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One-Click-Actions in DocumentsCorePack 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. If you would like to use One-Click-Actions in Microsoft Dynamics 365, at least a DocumentsCorePack-trial version is required. Please find further information regarding DocumentsCorePack 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 DocumentsCorePack you get the possibility to define One-Click-Actions for your document processes. This feature allows you to predefine the DocumentsCorePack dialog for your users. For example, you have the possibility to predefine a process like generate as pdf, attaching to email, and save to SharePoint to be available toy our users at a single click.

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. For further information have a look at chapter 2.4 DISPLAY RULES.

1.3 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.

1.4 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 single and one batch default One-Click-Action for an entity aIn 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. Just check the "Set as default configuration"-option. But you also have the possibility to change this afterward.

1.5 How to access the One-Click-Actions

You can access the One-Click-Actions via your DocumentsCorePack solution in the One-Click-Action tab or through the settings wheel in the right top corner of the **Create Document** dialog in Dynamics 365.

2. How to create One-Click-Actions via Dynamics 365

The following step-by-step instruction shows you how to create One-Click-Actions with just a few clicks.

2.1 Access One-Click-Actions via DocumentsCorePack solution

Open your Dynamics 365 Settings, navigate to (1) MSCRM-ADDONS-section and select (2) DocumentsCorePack, like you can see in the figure below.

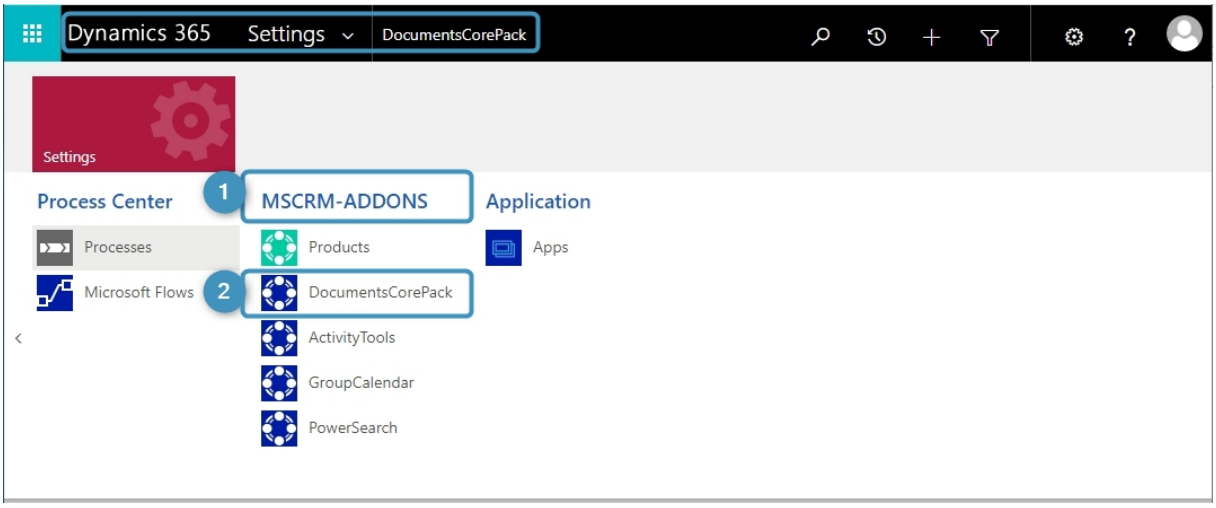


Figure 1: Dynamics 365 Settings – MSCRM-ADDONS – DocumentsCorePack

In the DocumentsCorePack main configuration window, you will be provided with a few tabs that allow you to configure DocumentsCorePack in general.

Please go to the (1) "**One Click Actions**"-tab, a new feature of DocumentsCorePack. You will be provided with the window below.

(2) The buttons in this group allow you to edit, delete, or add an entity to the list.

❸ Enter the entity name in the search box to locate the entity you want to create One-Click-Actions for. If the entity is not listed, add it with the **[New]**-button.
❹ To open the entity you want, select it and click the **[Edit]**-button, or double-click the entity. This will open a new dialog where you can create and manage One-Click-Actions for the entity.

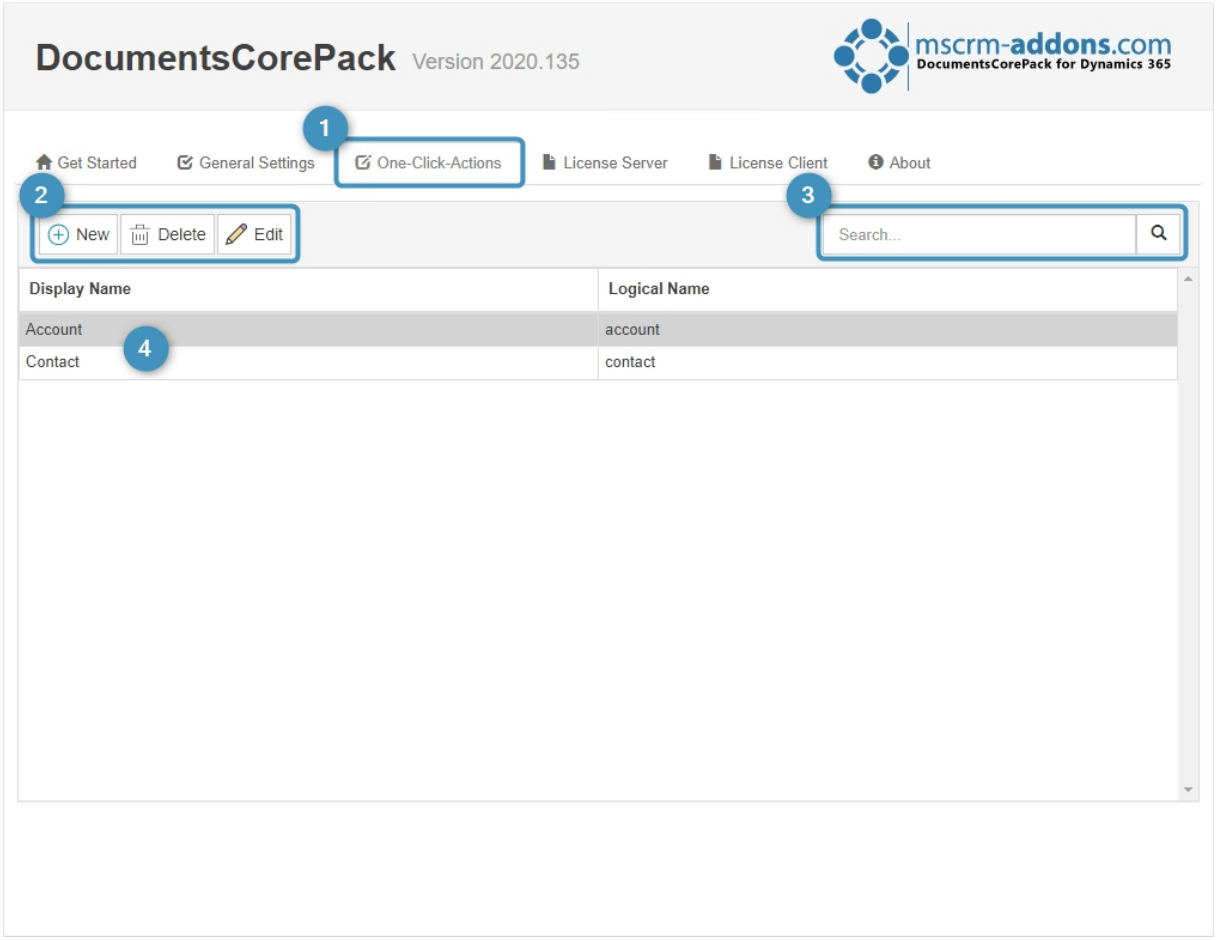


Figure 2: Main configuration window – after clicking One-Click-Actions tab – shows available entities.

2.2 Access One-Click-Actions via Dialog

In your Dynamics 365 navigate to any account and click "**Create Document**".

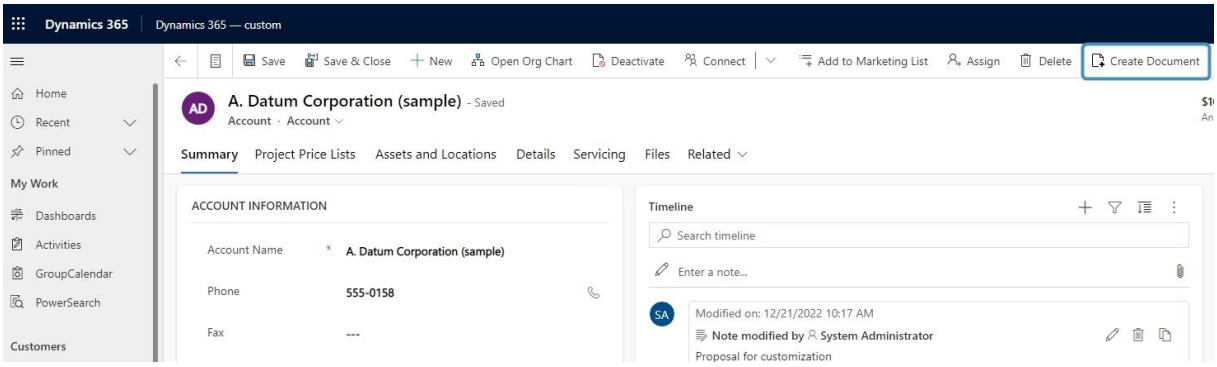


Figure 3: Sample account in Dynamics 365 - Create Document

The following window opens. Click on the settings wheel in the ❶ right top corner to access the One-Click-Actions.

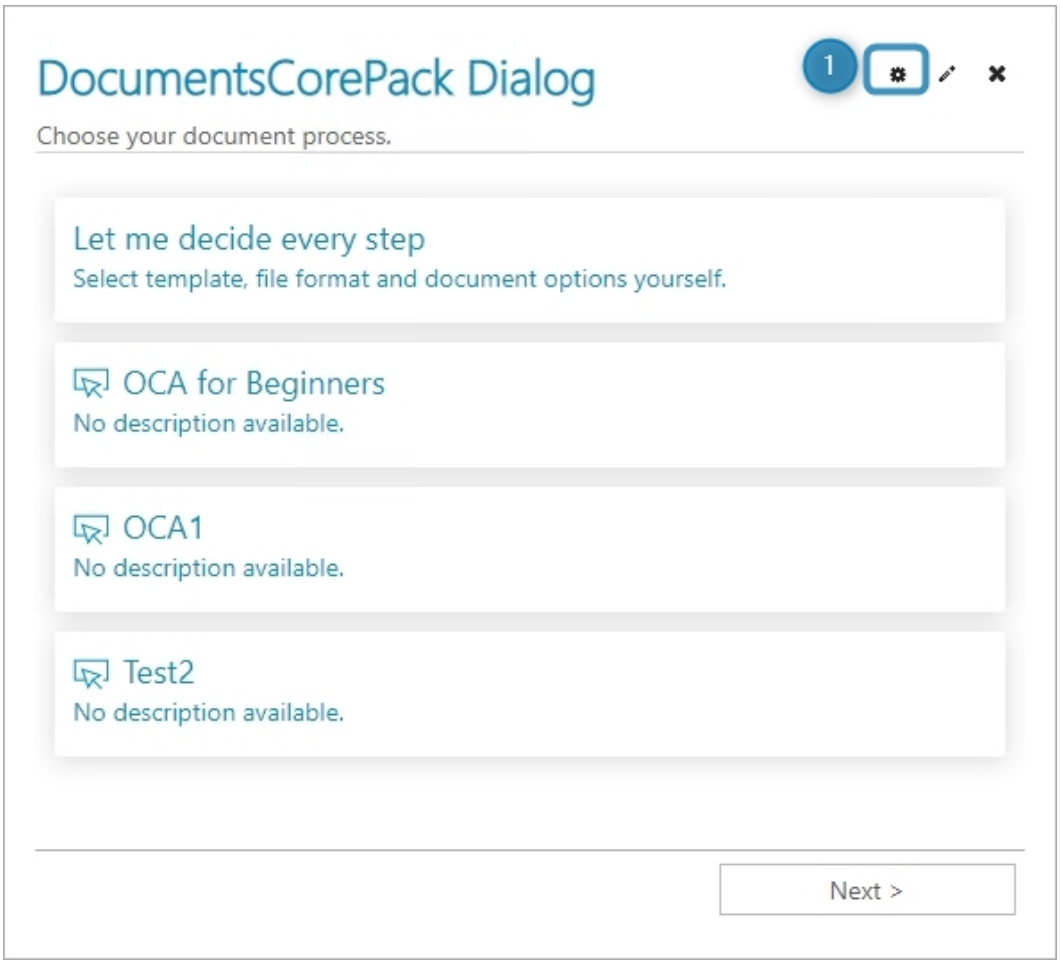


Figure 3: Access One-Click-Actions via Create Document

2.3 Step-by-step description how to create One-Click-Actions

This step-by-step tutorial will show you how to create a new One-Click-Action. Hit the **[New]**-button and this window is shown.

❶ Select "**Single**" to create a new Single Action One-Click-Action.

❷ Open on the right side the drop-down to select the entity, you want to make a One-Click-Action for.

❸ Name your One-Click-Action to remind you, what it is for.

❹ Confirm with **[Create]**.

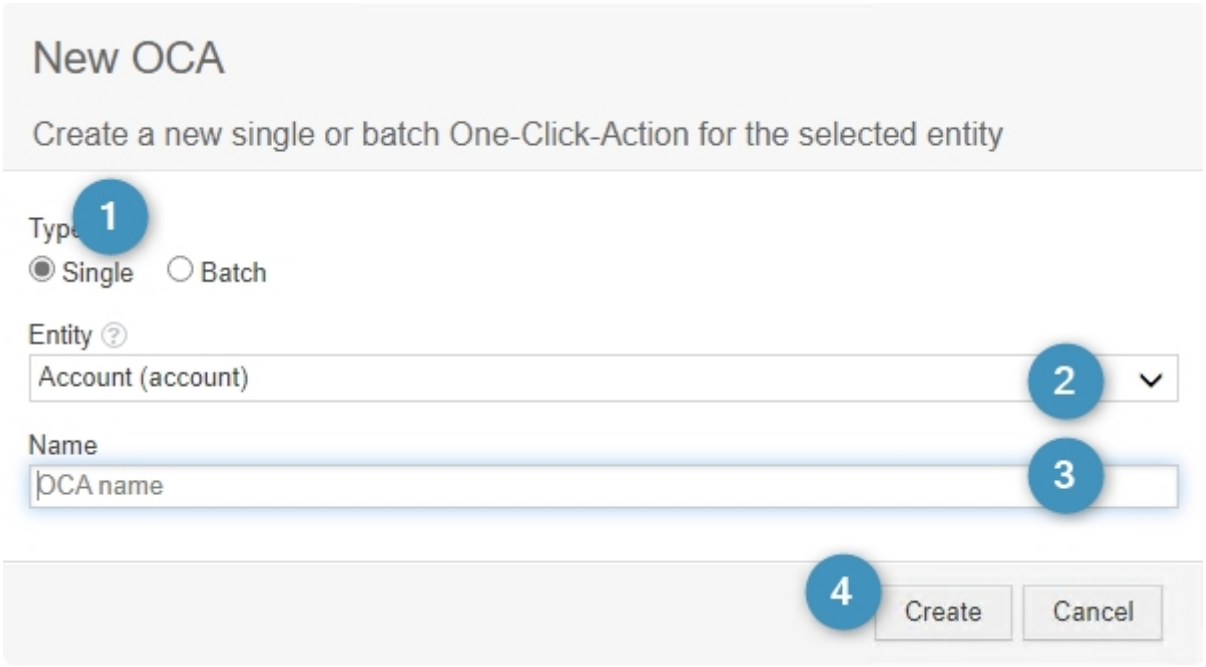


Figure 4: New One-Click-Actions-window

Step 1: General Settings

You will be provided with the configuration window for Single Record Actions. You will then need to go through the four following screens (General Settings, Template Settings, Processing Settings, Review Settings) to configure your One-Click-Action in detail.

Please note:

- The available wizard options may vary depending on what was previously selected.
- Once a One-Click-Action has been created, it can be edited again in the same way with these four screens.

1 You can edit the name you previously entered for the One-Click-Action.
2 You can add a description, which is helpful for users running the One-Click-Action. The two checkboxes enable you to.
3 Set as default configuration: Means this One-Click-Action will run whenever the user clicks Create-Document.
4 Hide in dialog: The One-Click-Action will temporarily be hidden from the user.

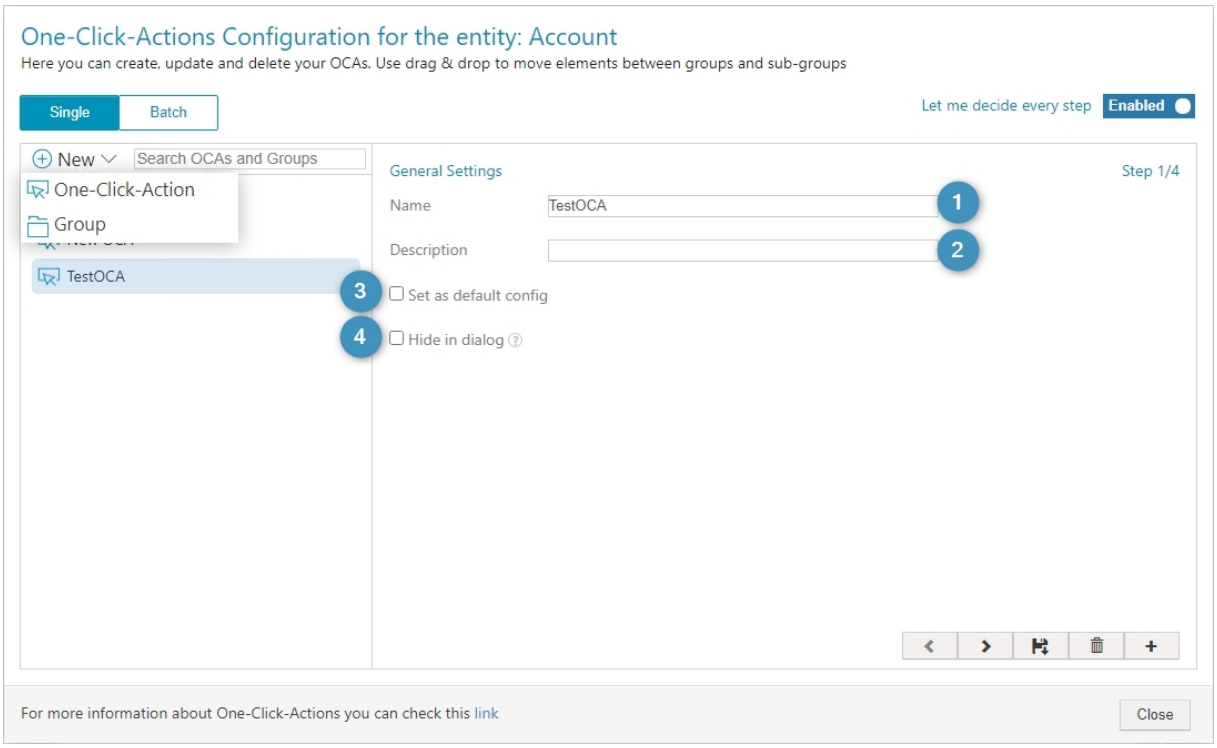


Figure 5: Configure your OCA – Step 1

Use the buttons at the bottom right of the page to complete the following as needed:

5 These buttons allow you to move forward to the next step or back to the previous one. When you are happy with your configuration, continue forward.
6 Press the Save button to save changes to your One-Click-Action.
7 Press the Delete button to delete your One-Click-Action.
8 Press the **[+]** button to set display rules.



Figure 6: Buttons for configuration

Step 2: Template Settings

There settings allow you to configure your template selection in detail. There are three template types available. Each open a different scenario, each of which we will explore in detail.

a. Allow User Selection
b. Predefine Template
c. Use MultiPart

We will first cover how to set your template settings, and then explain the differences between the three template options. Set your template settings with the instructions below.

❶ Click the drop-down and make your **Template selection**.
❷ The **Edit Template** checkbox enables the user to edit the template before the document is created.
❸ Your selected template type may offer a grouping feature. Follow the steps below to activate this feature.

- To the right of **Conditional Template Group**, press **Open** to launch a dialog where entity attributes can be linked to template groups (template groups are collections of templates – often representing operational aspects – defined in the template designer).
- Thus, if the predefined attributes match those of the selected record, the user of the One-Click-Actions can choose from contextual sets of templates. This is useful if you want to offer only templates from the same department as options.

Please Note: The options and controls available in the following screens may vary depending on the template type selected and other selections.

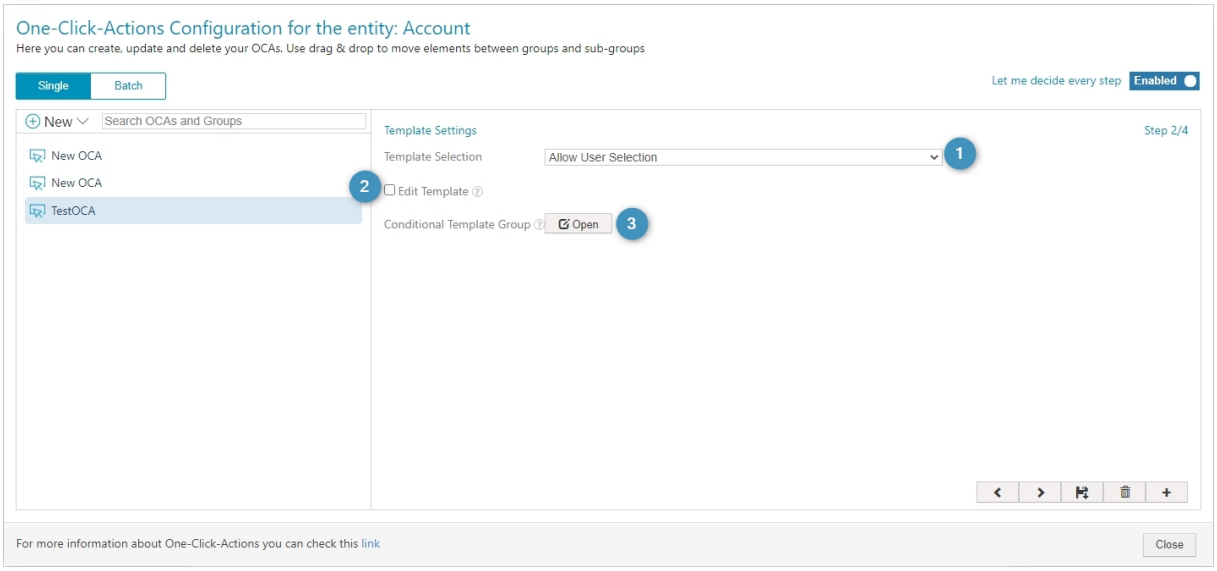


Figure 7: Setup Template Settings

a) Allow User Selection

This option is set as default and like the name says, it allows users to select a template. To see how this looks from a user's perspective, you can select your Account Entity in your Dynamics 365 and press **Create Document**.

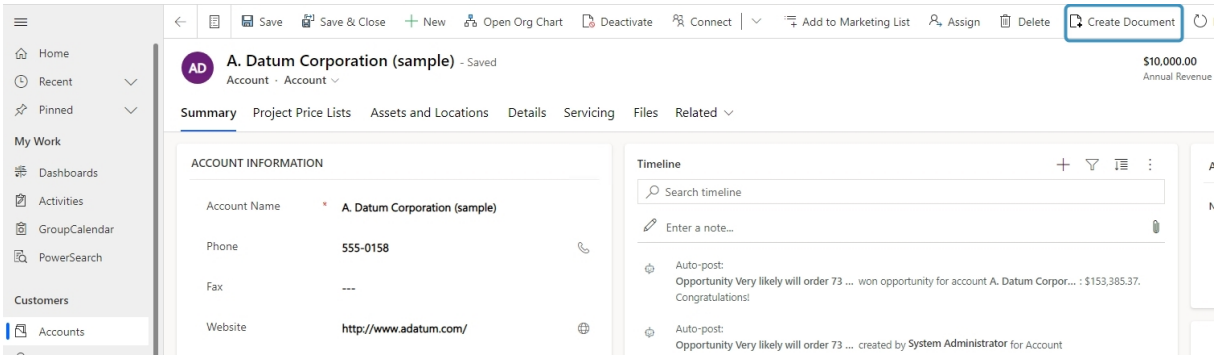


Figure 8: Step 2 – Allow user selection – Create Document in your Dynamics 365

The **DocumentsCorePack Dialog** will then open so that you can select your template. The user must press the **[Next]** button to advance to the next screen (in this case, to select document processing options).

Please note: You can access the One-Click-Actions directly through the **DocumentsCorePack Dialog** by pressing the settings wheel in right top corner.

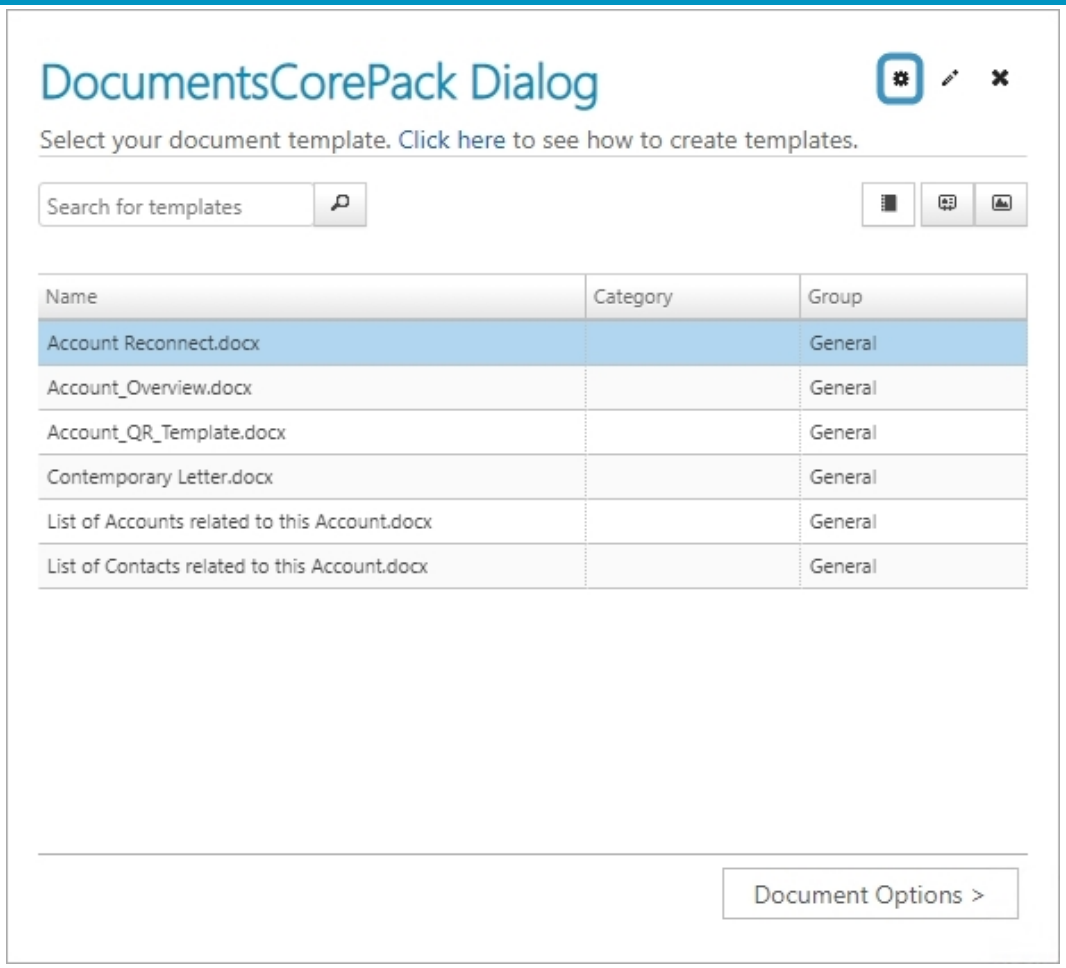


Figure 9: Step 2 – Allow user selection – DCP-Dialog Templates

b) Predefine Template

1. The second template type in the drop-down menu for **Template Selection** is **Predefine Template**.
2. Click in the **Template** field to open a **Lookup Record**-window to search for a suitable template that you want to set for the One-Click-Action, and then **Add** it.
3. A **Conditional Template Selection** button is provided for this template type.

- You can select Open to the right of this button to open a window to define templates that are conditionally selected to the user based on attributes that must match attributes of the current record.
- For example, based on a customer's location, the template of the appropriate language can be automatically supplied when the user runs the One-Click-Action.

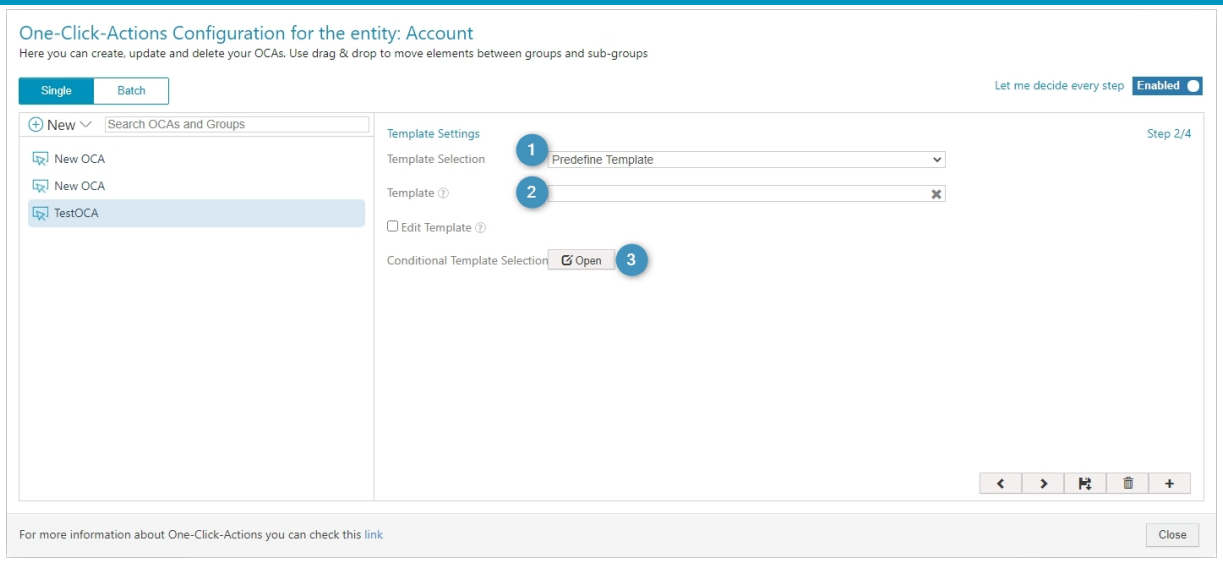


Figure 10: Settings for Predefine Template

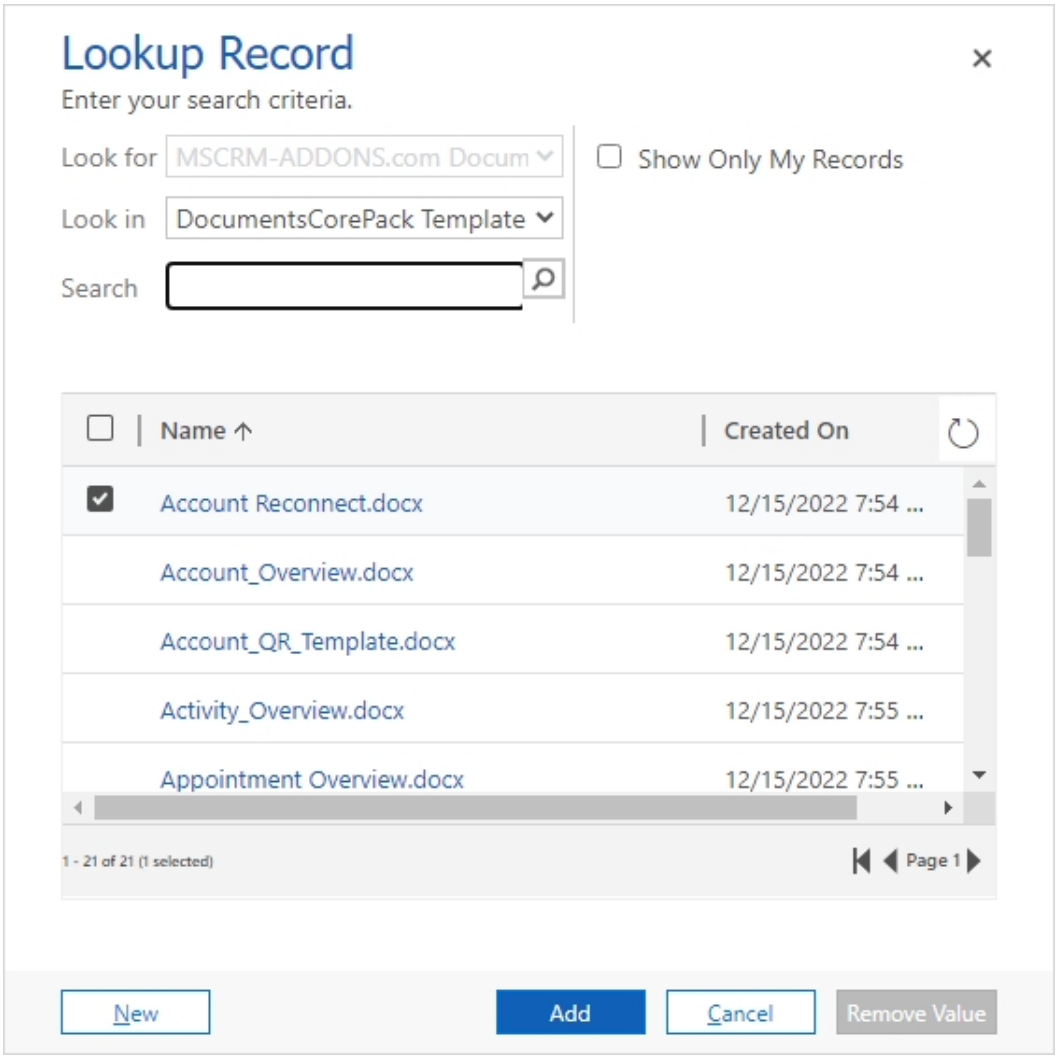


Figure 11: Step 2 - Predefine Template - LookUp Record

Please Note:

- This means that the user does not have a DocumentsCorePack template selection. The template is used automatically.
- Refer to this article if you are interested in learning about template creation.
- Click on the **[+]** button to add a template or note.
- Click on the template name to open a window showing template information and uses for managing and creating template.

c) Use MultiPart

The third option in the drop-down menu is ❶ **Use MultiPart**. This template allows for a compound document (a document made up of parts, such as dynamic DocumentsDorePack templates and static documents like pdf files) as a mixture of several predefined and/or freely selectable documents. Click here to learn more about MultiPart documents.

Please Note: From here on we will call the document parts DocParts for short.

❷ The first two DocParts of the docx type have been combined into one (see Figure 11). The DocPart Type can be a MS Word template (docx), note or SharePoint URL (hosted document). It can have a label and description, which are shown to the user when running the OCA.

❸ The following functions can be applied to selected DocParts.

a. Add another part.
b. Delete the part.
c. Combine the selected DocParts. To do this, you must select more than one DocPart to combine them.
d. Disassemble selected combined DocParts.

❹ The following settings can be applied to a DocPart.

a. Concatenate: Click here to open a dialog where you can set various options on how the DocPart will be concatenated with the previous DocPart.
b. Based on conditions (preset attributes that must match those of the selected record when the OCA is running) you can define display rules to show or hide a DocPart.
c. Use a checkbox to set this DocPart availabale as an option in the DCP-Dialog.
d. Define whether or not this DocPart is visible in the DCP-Dialog

5 Use these buttons to complete the following steps:

a. + b. Go to the previous or next wizard-step.
c. Save the settings made in this step.
d. Delete the OCA.
e. Set display rules for this OCA. Learn how here.

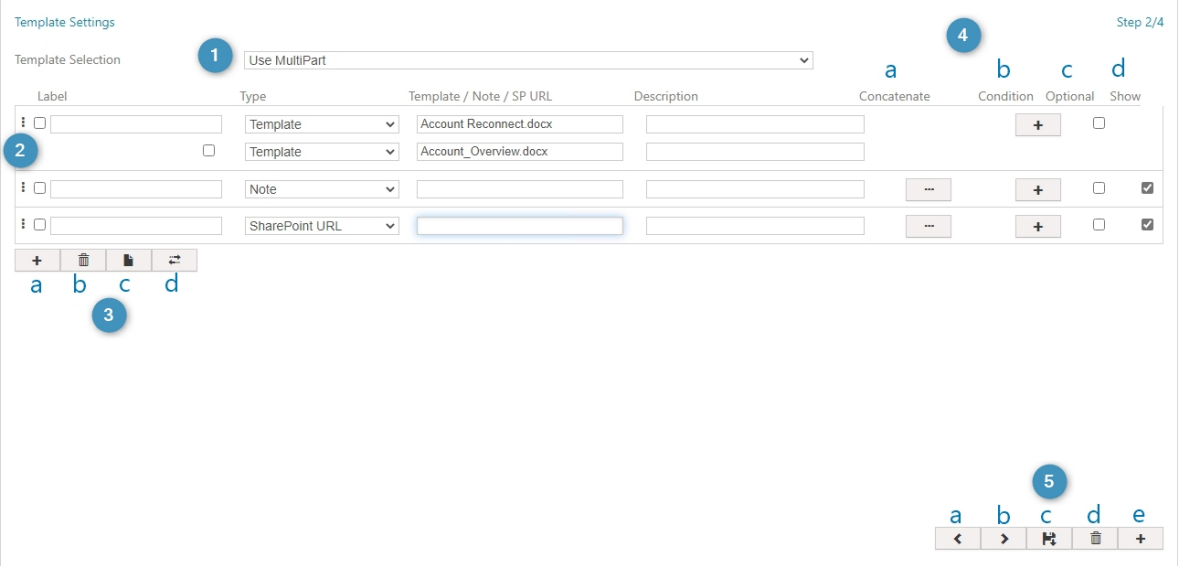


Figure 12: Step 2 – Use MultiPart – Configure your OCA

If you press the **Concatenate** button as described in 4 a, an overview (Figure 12) will open where you can define your concatenating options with the drop-down-list, and then confirm your selections. Learn more about the Concatenate Syntax here.

Step 3: Processing Settings

During this step, you can define the actions that should be done after the document creation. In this example (Figure 12), the action is defined as the following:

1 Send the template **Account_Overview** as .pdf.
2 Attach the document as a **note**.
3 Save it to **SharePoint**.
4 You can set your General Behavior. There are 3 possibilities:

1. Set configured settings as default.
2. Hide configured settings.
3. Disable configured settings.

5 You can inherit the main behavior or:

1. Do not save.
2. Set as the default.
3. Hide this setting.
4. Show, but do not allow changes.

Finally, move to the next step with the 6 arrow at the bottom right of the screen.

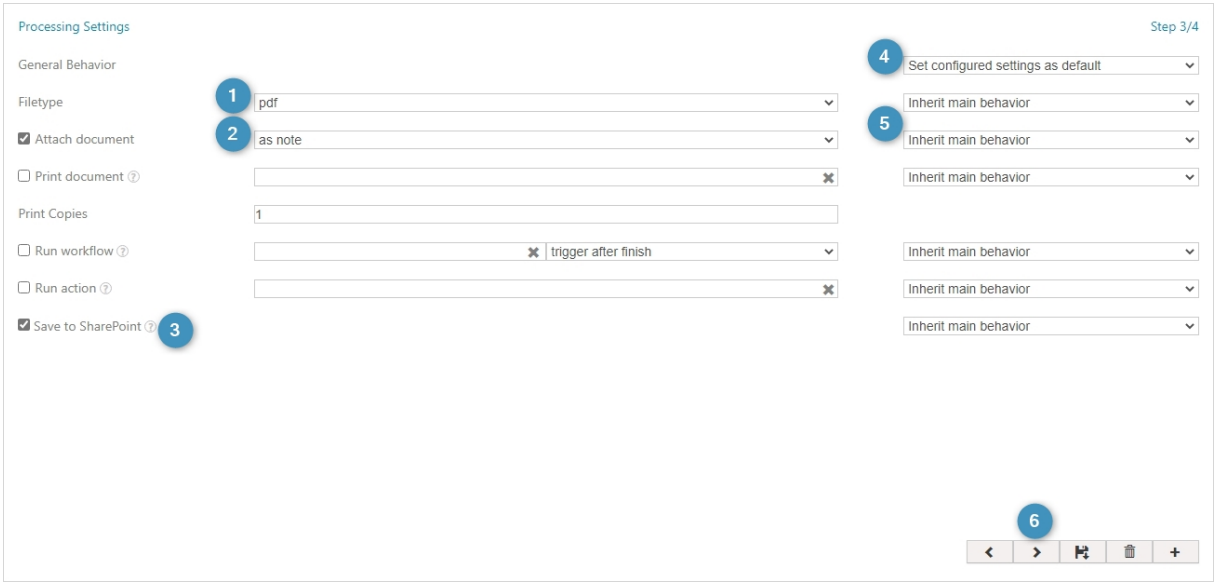


Figure 13: Step 3 – Configure your OCA

Step 4: Review Settings

You can review your document, create a PNG preview, and automatically open your document, like you can see in figure 16.

After configuring all steps, don´t forget to (1) save your One-Click-Action.

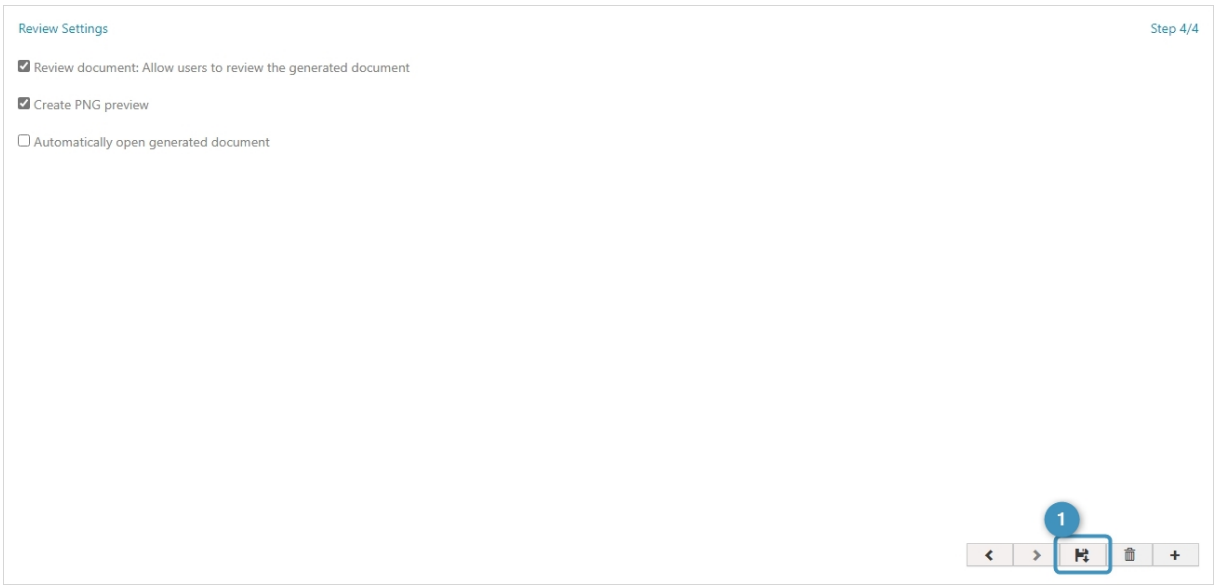


Figure 14: Review Settings - don´t forget to save

2.4 Display rules

One-Click-Actions (OCAs) are predefined settings for the DocumentsCorePack dialog to simplify and streamline document generation and delivery within Dynamics 365 and PowerApps.

The purpose of display rules is that users only see One-Click-Actions that are relevant to them. In this article, learn how to set the display rules for One-Click-Actions.

How to set display rules for One-Click-Actions:

- Set display rules via Conditions:
    - Display rules via Use Conditions – This option is commonly used for simple conditions.
    - Display rules via Fetch – Enter a Fetch-XML query for complex conditions.

- Display rules via Security Roles – Select the role(s) a user must have to be able to see the One-Click-Actions.
- Display rules via Business Units – Select the business unit(s) a user must be a member of to be able to see the One-Click-Actions.
- Display rules via Business Units – Select the business unit(s) a user must be a member of to be able to see the One-Click-Actions.

Please Note: These four types of display rules (Conditions, Security Roles, Business Units and Teams) are linked. This means that all conditions must be met for the One-Click-Action to be displayed.

For example, if you set display rules for all four tabs, then every condition must apply to have the One-Click-Action displayed for a user.

2.5 How to access Display Rules

Open the DocumentsCorePack settings and navigate to the 1 One-Click-Actions tab. An overview will open and will show the 2 OCAs that have been created for the respective entity. To 4 open it, click on the entity or the 3 **[New]**-button and a One-Click-Actions window will pop up. To open the display rules dialog, press the 5 **[+]** button.

Please note: If a display rule has already been configured, you will see an **[eye]**-icon.

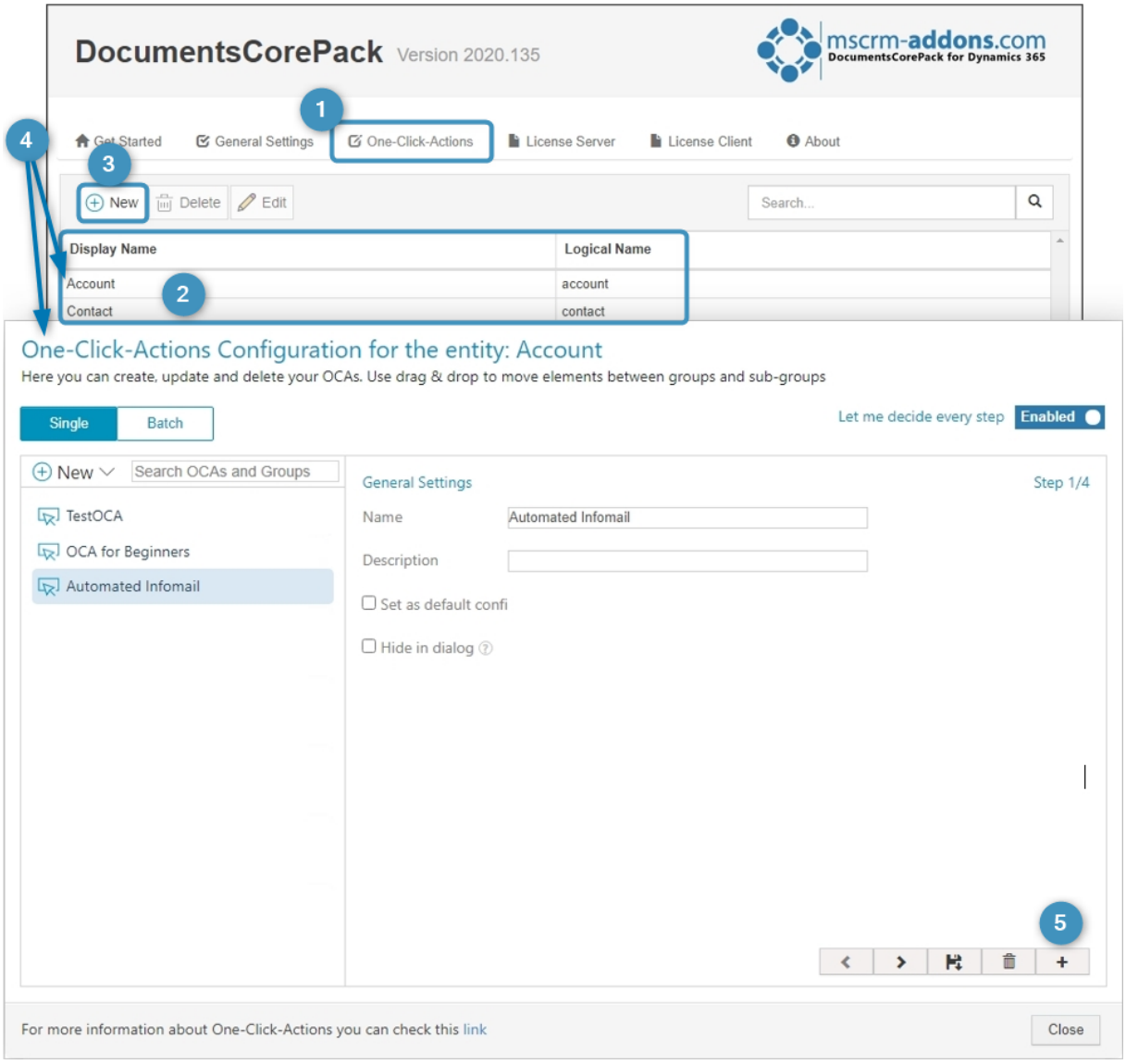


Figure 15: Open display rules dialog

You can choose between 2 Conditions (for simple conditions) or 3 Fetch/View (enter a Fetch-XML query for complex conditions).

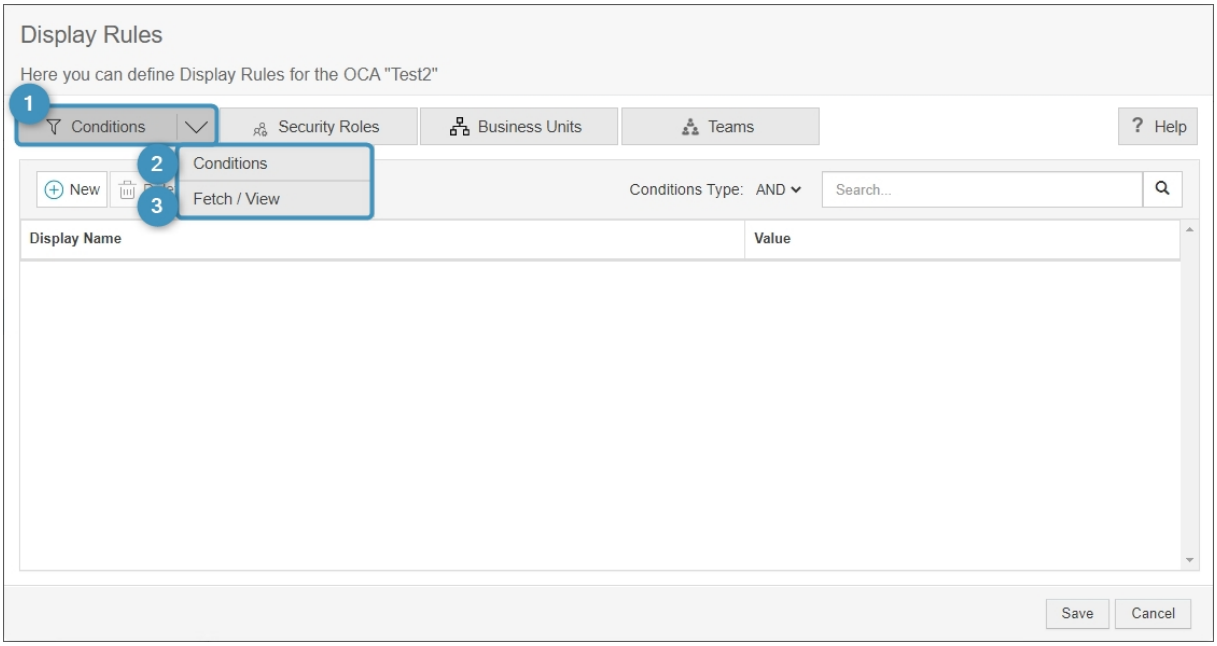


Figure 16: Display rules via Conditions

2.2.1. Display rules via Conditions

First, choose **Conditions** in the 1 Conditions tab. Here you have the possibility to add additional conditions as display rules.

A new condition (based on an attribute/column) can be added with the 2 **[+New]**-button.

Confirm all conditions with the 3 **[Save]**-button at the bottom-right corner of the screen.

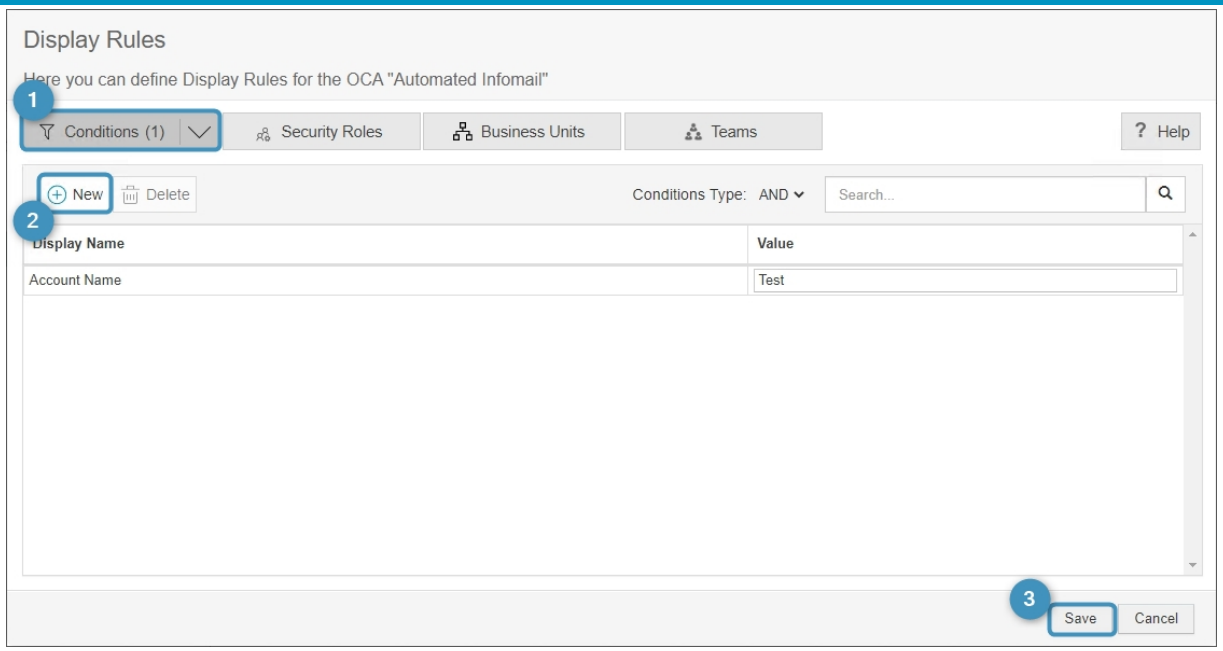


Figure 17: Display rules via Conditions

2.2.2. Display rules via Fetch

When you are unable to create your desired Display Rules using the simple conditions, you can choose to use the ❶ **Fetch/View** options. In the following window, you can enter a ❷ **Fetch-XML** to set a more complex filter for displaying OCAs. These statements can be generated by **Advanced Search**, by using additional third-party tools, or you can select an existing **View** as your FetchXML.

Please Note:

- OCAs will be displayed as soon as the Fetch returns a result.
- Please activate the Advanced find in model-driven apps if you want to generate a Fetch-XML from the Advanced find.

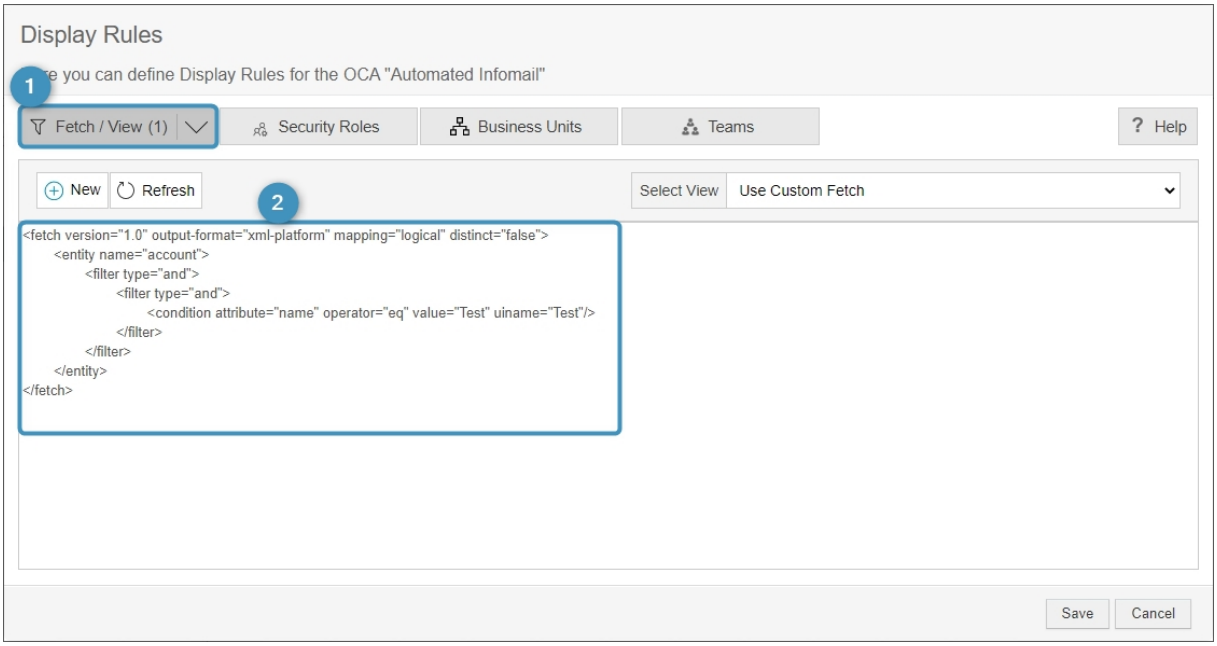


Figure 18: Display Rules via Fetch/View

2.2.3. Display rules via Security Roles

In the ❶ **Security Roles** tab, you can select the role that a user has to have to be able to see the OCA.

Click the ❷ **[+New]** button to open an overview of ❸ **all Security Roles**. Don´t forget to **[Save]**.

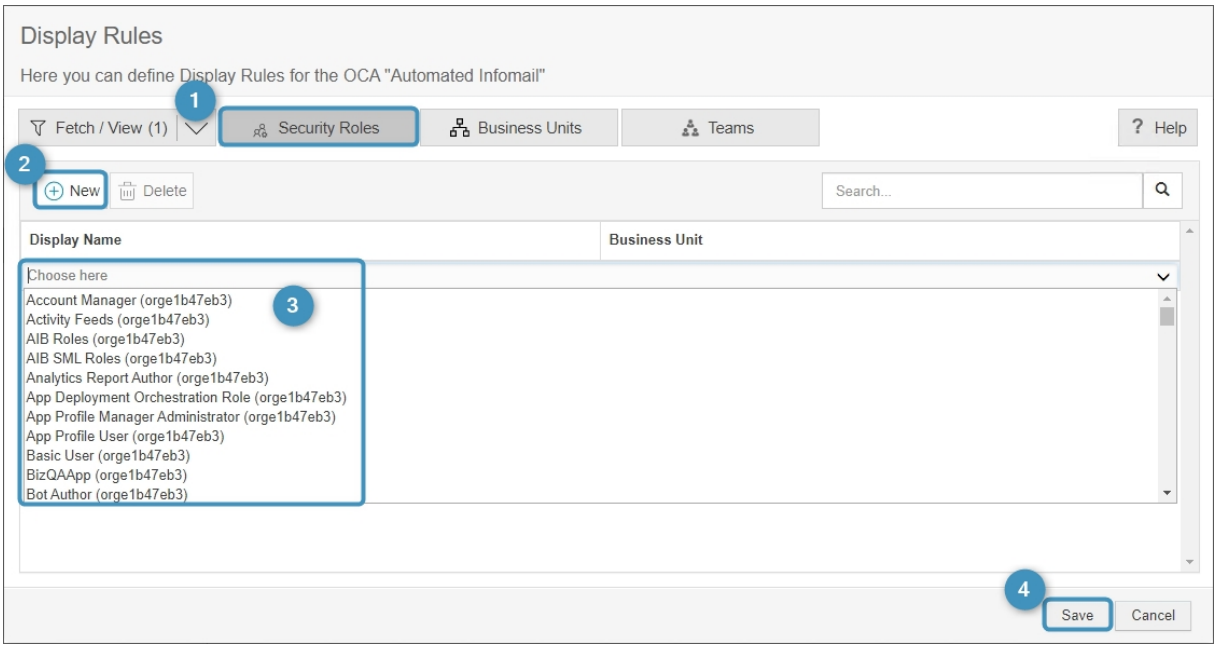


Figure 19: Display Rules via Security Roles

2.2.4 Display rules via Business Units

In the ❶ **Business Units** tab, you can select the business unit a user has to be a member of to be able to see the OCA.

Click the ❷ **[+New]** button to select ❸ the organization, and don´t forget to ❹ **[Save]**.

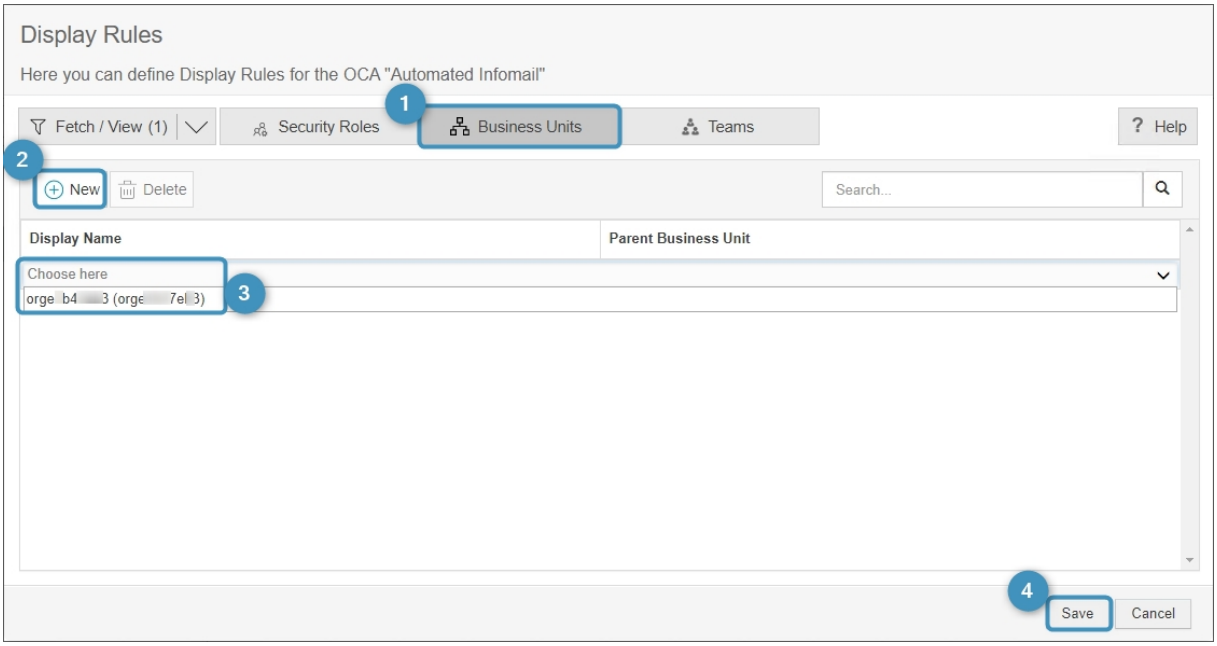


Figure 20: Display Rules via Business Unit

2.2.5 Display rules via Teams

In the ❶ **Teams** tab, you can select the team a user has to be a member of to see the One-Click-Actions.

Don´t forget to ❷ **[Save]**.

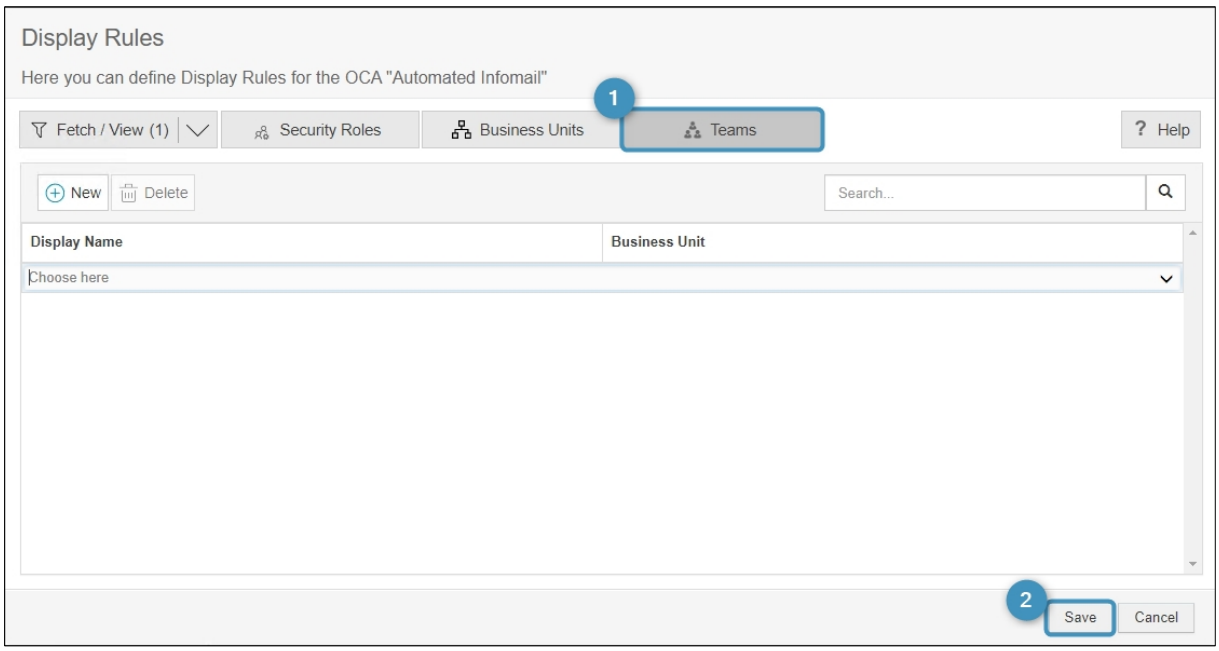


Figure 21: Display Rules via Teams

3 Test your One-Click-Action

If a Dynamics 365 user now clicks on **Create Document**, the user will automatically be provided with the available One-Click-Actions. They will only have access to the One-Click-Actions for which they meet the predefined display rules.

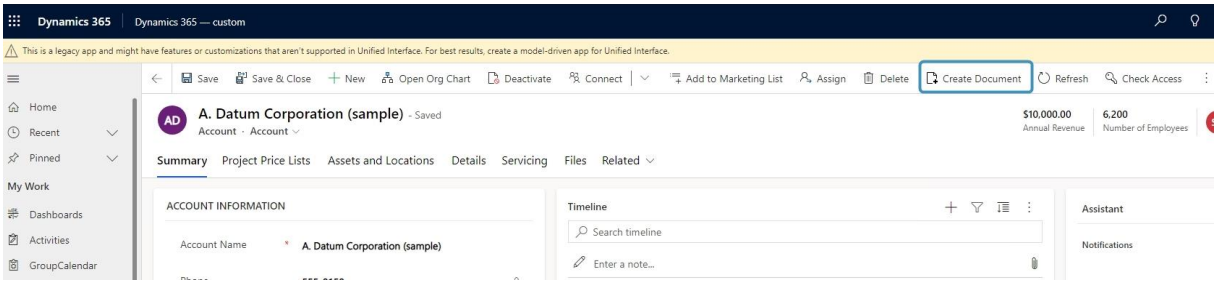


Figure 22: Create Document in Dynamics 365

The user can easily navigate the One-Click-Actions by using the search bar, or by selecting to view the list of recently used, most used, or their favorite One-Click-Actions at the top right of the screen. One-Click-Actions can be marked under My Favorites by the user by selecting the right corner of the One-Click-Action to show a star. One-Click-Actions can also be grouped however is convenient for the organization, such as being grouped based on department or the language of users.

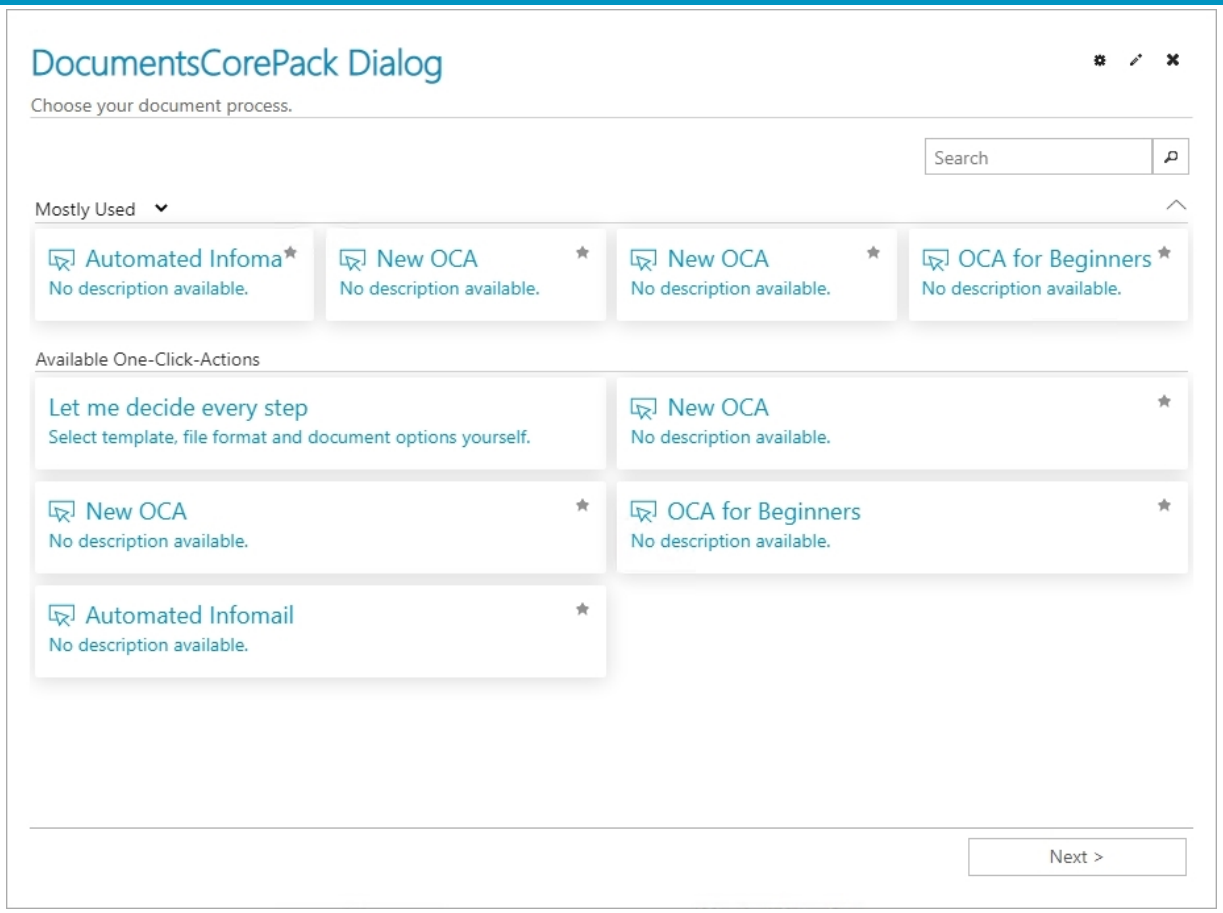


Figure 23: Create Document – OneClickActions

Click to open the One-Click-Action, you want to perform.

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5. Contact

For further technical questions, please visit our blog http://blogs.mscrm-addons.com or contact support@mscrm-addons.com. For sales and licensing questions please contact office@mscrm-addons.com or the corresponding contact information below.



Headquarter – Europe

PTM EDV-Systeme GmbH
Bahnhofgürtel 59
A-8020 Graz
Austria

Tel Austria +43 316 680-880-0
Fax +43 316 680-880-25

Support:

7AM - 7PM GMT+1 (Monday-Friday)

Sales:

+43 316 680 880 14

sales@mscrm-addons.com

www.ptm-edv.at

www.mscrm-addons.com



Headquarter – US

mscrm-addons.com Corp
1860 North Rock Springs Rd
Atlanta, GA 30324
United States

Tel US +1 404 720 6066

Support:

9AM - 6PM EST (Monday-Friday)

Sales:

+1 404 720 6046

ussales@mscrm-addons.com

www.mscrm-addons.com