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One-Click-Actions in DocumentsCorePack ServerBased for Microsoft Dynamics 365

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(How to configure One-Click-Actions in DCP SB for Microsoft Dynamics 365)

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Preamble

This documentation is intended to guide you through the generation of One-Click-Actions in Microsoft Dynamics 365.



The feature is integrated into DocumentsCorePack Server Based. If you would like to use One-Click-Actions in Microsoft Dynamics 365, 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 365 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 365
- Microsoft Dynamics CRM Online

1 Purpose of One-Click-Actions

With the DocumentsCorePack ServerBased you get the possibility to define specific one-click-actions per entity. This feature 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 action 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.

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

Every administrator in your Dynamics 365 system can create, modify 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 to create One-Click-Actions?

Creating one-click-actions has never been easier. The feature "One-Click-Actions" for DCP ServerBased is now in the Web Config available for Dynamics 365. It enables you to create and modify one-click-actions with just a few clicks. Please notice that you can also modify actions, even if they are created via the DCP Dialog.

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

Basically, you have the possibility to define exactly, what the one-click-action should do (file type, attach, print, save on SharePoint, run workflow, email recipients, etc.) and save that action. By using that functionality, you can configure and automate almost every step of the document generation.

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

- One-Click-Actions for a single document generation – based on a single record
- One-Click-Actions for batch document generation – based on multiple records

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 one default one-click-action for single documents and one for multiple records. In this case, the default

one-click-action is automatically executed, and the user cannot 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 to check the *Set as default configuration*-option. But you also have the possibility to change this afterward.

2 How to create One-Click-Actions via the Web Config

Creating one-click-actions has never been easier. The following step-by-step instruction shows you how to create one-click-actions with just a few clicks via the Web Config.

To do so, please open your Dynamics 365 Settings, navigate to MSCRM-ADDONS-section and select DocumentsCorePack, like you can see in the figure below.

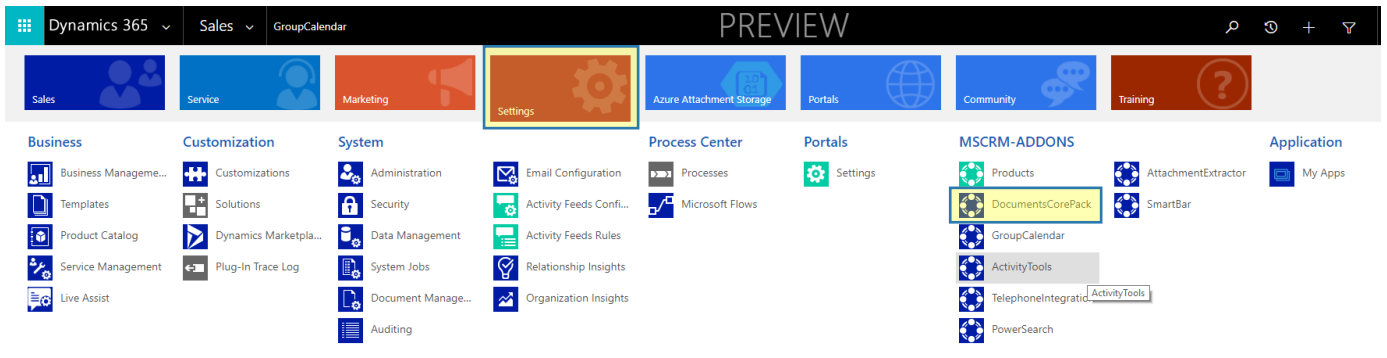


Figure 1: Dynamics 365 Settings – MSCRM-ADDONS – DocumentsCorePack

In the DocumentsCorePack main configuration window, you will be provided with a few tabs that allow you to configure DCP in general. Please go to the ① *One Click Actions-tab*, a new feature of DCP ServerBased. You will be provided with the window below, showing ② all available entities.

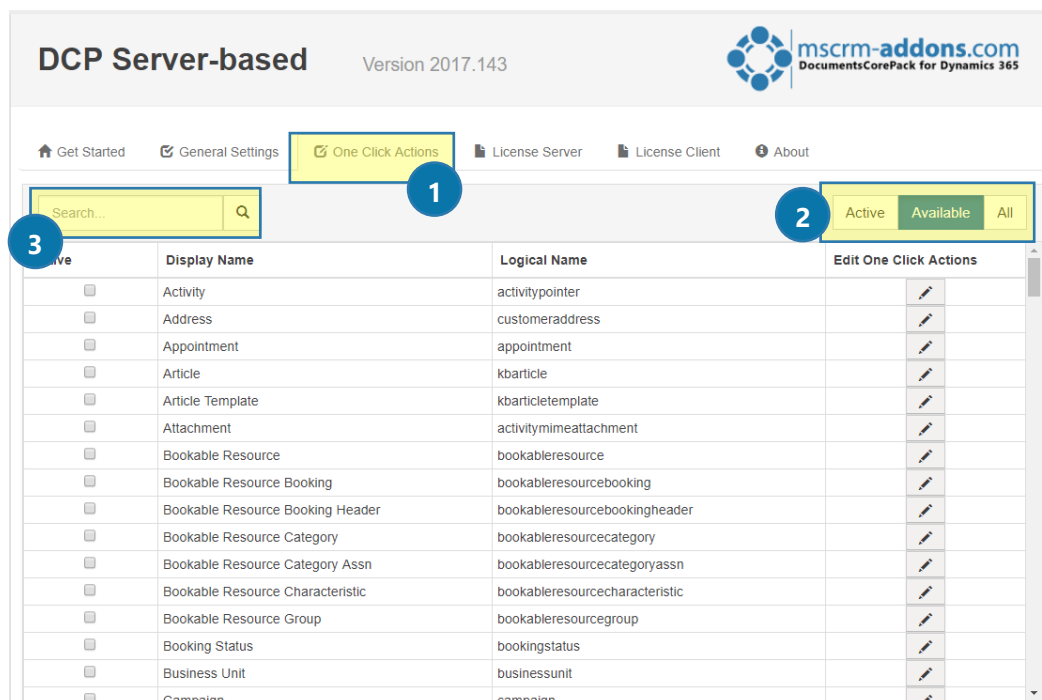


Figure 2: One-Click-Actions – available entities

③ The Search function helps you find the entity for which you want to create one-click-actions.

2.1 How to create One-Click-Actions for a single document generation

This step-by-step tutorial will show you how to create a new one-click-action based on a single record. In this example, we want to create a new action based on the Contact entity. Therefore, you have to search for contact and click on the **[Edit One Click Actions]**-button, like you can see in the figure below.

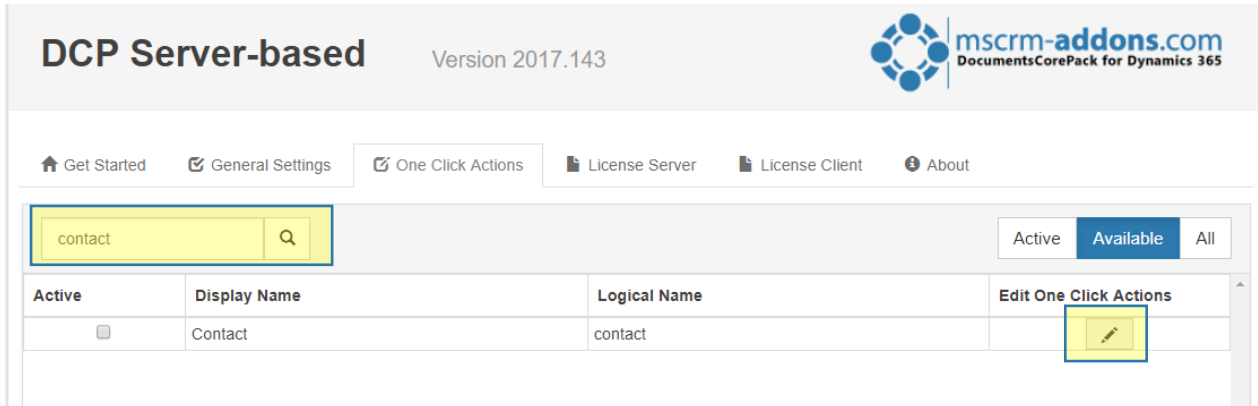


Figure 3: Create One-Click-Actions

The window below opens which usually provides you with all your **1** *Single Record Actions* and *Batch Actions* for the entity Contact (we don't have any action for this entity at the moment). Next click on the **2** **[New Single]**-button, which opens a dialog where you have to enter the name for your One-Click-Action, **3** "Single OCA" in this case.

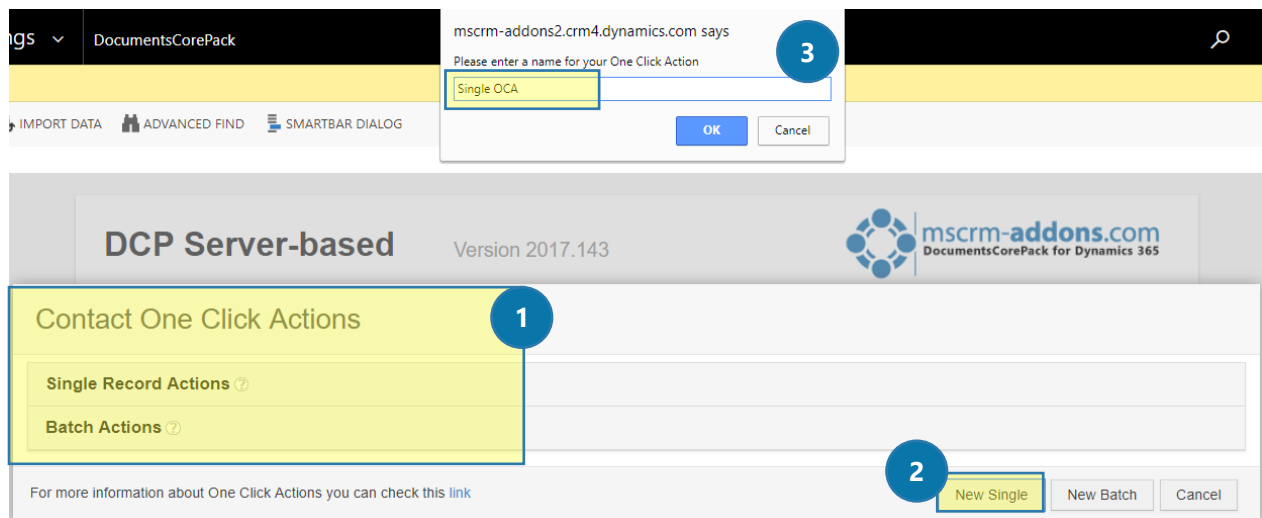
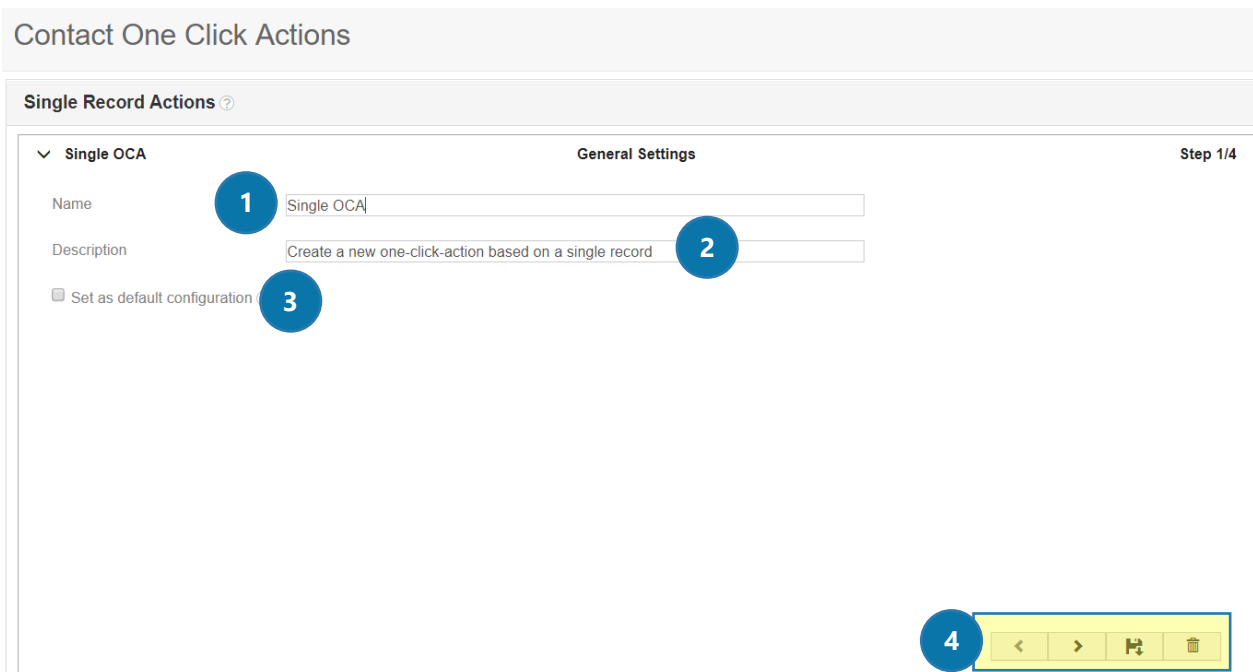


Figure 4: One-Click-Actions based on a single record

After hitting the **[OK]**-button, you will be provided with the configuration window for Single Record Actions. The creation of an action consists of four steps, which are explained below.

2.1.1 Step 1: General Settings

This window provides you with general settings, where you can change **1** the name of your action, **2** add a description and **3** set this action as default by checking the box.



Contact One Click Actions

Single Record Actions ?

Single OCA General Settings Step 1/4

Name **1** Single OCA

Description **2** Create a new one-click-action based on a single record

Set as default configuration **3**

4 < > [Save] [Delete]

Figure 5: Single Record Actions – General Settings (Step 1)

4 These buttons enable you to switch between steps, save your changes or delete the action.

2.1.2 Step 2: Template Settings

These settings help you configure your template selection in detail.

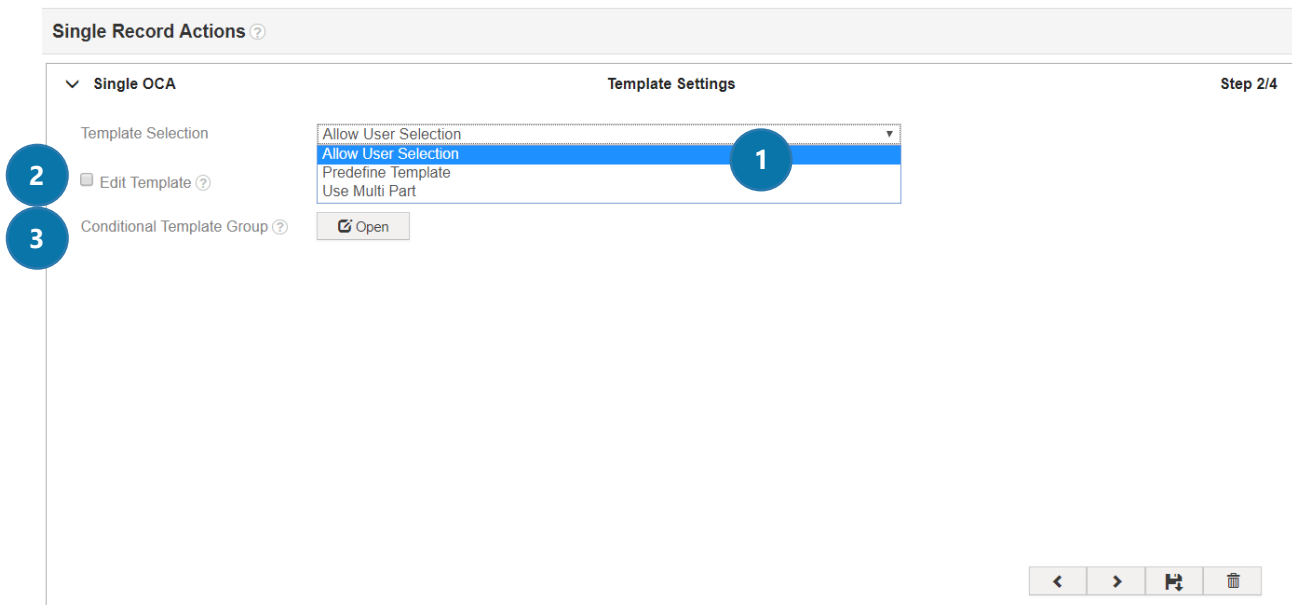


Figure 6: Single Record Actions – Template Settings (Step 2)

1 TEMPLATE SELECTION

This drop-down menu allows you to choose between three options: Allow User Selection, Predefine Template and Use MultiPart. Depending on which option you select, the *Template Settings*-window changes.

1. ALLOW USER SELECTION

This option is set as default and like the name says, it allows users to select a template. If you use this option, the two settings described below are possible.

2 EDIT TEMPLATE

Activate this setting to edit the template before the document would be created.

3 CONDITIONAL TEMPLATE GROUP

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 different account types. Based on the record attributes, you can then show the user only one or more template groups instead of all templates.

2. PREDEFINE USER SELECTION

By selecting this option, you will be provided with the window below. Here, you have the possibility to predefine a template, like you can see highlighted in yellow below. This means the user does not have a DocumentsCorePack template selection, the template is used automatically. This option also offers the *Edit Template*-setting above.

CONDITIONAL TEMPLATE SELECTION

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

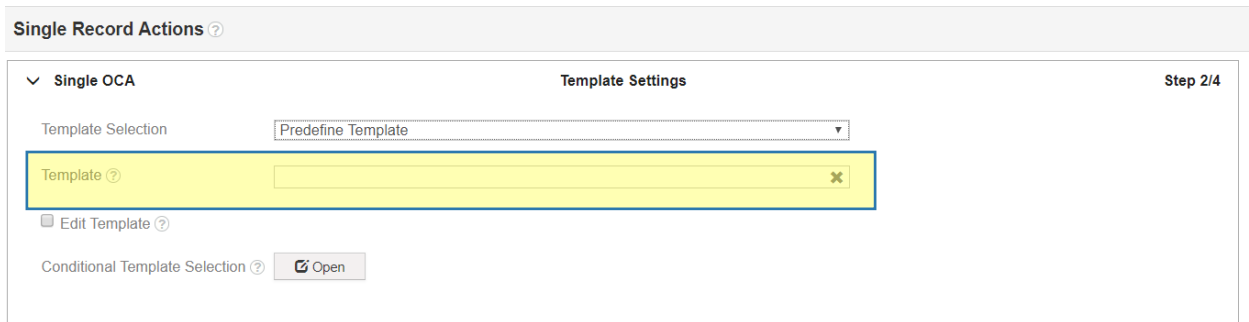


Figure 7: Template Settings (Step 2) – Predefine Template

3. USE MULTIPART

Usually you create a document from a template. By using the *Multipart-function*, you have the possibility to create a document from several DocParts. The DocParts can be dynamic (template) or static (note or SharePoint Url).

This function allows you to define several DocParts for your document. The figure below shows you the different kind of DocParts you can create, which will be explained step-by-step.

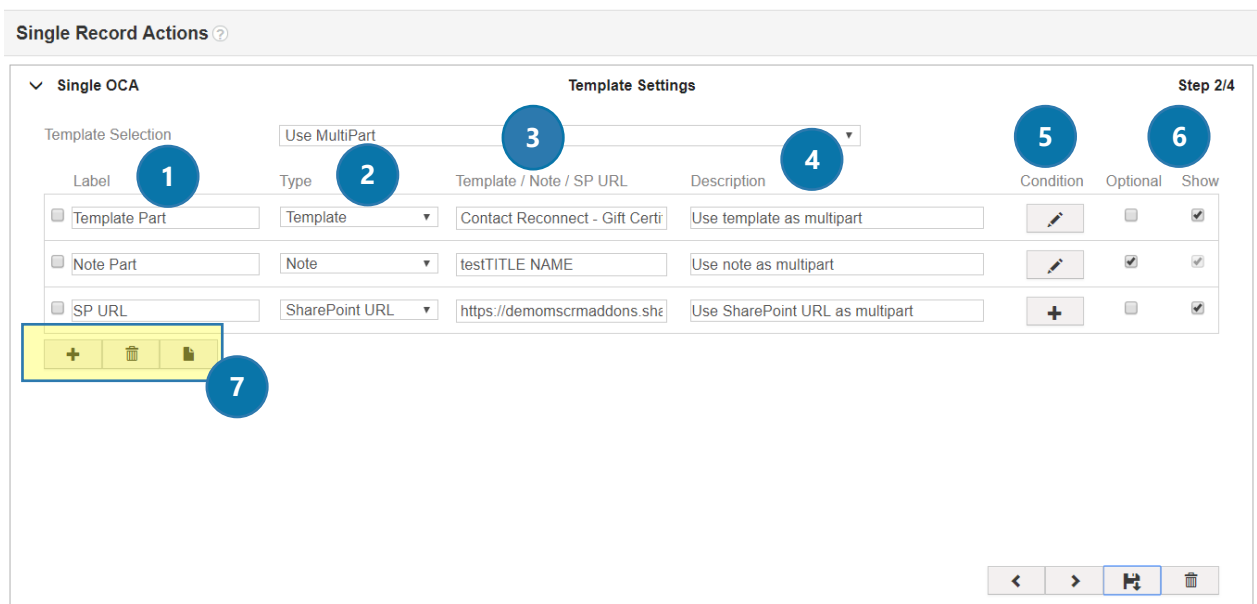


Figure 8: Template Settings (Step 2) – Use MultiPart example

1 LABEL

You can give your DocPart a label.

2 TYPE

Choose what type of multipart you want to create. You can select between three types:

1. TEMPLATE

By selecting Template as type, the *Look Up Record*-window pops up, like you can see below. Please notice that you can only select templates for the entity for which you are creating the one-click-action – in this example we search for the entity Contact. Select a template and click on the **[Add]**-button.

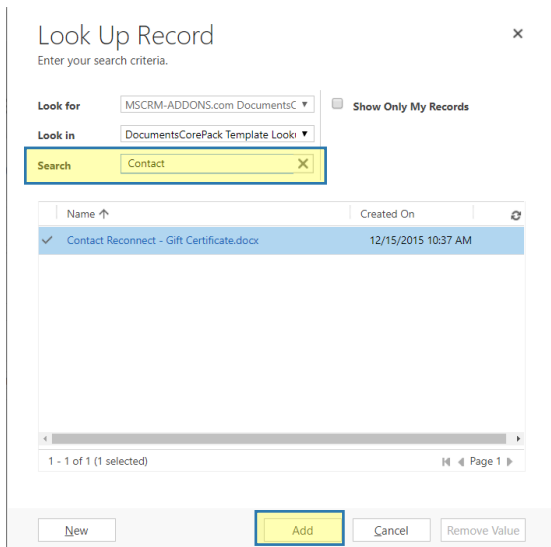


Figure 9: Use MultiPart – Type: Template

2. NOTE

You can also select a note as multipart, like you can see below.

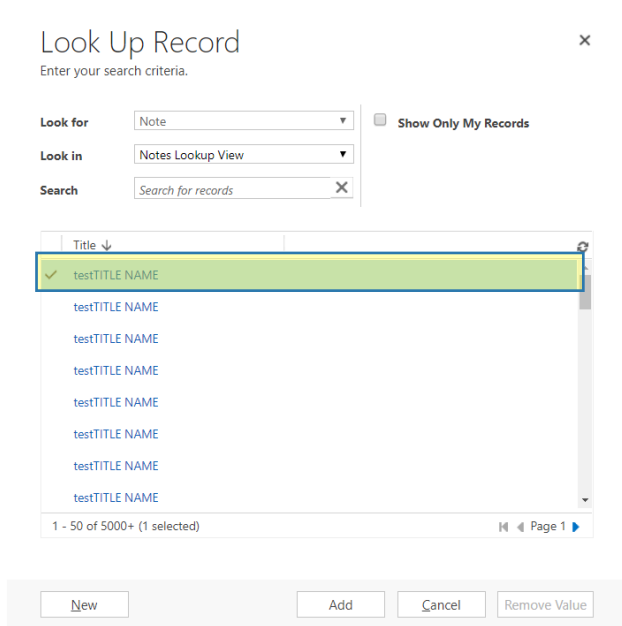


Figure 10: Use MultiPart – Type: Note

3. SHAREPOINT URL

You also have the possibility to use a SharePoint URL as DocPart.

3 TEMPLATE / NOTE / SP URL

This field will be automatically completed with the name of the template or note you have selected before or you have to enter your SharePoint URL.

4 DESCRIPTION

It is very helpfully to enter a description for your DocParts.

5 CONDITION

You have the option of entering one or more conditions for your DocParts. Only if the condition applies, the DocPart will be displayed, otherwise not.

Under **1 Available** you find all possible values which you can set as a condition. In this example, we set contacts from the city of Graz *OR* Vienna as a condition. Please notice that you can choose between **2 AND** and OR as the condition type. You can define as many conditions as you like. The *Active*-tab shows you all conditions you set, like you can see in this example.

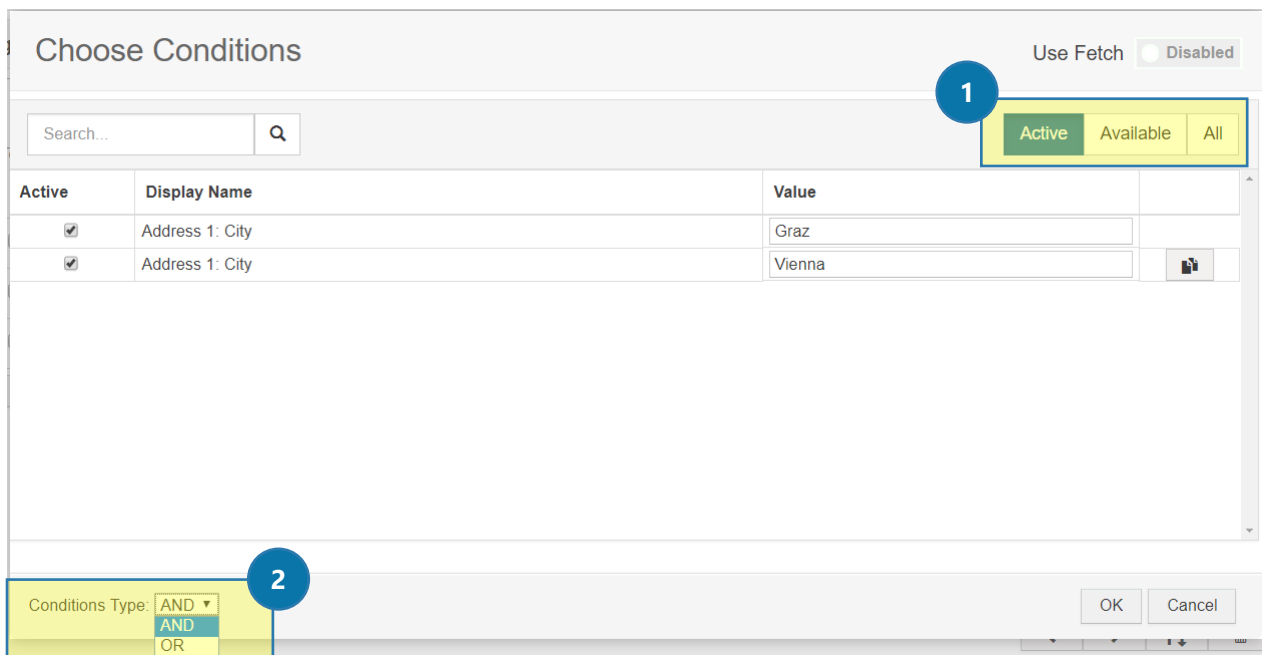


Figure 11: Use MultiPart – Conditions

6 OPTIONAL/SHOW

Define if your DocPart is optional or visible on the DocumentsCorePack Dialog. In our example is the Note Part optional and the other two DocParts should be shown on the DCP Dialog.

Open your DocumentsCorePack Dialog to see how this example looks like. Like explained above, the Note Part is optional and the other two are displayed.

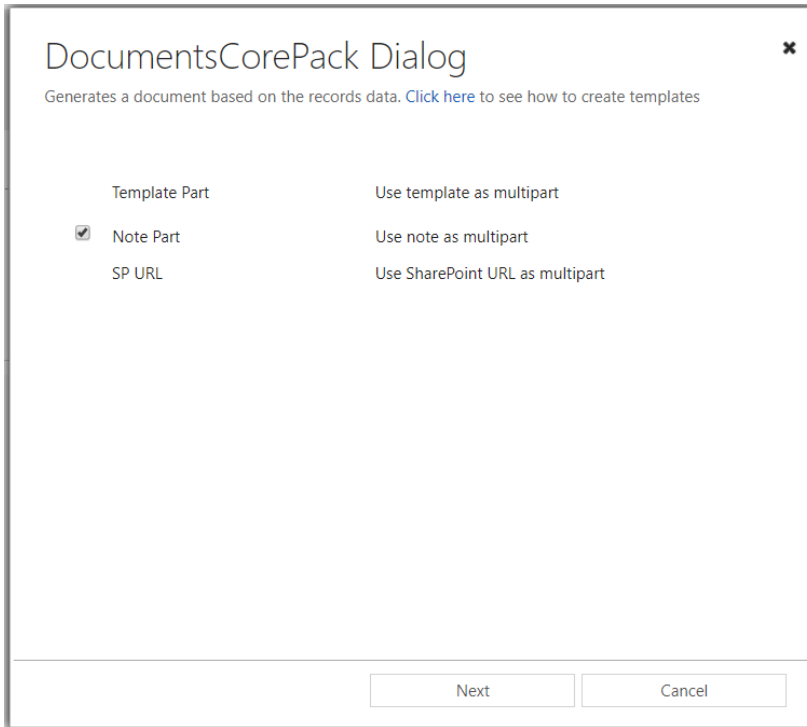


Figure 12: DCP Dialog – Single OCA example

7 ADD / DELETE / COMBINE DOCPARTS

The buttons, highlighted in yellow below, enable you to add, to delete DocParts and to combine them with only one click. The *Combine-function* creates a selection option, so that a user can select from the combined DocParts which one to use. Therefore, select the DocParts you want to combine and click on the **[Combine]**-button.

In this example we want to combine our three created DocParts, like you can see below.

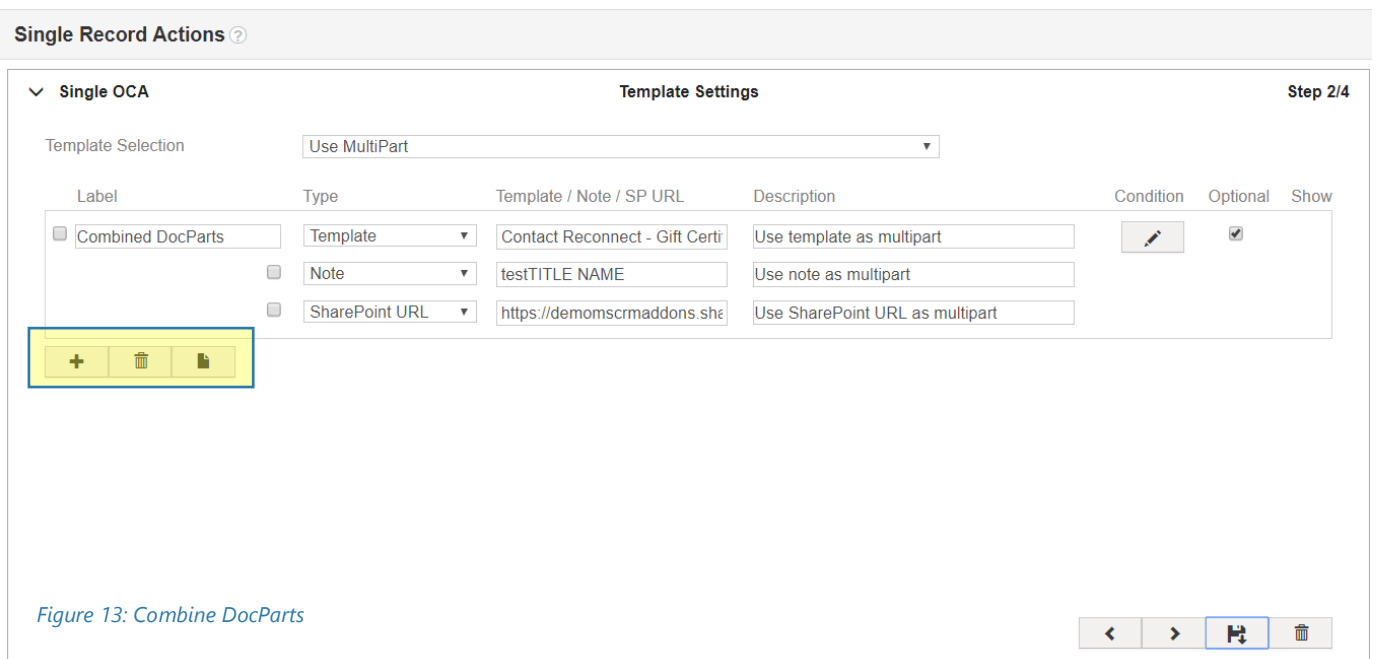


Figure 13: Combine DocParts

After saving the change, have a look at the DCP Dialog. Now you have only one One-Click-Action "Combined DocParts" and can select between the three created DocParts.

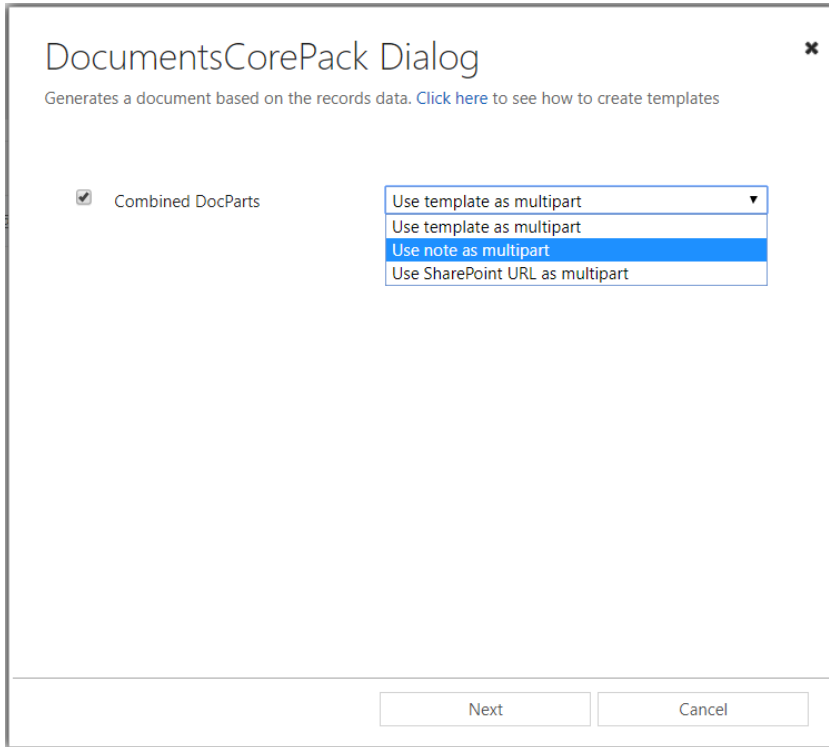


Figure 14: Combined DocParts

2.1.3 Step 3: Processing Settings

At this step, you can define the actions which should be done.

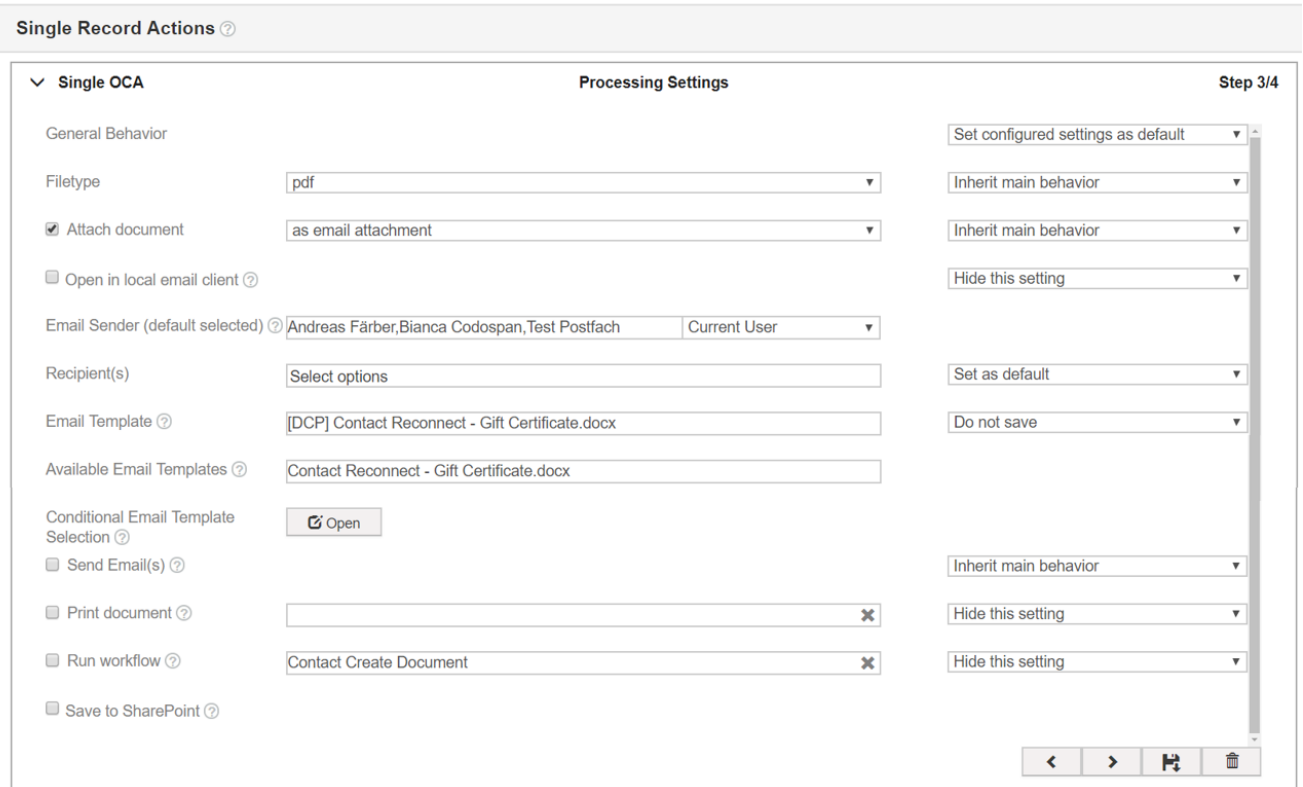


Figure 15: Single Record Actions - Processing Settings (Step3)

GENERAL BEHAVIOR

Define the default behavior of your action here. 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 e-Mail 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 **VERRIDE BEHAVIOR**–option is the option that allows us to control the state of the specific 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.

FILETYPE

You have different filetypes you can choose from (docx, pdf, doc, xps, text, html etc.). In our example our one-click-action should create a PDF-document.

ATTACH DOCUMENT

You have the option to attach your created document. There are several options you can select. Depending on which option you select, the processing settings for this action will change. In this example we want to attach the PDF-document to an email.

OPEN IN LOCAL EMAIL CLIENT

Activate this setting to open to open the email in your local email client after the creation process.

EMAIL SENDER (DEFAULT SELECTED)

It allows you to specify a list of email senders. Per default the emails sent by DCP Dialog are sent from the current logged on Dynamics 365 user. Using this setting, an alternative email sender can be defined. Also, multiple senders are possible. Once set, the user can select which sender he would like to use.

RECIPIENT(S)

You can specify one or more recipients with this step.

EMAIL TEMPLATE

Here you can predefine a template for your email content.

AVAILABLE EMAIL TEMPLATES

This setting allows you to show only a predefined list of available email templates. This is useful, if you have a lot of Dynamics 365 and DCP email templates for an entity, but only a few of them are required within the DCP Dialog.

CONDITIONAL EMAIL TEMPLATE SELECTION

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

SEND EMAIL(S)

If you activate this setting, the email will be automatically sent after the creation process.

PRINT DOCUMENT

You have the possibility to define a Printer which can print the document after the creation process.

RUN WORKFLOW

You can also define a workflow which can get trigger after the creation process.

SAVE TO SHAREPOINT

You can activate this setting to save the document to SharePoint after the creation process.

2.1.4 Step 4: Review Settings

You have the possibility to review your document, create PNG preview and automatically open your document, like you can see in the figure below.

After configuring all steps, you have to save your actual one-click-action.

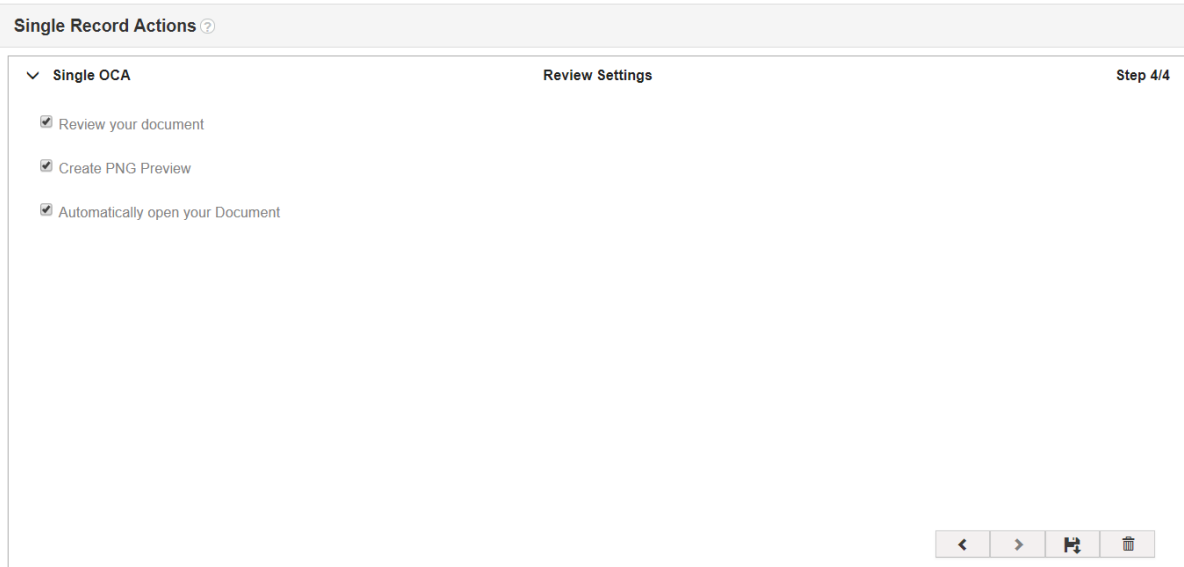


Figure 16: Single Record Actions - Review Settings (Step 4)

If a Dynamics 365 user now clicks on the **[Create Document]**-button, the user will be automatically provided with the new one-click-action (here: *Single OCA*).

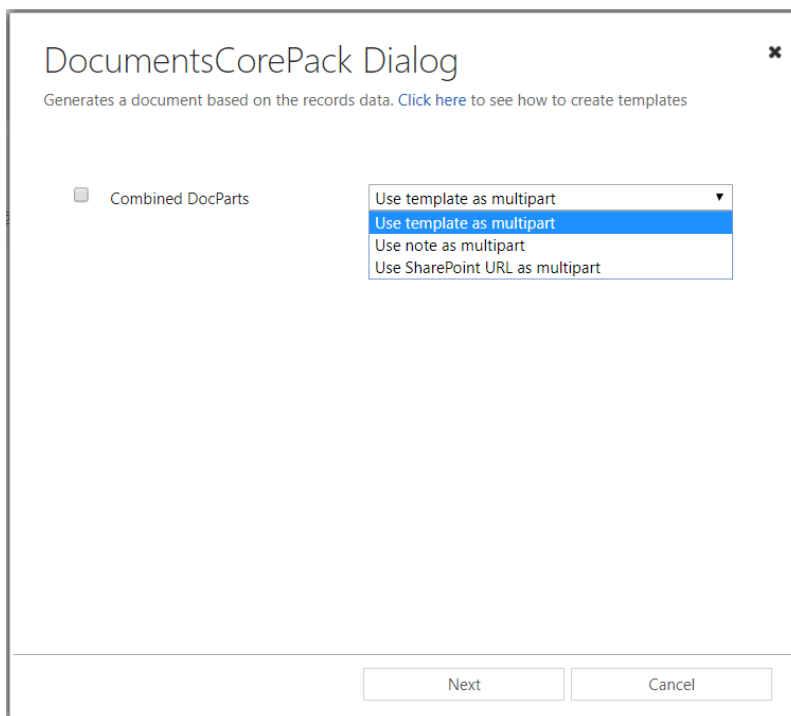


Figure 17: DCP Dialog – Combined DocParts

2.2 How to create One-Click-Actions for batch document generation

This step-by-step tutorial will show you how to create a one-click-action based on the Contact entity. This example is based on multiple records.

Therefore, please open your Dynamics 365 Settings and select DocumentsCorePack in the MSCRM-ADDONS-section. Next navigate to the *One-Click-Action-tab* and search for the entity Contact liked explained in the last chapter.

The window below opens. Next click on the **1 [New Batch]**-button, which opens a dialog where you have to enter the name for your One-Click-Action, **2** "Batch OCA" in this case.

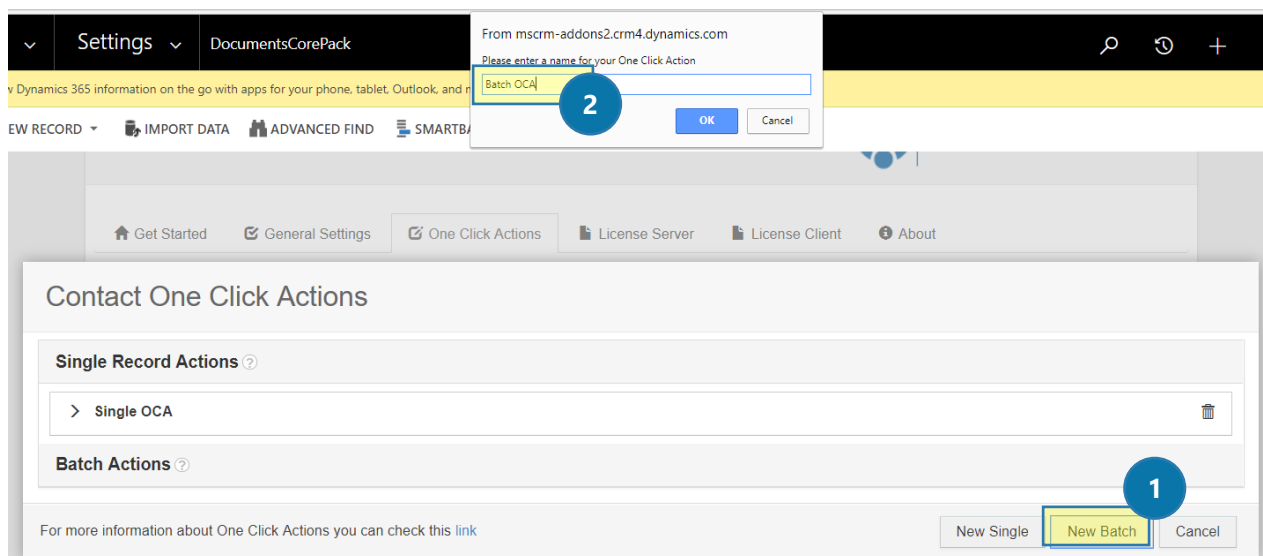
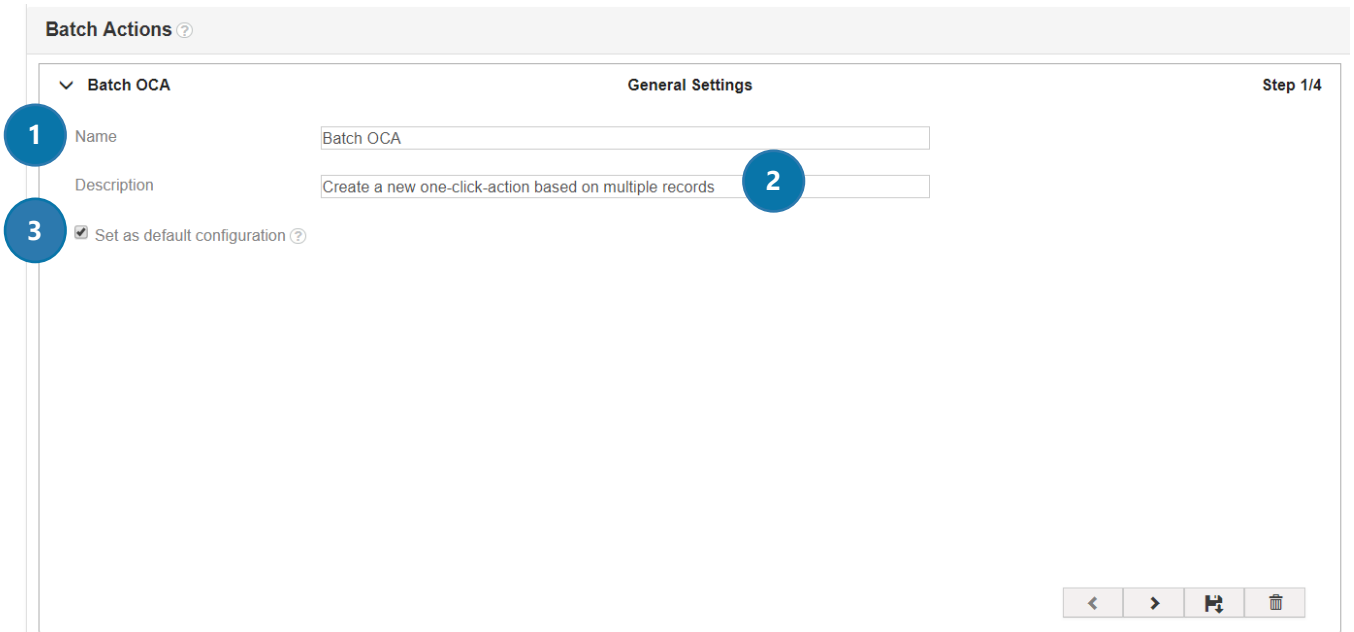


Figure 18: One-Click-Actions – based on multiple records

2.2.1 Step 1: General Settings

This window provides you with general settings, where you can change **1** the name of your action, **2** add a description and **3** set this action as default by checking the box.



The screenshot shows a configuration window titled "Batch Actions" with a sub-section "Batch OCA" and "General Settings". The "Step 1/4" indicator is in the top right. The "Name" field contains "Batch OCA" (callout 1). The "Description" field contains "Create a new one-click-action based on multiple records" (callout 2). The "Set as default configuration" checkbox is checked (callout 3). Navigation buttons (back, forward, refresh, delete) are at the bottom right.

Figure 19: Multiple Record Action – General Settings (Step 1)

2.2.2 Step 2: Template Settings

These settings help you configure your template in detail, like explained in [CHAPTER 2.1.2 STEP 2: TEMPLATE SETTINGS ON PAGE 9](#).

The only difference to one-click-actions based on a single record, is that you cannot use multipart for batch document generation.

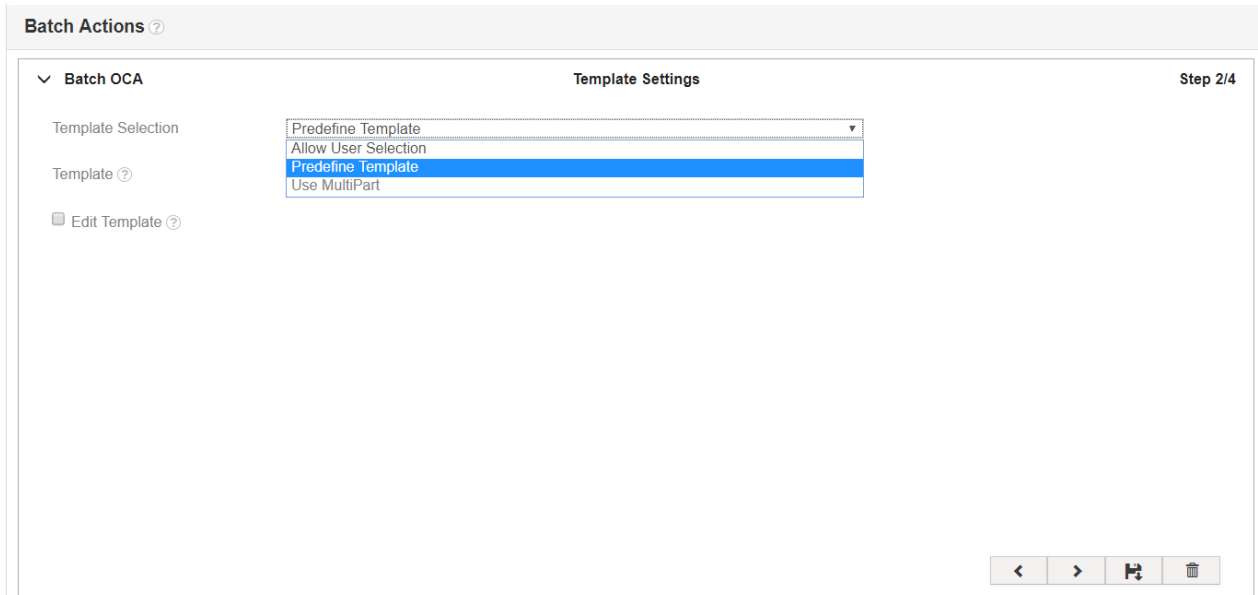
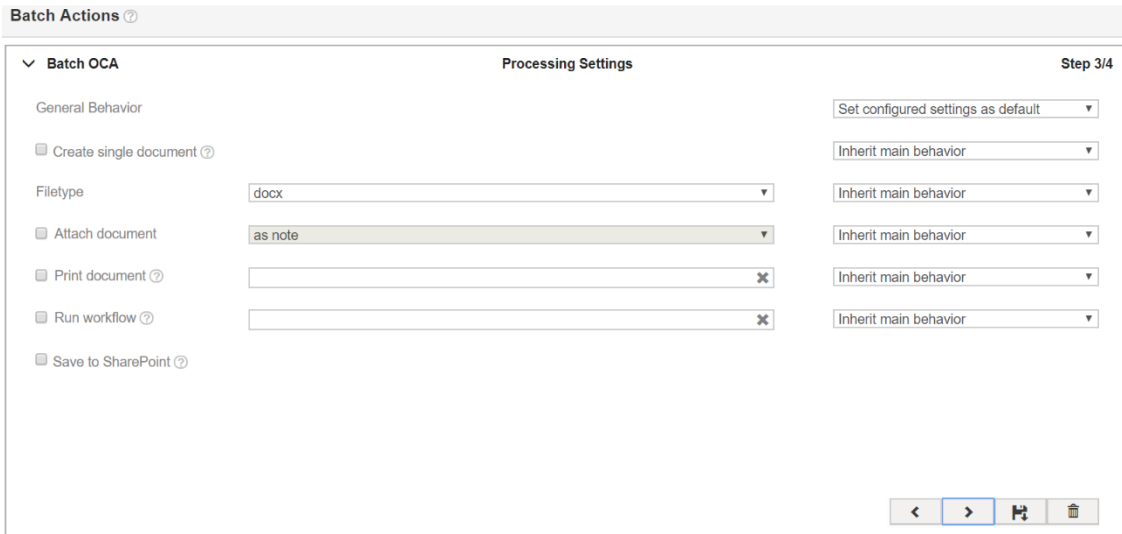


Figure 20: Multiple Record Action – Template Settings (Step 2)

2.2.3 Step 3: Processing Settings

At this step, you can define the actions which should be done. These settings are almost the same like in [CHAPTER 2.1.3 STEP 3: PROCESSING SETTINGS ON PAGE 15](#).



The screenshot shows the 'Batch Actions' configuration window for 'Batch OCA' in the 'Processing Settings' step (Step 3/4). The window is divided into several sections:

- General Behavior:** A dropdown menu set to 'Set configured settings as default'.
- Create single document:** A checkbox that is currently unchecked.
- Filetype:** A dropdown menu set to 'docx'.
- Attach document:** A dropdown menu set to 'as note'.
- Print document:** A dropdown menu with a clear button (X).
- Run workflow:** A dropdown menu with a clear button (X).
- Save to SharePoint:** A checkbox that is currently unchecked.

On the right side, there are five 'Inherit main behavior' dropdown menus, one for each of the actions listed on the left. At the bottom right, there are navigation buttons: a left arrow, a right arrow, a refresh icon, and a trash icon.

Figure 21: Multiple Record Actions - Processing Settings (Step3)

GENERAL BEHAVIOR

Define the behavior of your action here. You can set configured settings as default, disable or hide configured settings.

CREATE SINGLE DOCUMENT

Activate this setting to concatenate multiple documents to a single one.

FILETYPE

You have different filetypes you can choose from (docx, pdf, doc, xps, text, html etc.). In our example our one-click-action should create a docx file.

ATTACH DOCUMENT

You have the option to attach your created document. There are several options you can select. Depending on which option you select, the processing settings for this action will change. In this example we want to attach the docx file as a note.

PRINT DOCUMENT

You have the possibility to define a Printer which can print the document after the creation process.

RUN WORKFLOW

You can also define a workflow which can get trigger after the creation process.

SAVE TO SHAREPOINT

You can activate this setting to save the document to SharePoint after the creation process.

2.2.4 Step 4: Review Settings

You have the possibility to review your document, create PNG preview and automatically open your document, like you can see in the figure below.

After configuring all steps, you have to save your actual one-click-action.



Figure 22: Single Record Actions - Review Settings (Step 4)

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4 Contact

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

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