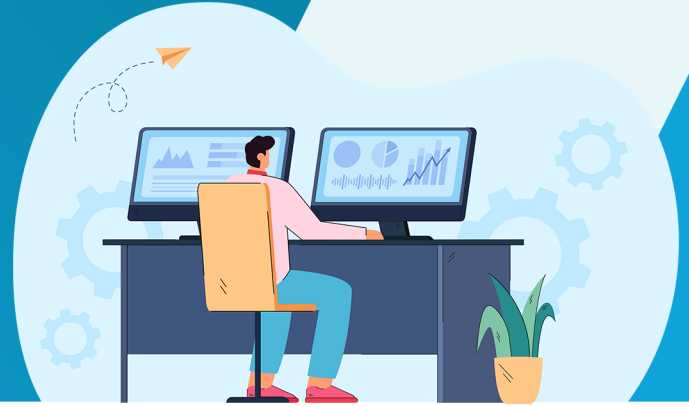


ONE-CLICK-ACTIONS

Simplify your document processes to a single click

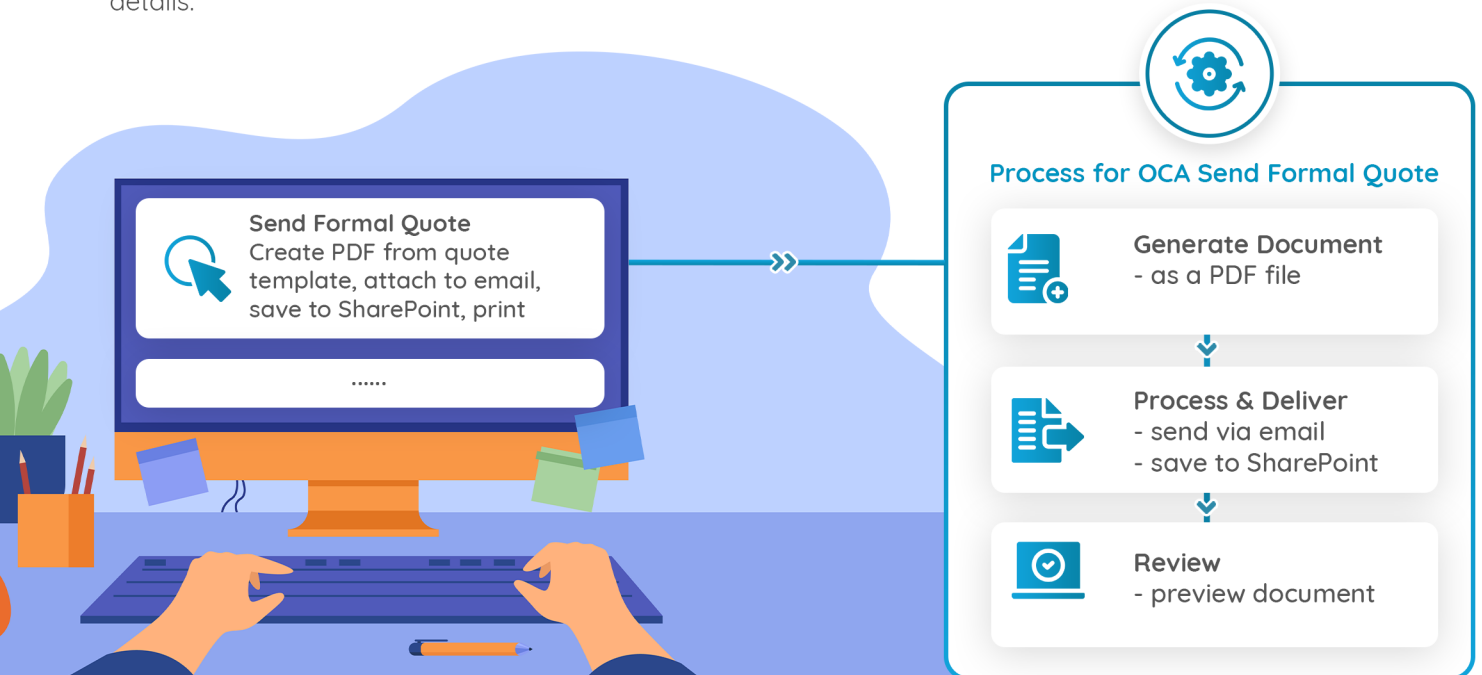


One-Click-Actions (OCAs) are preconfigured settings integrated into the DocumentsCorePack Dialog, aimed at simplifying and improving the document generation and delivery process within Dynamics 365 and Power Apps.

How One-Click-Actions work

A typical scenario where One-Click-Actions come in handy is illustrated by the Accounting department's requirement to produce PDF invoices, dispatch them via email to customers, and archive a copy to SharePoint.

Just click the designated OCA button in the Dialog. The predefined process will then seamlessly execute in the background. Initially, the invoice is generated, typically as a DOCX or PDF document, and subsequently attached to an email sent to the customer, while also being prepared for storage on SharePoint. Following this swift process, which typically takes just a few seconds to complete, you still have the chance to review and confirm all details.



Common Use Cases

Other common use cases are for example: automatically sending contracts via email, processing invoices, or creating a report. By defining a One-Click-Action, users can streamline this entire process with just one click.



NDA
Create an NDA contract as PDF, send it for e-signing via DocuSign



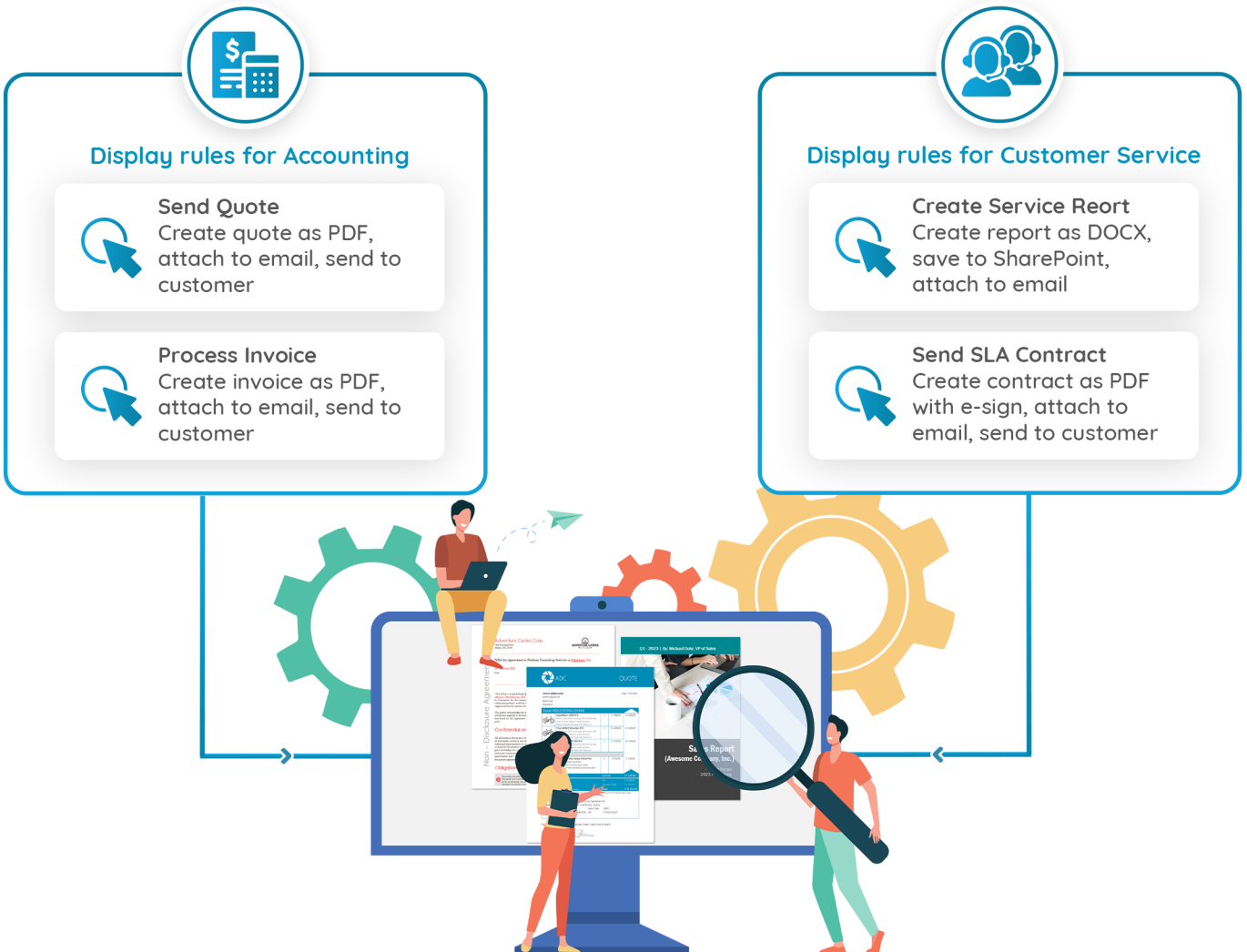
Process Invoice
Create invoice as PDF, attach to email, send to customer



Create Report
Create report as PDF, save to SharePoint, print

Display rules for One-Click-Actions

By utilizing display rules, One-Click-Actions can be tailored to users according to their roles (for instance, a particular OCA can be restricted to Accounting users). The primary aim of display rules is to ensure that users are presented only with One-Click-Actions relevant to their roles. These rules are established through four primary sources: Conditions, security roles, business units, or teams. There are almost endless possibilities to customize the display rules according to your needs, e.g. by department, country, language, etc.



Benefits of using One-Click-Actions

One-Click-Actions streamline document processes in Dynamics 365 & Power Apps, offering enhanced efficiency by enabling users to perform multiple tasks with a single click, ultimately improving productivity and user experience.



Save time by reducing mouse clicks



Simplify & automate tasks



Standardize document generation & delivery



Minimize user errors & enhance user adoption

