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WEBINAR

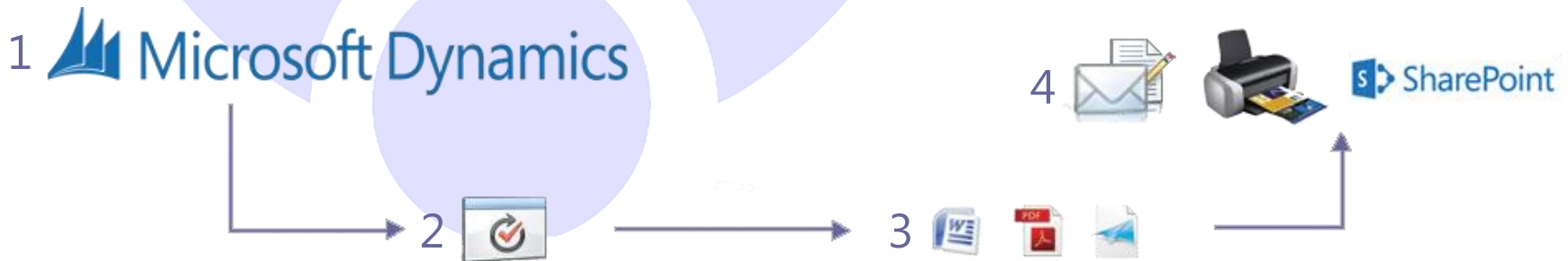
"Automation of document generation and document processing with AutoMerge"

Atlanta, 10/21/2013

Clint Higley

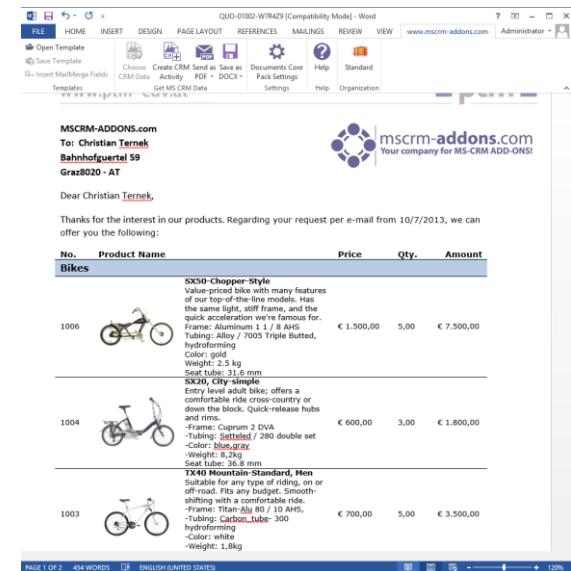
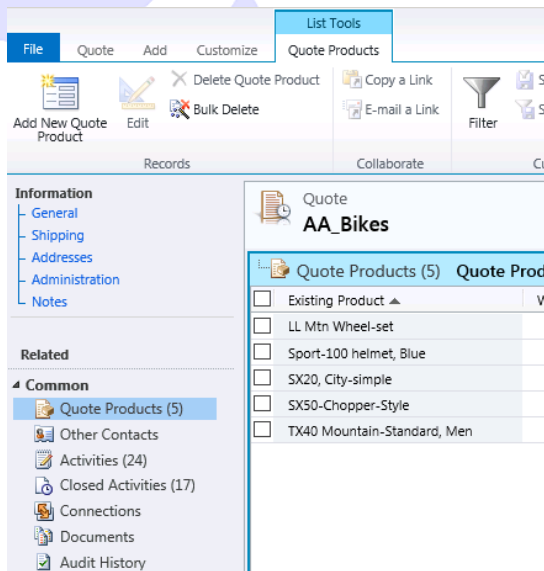
How AutoMerge Works

1. An event inside CRM occurs (new contact, quote, lead... is created, a record is updated, delted..) or an „On-Demand“ Process is initiated by a user.
2. A workflow or dialog gets started by MS CRM.
3. Inside the process, AutoMerge provides commands to generate documents in different file formats and save them back to CRM.
4. Next to document generation, AutoMerge provides several additional workflow-steps to process the document in the background. (Attach document to emial, send document to a printer, simply save the document to a SharePoint,...)



Meeting Business requirements (Application examples)

1. Getting from a quote in CRM to an email with a quote-document attached as a pdf with **3 clicks**.
2. Send generated document to a **local printer** (Automated printing)
3. **Google Cloud Printing** (allows e.g. to send the document to my Android Device)



Installation / Configuration

- Simple msi-installation that imports the solution into Your CRM – system and provides configuration tools (Print-service configuration, Licensing tool)

Provided Workflow-items:

- CreateDocument
- SendEmail
- AttachToEmail
- AttachToLetter
- PrintDocument
- Attach To Letter

The screenshot displays two overlapping windows from a CRM configuration tool. The top window, titled 'Process: Create Account Overview' and 'Create MSCRM-ADDONS.com AutoMergeWorkingItems', shows a 'General' tab with fields for Name, Owner, AutoMergeAction, Create Document, TemplateToExecute, SendEmail, CreatedDocument, and Attach To Letter. A dropdown menu is open for 'AutoMergeAction', listing options: CreateDocument, AttachToLetter, AttachToEmail, SendEmail, PrintDocument, and DeleteTempDocument. The bottom window, titled 'Process: Create Account Overview' and 'Set Custom Step Input Properties', shows a table with the following data:

| Property Name | Data Type | Value |
|-------------------|---------------------|---|
| DebugThisRequest | Two Options | <input checked="" type="radio"/> False <input type="radio"/> True |
| TemplateToExecute | Lookup | Account_Overview_DOCX-A |
| SaveAs | Single Line of Text | pdf |
| PrintTo | Single Line of Text | |
| SaveOnlyIntoTemp | Two Options | <input checked="" type="radio"/> False <input type="radio"/> True |

- After installation its just a few - minute configuration inside your workflow to generate the document and process it the way you want.
- IMPORTANT: Templates are generated by our powerful **DocumentsCorePack Template-Designer** (free license for AutoMerge customers)

The Future of AutoMerge

- Cloud based AutoMerge Online Configuration for CRM 2013
- Sorting for batch print jobs
- Additional –Workflow-Items

The screenshot shows the 'AutoMerge Online Configuration' web interface. At the top, it says 'Hello mathoc40' and provides a link for a quick tour. Below this, there are two main sections: 'Your available CRM connection profiles' and 'Your available service configurations'. The first section contains a table with columns for Name, CRM, Type, Organization Frie..., Organization Uni..., and User. The second section contains a table with columns for ID, Name, Status, Job Type, Batch Size, Data (thi..., Organization, CRM, and Instance.

| Name | CRM | Type | Organization Frie... | Organization Uni... | User |
|-----------------------------|-------------------------------|--------------------|----------------------|---------------------|----------------------|
| mscrmaddonsustest2 as mi... | https://mscrmaddonsustest2... | Online - Office... | mscrmaddonsust... | mscrmaddonsust... | michael.dohr@mscr... |

| ID | Name | Status | Job Type | Batch Size | Data (thi... | Organization | CRM | Instance |
|------|---------------------------|---------|----------|------------|--------------|--------------------|----------------------|----------------|
| 5101 | mscrmaddonsustest2service | Stopped | Both | 25 | 0 B | mscrmaddonsustest2 | https://mscrmaddo... | https://aut... |

The screenshot shows the 'Configure Google Cloud Printer Configuration' dialog box. It has a 'Configuration Name' field with 'MyPrinter' entered. Below that is a 'Google Account' section with a 'Username' field containing 'mathoc40@gmail.com' and a 'Get available printers' button. The 'Available Printers' section shows a dropdown menu with several printer options, including 'HP Officejet Pro 251dw Printer PCL 6 (Netzwerk)'. The 'Printer Settings' section has several checkboxes for 'Use Default' and dropdown menus for 'Anzahl der Exemplare', 'Auflösung', 'Ausrichtung', 'Beidseitiger Druck', and 'Durch Geräteschriftart ersetzen'. At the bottom, there are 'Save Configuration' and 'Print Test Page' buttons.

Thank You


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<http://www.mscrm-addons.com/Support/Webinars.aspx>

Resources:

- 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://blogs.mscrm-addons.com/>, you'll find it to be a helpful resource!

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Q&A

- If I do not get to your question due to time limitation expect an email from me later today with the answer!