One-Click-Actions in DocumentsCorePack ServerBased for Microsoft CRM 2015/2016

v.0.1, April 2017

(How to configure One Click Actions in DCP SB for Microsoft CRM 2015/2016)

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Preamble

This documentation is intended to guide you through the generation of One-Click-Actions in Microsoft CRM 2015/2016. For Microsoft Dynamics 365, please find the documentation here.

The feature is integrated into DocumentsCorePack Server Based. If you would like to use One-Click-Actions in Microsoft Dynamics 2015/2016, at least a DCP SB trial version is required. Please find further information regarding DCP SB in the documentation of the same name on our website.

Target Audience

This guide is intended for users who would like to benefit from One-Click-Actions in DocumentsCorePack and have the following minimum skills:

- Basic Microsoft Dynamics CRM Knowledge
- Maintaining and configuring a Microsoft CRM Organization

Supported Web Browsers and versions

Supported Web Browsers:

- Internet Explorer 10 and higher
- Chrome
- Edge
- Firefox

One of the following versions of Microsoft Dynamics CRM must be available:

- Microsoft Dynamics CRM Server 2015/2016
- Microsoft Dynamics CRM Online

Purpose of One-Click-Actions?

With the DocumentsCorePack Server-Based Dialog you get the possibility to define specific one-click-actions per entity.
The dialog enables you to predefine the available options for your users. For example, you have the possibility to define if specific options (like Save to SharePoint) are required fields. These fields cannot be disabled by a user.
In contrary, the dialog can also be completely automated, which means that with one simple click, an email with an attachment is sent, the document will be printed and stored on SharePoint and the dialog closes automatically when the work is done. For each entity, a specific one-click-action can be configured depending on your requirements.

1 DocumentsCorePack Dialog basics

DCP ServerBased includes many valuable tools. The tool that enables you to create One-Click-Actions is the DocumentsCorePack Dialog.

1.1 Who is allowed to create or modify One-Click-Actions?

Every administrator in your CRM system is able to create and delete one-click-actions.

1.2 Who has the possibility to see and use One-Click-Actions?

Every user, who has the permission to work with the ***[Create Document]***-button, will be provided with all available one-click-actions. If the administrator decides, that a specific one-click-action is the default for every user, the users will not get prompted and the one-click-action is automatically executed. In this case, only the administrator will see all one-click-actions for administration purpose.

1.3 How do I open the DCP dialog?

Open the DCP dialog, open a random entity (*here*: lead) and simply click on the ***[Create Document]***-button in the CommandBar of your Microsoft Dynamics application.

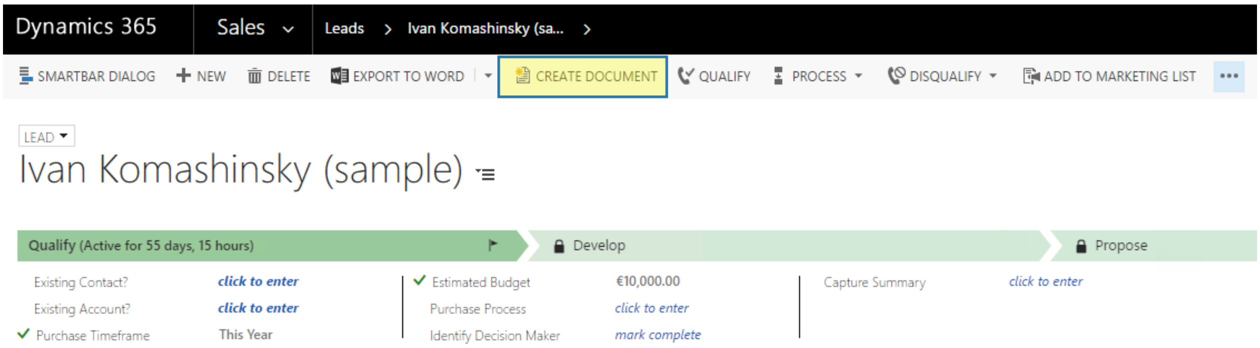


Figure 1: Open the DocumentsCorePack dialog

In the so opened dialog, users will be prompted with one-click actions, provided that you have already set up a few of them.

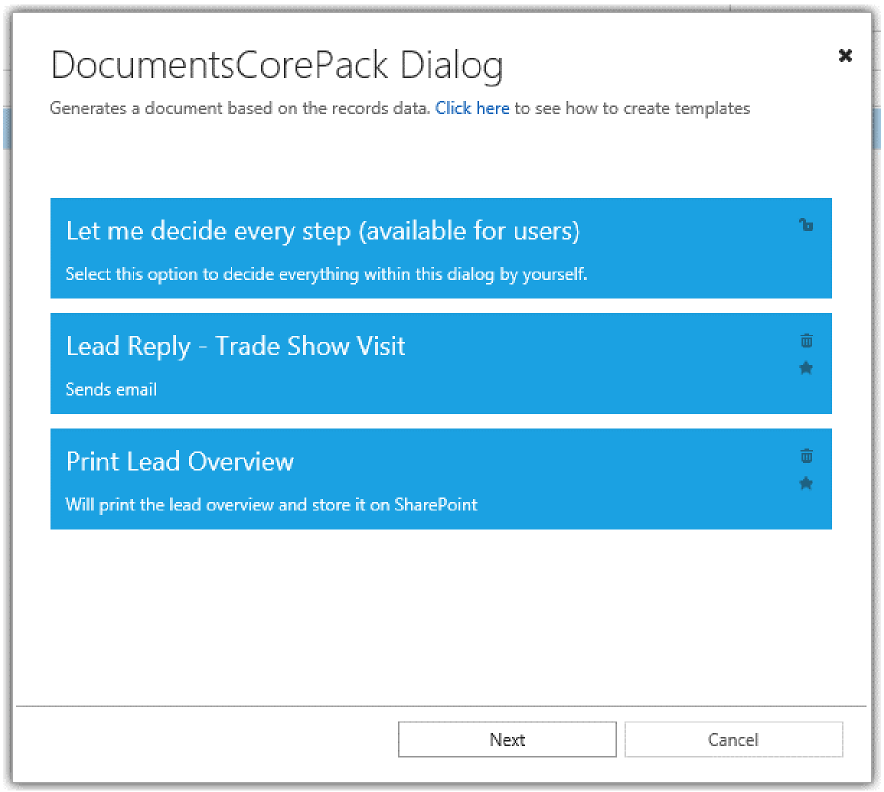


Figure 2: DocumentsCorePack dialog

There are different one-click-actions for single records and for batch document creation. The selection of available one-click-actions depends if you select a single record or multiple records and is entity-specific.

1.4 Which kind of One-Click-Actions are there?

Basically, you configure the dialog in order to define exactly, what the one-click-action should do (file type, attach, print, save on SharePoint, run workflow, email recipients, etc.) and then, you save that action with the ***[Save Config]***-button in the dialog.

Using that functionality, you have the possibility to configure and automate almost every step of the document generation.

There are two different kinds of one-click-actions:

If you want to create a **one-click-action for a single document generation**, start the dialog with a single record selected. Learn more about how to create a one-click action for a single document generation in CHAPTER 2 HOW TO CREATE ONE-CLICK-ACTIONS AS ADMINISTRATOR (EXAMPLE 1) ON PAGE 10.

If you want to create a **one-click-action for batch document generation**, start the dialog with multiple records selected. Learn more about how to create a one-click action for batch document generation in CHAPTER 3 HOW TO CREATE ONE-CLICK-ACTIONS AS ADMINISTRATOR (EXAMPLE 2) ON PAGE 16.

1.5 Default One-Click-Actions

It is possible to define a default one-click-action. That means when a user clicks on the ***[Create Document]***-button, the one-click-action is automatically executed, and the user will not get prompted with the available one-click-actions.

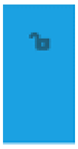
As there are specific one-click-actions for single records and multiple records, it is possible to specify different default one-click-actions for single and batch. Additionally, it would also be possible to specify one default one-click-action for single documents and one for multiple records. In this case, the users would decide from the available one-click-actions.

Being administrator, you will always see all available one-click-actions for administration. So, for administrators, the default one-click-action will not be executed.

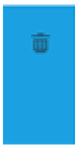
During the creation of a one-click-action, you have the possibility to set it as the default action. To do so, you have the check the *Set as default configuration*-option. But you also have the possibility to change this afterward.

1.6 Administration of the DocumentsCorePack dialog

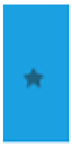
The moment you open the dialog as an administrator, you will be provided with an overview of all existing one-click actions. There are various actions you can apply as administrator using certain icons, such as:



CONFIGURE, IF USERS SHOULD HAVE THE POSSIBILITY TO SEE THE OPTION "LET ME DECIDE EVERY STEP"



DELETE ONE-CLICK-ACTIONS



SET A SPECIFIC ONE-CLICK-ACTION AS DEFAULT FOR ALL USERS

Additionally, you can CHANGE THE ORDER VIA DRAG & DROP. The buttons are visible in the DCP dialog:

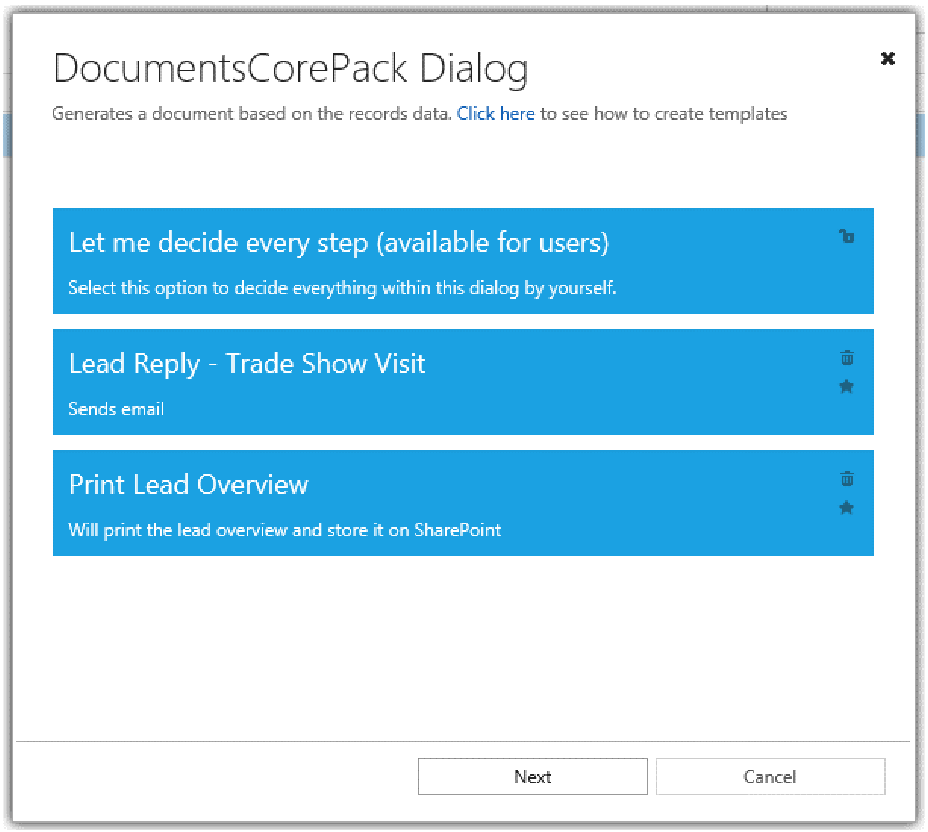


Figure 3: DocumentsCorePack dialog

2 How to create One-Click-Actions as administrator (Example 1)

First, you must be an administrator to use that option. The creation itself is more than easy. This step-by-step tutorial will show you how to create a one-click-action based on a Quote entity.

2.1 Step 1: Open the DCP dialog

As soon as you are logged in as an administrator, simply hit the ***[Create Document]***-button on the entity for which you want to create a one-click-action. Then, select the template which should be used and click on the ***[Next]***-button

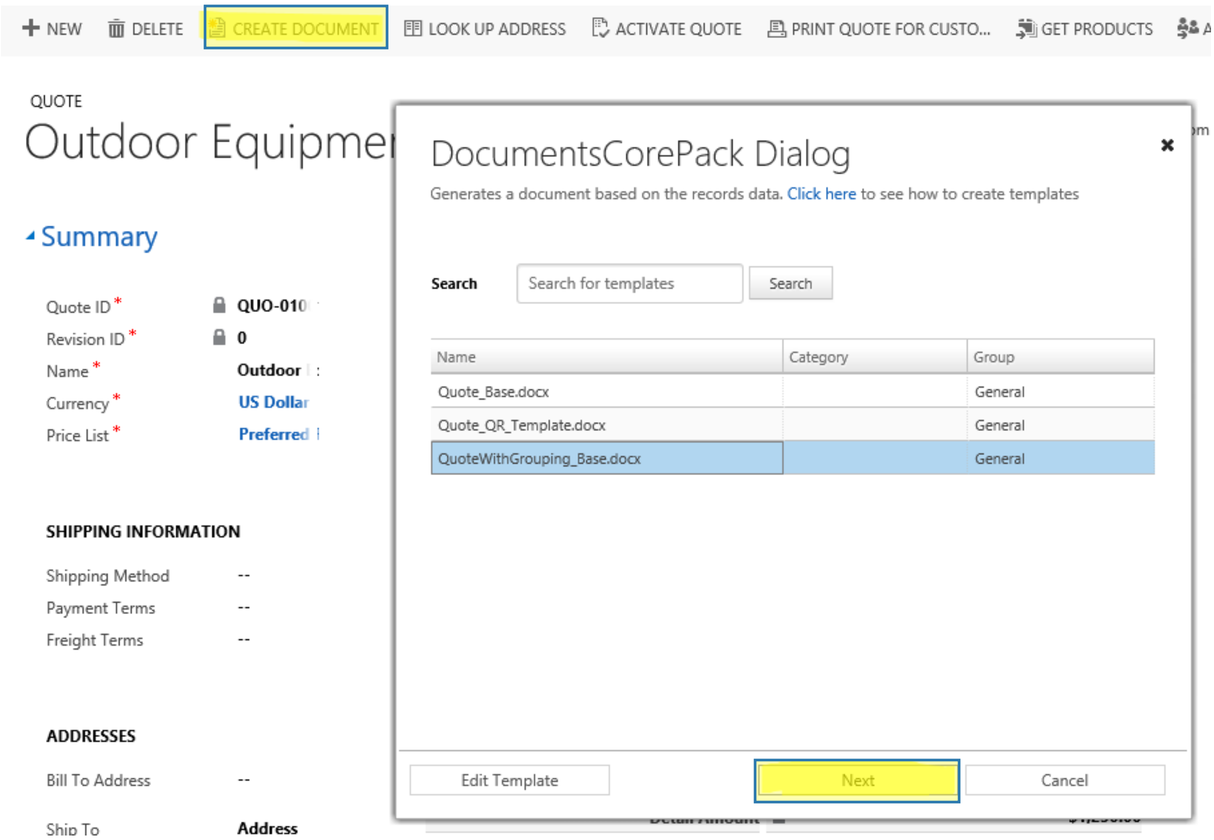


Figure 4: DocumentsCorePack dialog opened in Quote entity

2.2 Step 2: Define some actions

At this point in the dialog, it is your you define the actions which should be done. In our example, we want to create a one-click-action that should attach the PDF-document to an email, send it to the customer and also, select an additional DCP template for the email content. Also, the email should be sent automatically. The document should be opened for review before it is sent to the customer.

So first, we set the corresponding settings in the DocumentsCorePack dialog that will make sure that the process runs as described above.

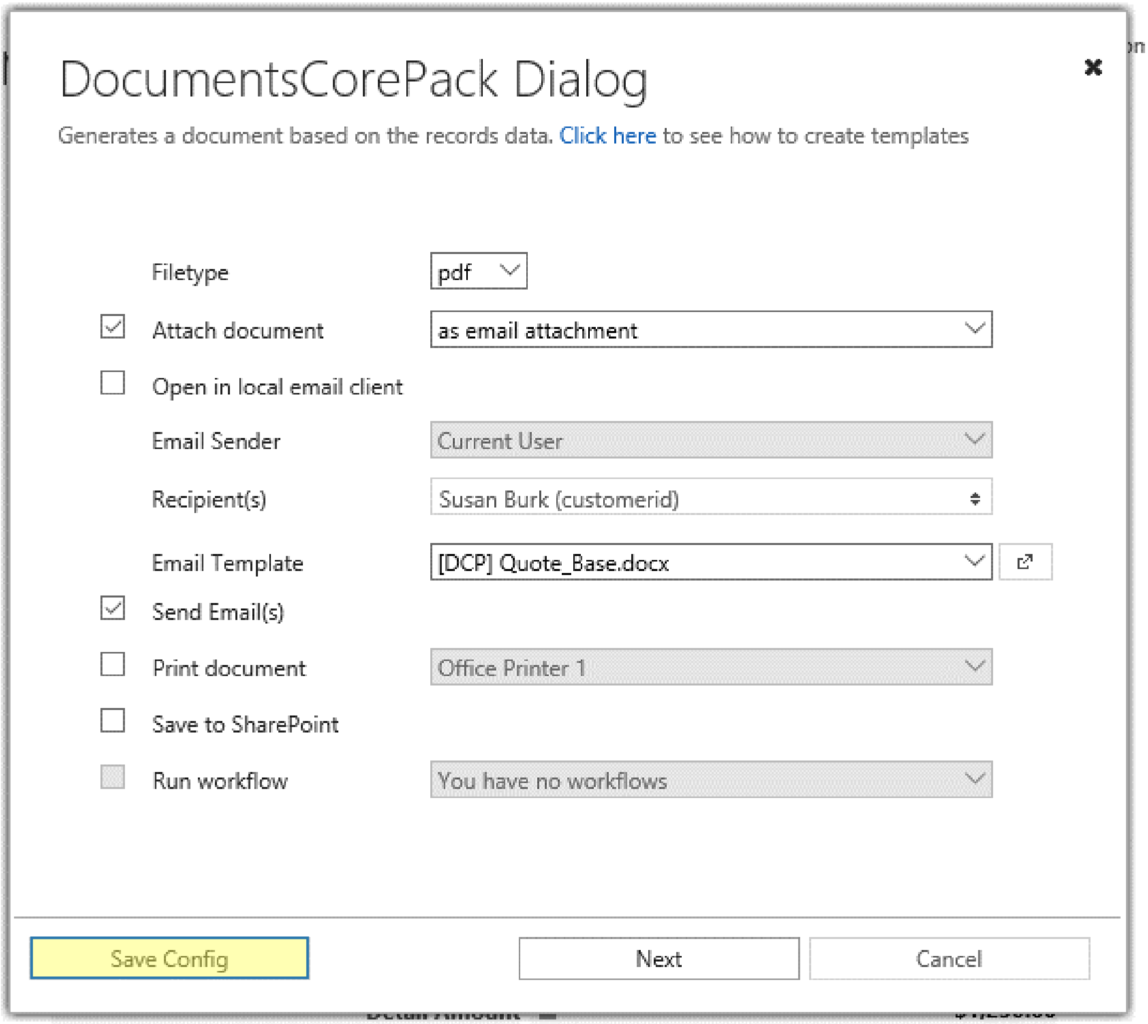


Figure 5: DocumentsCorePack dialog with settings

Next, please click on the ***[Save Config]***-button, which will open a dialog with additional parameters and options for the one-click-action.

If you would click on the ***[Next]***-button here, the document would be generated, and the configured steps would be configured.

2.3 Step 3: Define the One-Click-Action options

In the so opened *Save Config*-dialog, you have the possibility to set your preferred one-click-action options.

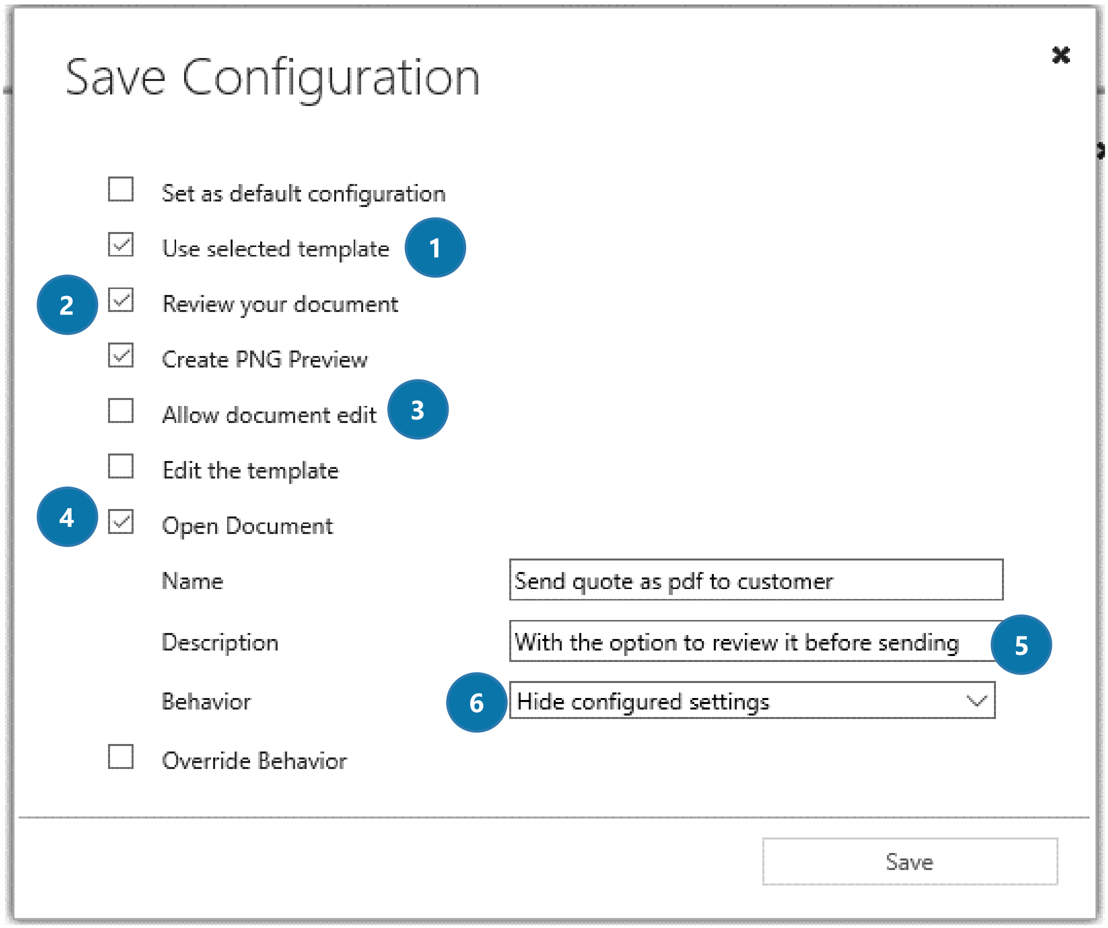


Figure 6: Save Configuration-dialog

You should be aware of the following important facts regarding this example:

Checking the USE SELECTED TEMPLATE–OPTION ① means, that the user will not have a template selection and the initial selected template (QuoteWithGrouping_Base in our case) is used automatically.
Checking the REVIEW YOUR DOCUMENT-OPTION ② enables the user to view the generated PDF before it is sent.
The ALLOW DOCUMENT EDIT–OPTION ③ is disabled because we do not want the user to edit the generated quote.
The OPEN DOCUMENT–OPTION ④ will automatically open the document on the user's machine
Here ⑤, we specify a name and description. So, the user knows exactly, what the one-click-action will do. In the BEHAVIOR DROP-DOWN MENU ⑥, we select *Hide configured settings*. So, certain options will be invisible to the user. Plus, they cannot be changed. (e.g. file type, email template, recipient etc.)

2.4 Step 4: Save your settings

After you have configured the one-click-action you simply have to click on the ***[Save]***-button to save the action for your users.

2.5 Step 5: The result (user view)

When a CRM user now clicks on the ***[Create Document]***-button, the user will be automatically provided with the new one-click-action (here: *Send quote as pdf to customer*).

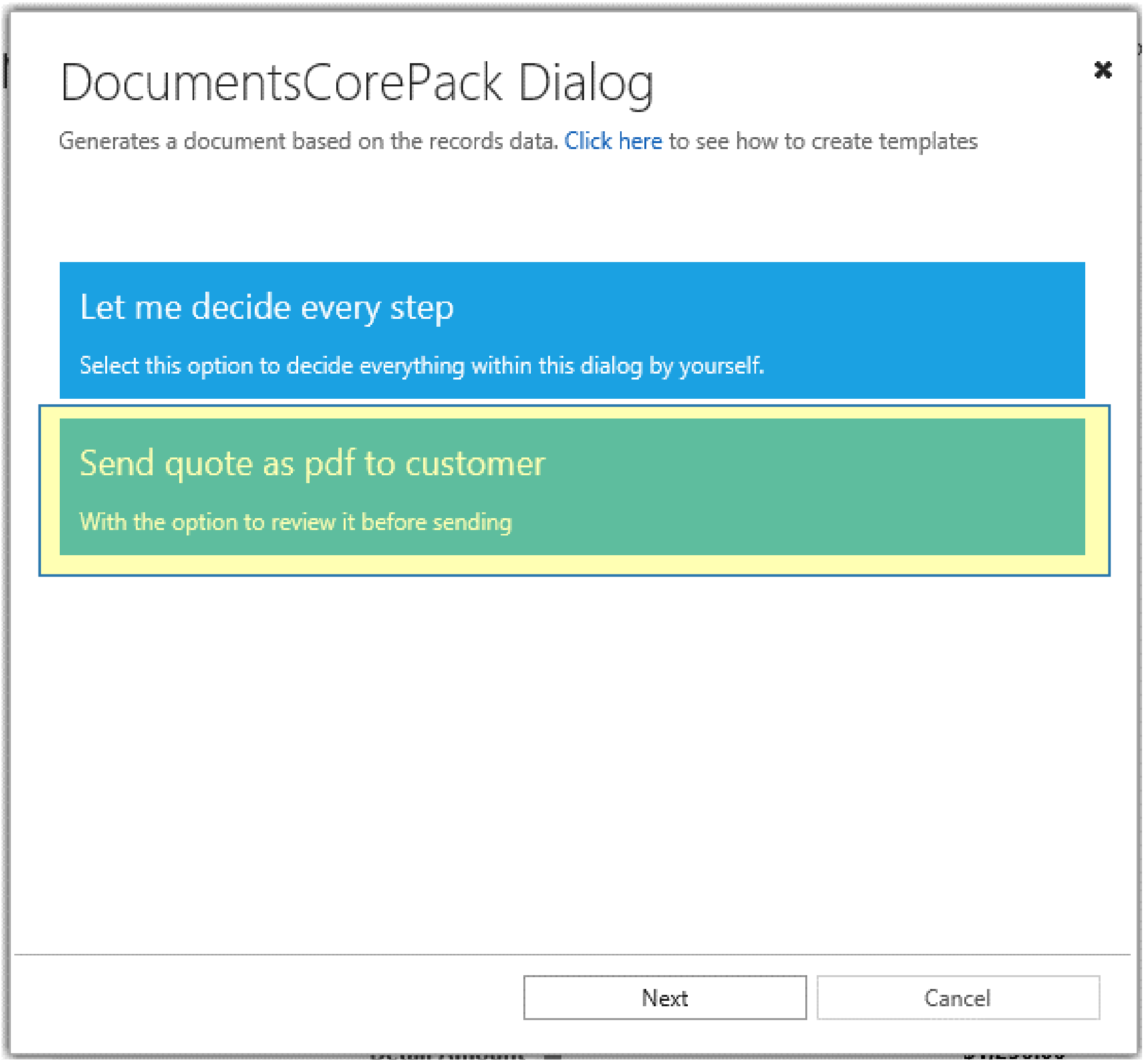


Figure 7: The result - user view

When the user clicks on the one-click-action, the template selection and the dialog options will be skipped.

Instead, the user will be provided with the last step of the dialog, which means, that the generated .pdf will open automatically to be reviewed.

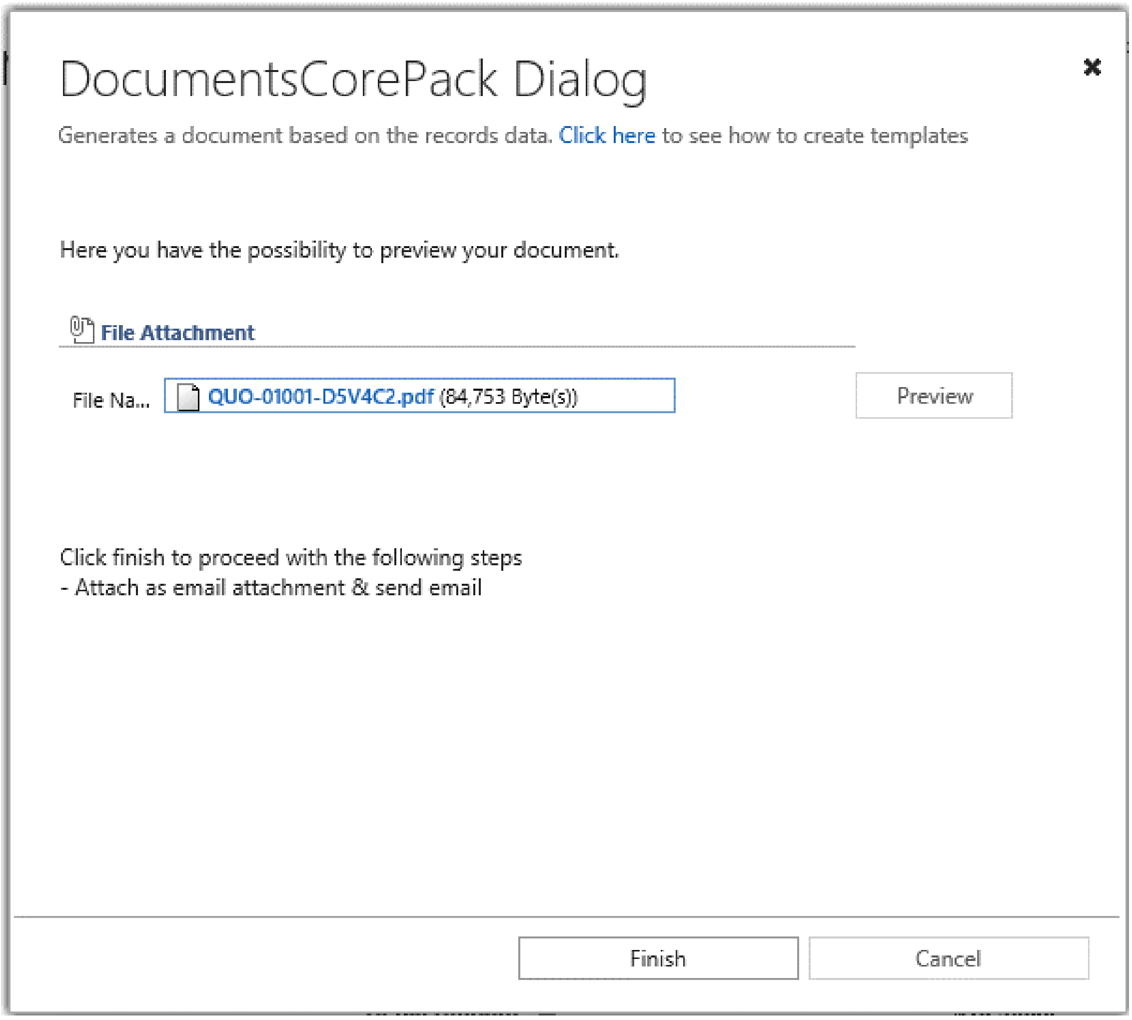


Figure 8: Result - user view - .pdf to be reviewed

When the .pdf looks fine, the user can click on the ***[Finish]***-button to finalize the dialog. The email with the attached .pdf and the other DCP template (as email content) will be sent to the customer. The recipient has already been configured in the one-click-action of our example.

The last step can also be automated without the document review and the email will be sent straight to the customer. In that case, you have to uncheck the *Review your document*-option in the ***[Save Config]***-dialog. So, it would be a “real” one-click-action.

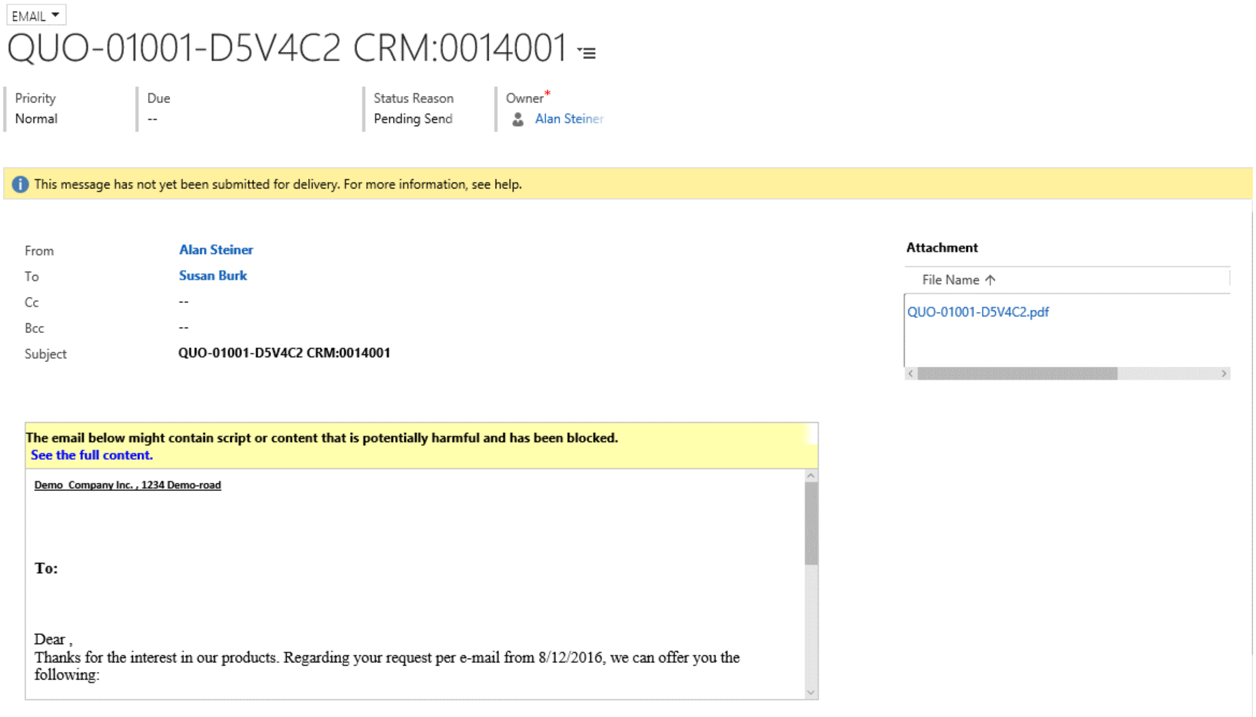


Figure 9: Result – user view – email

3 How to create One-Click-Actions as administrator (Example 2)

This step-by-step tutorial will show you how to create a one-click-action based on the Contact entity. This example is not based on a single record, but on multiple records.

3.1 Step 1: Open the DCP dialog

Again, we start as administrators just like in our first example and open the dialog with a click on the ***[Create Document]***-button. But this time, we have selected multiple contacts. When multiple records are selected, the dialog will automatically detect that and if you create a one-click-action this time, it is automatically being saved for batch processes. This means, this one-click-action is only available for users, that have selected more than one record.

3.2 Step 2: Select your template

As soon as you have selected your users and opened the DocumentsCorePack dialog, select your preferred template. (here: *Activity_Overview*) and click on the ***[Next]***-button.

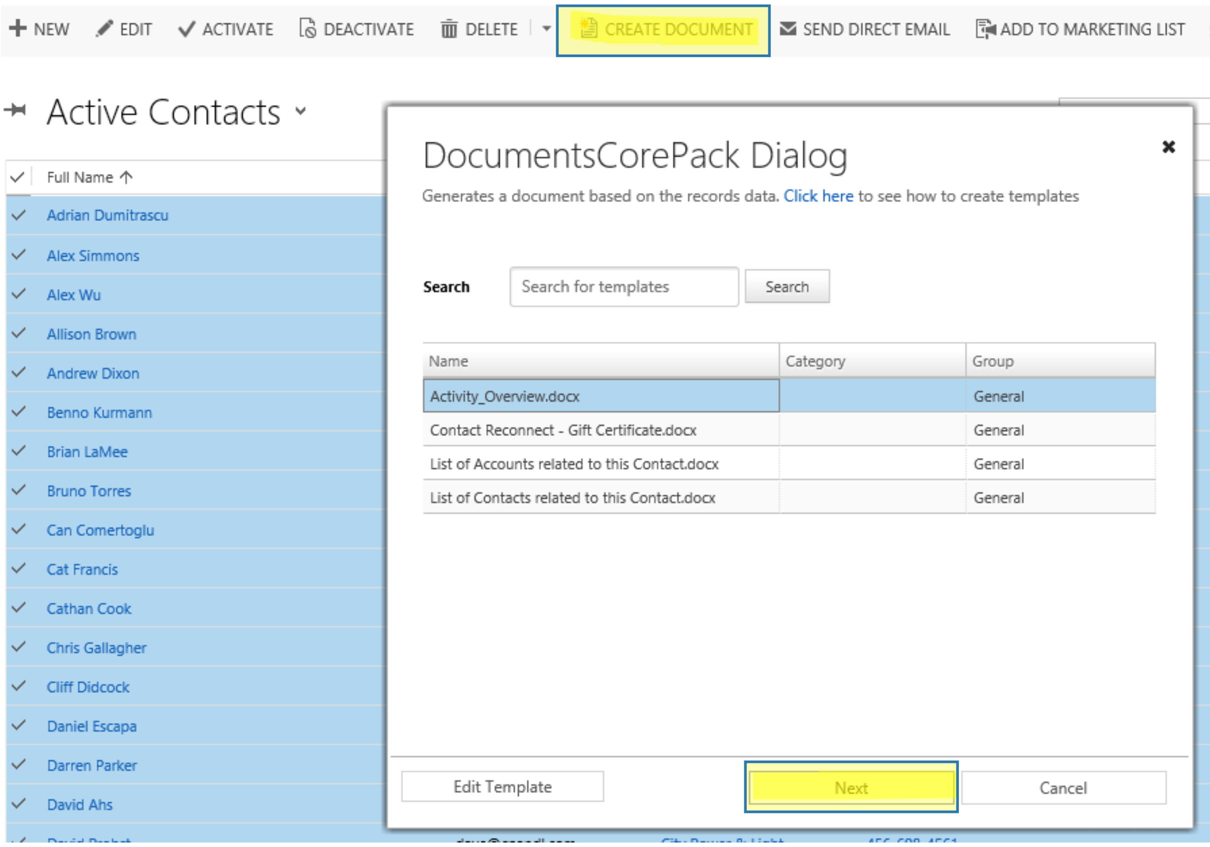


Figure 10: Select your preferred records & template

3.3 Step 3: Define some actions

In the so opened dialog, we check the *Save to SharePoint*-option and leave everything else unchecked (for our example). Next, please click on the ***[Save Config]***-button.

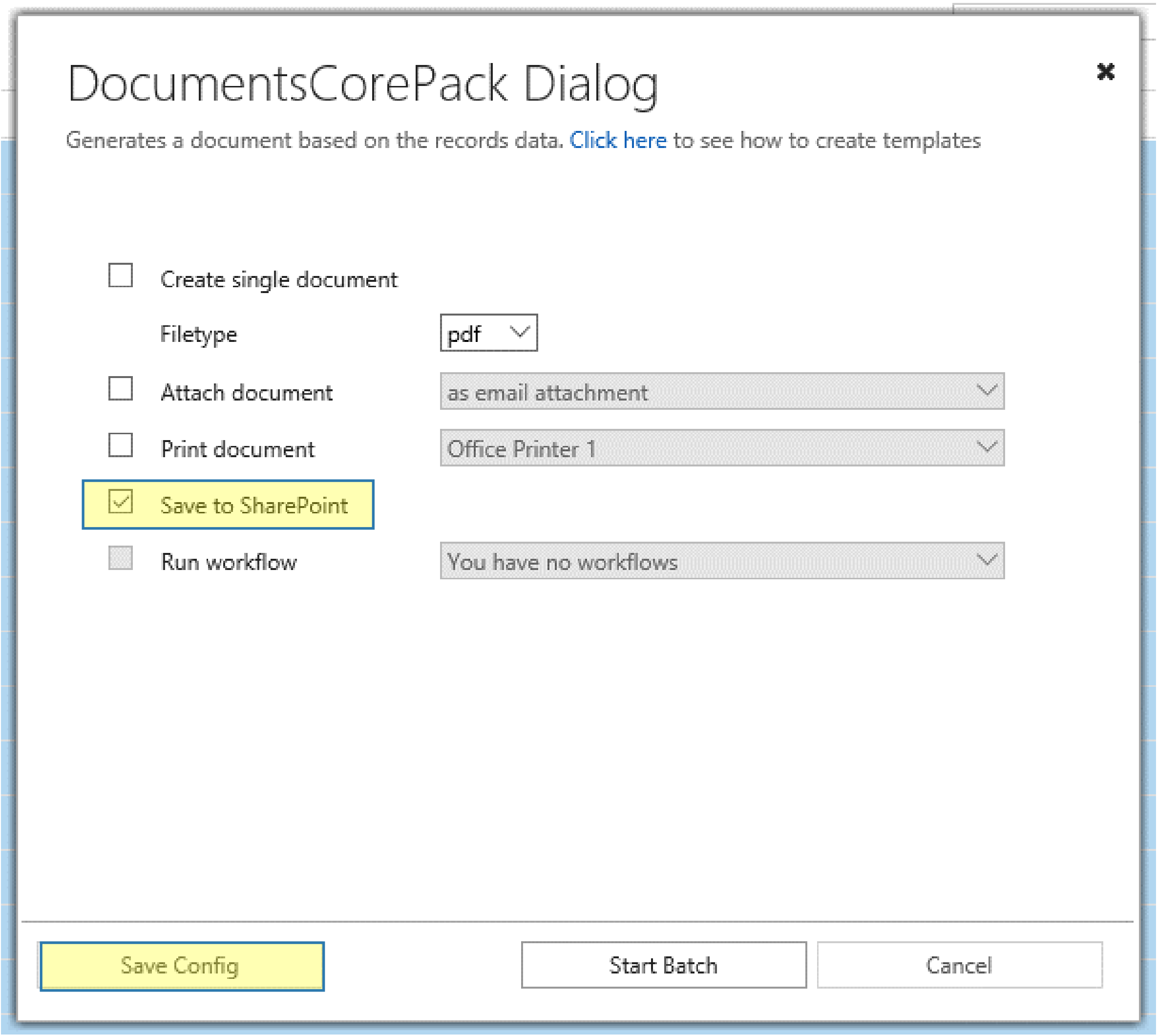


Figure 11: DocumentsCorePack dialog settings

3.4 Step 4: Save the Configuration

In the so opened window, we select again the *Use selected template*-option, so the user will not be able to select a certain template. Additionally, we again set the *Behavior*-option to *Hide configured settings*. Now, the process starts immediately. We name the action and insert an optional description. Finally, we click on the ***[Save]***-button.

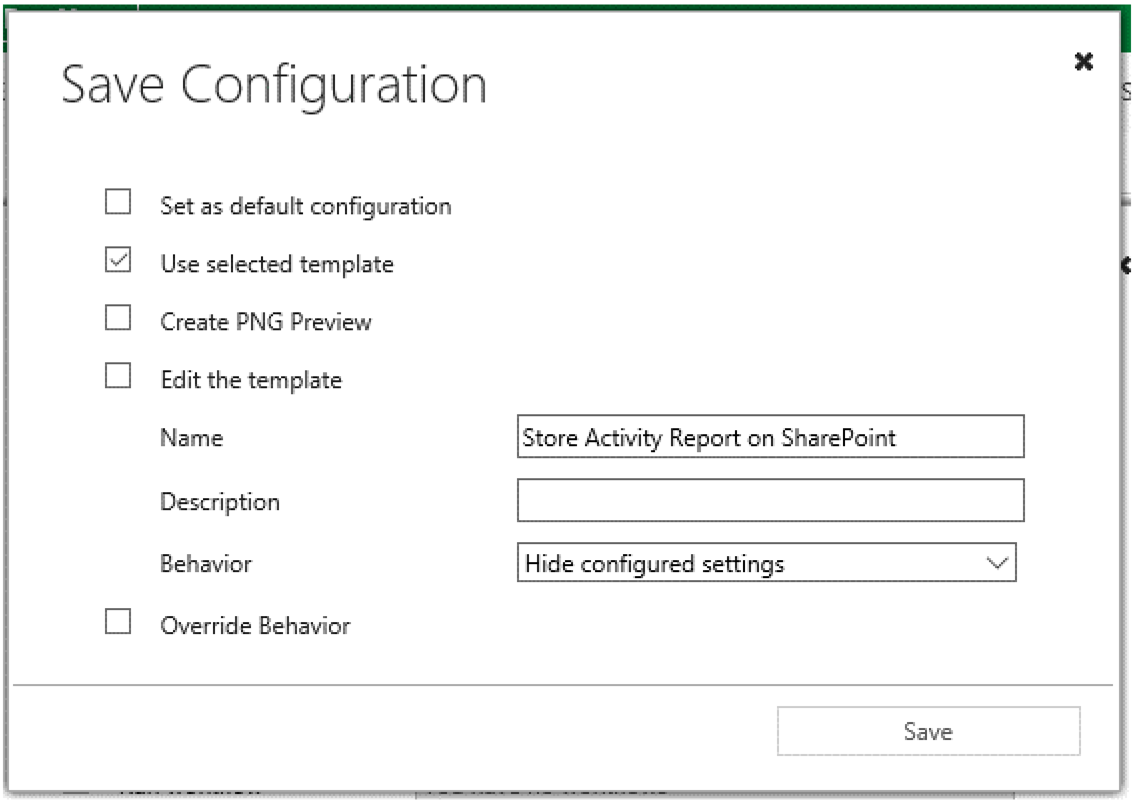


Figure 12: Save Config-dialog

3.5 Step 5: The result (user view)

When a CRM user now selects multiple contacts and clicks on the ***[Create Document]***-button, the user will only be provided with the created one-click-action.

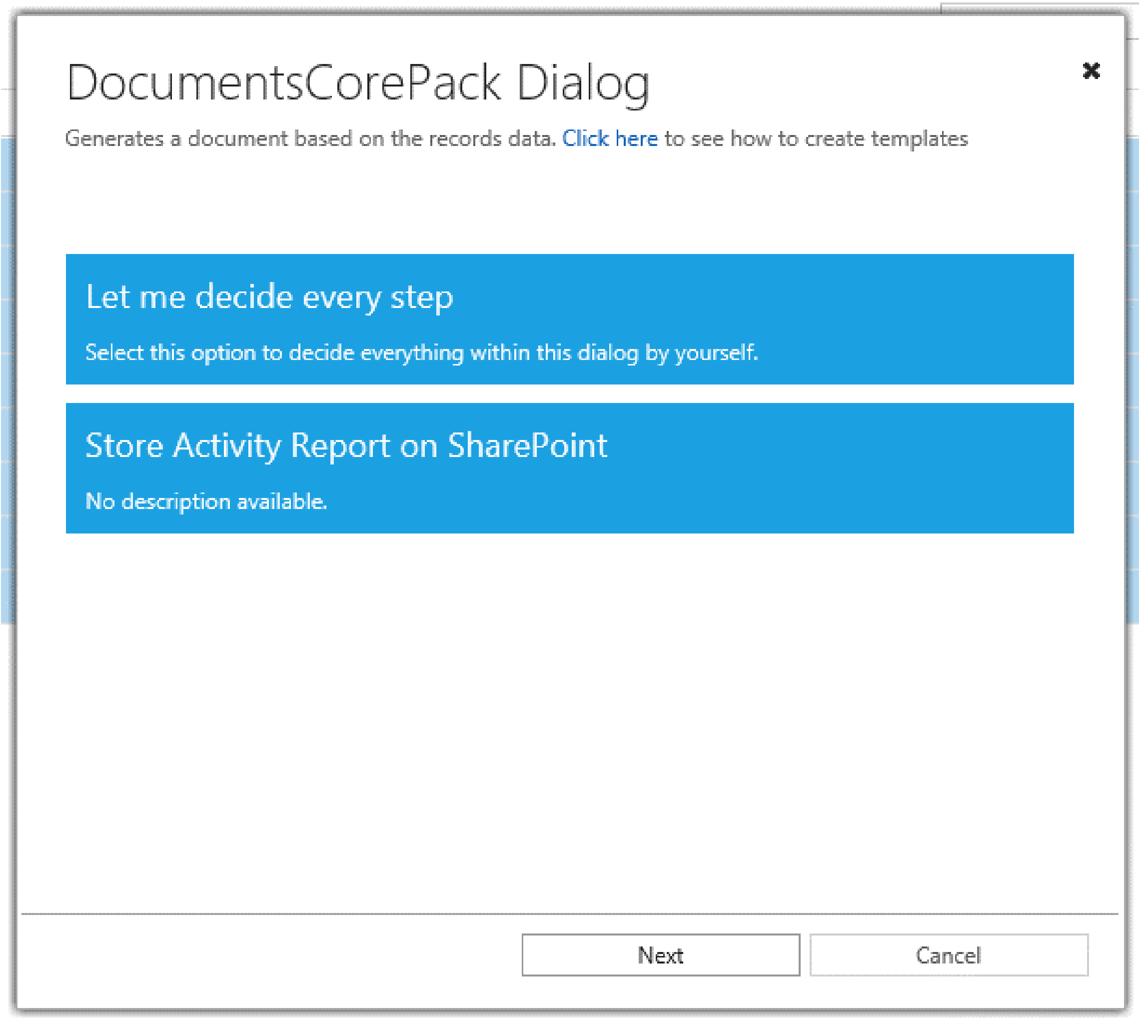


Figure 13: Result – one-click-action (user view)

When the user selects the *Store Activity Report on SharePoint*-one-click-action, the process will be started immediately. The user can either close the dialog or wait until it is finished to see the result page of the created documents, which are then stored on SharePoint in the corresponding contact locations.

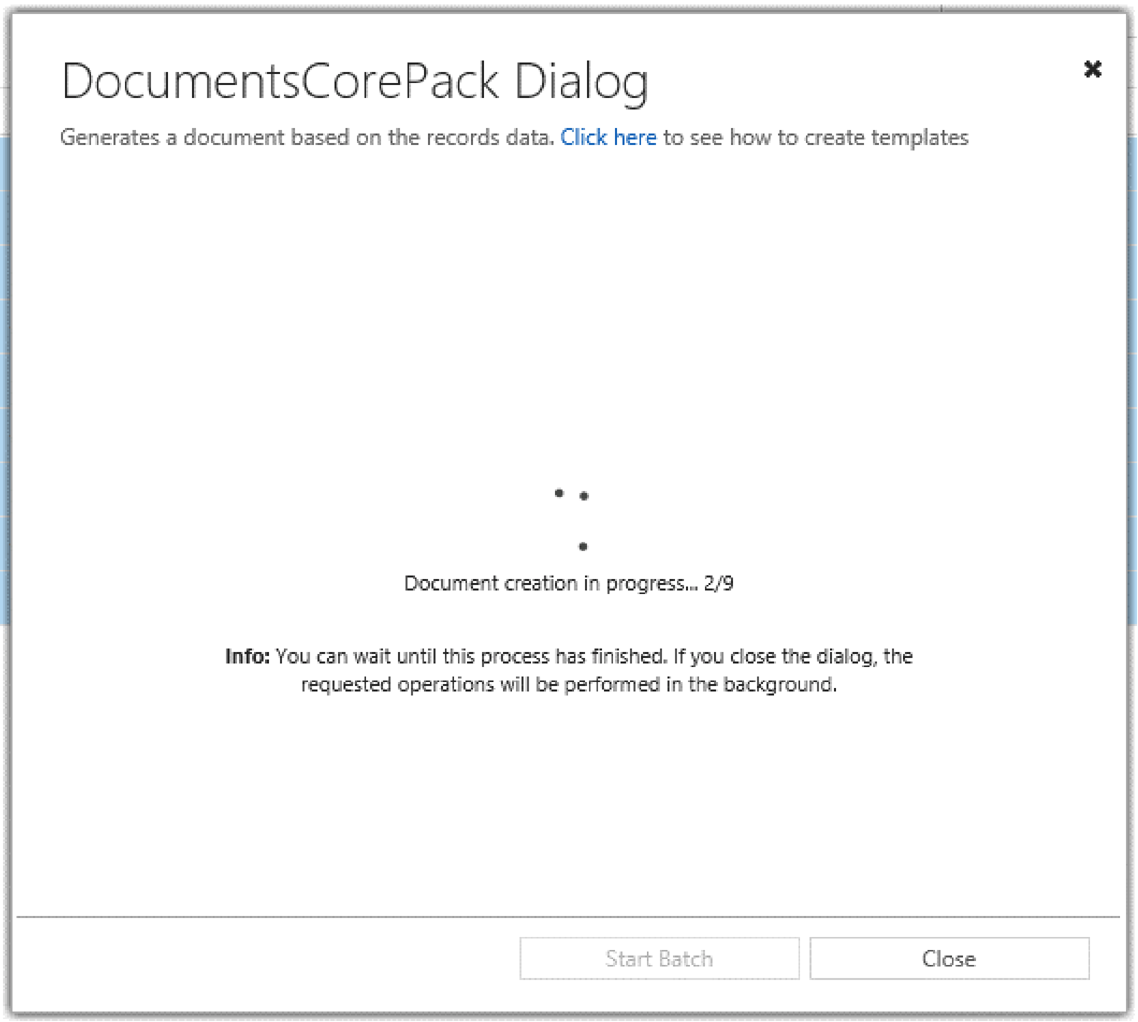


Figure 14: DocumentsCorePack document generation

4 How to create One-Click-Actions as administrator (Example 3)

This step-by-step tutorial will show you how to create a one-click action that sends an email to a contact and saves the document on SharePoint. But this time, we let the user decide which template and email template should be used. Still, we do not allow him to change anything else.

4.1 Step 1: Open the DCP dialog

Please start the dialog as shown in CHAPTER 3 HOW TO CREATE ONE-CLICK-ACTIONS AS ADMINISTRATOR (EXAMPLE 2) ON PAGE 16.

4.2 Step 2: Define some actions

Next, we configure the DocumentsCorePack dialog settings. For this example, the file type should always be *.pdf*. Also, the *attach as email*-, the *send email*- and *the save to SharePoint*-option will be selected. Corresponding to the previous examples, we click on the ***[Save Config]***-button as soon as we have defined all necessary actions.

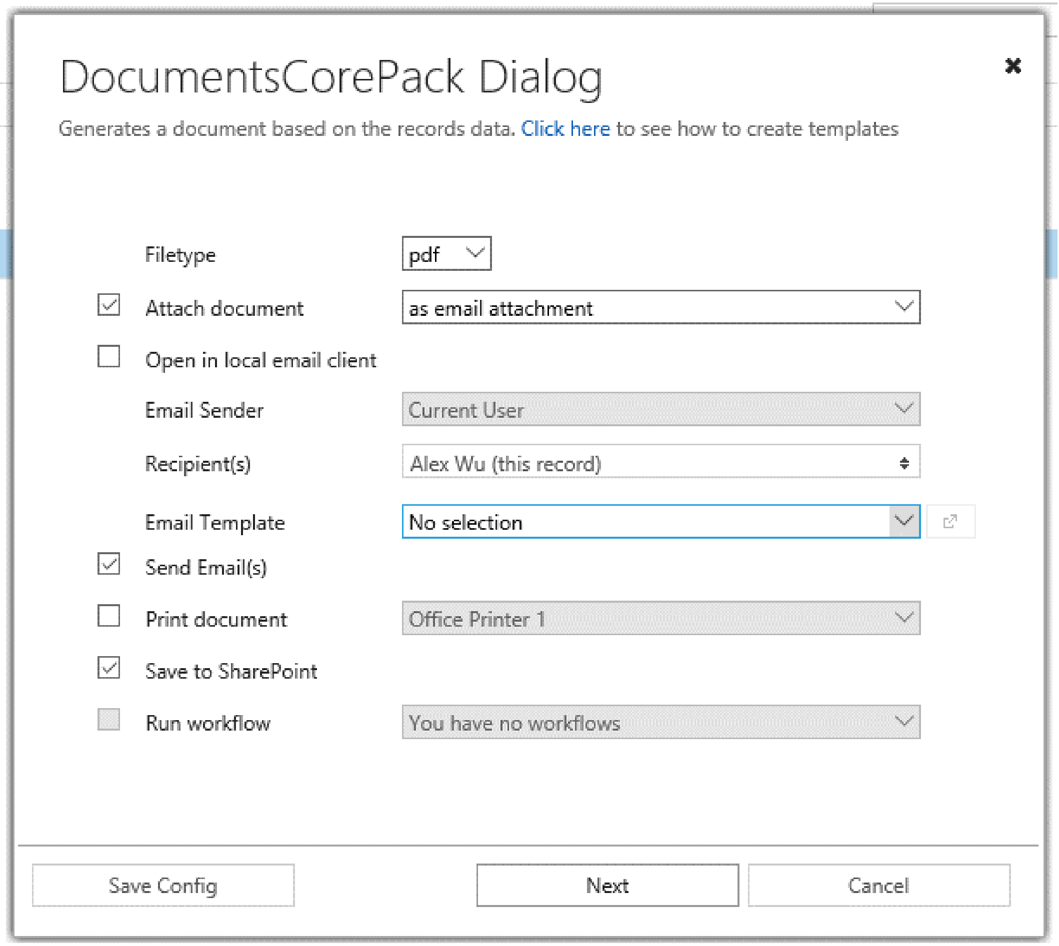


Figure 15: DocumentsCorePack dialog settings

4.3 Step 3: Define the One-Click-Actions

As we would like to achieve that some options should be changed by the user, but others should not be changed, and some specific options should be hidden completely, we enable the *Override Behavior*-option this time. Using that option, we specify exactly what the user should or should not see and which fields can be changed by the user.

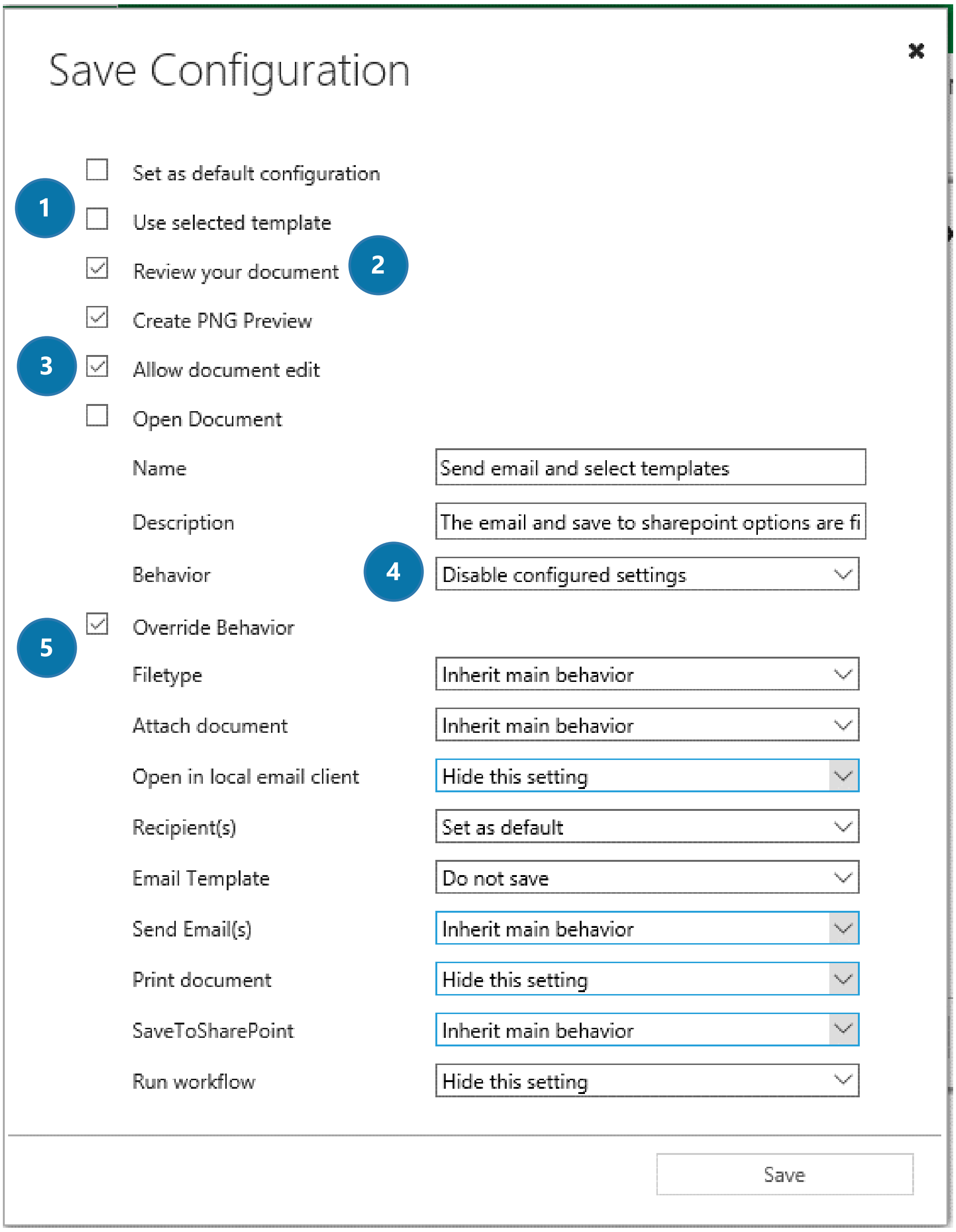


Figure 16: Save Configuration field

Please find some more detailed information to the fields on the next page.

The USE SELECTED TEMPLATE–OPTION 1 is unchecked because the user should decide which template he wants to be selected.

The REVIEW YOUR DOCUMENT–OPTION 2 will show the document on the last page of the dialog so that the user can review it and if necessary, cancel the email.

The ALLOW DOCUMENT EDIT–OPTION 3 enables the user to edit the document before it will be sent to the contact.

BEHAVIOR 4 – this is a quite important point for this example. With this option, we specify the default behavior of each option in the dialog. There are three possible values here:

1) SET CONFIGURED SETTINGS AS DEFAULT:
   This will save your selected options as default, but everything can be changed by the users. E.g. .pdf is the default file type, but users can also switch it to another file type
2) HIDE CONFIGURED SETTINGS:
   Enabled, it will hide all options from the user. When no setting has a specific behavior (when override behavior is selected), the user will not see the dialog page at all
3) DISABLED CONFIGURED SETTINGS:
   Users will see, but not be able to change the value. E.g. Imagine, you specify an email template, the user will see it, but will not be able to change anything. If there is a setting with no specific behavior, the user will not see that dialog page at all.

The OVERRIDE BEHAVIOR–option 5 is the option that allows us to control the state of the specific dialog options. This is, how it works: With the behavior, we specify the default options (let the user change, show but disallow changes or completely hide). Using the Override Behavior-option, we pick certain options and assign another behavior to them. Possible values are:

1) INHERIT MAIN BEHAVIOR:
   The option will have the same behavior as configured in the regular *Behavior*-step
2) DO NOT SAVE:
   This will not even save the setting into the one-click-action. Which means, the user has the possibility to change it according to his will and that it has no specific default value.
3) SET AS DEFAULT:
   This option will save the setting (e.g. a certain file type) as default and it will always be the same when the one-click-action is executed, but the user can change it
4) HIDE THIS SETTING:
   This will save the setting (e.g. file type pdf) and the resulting file type will always be a pdf. In this case, the user has no chance to see or change the setting.
5) SHOW, BUT DO NOT ALLOW CHANGES:
   This option will save the setting (e.g. file type pdf) and the user will see it, but is not allowed to apply any changes.

Applied as in our example, the single settings produce the following effects:

Our main behavior is DISABLE CONFIGURED SETTINGS. This means, all configured settings (file type, attach, print, etc.) will be shown to the user, so the user will be able to see it, but will not be able to change it.

Next, we make use of the OVERRIDE BEHAVIOR-OPTION in order to customize the settings for the user.

1) FILETYPE-OPTION
   Inherited main behavior: Will be the same value as the main behavior.
   In our example, the main behavior is set to *Disable configured settings*, which means the user will be able to see the filetype, but will not be able to change it.
2) ATTACH DOCUMENT-OPTION
   Inherited main behavior: Will be the same value as the main behavior.
   In our example, the main behavior is set to *Disable configured settings*, which means the user will be able to see that the attached document will be attached as an email attachment, but he will not be able to change it.
3) OPEN IN LOCAL EMAIL CLIENT
   Hide this setting: We have not enabled that option before we clicked on the ***[Save Config]***-button. This is why this setting will be disabled for the one-click-action. But we do not want to show the user that option, because we would like to have a clean user interface. So, we hide this setting completely.
4) RECIPIENTS
   Set as default: This will save our selected recipients so that always the same recipients are selected when the one-click-action is executed. But the user will be able to change the recipients as needed.
5) EMAIL TEMPLATE
   Do not save: this will not save any email template of the one-click-action. Which means, per default no email template is selected and the user has to select one of the email templates
6) SEND EMAIL
   Inherit main behavior: Will be the same value as the main behavior. In our case, the main behavior is set to *Disable configured settings*. Which means, the user will see that the e-Mail will be sent automatically, but the option cannot be changed
7) PRINT DOCUMENT
   Hide this setting: We have not enabled that option before we clicked on the ***[Save Config]***-button. This is why this setting will be disabled for the one-click-action. But we do not want to show the user that option, because we would like to have a clean user interface. So, we hide this setting completely.
8) SAVE TO SHAREPOINT
   Inherit main behavior: Will be the same value as the main behavior.
   In our example, the main behavior is set to *Disable configured settings*, which means the user is allowed to see that the document will be saved on SharePoint, but it cannot be changed.
9) RUN WORKFLOW
   Hide this setting: We have not enabled that option before we clicked on the ***[Save Config]***-button. This is why this setting will be disabled for the one-click-action. But we do not want to show the user that option, because we would like to have a clean user interface. So, we hide this setting completely.

4.4 Step 4: Save the Configuration

Please do not forget to save your configuration with a click on the ***[Save]***-button!

4.5 The result (user view)

When the user now starts the dialog and selects the *Send email and select template* one-click-action, he would be able to select the template, which should be attached as a .pdf.
After the template has been selected, the user has the possibility to change the recipient and the email template. Any other setting will be shown, but it will also be disabled.

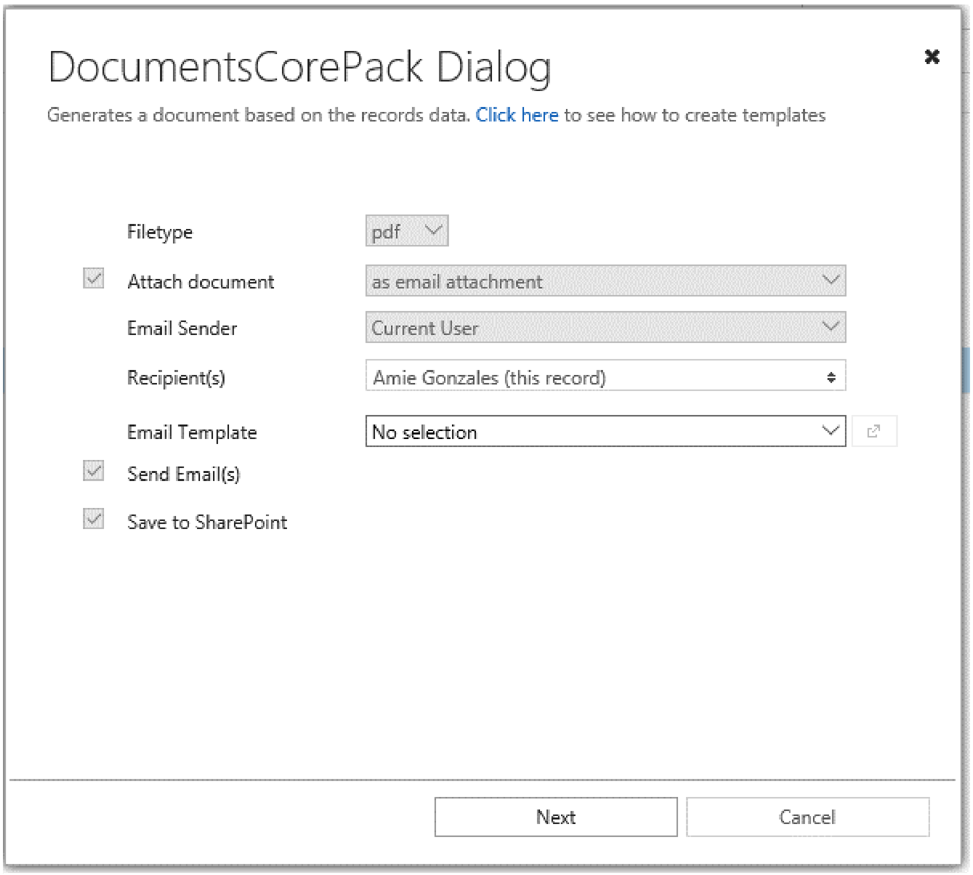


Figure 17: Result - example

5 DocumentsCorePack Dialog advanced options

There are a few options for one-click-actions which cannot be configured directly in the user interface. These few settings must be configured manually in the XML of the one-click-action. The following options exist in the advanced configuration.

For single document one-click-actions:

- Conditional template selection based on the attributes of the record
- Conditional template groups which should be shown, also based on the attributes of the record
- Conditional email template selection based on the attributes of the record
- A specific list of available email senders
- Limit the available email templates
- DocuSign/AssureSign: Specify the available email recipient fields to avoid reading the metadata

For batch document one-click-actions:

- A specific list of available email senders
- Limit the available email templates
- DocuSign/AssureSign: Specify the available email recipients other than the current record

To be able to customize the advanced options, you require basic knowledge of XML editing. A good XML editor could be useful as well.

5.1 How to access the advanced configuration

To be able to customize the advanced options, you require basic knowledge of XML editing. A good XML editor could be useful as well.

However, in order to open the advanced configuration, please navigate to Settings > Products in your Microsoft Dynamics application.

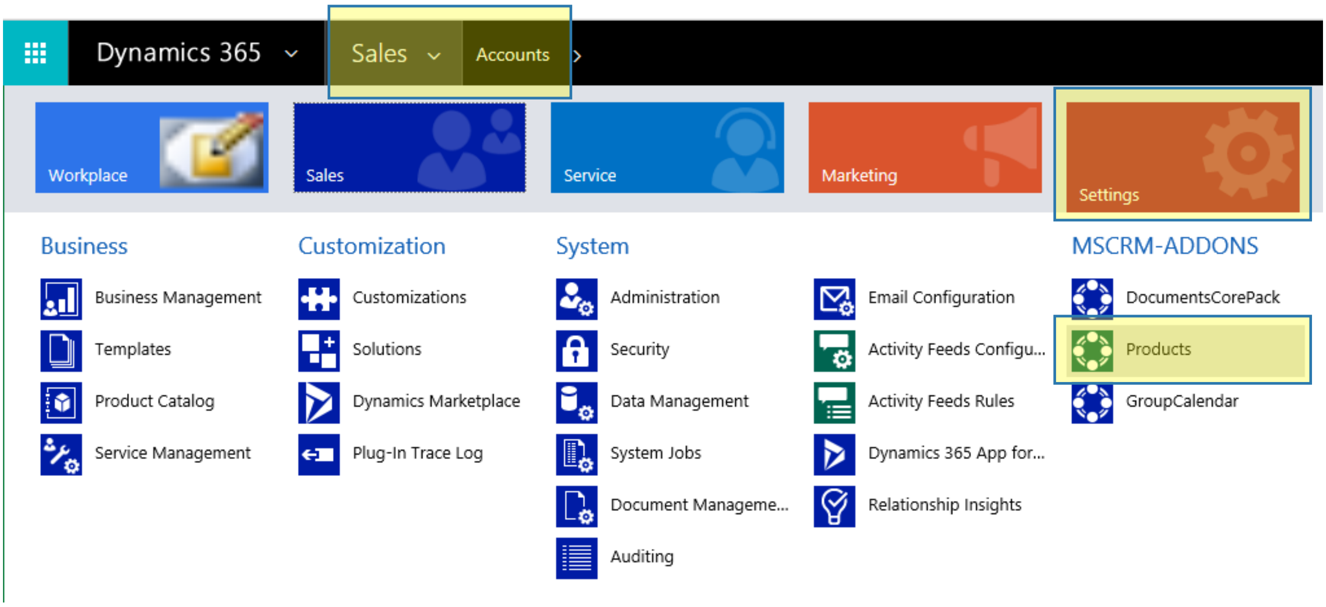


Figure 18: Settings > Products

In the so opened window, please open the settings for AutoMerge. Once you have opened the AutoMerge settings, you will be provided with some settings for all your one-click-actions.

They are named *AutoMergeCommands_[ENTITYNAME]*.

There is no setting available when you've never created a one-click-action via the User Interface.

For example, if you want to open the configuration for your Contact one-click-action, just open the setting AutoMergeCommands_contact and you'll see the full xml.

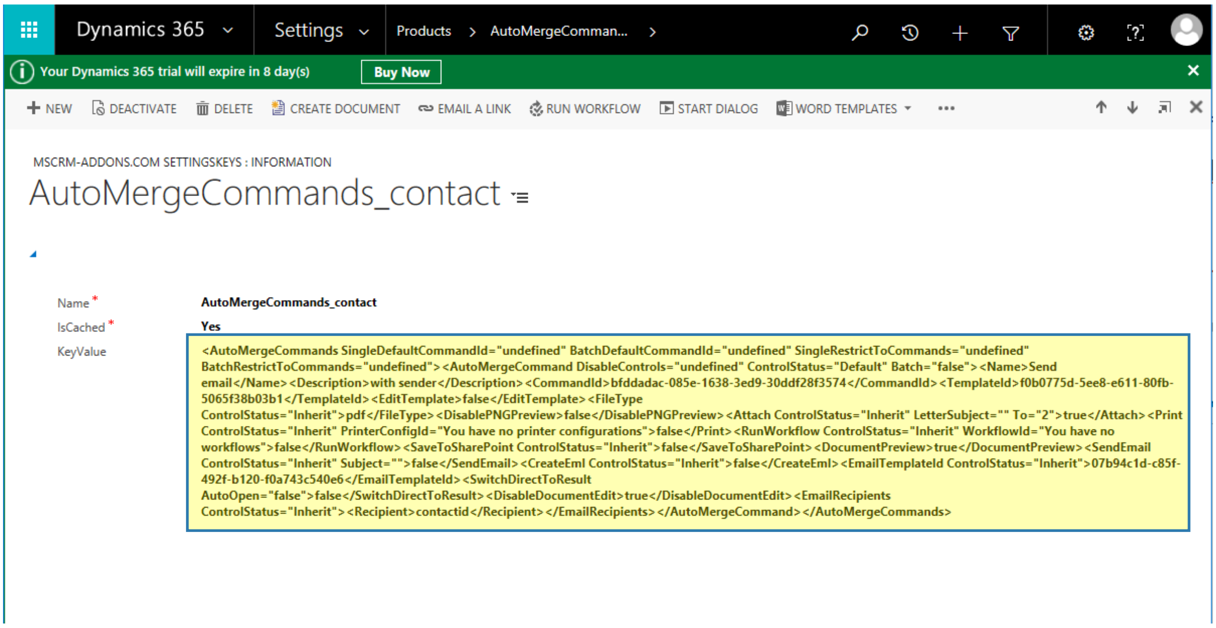


Figure 19: Example XML for AutomergeCommands_contact

Please copy the XML into an editor, which will format the XML, so it will look like the example below:

```
<AutoMergeCommands SingleDefaultCommandId="undefined" BatchDefaultCommandId="undefined"
                   SingleRestrictToCommands="undefined" BatchRestrictToCommands="undefined">
  <AutoMergeCommand DisableControls="undefined" ControlStatus="Default" Batch="false">
    <Name>Send email</Name>
    <Description>with sender</Description>
    <CommandId>bfddadac-085e-1638-3ed9-30ddf28f3574</CommandId>
    <TemplateId>f0b0775d-5ee8-e611-80fb-5065f38b03b1</TemplateId>
    <EditTemplate>false</EditTemplate>
    <FileType ControlStatus="Inherit">pdf</FileType>
    <DisablePNGPreview>false</DisablePNGPreview>
    <Attach ControlStatus="Inherit" LetterSubject="" To="2">true</Attach>
    <Print ControlStatus="Inherit" PrinterConfigId="You have no printer configurations">false</Print>
    <RunWorkflow ControlStatus="Inherit" WorkflowId="You have no workflows">false</RunWorkflow>
    <SaveToSharePoint ControlStatus="Inherit">false</SaveToSharePoint>
    <DocumentPreview>true</DocumentPreview>
    <SendEmail ControlStatus="Inherit" Subject="">false</SendEmail>
    <CreateEml ControlStatus="Inherit">false</CreateEml>
    <EmailTemplateId ControlStatus="Inherit">07b94c1d-c85f-492f-b120-f0a743c540e6</EmailTemplateId>
    <SwitchDirectToResult AutoOpen="false">false</SwitchDirectToResult>
    <DisableDocumentEdit>true</DisableDocumentEdit>
    <EmailRecipients ControlStatus="Inherit">
      <Recipient>contactid</Recipient>
    </EmailRecipients>
  </AutoMergeCommand>
</AutoMergeCommands>
```

Figure 20: Example XML in XML editor

5.1.1 XML Configuration Schema

We will describe each node detailed, that is available in this XML. Basically, the XML is structured like this:

```
<AutoMergeCommands>
  <AutoMergeCommand Batch="false">
    <!-- all available options -->
  </AutoMergeCommand>
</AutoMergeCommands>
```

`AutoMergeCommands:`

This is the main node. All other configured one-click-actions are below that node.

`AutoMergeCommand:`

This is each one-click-action itself. Batch and single one-click actions differ in the attribute *Batch*.

Underneath each `AutoMergeCommand`-node, there are the specific options. They define what the one-click-actions do.

The easiest way to find the one-click-action you want to modify would be to search for the name under which you have saved it.

5.2 How to modify a One-Click-Action

The settings, which are included in the XML, have already been configured in the user interface. Below, only the additional advanced options will be mentioned. To add one or more of the configured settings, simply add the additional node somewhere under the *AutoMergeCommand*-node of your selected one-click-action.

5.2.1 How to configure a list of email senders

This setting is valid for both, batch, as well as for single document generation.

It allows you to specify a list of email senders.
Per default, the emails sent by the DocumentsCorePack Dialog are sent from the current logged on CRM user. Using this XML, an alternative email sender (e.g. a support queue) can be defined. Also, multiple senders are possible. Once set, the user can select which sender he would like to use.

```
<!-- (Optional) Define email sender. Available types:  -->
<!--            systemuser: with the systemuser guid -->
<!--            queue: with the queue guid -->
<!--            CurrentUser: current executing CRM  user -->
<!--            preselect the sender with "Selected" -->
<!--            Name: the name of the sender which should be displayed -->

<EmailSender>
  <Sender Selected="true" Type="CurrentUser"></Sender>
  <Sender Type="systemuser" Name="User X">systemuserGUID</Sender>
  <Sender Type="queue" Name="Support Queue">queueGUID</Sender>
</EmailSender>
```

5.2.2 How to configure conditional template selection based on record attributes

This setting is valid for single document generation only.

This setting allows you to preselect a DocumentsCorePack template based on the current records attributes. This is useful, for example, if there is a language attribute on the account. Based on this attribute, either a German or an English template could be selected.

```
<!-- (Optional) You can create simple if-statements to select different templates. -->
<!-- The first match will be used. If there is no match, the TemplateId will be used. -->
<!-- If the TemplateId is not configured, the user have to choose the template -->
<ConditionalTemplateSelection>
  <!-- (Required) Attribute: The CRM attribute to check for. The logicalname is used -->
  <!-- (Required) EqualsValue: The value to check for. For lookups use the GUID, -->
  <!--                         for picklists the int value -->
  <!-- (Required) templateGUID: You have to insert the GUID of the -->
  <!--                          "MSCRM-ADDONS.com DocumentsCorePack Template" record-->
  <TemplateId Attribute="name" EqualsValue="asdf">templateGUID</TemplateId>
</ConditionalTemplateSelection>
```

5.2.3 How to configure conditional email templates based on records attributes

This setting is valid for single document generation only.

It allows you to preselect an email template based on the current record attributes. This is useful, for example, when there is a language attribute on the account and based on this attribute either a German or English template should be selected.

```
<!-- (Optional) You can create simple if-statements to select different crm email templates. -->
<!-- The first match will be used. If there is no match, the EmailTemplateId will be used. -->
<!-- If the EmailTemplateId is not configured, the user have to choose the crm email template -->
<ConditionalEmailTemplateSelection>
  <!-- (Required) Attribute: The CRM attribute to check for. The logicalname is used -->
  <!-- (Required) EqualsValue: The value to check for. For lookups use the GUID, -->
  <!--                         for picklists the int value-->
  <!-- (Required) templateGUID: You have to insert the GUID of the CRM email template record-->
  <EmailTemplateId Attribute="name" EqualsValue="asdf">templateGUID</EmailTemplateId>
```

5.2.4 How to configure conditional template groups based on record attributes

This setting is valid for single document generation only.

This setting allows you to show specific template groups based on the current record attributes. This is useful, for example, when you have separated your account templates into specific groups for specific account types. Based on the attributes of the record, you can then show the user only one or more template groups instead of all templates.

```
<!-- (Optional) You can create simple if-statements to predefine the available -->
<!-- template groups. The first match will be used. If there is no match, all groups -->
<!-- will be shown. To show multiple groups, separate them with comma -->
<ConditionalTemplateGroup>
  <!-- (Required) Attribute: The CRM attribute to check for. The logicalname is used -->
  <!-- (Required) EqualsValue: The value to check for. For lookups use the GUID, -->
  <!--                         for picklists the int value -->
  <!-- (Required) Group: You have to insert the name of the template group.  -->
  <!--                   Comma-separated groups are allowed -->
  <!--                   The "General" group is defined through the entity type code-->
  <Group Attribute="name" EqualsValue="asdf">group1,group2,..</Group>
</ConditionalTemplateGroup>
```

5.2.5 How to limit the list of available email templates

This setting is valid for both, batch, as well as for single document generation.

This setting allows you to show only a predefined list of available email templates. This is useful, for example, if you have a lot of CRM and DCP email templates for an entity, but only a few of them are required within the DocumentsCorePack Dialog.

```
<!-- (Optional) define available email templates -->
<!--            Available Types: CRM/DCP -->
<AvailableEmailTemplates>
  <TemplateId Type="CRM">crmemailtemplateGUID</TemplateId>
  <TemplateId Type="DCP">dcptemplateGUID</TemplateId>
</AvailableEmailTemplates>
```

5.2.6 How to specify the available email recipients for AssureSign and/or DocuSign

When you use AssureSign or DocuSign, the dialog reads per default only the direct email fields. But when you want to send out the email to the related contact, the configuration of the available email recipients is possible.

However, there is a difference between batch and single one-click-actions.

SINGLE:

For single documents, the dialog reads the email field's metadata after you have selected another recipient. If you now want to limit the list of email fields, you have the possibility to configure them with that setting. Also, the dialog will not read any metadata when this setting is configured. So, this setting can be either used to improve the dialog performance or to limit the list of email fields.

BATCH:

In case of batch document generation, the dialog only reads the email fields of the current record.
Having this setting configured, you email fields of related records can be specified, e.g. the related contact including the email field.

The configuration is the same for batch and single.

```
<EmailRecipientsAddressFields>
  <Recipient LogicalName="accountid">
    <EmailField>emailaddress2</EmailField>
  </Recipient>
  <Recipient LogicalName="primarycontactid">
    <EmailField>emailaddress2</EmailField>
    <EmailField>emailaddress3</EmailField>
  </Recipient>
</EmailRecipientsAddressFields>
```

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7 Contact

For further technical questions, please visit our blog http://blogs.mscrm-addons.com or contact support@mscrm-addons.com.

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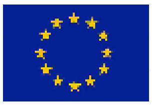

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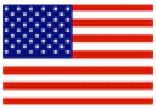

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