

# AutoMerge

for MS Dynamics CRM 2011



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**AutoMerge** enables an easy generation and processing of documents based on templates that incorporate all CRM fields and that can be easily created without specific programming knowledge. The process of document generation and processing can be executed automatically via workflows or in a one-click-scenario via dialogs. It is possible to generate documents with the following formats: doc, docx, pdf, html, jpg, bmp, png, xps, ...

## Main functionalities:

### Template creation:

The templates AutoMerge uses for generating and processing documents can be easily created in advance with the Template Designer of our DocumentsCorePack addon. (INFO: In case of not already using DocumentsCorePack, users get a license for the Template Designer when purchasing AutoMerge). When creating a template, users can use all fields from CRM, insert them quickly and easily within the DocumentsCorePack Template Designer in MS Word and therefore do not need to have specific programming knowledge. The DocumentsCorePack Template Designer is capable to resolve any relations and works with custom entities, as well as with standard CRM entities. Furthermore, it supports the automated creation of tables and an easy insertion of other documents or pictures from CRM.

### Document generation:

AutoMerge allows generating documents once a CRM-event like creating or deleting contacts, quotes, accounts, etc. occurs. The feature is based on CRM workflows/dialogs which contain the template and format that should be used. Supported formats: doc, docx, pdf, html, jpg, bmp, png, ...

### Document processing:

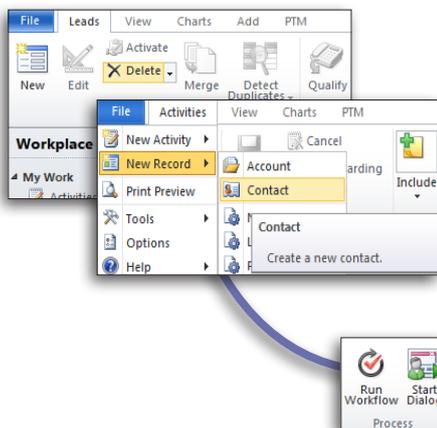
AutoMerge provides following workflow steps:

- Generate a document based on a template designed with the "DocumentsCorePack Template Designer"
- Print the document (the printer can be defined in the workflow/dialog)
- Save the document in the SharePoint folder associated with the starting record
- Attach the generated document to an email or letter activity
- Send the email

### Availability

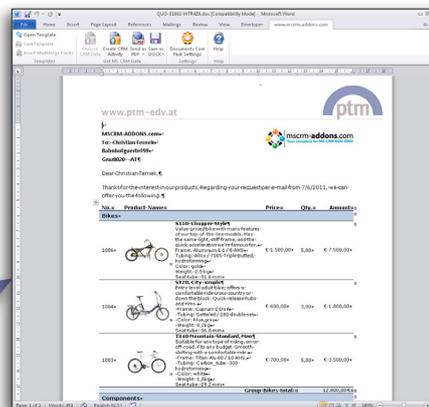
- MS Dynamics CRM 2011
- On-Premise (RTM)
- Hosted (IFD)
- Online (RTW)

A CRM-event occurs  
(e.g. a new contact is created)



A CRM-process/workflow starts

AutoMerge for MS Dynamics CRM creates the document



Document-processing options



## Licensing (Prices exclusive of VAT)

**AutoMerge Small (1-20 User)**  
License: 1100€  
Annual Support: 220€

**AutoMerge Large (101-300 User)**  
License: 4400€  
Annual Support: 880€

**AutoMerge Upgrade**  
Small-Medium-Large 1650€

**AutoMerge Medium (21-100 User)**  
License: 2750€  
Annual Support: 550€

**AutoMerge Enterprise (300+ User)**  
on request



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