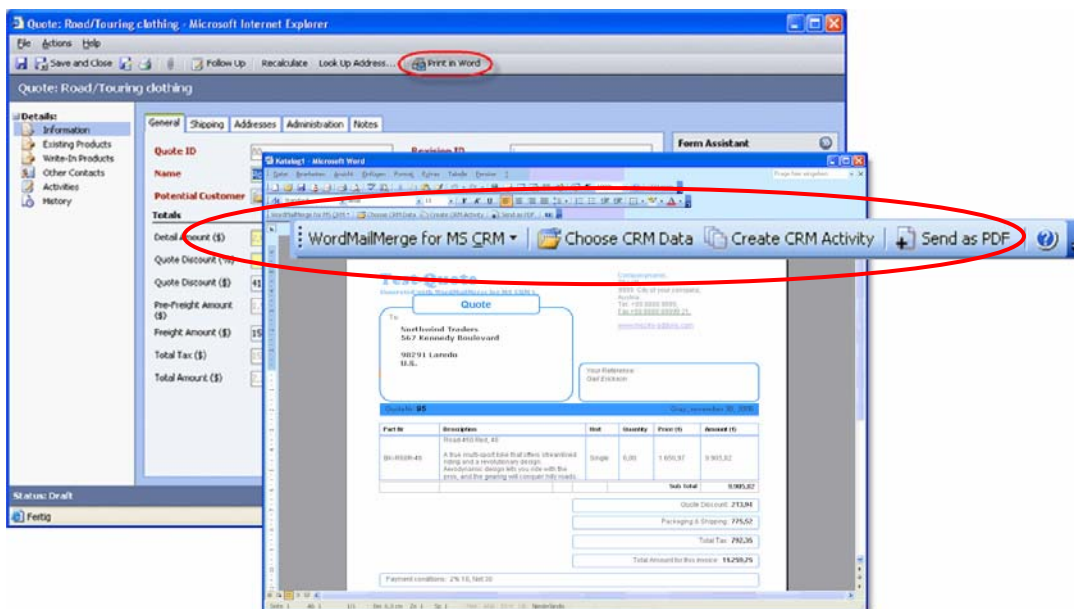


## c360 Word Mail Merge for Microsoft Dynamics CRM 3.0

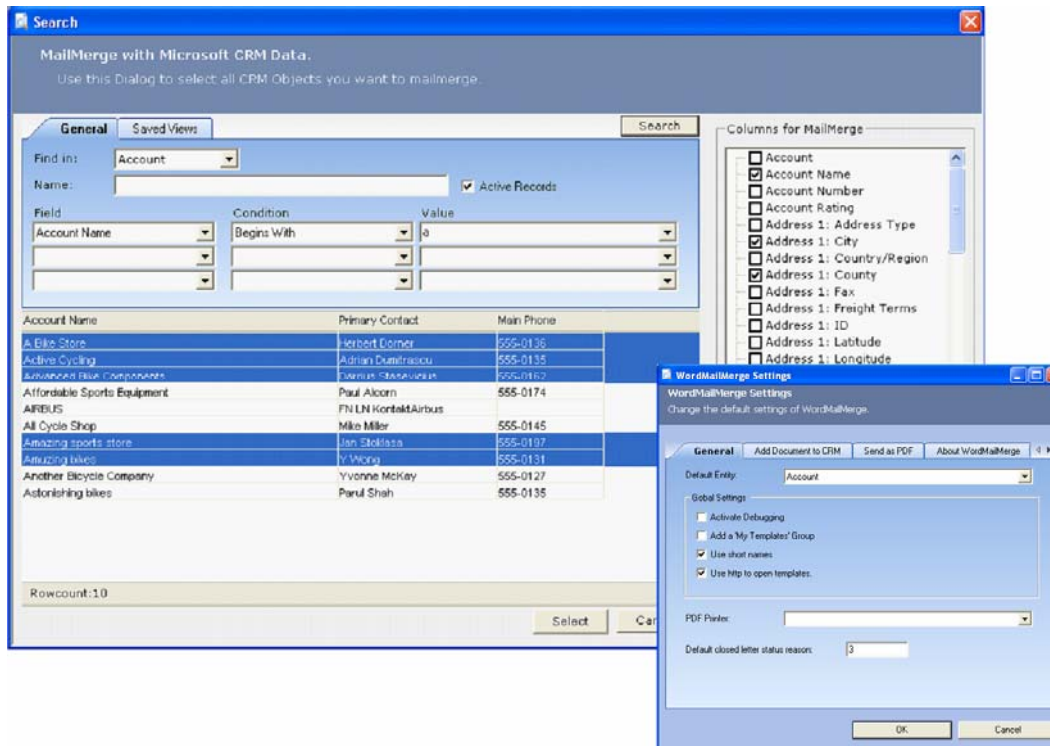
### Overview

c360 Word Mail Merge is a Microsoft CRM enhancement that allows you to create Word documents with data from Microsoft CRM. Word Mail Merge enables you to create a **mail merge** using CRM fields/entities, add additional fields to the mail merge, create **letter-activity** directly from Word and **add Word documents** directly to CRM entities. With Word Mail Merge, Microsoft CRM users will be able to:

- Merge CRM entity record details (contacts, accounts, custom entity) into a Word template directly from the **CRM web client**
- **Mail Merge** in Word with many CRM records
- Choose many fields from CRM entities (including **custom fields**) when generating a **mail merge** document
- Generate word documents with **custom entities** and insert related information (from accounts, contacts)
- Create mail merges using **quotes, orders, invoices** and use custom fields
- Generate Word documents and send it as **PDF per email** (required Adobe PDF Writer or PDF995)
- Send personalized emails/**newsletters** with **attachments**
- Create word documents and save them as **letter activities** back in CRM (with the **attachment**)
- Save ANY **Word** document directly from Word to Microsoft CRM and link to any CRM entity (Leads, Contacts, custom entity)
- Create mail merges and save them to a CRM entity as an outgoing letter activity with the content of the document as description and document itself attached as a note
- Use **Advanced Find query** within MS Word to perform mail merge and generate mass email or mass print letters



*Mail Merge CRM entity records into Word Templates directly from the Web Client*

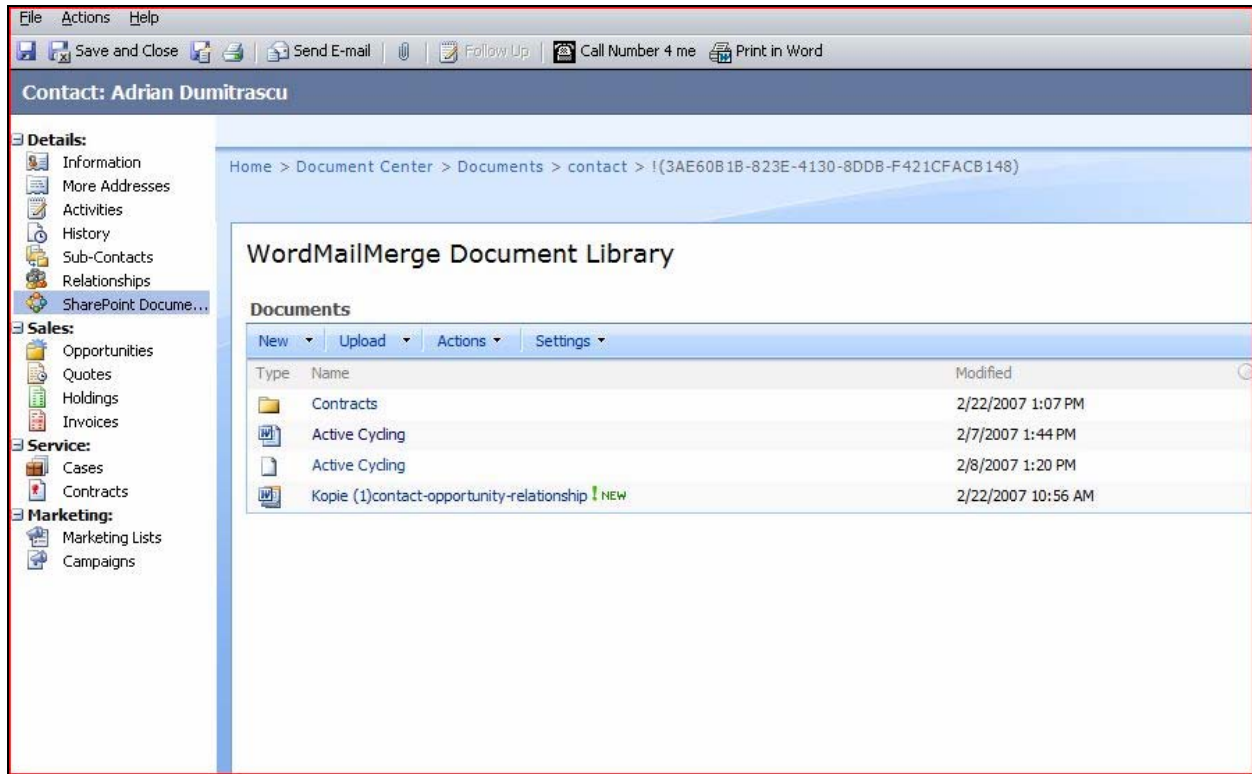


*Mail Merge in MS Word with many CRM records*

## SharePoint Integration - new!

Word Mail Merge now integrates your SharePoint Services/Portal Server with Microsoft Dynamics CRM 3.0. Now you can generate Word documents and save the result directly in SharePoint. Furthermore, you can also see the generated documents in CRM. The new features are:

- Integrate your SharePoint Services/Portal Server easily with Word Mail Merge
- Automatically save documents into a specific SharePoint folder/list/site depending on your server settings
- The possibility to automatically generate folders for each row in an entity. This means a unique folder for each row in an entity (i.e every account, contact, custom entity)
- Open/Save templates from/to your SharePoint and also manage your templates in SharePoint.
- Define different locations in SharePoint for each entity to save the generated documents.
- The integration offers the possibility to save generated documents to SharePoint and automatically insert a link into the letter activity. This means that the document can be opened with one click from the letter activity.



*Word Mail Merge- SharePoint/CRM Integration*

### **Evaluation Copies**

Free evaluation copies of c360 Word Mail Merge can be obtained from c360 Solutions' web site. Evaluation copies come with a license key that provides full functional unlimited usage for a 30-day trial period.

### **Pricing**

The cost of Word Mail Merge is \$65 per assigned Microsoft CRM license

### **Languages**

All c360 products are available in multiple languages and can be easily translated into additional languages by simply making changes to the label and caption values found in a separate .XML document. Each product's Installation and Configuration guide provides detail on making language modifications. All product downloads include language files for multiple languages.

### **Licensing**

The number of Word Mail Merge licenses must equal or exceed the number of assigned user licenses or Word Mail Merge will not function for any user. For example, a company that has purchased 25 Microsoft CRM licenses, but has only 11 of them assigned to users needs 11 Word Mail Merge licenses.



### **Support, Upgrades and Enhancements**

The list price of Word Mail Merge includes first year support, upgrades and enhancement per the c360 Solutions Software license agreement. After the first year, a support and enhancement plan can be purchased for 20% of the total cost of all Word Mail Merge licenses.

### **c360 Partner Program**

Authorized Microsoft CRM partners may inquire about the c360 partner program by visiting <http://www.c360.com/PartnerProgram.aspx>.

### **Information**

For more information on c360 Word Mail Merge, contact c360 Solutions at:

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