Send an E-mail with a Generated and a Static Attachment through a Workflow

Applicable to: XperiDo for Microsoft Dynamics

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Desired outcome

We want to create a workflow that sends out an e-mail and attaches a generated document and a pre-existing, static document.

Before you start

Before you start on this guide, you want to make sure

- that you have a license for the XperiDo Assembly for Microsoft Dynamics Workflows;
- that you have the e-mail functionalities of Microsoft Dynamics 365/CRM set up correctly and that you have activated the mailbox of the user or queue we will send the e-mail from;
- that you have created two XperiDo templates:
  - one that we’ll use to generate an attachment;
  - one that we’ll use to generate the body of the e-mail;
- that you have a pre-existing static document available to add as a second attachment to the e-mail.

Approach

Create a workflow

First off, we’re going to create a workflow in Dynamics via Settings>Processes. We’ll create it against the Contract entity in our example and give it a name. We called ours “Create doc and add static pdf”. You can choose a scope and a trigger for your workflow and choose some more options around availability as an on-demand process or a child process. Feel free to pick the options that work best for your specific use case.

Add steps to create the generated attachment

The first two steps that we will add to our workflow are used to generate the document that will be attached to our e-mail.

Step 1: Select the template (optional)

Use the XperiDo>Select Template step to pick a template by name. We are adding this step to look up our template by name rather than by GUID. Which makes our workflow exportable to other Dynamics orgs along the XperiDo promotion path, provided that they contain a template by that name. If you are using XperiDo in a single org set-up (Standard or Basic Edition), you can skip this step.
In the step properties, simply type the display name of the XperiDo template you want to use to generate the attached document. In our example, the template is called "Maintenance Template".

Step 2: Generate the document for the attachment

Use the XperiDo>Generate Document to generate a document with the template we selected in the first step.
In the properties of this step, we'll refer to the outcome of the first step and fill out the rest of the settings fields according to our preferences.

Add steps to create the e-mail body

The next two steps that we will add to our workflow are used to generate the document that will populate the body of our e-mail. Basically, we'll repeat the steps above, but now using a different template.

Step 3: Select the template (optional)

Use the XperiDo>Select Template step to pick a template by name.

In the step properties, simply type the display name of the XperiDo template you want to use to generate the e-mail body. In our example, the template is called "Contract Mail".
Step 4: Generate the document for the attachment

Use the XperiDo>Generate Document to generate a document with the template we selected in the first step.

In the properties of this step, we'll refer to the outcome of the first step and fill out the rest of the settings fields according to our preferences.

Bring it all together in an open e-mail activity

In the next step, we'll use the documents we generated to constitute attachment and body of an e-mail activity. We're going to save this e-mail in an open state. That will keep the e-mail pending, so we'll be able to add a static document as a second attachment later on in the workflow.

Step 5: Create e-mail activity

Use the XperiDo>Send E-mail step to create an open e-mail activity that uses the result of document generation step 2 as an attachment to the e-mail and the result of document generation step 4 as the body of the e-mail.
In the properties of this step, insert the e-mail addresses of sender and receiver(s) and retrieve the transaction IDs of the documents we generated in steps 2 and 4. Make sure to create an open e-mail activity.

Add a static document to the e-mail
So far, the outcome of our workflow is an open e-mail activity, with an XperiDo-generated attachment and body. In the final steps, we’ll use out-of-the-box Microsoft Dynamics workflow steps to add a static attachment and change the status of the e-mail activity from open to closed.

**Step 6: Update the e-mail activity record**

In this step we will use the standard **Update Record** step to edit the e-mail activity we created in step 5. We will add an extra attachment, namely the static PDF-file we would like to add to the outgoing e-mail.

Select the e-mail activity as the record you want to edit and select the extra attachment in the properties of the step. Leave all other fields blank.

**Send the e-mail**

In order to send the e-mail, you will need a workflow step that can take your open e-mail activity and send it. This step is not available in Microsoft’s standard set of workflow steps. Fortunately, you can find a solution by Jason Lattimer on Github that contains such a step:

https://github.com/jlattimer/CRM-Email-Workflow-Utilities/releases. Download the correct version of this solution for your Dynamics org and import it.
Step 7: Send the E-mail

Use the Send Email step of the LAT.WorkflowUtilities.Email Assembly to send out the open e-mail activity we have created.

That's it. Our workflow is now ready for test and use. Don't forget to save and activate it.