

c360 Documents Pack vs CRM 4.0 Mail Merge

Limitation of entities

The CRM internal mailmerge is limited to 5 entities (accounts, contacts, leads, opportunities, quotes and custom entities) while c360 Documents Pack has no limitations and supports all kind of entities.

Relationships

c360 Documents Pack is capable of resolving any kind of relationship between all entities (including custom entities). It's possible to resolve multiple stages e.g -> Quote->Quote Product->Product. Additionally, the "direct fetch"-functionality simplifies the resolution of complex relationships. In CRM 4.0, relations can only be resolved for the quote entity.

Send as PDF

Created documents can be sent to customers as PDF files.

This option converts the generated documents and therefore c360 Documents Pack provides a powerful option to simplify accounting by handling invoices, quotes, orders etc...

Title created activities

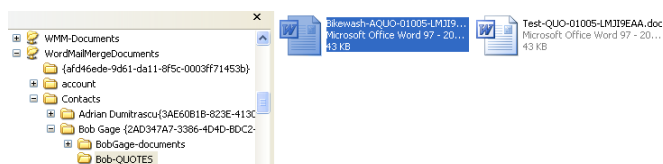
c360 Documents Pack allows to create and title 3 types of activities (letter, email, fax). It's possible to use any field or even combinations of fields e.g. quotename + quotenumber to title the created activity and associated documents

Next to this it's possible to save the activity to a specific entity (see configuration below)

CreateActivitiesfor:

Document Name:

SubFolder Name:



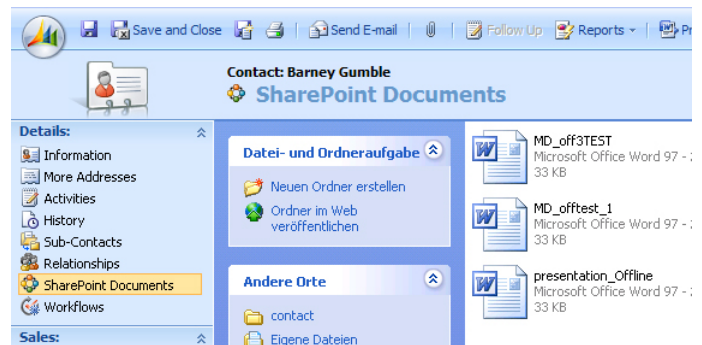
Picture: configuration option a document structure

Read-only CRM users

c360 Documents Pack has no limitation on "readonly"-users in CRM 4.0. Therefore, they will be enabled to generate documents too.

SharePoint & File Explorer integration

Next to the possibility to attach the generated document to the activity itself, c360 Documents Pack provides a SharePoint / File-Explorer integration and therefore a further option to create a structured filesystem. These integrations support all kind of files and can be easily found within CRM.



Marketing features

c360 Documents Pack allows users to send newsletters or mass mails to customers. Pictures are automatically embedded in the mail itself to guarantee that the email shows up properly at the customer.

Next to this, it allows to add multiple attachments to the mail.