CLAUDE SETUP GUIDE

Build Advanced Word Templates with Claude

Add the Advanced Word Template skill to Claude, connect Claude to Dynamics 365 CE, and turn any sample Word file into a ready template with its queries.

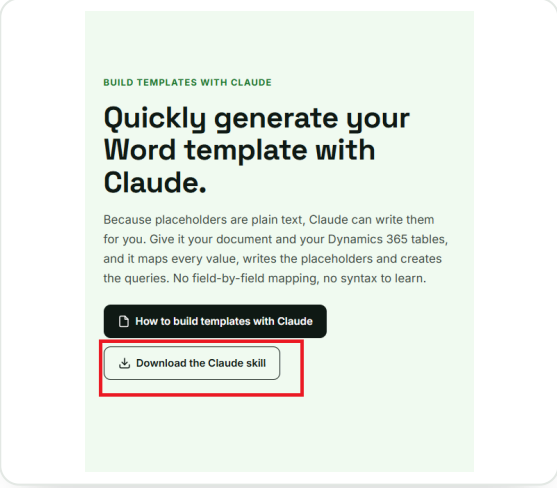
Before you start

- Advanced Word Template is installed and activated in your Dynamics 365 CE environment.
- You use the Claude desktop or web app with a plan that supports skills and custom connectors, and **Code execution and file creation** is on under **Settings › Capabilities**.
- Your Dynamics 365 administrator has allowed Claude to use the Dataverse MCP server for your environment (see step 4).
- You have a sample Word file: the document you use today, with example values in it.

1 Download the Claude skill

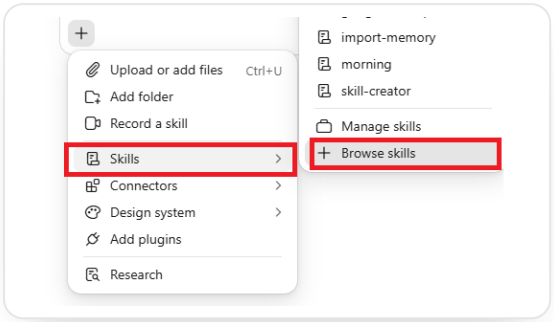
1. Open the Advanced Word Template page on the Bever Marketplace.
2. In the **Build templates with Claude** section, click **Download the Claude skill**.
3. Save **advanced-word-template.zip**. Don't unzip it.

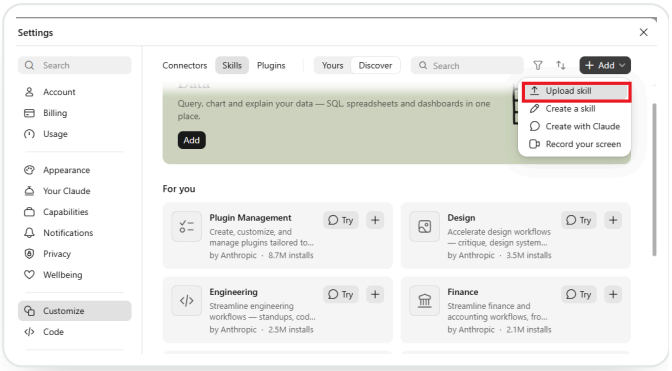
What the skill does It teaches Claude the template syntax, the query rules and the Word layout rules, so the templates it builds work the first time.



2 Add the skill to Claude

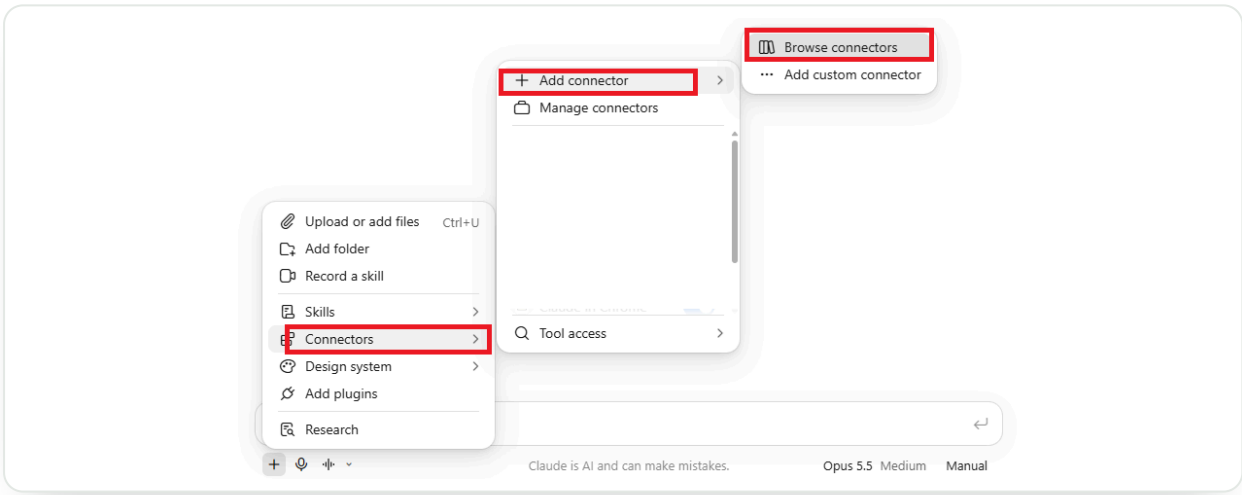
1. In a new chat, click **+**, then **Skills** › **Browse skills**.
2. Click **+ Add** › **Upload skill** and choose the ZIP file you downloaded.
3. Check that **advanced-word-template** appears in your skills list and is turned on.

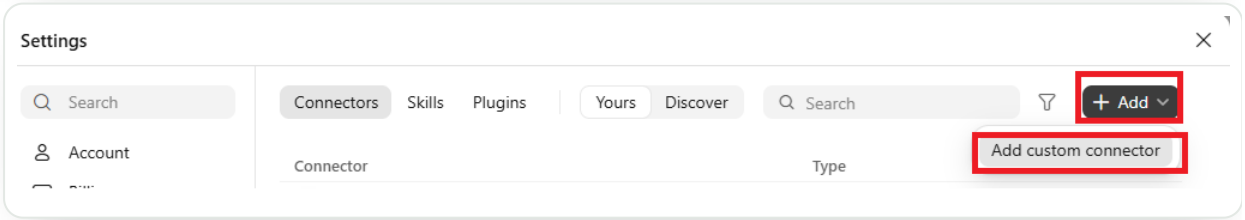




3 Add a connector for Dynamics 365 CE

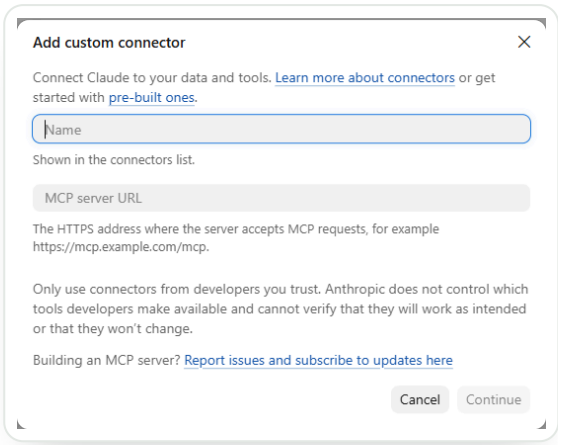
1. In a chat, click **+** › **Connectors** › **Add connector** › **Browse connectors**.
2. In Settings, on the **Connectors** tab, click **+ Add** › **Add custom connector**.





4 Enter your Dynamics 365 MCP server URL

1. **Name:** a name you'll recognise, for example **Microsoft Dataverse** or the name of your environment.
2. **MCP server URL:** your environment URL followed by `/api/mcp`, for example `https://yourorg.crm4.dynamics.com/api/mcp`

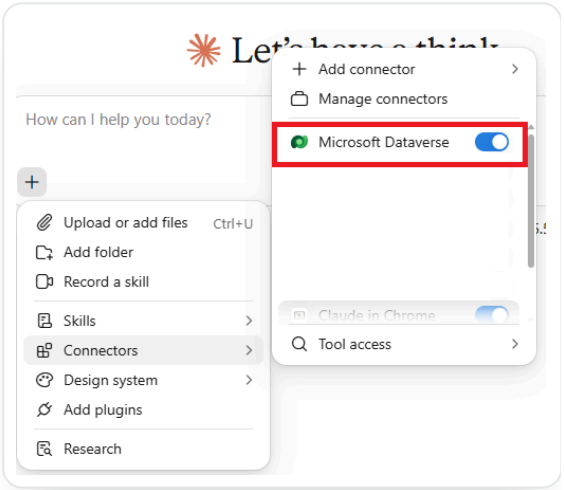


> **Admin setting** Your administrator enables the client in the Power Platform admin center: *Environments › your environment › Settings › Product › Features › Dataverse Model Context Protocol*. If you're not sure of your URL, ask Claude or your administrator.

5 Connect and turn the connector on

1. Click **Continue**, then **Connect**, and sign in with your Microsoft work account.
2. In a chat, open **+** › **Connectors** and make sure your connector is switched on.

Claude can now read your tables, fields and relationships, and create template records for you.

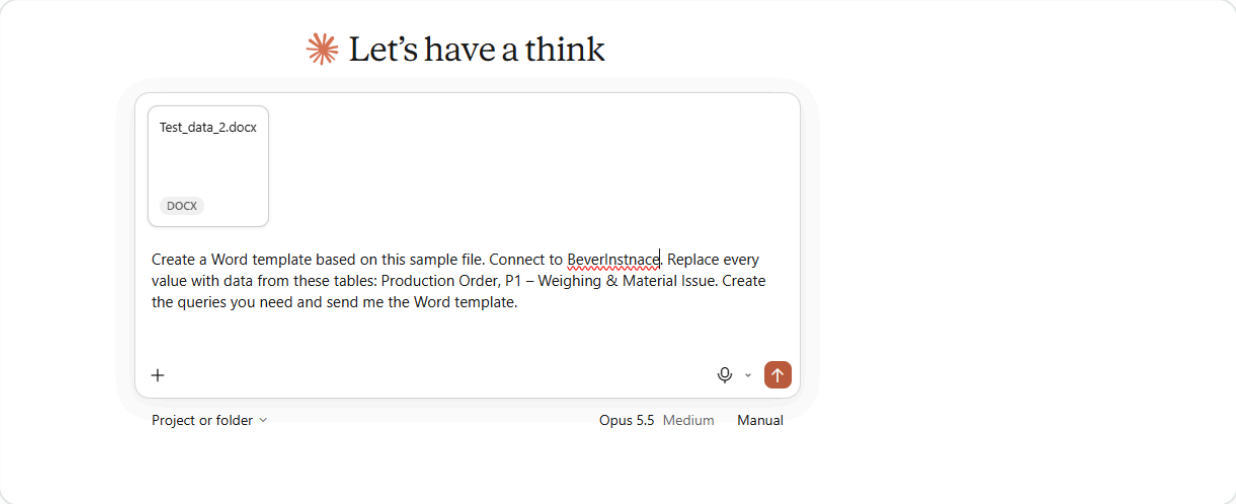


6 Upload your sample file and ask Claude

Attach your sample Word file to a new chat and say which connector and tables to use. For example:

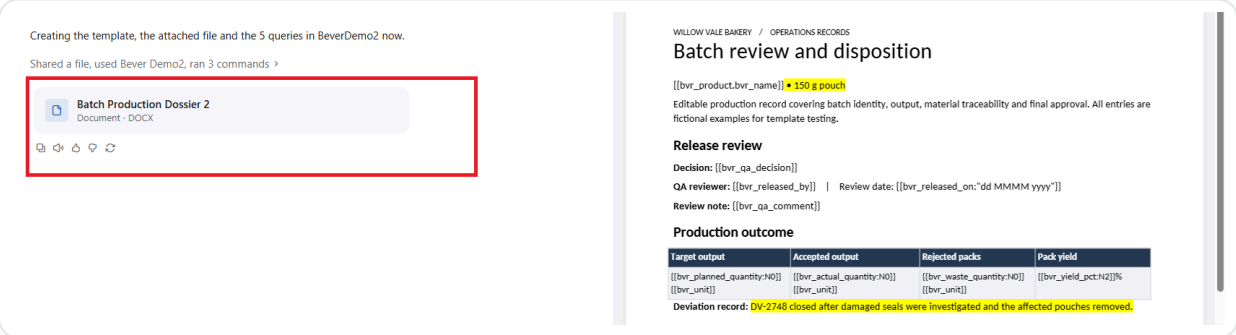
EXAMPLE PROMPT

```
"Create a Word template based on this sample file. Connect to BeverDemo2. Replace every value with data from these tables: Production Order, P1 – Weighing & Material Issue. Create the queries you need and send me the Word template."
```



7 Review and confirm

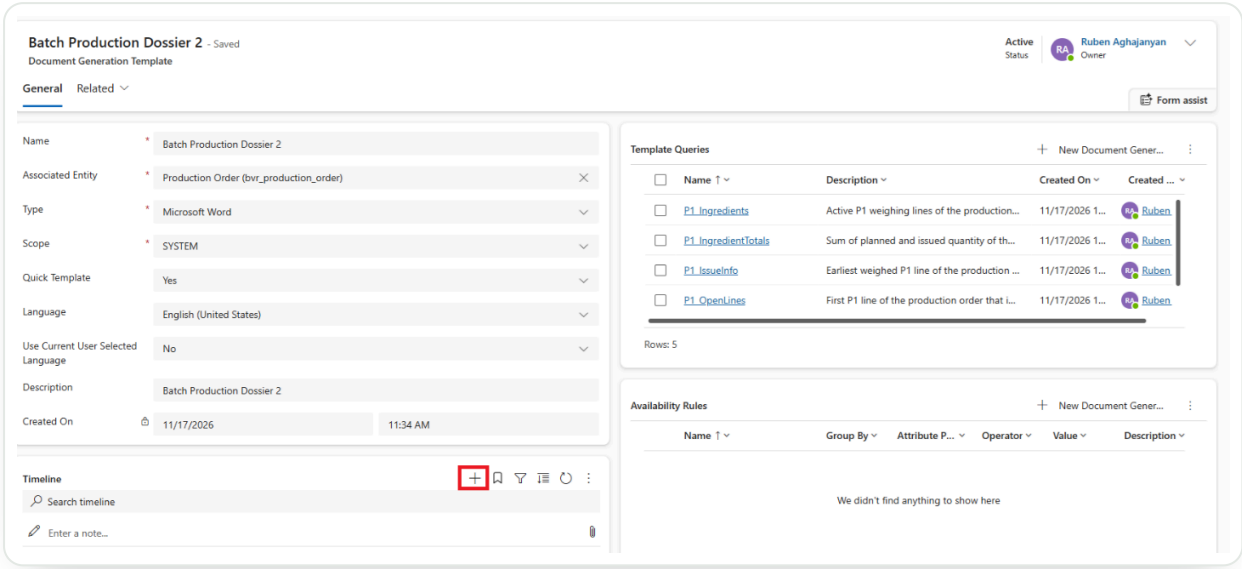
1. Claude maps every value to a field, writes the placeholders and the queries, and checks the layout.
2. It shows what it will create in Dynamics 365. Reply **yes** to go ahead.
3. Claude creates the template record and its queries, and sends you the Word file. Download it.



Yellow highlights Values highlighted in yellow had no matching field. Fill them in, remove them, or ask Claude to map them to another field.

8 Attach the Word file to the template

1. Open the new template record in Dynamics 365 (Claude gives you the link).
2. In the **Timeline**, click `+` › **Note**, attach the Word file you downloaded and save.



Generate your first document

Open a record of the template's table, click **Generate Document**, choose your template and check the result.

Want changes? Tell Claude what to fix in the same chat. Attach the new file as a new note on the same template: the newest file is always used.

Need help? Contact us at info@bevercrm.com or +374 77 590071.