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**Feature Preview: User-Prompts**  
in  
DocumentsCorePack for Dynamics 365

# User-Prompts: Incorporate user-input into generated documents

## Requirement – Solution – Use Cases



### Requirement

Next to static text and field values inside Dynamics 365, user input should be incorporated into generated document

#### Problems:

- Users must always edit generated documents in Microsoft Word
  - Additional clicks
  - Loss of standardization
- Data not present inside Dynamics
  - Conditions not applicable



### Solution

Enable configurable prompts to users to capture and incorporate user-input into generated document

#### Goal:

- Easy and intuitive prompt designer to predefine user-defined content
- Prompt users during document process without MS Word edit
- Avoid editing errors



### Popular Use Cases

- Adding Appendices or Additional Address Blocks
- Personalized Notes
- Legal Verbiages
- Variations in Terms & Conditions

# User-Prompt: Configuration Options

Preconfigure prompts using the DocumentsCorePack Tempalte Designer



## Input Types

### Section Visibility:

- Choose whether certain sections should be shown or not

### Text:

- Add text to your document

### Predefined Option Selection:

- Choose content upon selection from a predefined list

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# Demo & Roadmap

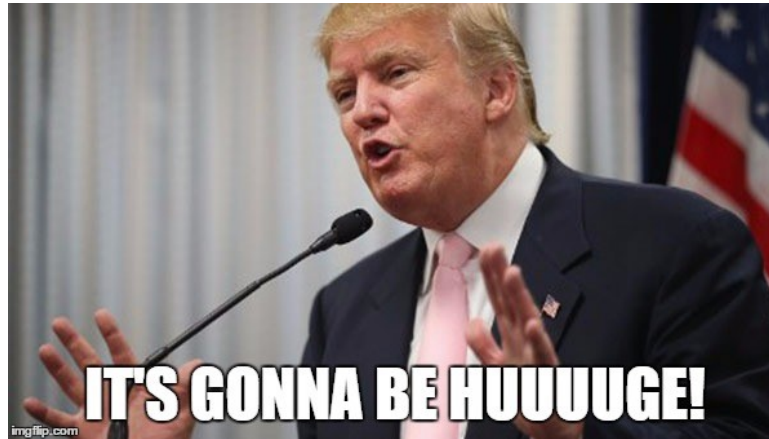
## Step-by-Step Live Demo

Part 1) Show how to create and insert User-Prompt fields into templates.

Part 2) Show the User-Prompt interface in the DCP Dialog and Incorporation of user response into the document

### Availability:

- This will be part of our Major DCP Release mid-July 2018.



# Thank you!

## Support & Contact

- You can find us on the web at <http://www.mscrm-addons.com>
- Help-Center (Live-Chat, Support): <http://www.mscrm-addons.com/Support.aspx>
- Don't forget we have an awesome blog at <http://www.mscrm-addons.com/Blog>, you'll find it to be a helpful resource!

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