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Run Flows or Actions from the DocumentsCorePack Dialog

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DocumentsCorepack Dialog: User driven document operations



Dialog processing capabilities

- Emailing (attachments, content)
- Save document (note, activity attachment)
- Save to SharePoint
- E-Signing: DocuSign, AdobeSign, AssureSign
- Print: to local and network printers
- Run Processes:
 - Workflow
 - Actions
 - Flow

DocumentsCorePack Dialog ⚙️ ✕

Generates a document based on the records data. [Click here](#) to see how to create templates

Filetype	pdf ▾
<input checked="" type="checkbox"/> Attach document	as email attachment ▾
<input type="checkbox"/> Open in local email client	
Email Sender	Current User ▾
Recipient(s)	Select options ▾
Email Template	No selection ▾ ↗
<input type="checkbox"/> Send Email(s)	
<input type="checkbox"/> Print document	Printer@Administrator_LT-USOFFICE03 ▾
<input type="checkbox"/> Save to SharePoint	
<input type="checkbox"/> Run workflow	BM- Generate Quote Multipart XML ▾
<input type="checkbox"/> Run Action	▾
<input type="checkbox"/> Run Microsoft Flow	Save to OneDrive ▾

Next Cancel



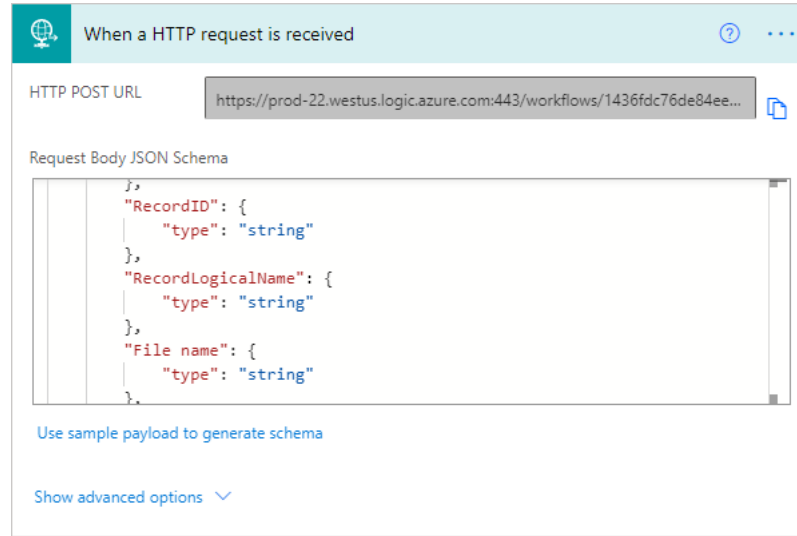
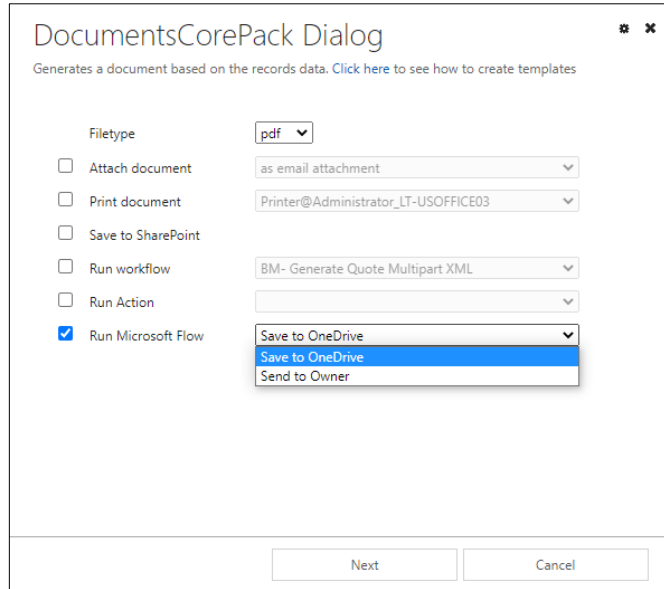
Dynamics 365
Customer Engagement



Model Driven Apps

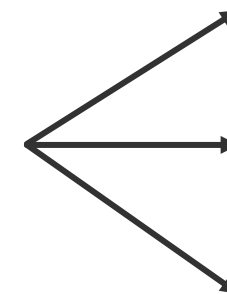
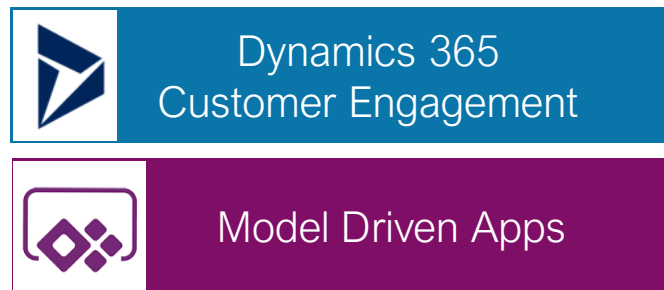


Run Flow: Utilize PowerAutomate to process documents or add custom logic



Parameters:

- RecordID: Dataverse record
- Document
 - Filename
 - Filesize
 - Document (base 64)



Office 365 Outlook



Microsoft Dataverse



OneDrive for Business



SharePoint



Dropbox



Run Actions: Utilize Actions to perform custom actions

DocumentsCorePack Dialog

Generates a document based on the records data. [Click here](#) to see how to create templates

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: Printer@Administrator_LT-USOFFICE03

Save to SharePoint

Run workflow: BM- Generate Quote Multipart XML

Run Action: Review Document on SharePoint Task

Run Microsoft Flow: Save to OneDrive

Next Cancel

Process: Review Document on SharePoint Task

Information

General Administration Notes

Keep logs for workflow jobs that encountered errors

Hide Process Arguments

Name	Type	Required	Direction
OutputEmail	EntityReference	Optional	Output
Task	EntityReference	Optional	Output
AMWI	EntityReference	Optional	Input
Email	EntityReference	Optional	Input

- Update Email
Update: Email (Email) [View properties](#)
- Create Task for document review
Create: Task [View properties](#)
- assing output task
Assign Value: Task [View properties](#)
- assign input as output email
Assign Value: OutputEmail [View properties](#)

Input parameters from dialog:

- AutoMergeWorkingItem
- Note (*attach as note*)
- Email (*attach to email or email content*)
- Activity (*letter, fax, task*)

Output Entity References are automatically opened

Dynamics 365 Customer Engagement

Model Driven Apps

Dynamics 365 Actions

Review Document Task
Task · Task for Interactive experience

High Priority 5/12/2021 6:51 AM Due Open Activity Status John Snow Owner

TASK Related

Regarding
[Add-On Solutions For Dynamics 365](#)

DETAILS

Subject: Review Document Task

Duration: 15 minutes

Regarding: [Add-On Solutions For Dynamics 365](#)

Description
new document generated for review:
<https://usdemo18.sharepoint.com/sites/USdemo/quote/Add-On Solutions For Dynamics>

Demo:

- Use Case #1: Use a flow to save a generated document to specific SharePoint folder and create a timeline entry in Dynamics 365
- Step-By-Step: Set up a flow to be triggered from the dialog
 - Flow Creation in PowerAutomate
 - Enable flow to be called from Dialog
 - Test run
- Call Action from dialog:
 - Call an action to create and open a new task and email upon document creation
 - Review Action setup and options

Helpful resources:

- Call Flow from Dialog: [Step-by-Step Guide](#)
- Call Actions from Dialog: [Step-by-Step Guide](#)

Thank You, & Stay Safe!

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- Don't forget we have an awesome Knowledge Base at <https://support.mscrm-addons.com/>, you'll find it to be a helpful resource!

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