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One-Click-Actions

in

DocumentsCorePack for Dynamics 365

# The case for One-Click-Actions

## Requirement – Solution – Use Cases



### Requirement

Most business processes are repetitive and users have to do the same task over and over again.

#### Problems:

- Number of clicks needed relates directly to Productivity
- User errors (mistakes scale with number of options/clicks)



### Solution

Allow to predefine document related business processes for end-users.

#### Goal:

- Reduce the number of clicks to minimum
- Standardize and simplify daily tasks
- Avoid user errors



### Popular Use Cases

- Send document as PDF to customer (quotes, invoices)
- Create report, save to SharePoint and Print
- Send contract for e-Signing to customer
- ...

#### Helpful Links

Documentation: [DocumentsCorePack Documentation Library](#)  
Start a trial: [DocumentsCorePack on Microsoft AppSource](#)

# One-Click-Actions Designer

## The three elements of an Action



### 1. Template Selection

What document should be generated?

#### Options:

- User selection
- Predefined fixed template
- Predefined Conditional template
- "Multipart" (to be released)



### 2. Define Processing

How to process the document upon generation?

#### Options:

Define what should happen to the document upon generation

- Print
- Send by email
- Send for e-Signing
- Save to SharePoint
- etc.



### 3. Review document

Allow users to review/modify document before processed?

#### Options:

- Web-Preview (\*.png)
- Open document
- Edit in Word
  - Auto-Open



# Demo & Roadmap

## Step-by-Step Live Demo

Part 1) Overview of the One-Click-Action Wizard while creating a simple One-Click-Action Button.

Part 2) Editing the Created One-Click-Action to use conditional template selection.

Part 3) Examples

### Roadmap:

- Visibility Rules: Define availability of Actions based on
  - User data (security role, Business unit,...)
  - Record data (attributes of record, e.g. location of customer)
- Multipart Documents: Create documents consisting of various elements (e.g. proposals)  
March 2018 Webinar

# Thank you!

## Support & Contact

- You can find us on the web at <http://www.mscrm-addons.com>
- Help-Center (Live-Chat, Support): <http://www.mscrm-addons.com/Support.aspx>
- Don't forget we have an awesome blog at <http://www.mscrm-addons.com/Blog>, you'll find it to be a helpful resource!

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