One Click Actions: Document Generation & Delivery with a single click

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Empowering Dynamics 365 Users

One-Click-Actions in a nutshell

1. Generate ✚ **2. Process & Deliver** ✚ **3. Control & Review**

- PDF
- DocX,
- HTML, ...

- E-mail
- E-signature
- SharePoint
- Print

- Review
- Edit document

Example: Invoice to be generated as PDF

Example: Save to SharePoint, send by Email & print copy

Example: Allow user review & edit

One-Click Actions: Preconfigure your business process to be executable via a single click form the DocumentsCorePack Dialog

→ **Process Invoice**
Create PDF, send by Email, Save to SharePoint and Print
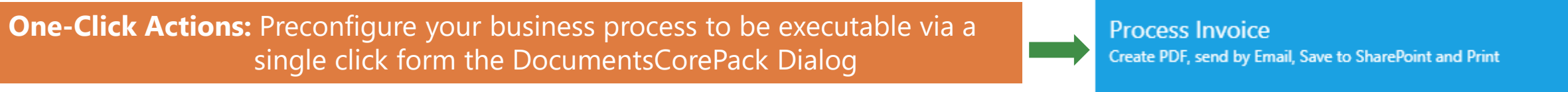
OCA features you should know about!
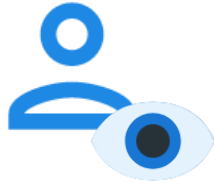
Display Rules

Only show OCAs relevant for your users based on:

- Security Role
- Field Data
- Using Fetch XML

Conditional Template Selection

Auto-select template based on:

- Field Data,
- Using Fetch XML
- Conditional template Groups

Always make sure that your users are selecting the correct template.

OCAs in workflows & flows

- Intuitive OCA designer to define your business processes
- Simplify your workflows & flows

Use your OCA in workflows and flows* to avoid any compilcation such as in Multipart documents.

Boost productivity in your Business Application

Demo & Roadmap

Step-By-Step Demo:

- How to create a One-Click-Action
- How to show and hide OCAs
- How to show templates based on conditions
- Using a flow and OCA to create a multipart document

Helpful resources:

- Step-by-Step: How to configure a One-Click-Action
- Display rules for One-Click-Actions
- Multipart documents in DocumentsCorePack
- Use One-Click-Actions (OCA) within an AutoMergeWorkingItem
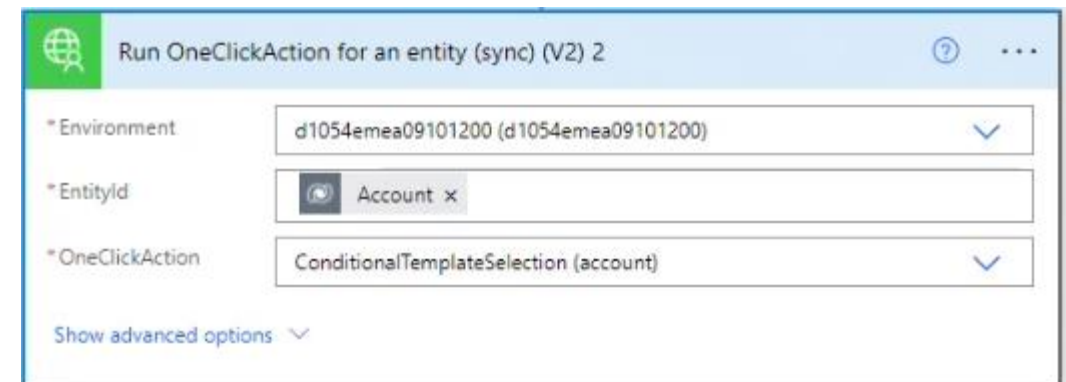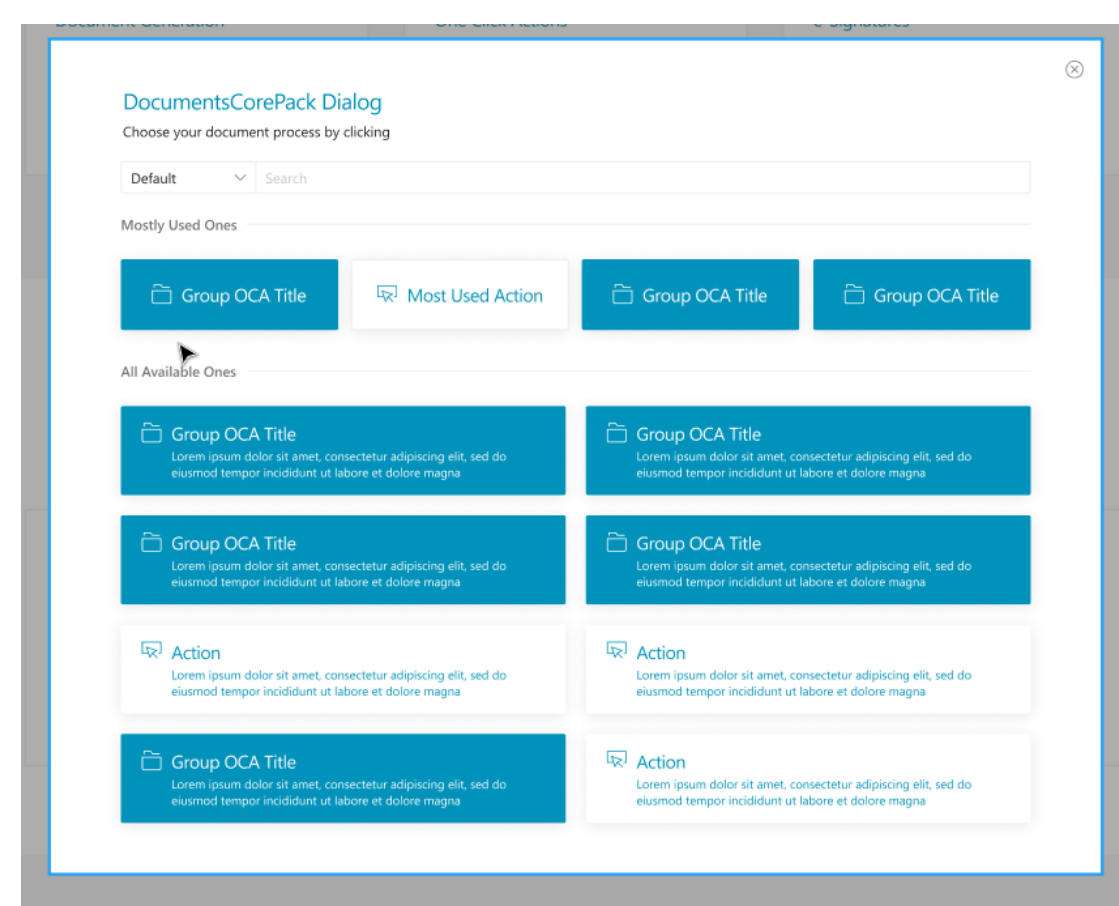
Thank You,
& Stay Safe!

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