

One-Click Actions

Simplify your document process to a single click

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Create and process documents from the Command-Bar

Steps:

1. Template selection
2. Processing settings
3. Review & edit

Manual document processes (single & batch)

The DocumentsCorePack Dialog

Dynamics 365 | Sales Hub Search

Activities **Create Document** Refresh

Read-only This record's status: Won

DocumentsCorePack Dialog
Select your document template. [Click here](#) to see how to create templates.

Search for templates

Name	Cat
DyncmicsCON_Template.docx	
Quote_Base.docx	
Quote_Base_DE.docx	
Quote_Base_DynCon.docx	
Quote_Base_ED.docx	
Quote_Base_Editabl.docx	
Quote_Base_Editable.docx	
Quote_Base_Editable_4.docx	
Quote_Base_Editable3.docx	
Quote_Base_EN.docx	

DocumentsCorePack Dialog
Define your document process. [Click here](#) to learn about One-Click Actions.

Filetype: pdf

☒ Attach document: as email attachment

☐ Open in local email client

Email Sender: Current User

Recipient(s): Select options

Email Template: No selection

☐ Send Email(s)

☐ Print document: pdf printer@chigley_pc-usoffice04

☒ Save to SharePoint

Sub Folders:

☐ Run workflow: DCPDocuSignWorkflow

☐ Run Action:

☒ Run Microsoft Flow: SaveToDropBox

Next

Preview - Mustermann GmbH_QUO-01022-S9J8D6

mscrm-addons.com
Your company for MS-CRM ADD-ONS!

Mustermann GmbH
Schütterlettenweg 23
8045 Graz
Germany

Graz, 4/4/2022

Quote #QUO-01022-S9J8D6				
	DocumentsCorePack XXL (300-600 Users) Professional document generation and processing in Microsoft Dynamics 365!	1	€8,280.00	€ 8 280,00
	AttachmentExtractor XXL (300-600 Users) Database space is expensive - this is why we developed AttachmentExtractor. Save precious database space in Dynamics 365 by extracting attachments from your Dynamics 365 environment to an alternative storage.	1	€4,980.00	€ 4 980,00
Subtotal:				€ 13 260,00
Tax:				€ 0,00
Discount (%):				€ 0,00
Total:				€ 13 260,00

This quote is valid for 30 days from today.

After receipt of payment in full we will send you the permanent license key for the software by e-mail.

Account Name: PTM EDV-Systeme GmbH
Bank: Steiermärkische Bank und Sparkassen AG
Address: Sparkassenplatz 4, 8010 Graz, Austria



1. Generate

- **Generate PDF**
- Word
- ...



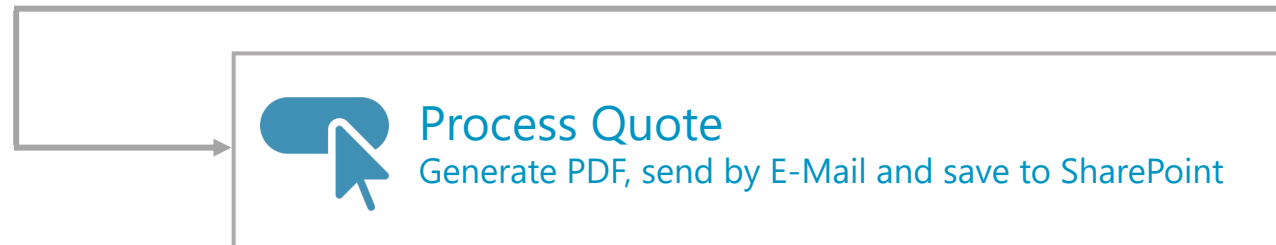
2. Process & Deliver

- **Send via E-mail**
 - Send for E-signature
- **Save to SharePoint**
 - Print,
 - Run Flow,...



3. Review

- **Document Preview**
 - Edit document



Only show OCAs relevant for your users



Accounting



Customer Service



Process Quote

Generate PDF, send by E-Mail and save to SharePoint



Send Service Contract

Generate Contract for upcoming year and send via DocuSign



Pro-Forma Invoice

Generate pro forma invoice as PDF & send by E-Mail



D8-Report

Generate official D8-Report for support ticket



Generate Invoice

Generate official invoice, send by E-Mail, save to SharePoint & pass to Quickbooks



Live Demo:

- Demo: Dialog & One-Click-Actions
- Step-by-Step: Configuring One-Click-Actions
- Step-by-Step: Configuring Display-Rules
- Step-by-Step: Creating a Multipart Document

- **Free Trials Available** for all Add-Ons
- No functional limitations
- Fully supported
- ~30 minutes to get started



Available on
Microsoft AppSource

Thank you!



www.mscrm-addons.com



[support.mscrm-addons.com](mailto:support@mscrm-addons.com)



[Youtube Channel \(How To's, Webinars\)](#)



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