

# Document Merge

## Quick and Easy Document Merging in Oracle CRM On Demand

Document Merge allows users to create documents in DOCX and PDF formats in seconds, using data merged from any object in Oracle CRM On Demand, including any child objects needed.

### Create

Set up document templates so your message and branding stay consistent and professional, for every document you create. Using Merge On Demand technology, any data in Oracle CRM On Demand can be part of your template. You can even email your newly created document seconds after it is created without having to save the file to your computer, open your mail program, create an email, and attach the document and send.

- Fast Results
- Data merged from any object
- Consistent corporate message
- Precise formatting
- Template Manager
- Quotes and Contracts
- Account Summaries
- Resumes
- Insurance forms
- Much more!

### How Document Merging Works

Document Merging lives in a web applet that is configured on any object. When you click on the Merge button, your document pulls data in from multiple objects in Oracle CRM On Demand and creates a Word document and a PDF in seconds!

You can then click on the email button to select an email template or compose a new message with the new document attached. Once the email is sent, an activity is logged in Oracle CRM On Demand allowing the user to see when the email was sent.

### How Document Merging Saves You Time

Are you sending out quotes to clients on a regular basis? Tired of updating the document every time with data that is already in Oracle CRM On Demand? Instead of updating and formatting every document yourself, let Merge On Demand do the work for you. Just click on the merge button and your document is ready to send.

***CLICK HERE to watch a demo of how Document Merge works seamlessly in Oracle CRM On Demand.***

### Modify

Changing document templates is a breeze with our Template Manager portal. Make any edits needed in Word 2007 or above, update any mappings needed using XML tagging, save, and upload the file in our portal. Instantly, your document is updated and ready to merge in Oracle CRM On Demand.