



nordic.
summit

Product configuration and document automation for
Microsoft Dynamics 365 – Erwin Buggenhout, Experlogix

Erwin Buggenhout

- Father of Cas and Rien, Belgian, kid of the 90s, guitar fanatic, wine rather than beer lover
- Product manager document automation at Experlogix

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in [erwinbuggenhout](#)

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Power Apps Environment: Xpertdoc One CRM

Objects: Tables (743)

Default Solution > Tables

Table ↑	Name	Type	Managed	Customizable	Tags
[Deprecated] Dynamics Customer Service Analytics	msdyn_analyticf...	Standard	Yes	No	Managed
AAD User	aaduser	Virtual	Yes	Yes	Standard
Aanmelding	sym_aanmelding	Standard	No	Yes	Custom
Account	account	Standard	Yes	Yes	Core
Account GP Company	job_accountsco...	Standard	Yes	Yes	Standard
Action Approval Model	msdyn_flow_acti...	Standard	Yes	No	Managed
Action Card	actioncard	Standard	Yes	Yes	Standard
Action Card Regarding	msdyn_act_incar...	Standard	Yes	Yes	Standard
Action Card Role Setting	msdyn_act_incar...	Standard	Yes	Yes	Standard
Action Input Parameter	msdyn_productiv...	Standard	Yes	No	Managed
Action Output Parameter	msdyn_productiv...	Standard	Yes	No	Managed
Activity	activitypointer	Standard	Yes	Yes	Standard

Need more tables?



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from Microsoft



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 **experlogix**

And still...

MIND THE GAP

Gaps of interest

- Complex product/service configuration and price calculation
- Advanced document automation



Proven success, rich expertise

Experlogix Configure, Price, Quote (CPQ)

60,000+
users

600+
companies

400+
partners

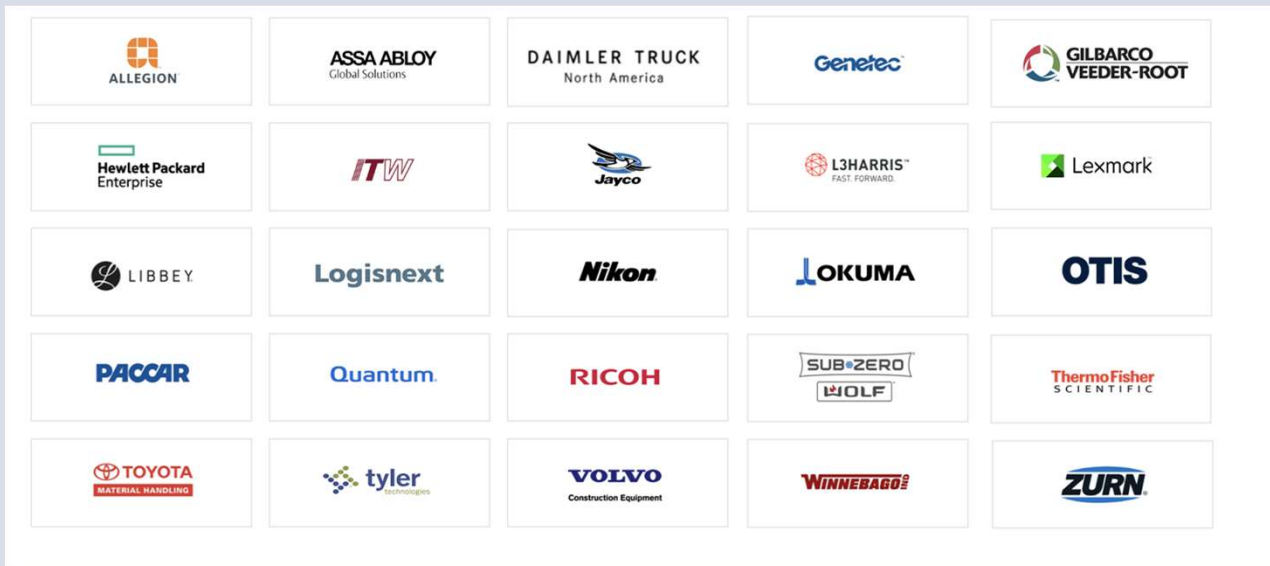
30+
countries

Experlogix Document Automation

50,000+
users worldwide

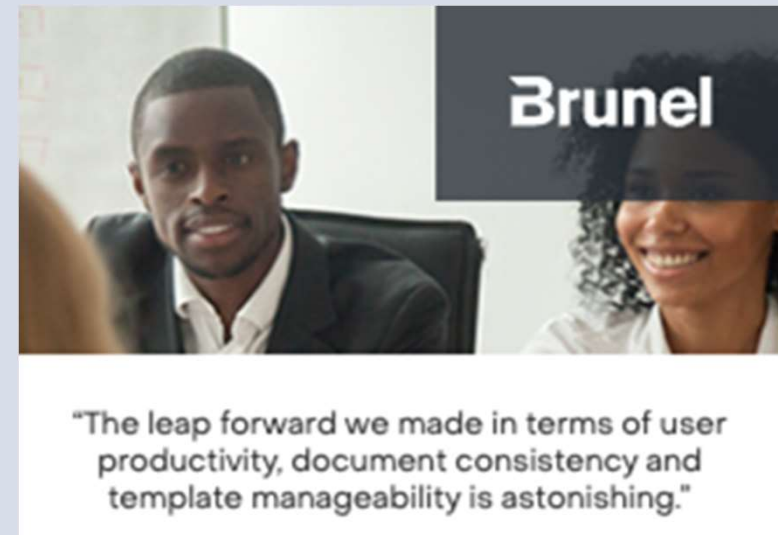
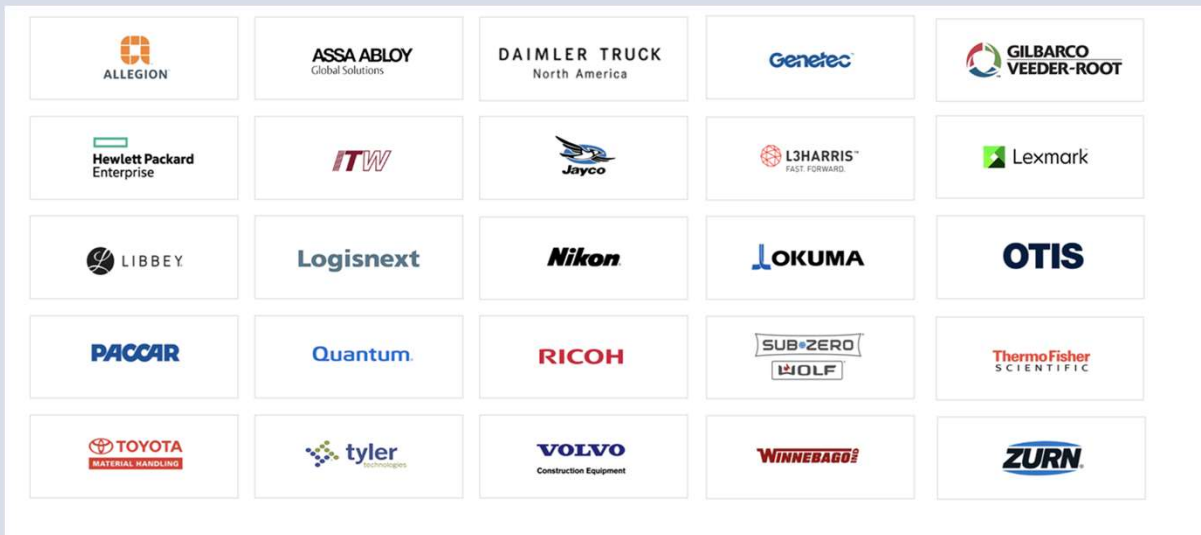
40 million
documents
generated
annually

A world of CPQ experience



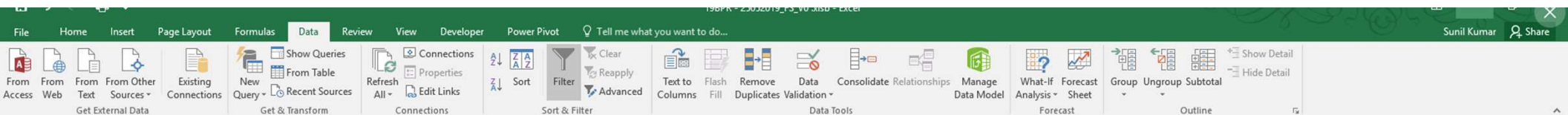
“Our dealers could be sitting on the showroom floor with a laptop or at a boat show with a tablet, and configure a complex order with Experlogix CPQ.”

A world of Document Automation experience



Two cardboard boxes are shown against a light gray background. The box on the left is closed and stands upright. The box on the right is open, with its lid propped up at an angle, revealing an empty interior. The text "What's in the box?" is overlaid in a large, black, sans-serif font across the middle of the image, partially covering both boxes.

What's in the box?



```
=IF(AND($N5="ChangeOver Postpone",ISNUMBER($L5)=TRUE,NOT(Y$4<=$J5),OR(NOT(Y$4>=$J5),$I5=Y$4)),ROUND(((IFERROR(INDEX('Item M. & Forecast'!$AH$6:$AN$1048576,MATCH('ChangeOver Summary Sheet'!$P5,'Item M. & Forecast'!$H$6:$H$1048576,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'Item M. & Forecast'!$AH$5:$AN$5,0))*INDEX('19BPR MAT Cost'!$AA$3:$DG$6,MATCH('ChangeOver Summary Sheet'!$R5,'19BPR MAT Cost'!$Z$3:$Z$6,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'19BPR MAT Cost'!$AA$1:$DG$1,0))*$U5*$S5,INDEX('Item M. & Forecast'!$AH$6:$AN$1048576,MATCH('ChangeOver Summary Sheet'!$P5,'Item M. & Forecast'!$H$6:$H$1048576,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'Item M. & Forecast'!$AH$5:$AN$5,0))*INDEX('19BPR MAT Cost'!$AA$3:$DG$6,MATCH('ChangeOver Summary Sheet'!$R5,'19BPR MAT Cost'!$Z$3:$Z$6,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'19BPR MAT Cost'!$AA$1:$DG$1,0))*$V5*$S5))-((IFERROR(INDEX('Item M. & Forecast'!$AH$6:$AN$1048576,MATCH('ChangeOver Summary Sheet'!$F5,'Item M. & Forecast'!$H$6:$H$1048576,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'Item M. & Forecast'!$AH$5:$AN$5,0))*INDEX('19BPR MAT Cost'!$AA$3:$DG$6,MATCH('ChangeOver Summary Sheet'!$H5,'19BPR MAT Cost'!$Z$3:$Z$6,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'19BPR MAT Cost'!$AA$1:$DG$1,0))*$M5*$S5))))*INDEX('Sales 19BPR'!$J$3:$P$1048576,MATCH($D5,'Sales 19BPR'!$H$3:$H$1048576,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'Sales 19BPR'!$J$2:$P$2,0))/1000000,2),IF(AND($N5="ChangeOver Postpone",ISNUMBER($L5)=FALSE,NOT(Y$4<=$J5),OR(NOT(Y$4>=$J5),$I5=Y$4)),ROUND(((IFERROR(INDEX('Item M. & Forecast'!$AH$6:$AN$1048576,MATCH('ChangeOver Summary Sheet'!$P5,'Item M. & Forecast'!$H$6:$H$1048576,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'Item M. & Forecast'!$AH$5:$AN$5,0))*INDEX('19BPR MAT Cost'!$AA$3:$DG$6,MATCH('ChangeOver Summary Sheet'!$R5,'19BPR MAT Cost'!$Z$3:$Z$6,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'19BPR MAT Cost'!$AA$1:$DG$1,0))*$U5*$S5,INDEX('Item M. & Forecast'!$AH$6:$AN$1048576,MATCH('ChangeOver Summary Sheet'!$P5,'Item M. & Forecast'!$H$6:$H$1048576,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'Item M. & Forecast'!$AH$5:$AN$5,0))*INDEX('19BPR MAT Cost'!$AA$3:$DG$6,MATCH('ChangeOver Summary Sheet'!$H5,'19BPR MAT Cost'!$Z$3:$Z$6,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'19BPR MAT Cost'!$AA$1:$DG$1,0))*$M5*$S5))))*INDEX('Sales 19BPR'!$J$3:$P$1048576,MATCH($D5,'Sales 19BPR'!$H$3:$H$1048576,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'Sales 19BPR'!$J$2:$P$2,0))/1000000,2),IF(AND($N5="ChangeOver Prepone",ISNUMBER($L5)=TRUE,NOT(Y$4<=$J5),OR(NOT(Y$4>=$J5),$I5=Y$4)),ROUND(((IFERROR(INDEX('Item M. & Forecast'!$AH$6:$AN$1048576,MATCH('ChangeOver Summary Sheet'!$P5,'Item M. & Forecast'!$H$6:$H$1048576,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'Item M. & Forecast'!$AH$5:$AN$5,0))*INDEX('19BPR MAT Cost'!$AA$3:$DG$6,MATCH('ChangeOver Summary Sheet'!$R5,'19BPR MAT Cost'!$Z$3:$Z$6,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'19BPR MAT Cost'!$AA$1:$DG$1,0))*$U5*$S5,INDEX('Item M. & Forecast'!$AH$6:$AN$1048576,MATCH('ChangeOver Summary Sheet'!$P5,'Item M. & Forecast'!$H$6:$H$1048576,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'Item M. & Forecast'!$AH$5:$AN$5,0))*INDEX('19BPR MAT Cost'!$AA$3:$DG$6,MATCH('ChangeOver Summary Sheet'!$H5,'19BPR MAT Cost'!$Z$3:$Z$6,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'19BPR MAT Cost'!$AA$1:$DG$1,0))*$M5*$S5))))*INDEX('Sales 19BPR'!$J$3:$P$1048576,MATCH($D5,'Sales 19BPR'!$H$3:$H$1048576,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'Sales 19BPR'!$J$2:$P$2,0))/1000000,2),IF(AND($N5="ChangeOver Postpone",ISNUMBER($L5)=FALSE,NOT(Y$4<=$J5),OR(NOT(Y$4>=$J5),$I5=Y$4)),ROUND(((IFERROR(INDEX('Item M. & Forecast'!$AH$6:$AN$1048576,MATCH('ChangeOver Summary Sheet'!$P5,'Item M. & Forecast'!$H$6:$H$1048576,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'Item M. & Forecast'!$AH$5:$AN$5,0))*INDEX('19BPR MAT Cost'!$AA$3:$DG$6,MATCH('ChangeOver Summary Sheet'!$R5,'19BPR MAT Cost'!$Z$3:$Z$6,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'19BPR MAT Cost'!$AA$1:$DG$1,0))*$U5*$S5,INDEX('Item M. & Forecast'!$AH$6:$AN$1048576,MATCH('ChangeOver Summary Sheet'!$P5,'Item M. & Forecast'!$H$6:$H$1048576,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'Item M. & Forecast'!$AH$5:$AN$5,0))*INDEX('19BPR MAT Cost'!$AA$3:$DG$6,MATCH('ChangeOver Summary Sheet'!$H5,'19BPR MAT Cost'!$Z$3:$Z$6,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'19BPR MAT Cost'!$AA$1:$DG$1,0))*$M5*$S5))))*INDEX('Sales 19BPR'!$J$3:$P$1048576,MATCH($D5,'Sales 19BPR'!$H$3:$H$1048576,0),MATCH('ChangeOver Summary Sheet'!$Y$4,'Sales 19BPR'!$J$2:$P$2,0))/1000000,2))))))
```

The magic formula

Sr. No.	Description	Currency	Cost Change Ratio (%)	Part Type	Usage / Kit (Auto Calculation)	Usage / Kit (Manual Input)	Concatenate (FG * PartNo)	2019-1 1 Q	2019-1 2 Q	2019-II	2020-I	2020-II	2021-I	2021-II	Auto Definition	Manual Remarks
1	YOKE(MOTOR)	INR	100%	Child Part	1		Q0037731712MQ8028503BN	-1.4	-1.51						Localisation	Localisation
2	YOKE(MOTOR)	INR	100%	Child Part	1		Q0037732712MQ8028503BN	-0.25	-0.27						Localisation	Localisation
3	YOKE(MOTOR)	INR	100%	Child Part	1		Q0037734712MQ8028503BN	-0.62	-0.67						Localisation	Localisation
4	YOKE(MOTOR)	INR	100%	Child Part	1		Q0037734722MQ8028503BN	-2.07	-2.24						Localisation	Localisation



Download file to create a template

Create word template from Dynamics 365 data by downloading word file

Entity

Quote

Select related entity records associated with single record of this entity

1:N Relationship

Quote Product

Select entities which are related to many records of another entity

N:1 Relationship

Account (quote)

Many records of this entity are related to many records of another entity

N:N Relationship

Getting stuck in Word

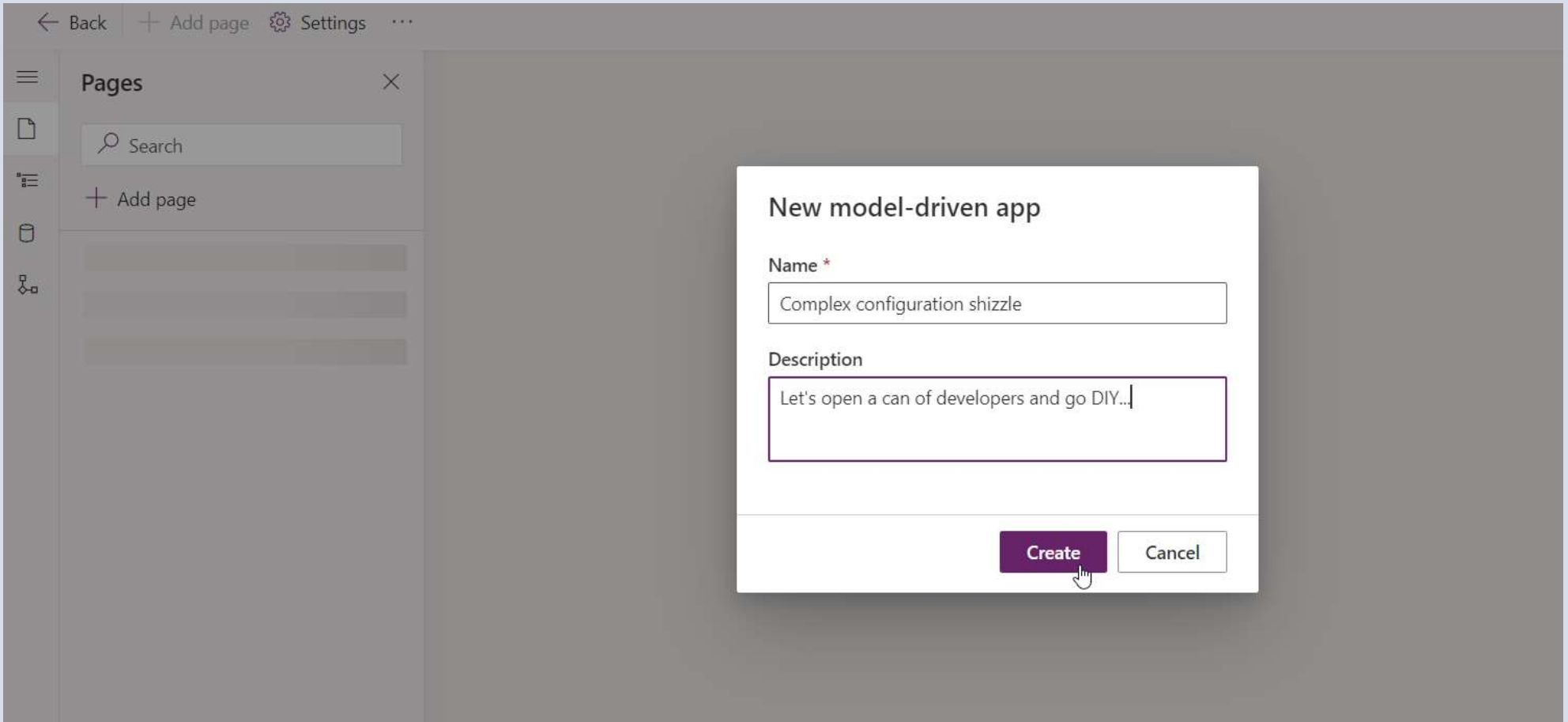
The screenshot shows the Microsoft Word interface with the Developer tab selected. The XML Mapping pane is open on the right, displaying a list of XML elements under the 'quote' namespace. The 'accountidname' element is highlighted. The main document area shows a text box containing 'accountidname'. The background shows a Dynamics 365 data view with columns and filters.



Who you gonna call?



The heroes of our time





Report Properties

Page Setup
Code
References
Variables

Write custom code for this report.

Custom code:

```
Function PhoneF
Select Case Ph
Case 7
Return Phon
Case 10
Return
&"-" & PhoneNu
Case 12
Return
&"-" & PhoneNu
Case Else
Return
End Select
End Function
```

Report Properties

Page Setup
Code
References
Variables

Write custom code for this report.

Custom code:

```
*****
' Set Background color based on input value and threshold
*****
Function BgColor(ByVal InputValue AS double, _
ByVal ThresholdValue As double) As String

If InputValue > ThresholdValue Then
Return "Green"
Else
Return "Red"
End If

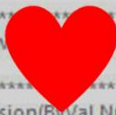
End Function

*****
' Handle divide by zero w/ error
' Author: Scott Murray
*****
Public Function CalcDivision(ByVal Numerator As Object, _
ByVal Denominator As object, ByVal DivideByZeroDefault As Object) As Object
If Denominator <> 0 Then
Return Numerator/Denominator
Else
Return DivideByZeroDefault
End If
End Function
```

Help

Help

OK Cancel

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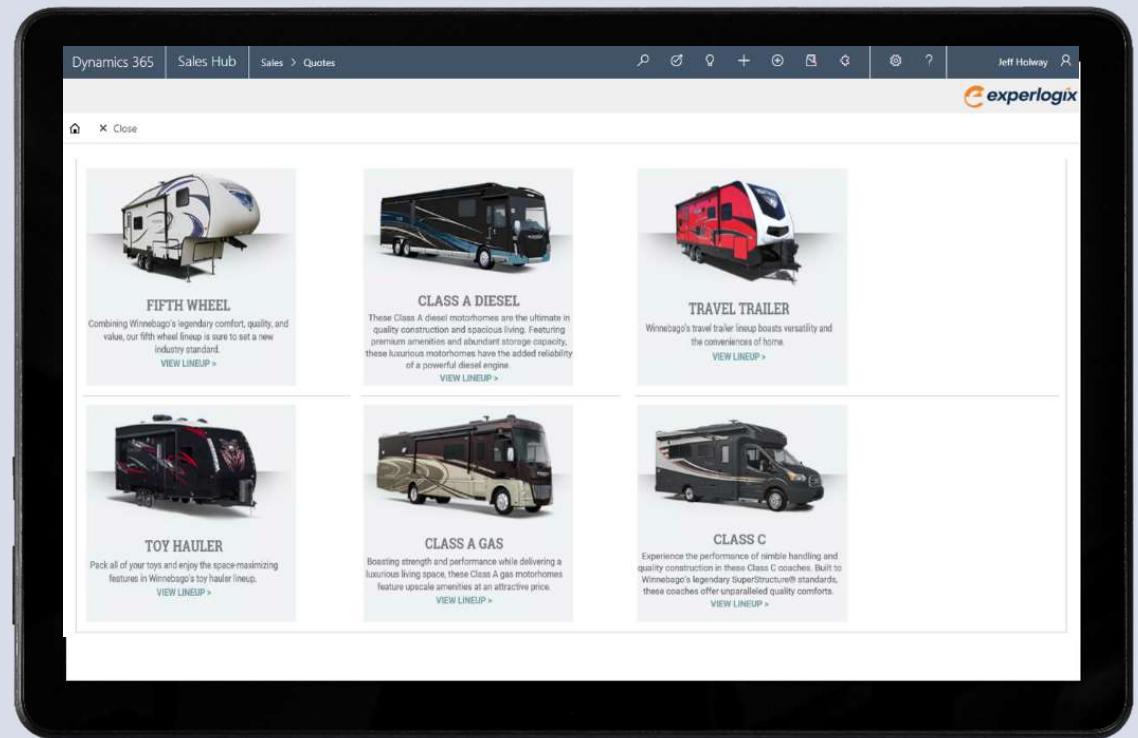
So back to the ISVs

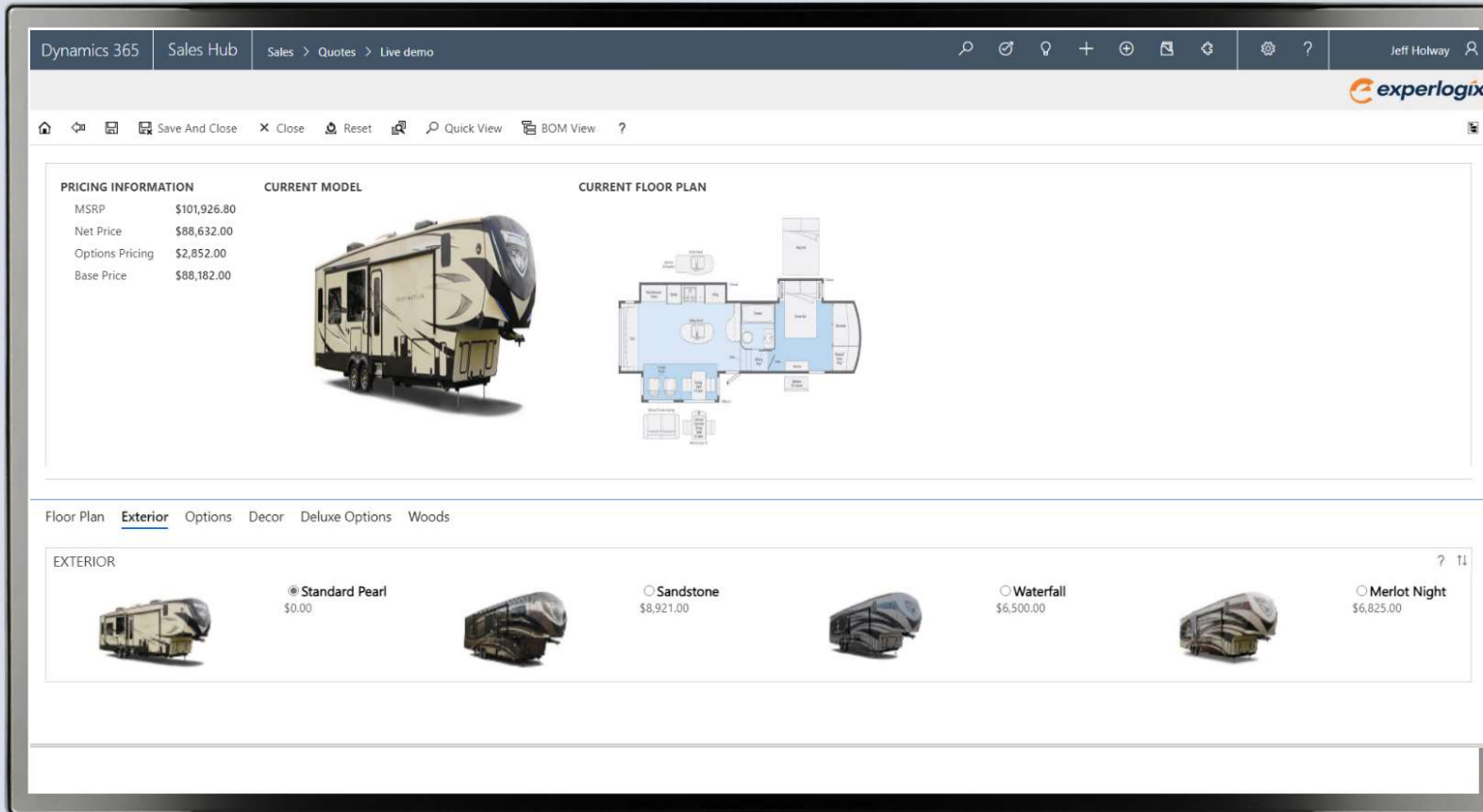
Categories Industries Products

AI + Machine Learning	Analytics	Collaboration	Commerce	Compliance & Legal	Customer Service
Finance	Geolocation	Human Resources	Internet of Things	IT & Management Tools	Marketing
Operations & Supply Chain	Productivity	Project Management	Sales		

Dynamics 365 CPQ

- Graphical, guided selling experience from a website
- Native within D365 Sales Hub + D365 Operations
- Embed upsell/cross sell messaging
- Provide time-based promotions
- Full BOM support







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DETAILS

↔
COMPARE



MINNIE
Starting At: \$32,232

☰
DETAILS

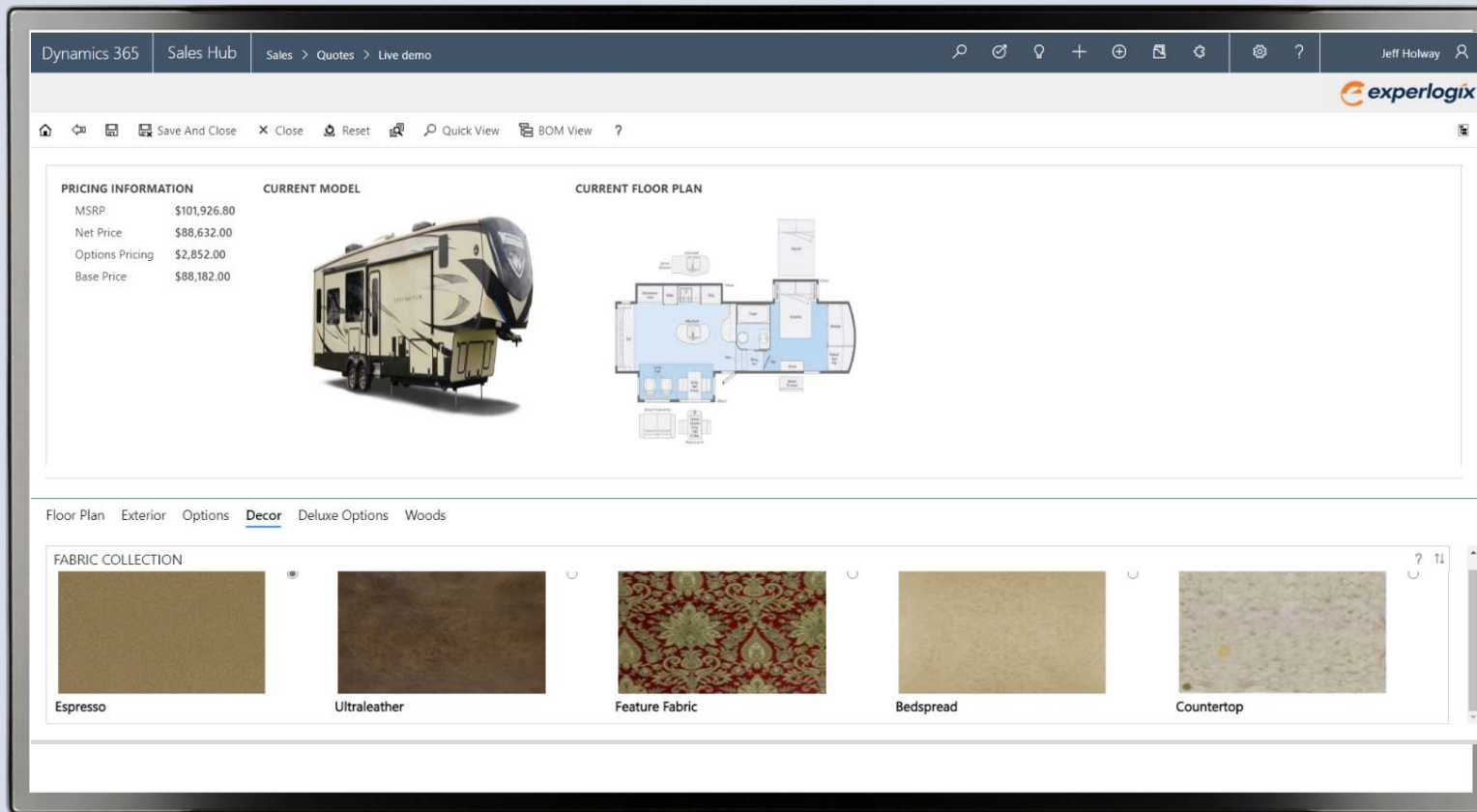
↔
COMPARE

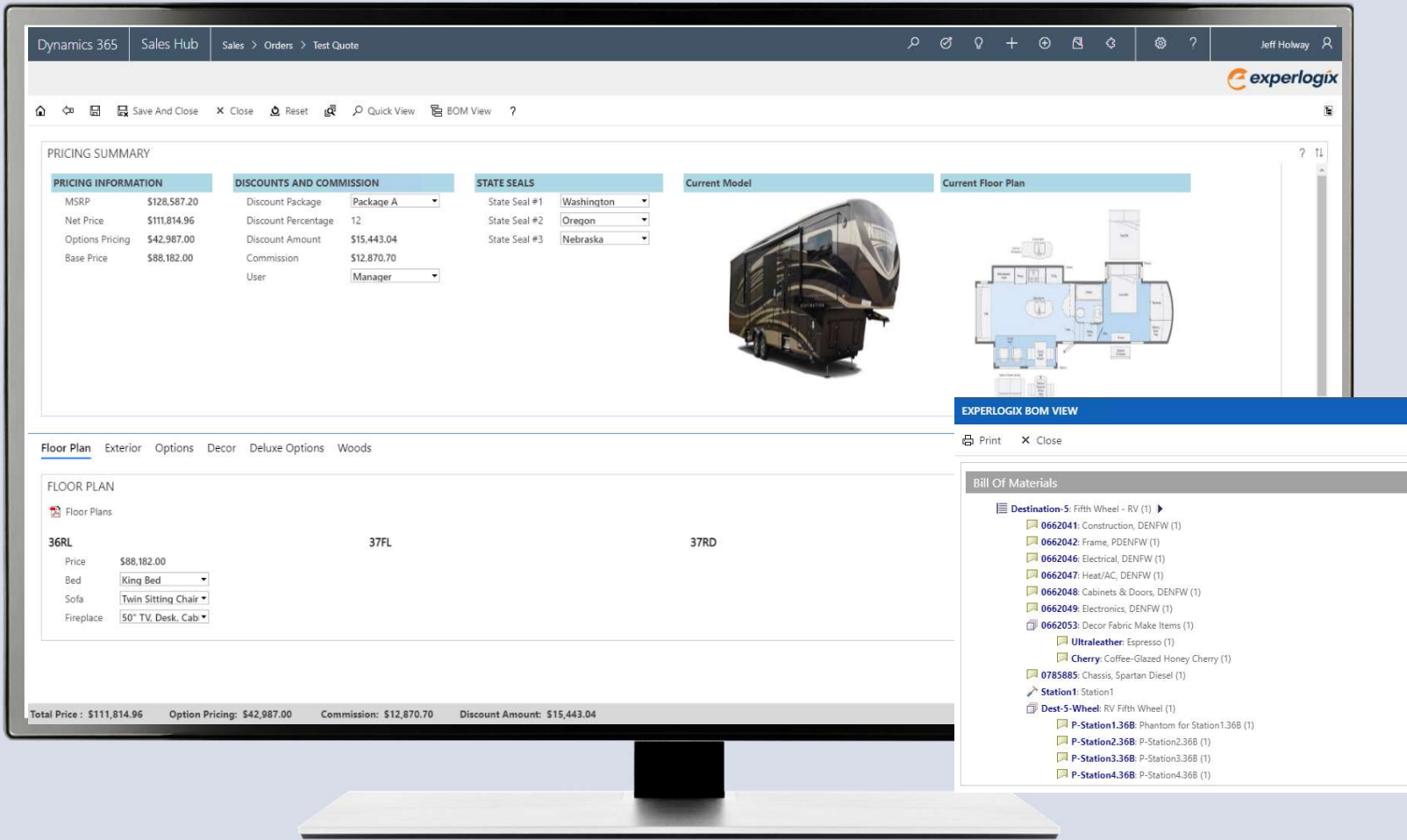


VOYAGE
Starting At: \$37,801

☰
DETAILS

↔
COMPARE





Dynamics 365 Sales Hub Sales > Quotes

Search for records

All Quotes

Name Voyage

Dynamics 365 Sales Hub Sales > Quotes > Voyage

QUOTE Voyage

Total Amount: \$93,879.00

Effective From: --- Effective To: --- Owner: Jeff Holway

Summary Details Related

Quote ID: QUO-01138-85Z2D5

Revision ID: 0

Name: Voyage

Potential Customer: John Savage

Currency: US Dollar

Price List: Default

Status: Draft

SHIPPING INFORMATION

Shipping Method: ---

Payment Terms: ---

Freight Terms: ---

PRODUCTS

Product Name	Config #	Price Per...	Quantity	Disco...	Ex
Digital Control Center Vegetouch iPad	0	\$5,097.00	1,00000	---	---
Canadian Standards	0	\$300.00	1,00000	---	---
Voyage by Winnebago	0	\$88,482...	1,00000	---	---

SALES INFORMATION

Opportunity: Live demo

DESCRIPTION: ---

Detail Amount: \$93,879.00

(-) Discount (%): ---

(-) Discount: ---

Pre-Freight Amount: \$93,879.00

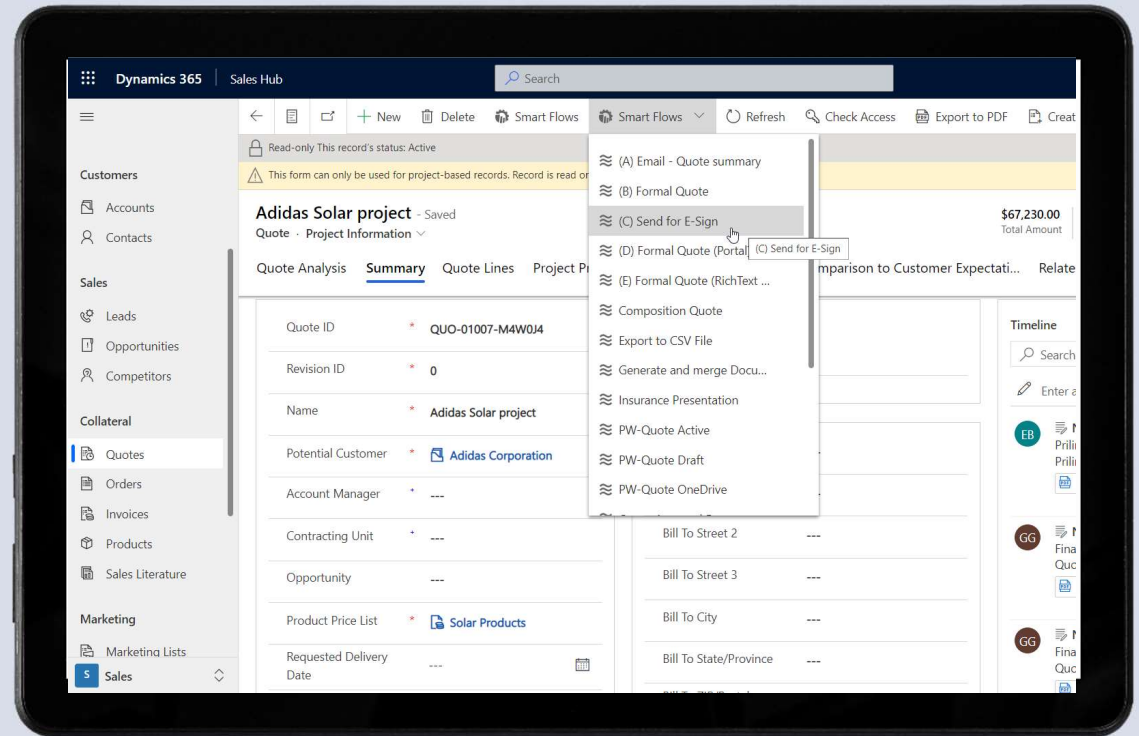
(+) Freight Amount: ---

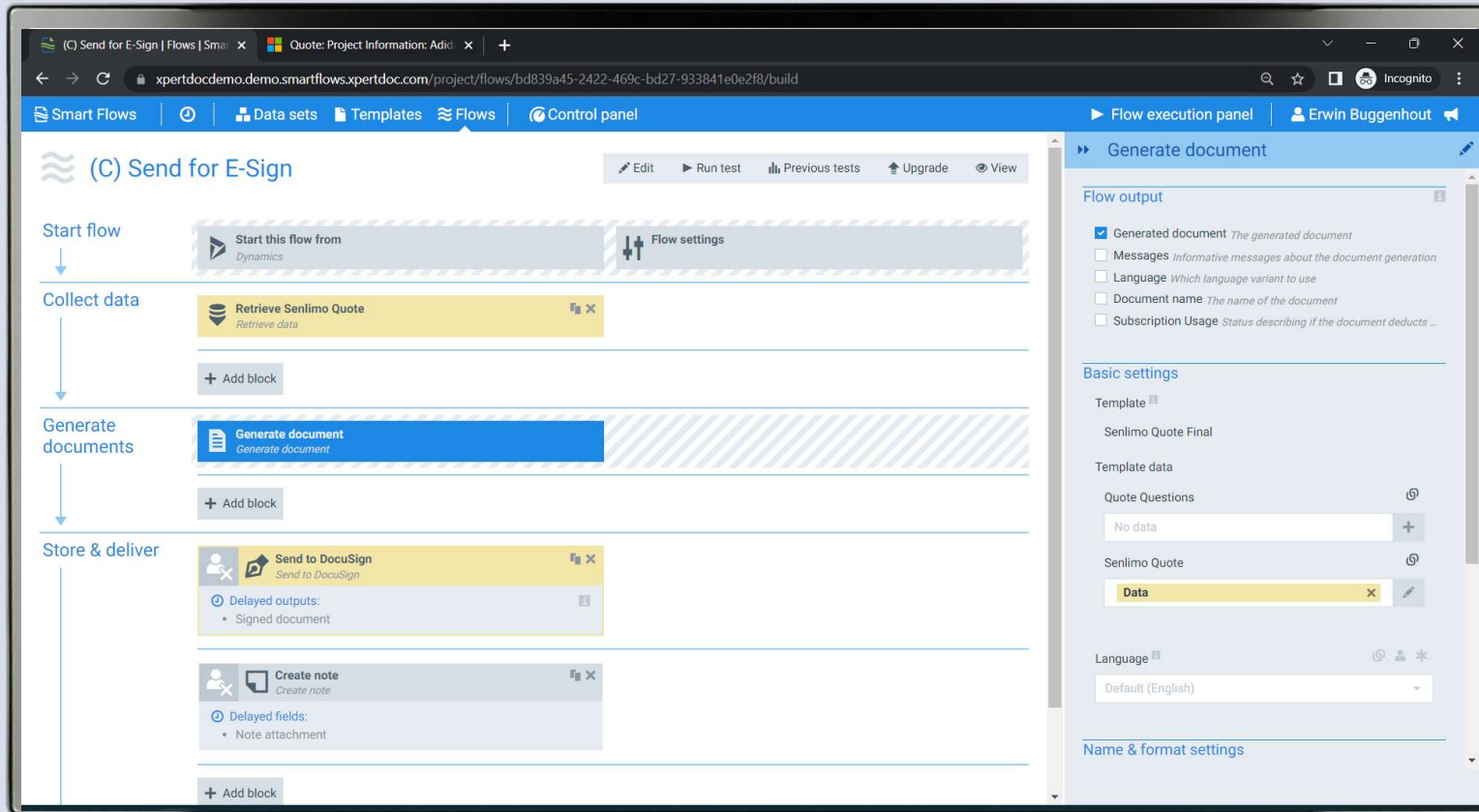
(+) Total Tax: \$0.00

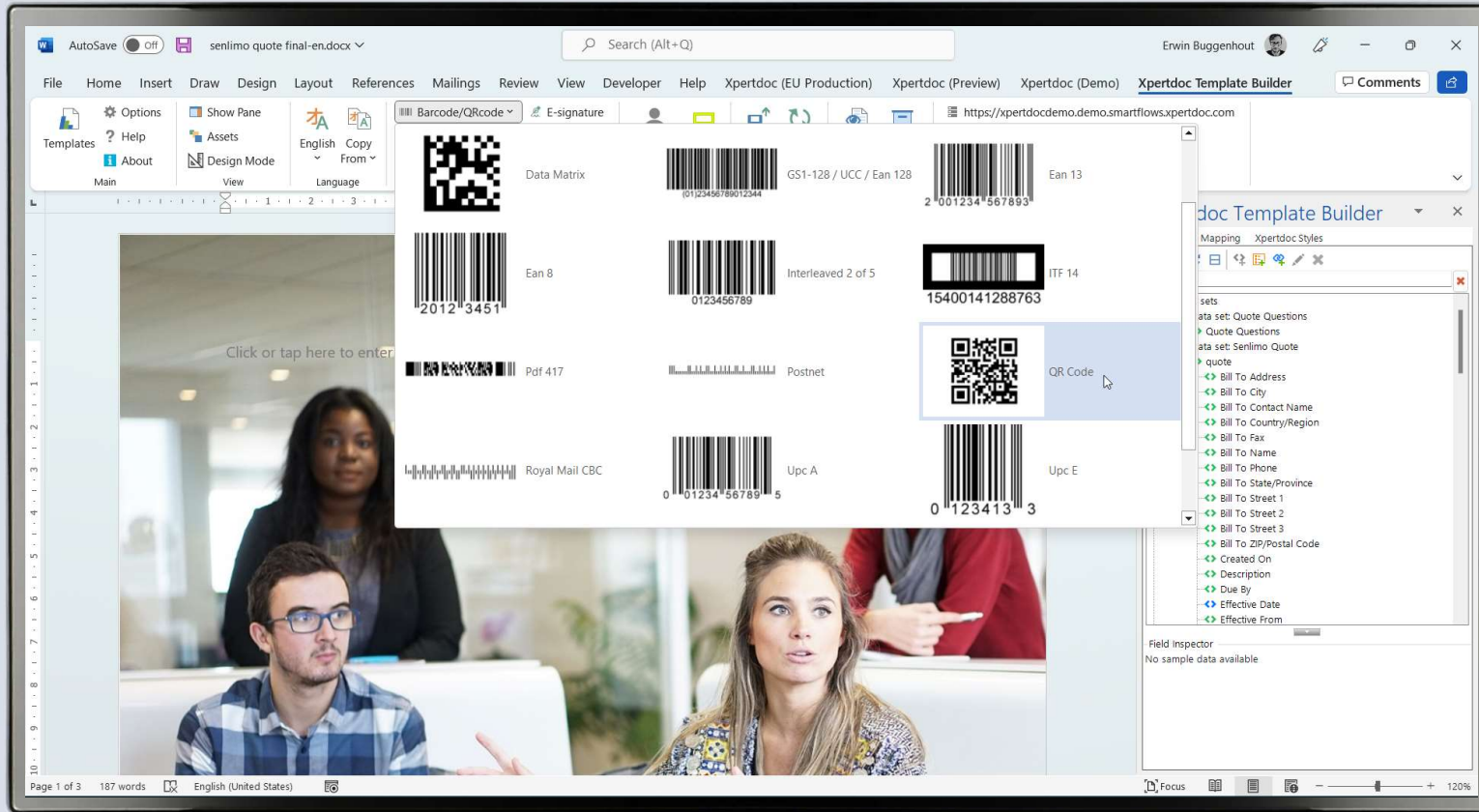
Draft

Smart Flows for Dynamics 365

- Seamless document automation integration with leading CRM, ERP, CPQ, and ECM platforms — with advanced API
- Interactive document generation with automated flows
- Robust, user-friendly features on a single, intuitive document automation platform







What to look for in an ISV?



THOROUGH
UNDERSTANDING



DOMAIN
EXPERTISE



BODY
TO SUPPORT YOU



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RECORD

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