

UPSOURCEIT

Merge On Demand 1.5 Validated Integration with Oracle CRM On Demand 19



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Merge On Demand—*Powerful. Easy. Integrated.*

Merge On Demand is a suite of software as a service (SaaS) products that automate time-consuming tasks and enable better communication from Oracle CRM On Demand.

Company Overview

upsourceIT is a boutique consulting firm based in Denver, Colorado, with more than 12 years of experience implementing and integrating Oracle's customer relationship management (CRM) solutions. This pedigree of creating innovative solutions that work for customers in the real world drives the Merge On Demand product suite.

Integration Overview

Merge On Demand 1.5 extends core Oracle CRM On Demand 19 functionality to meet important business requirement gaps and streamline repetitive tasks. Merge On Demand was born out of the necessity to print data from within Oracle CRM On Demand in an elegant, formatted process that was not available through other out-of-the-box functions. This requirement bloomed into what is now the MODify Suite.


The core MODules include:





Validated Integration

Oracle CRM On Demand

Through the Oracle PartnerNetwork, partners with validated integrations are able to provide customers with standards-based product integrations, tested and validated by Oracle. Customers benefit from improved risk management and smoother upgrade capability, leading to a lower total cost of ownership and greater overall satisfaction.

 **Document MOD** Merge data from multiple objects into Word templates and output immediately to Word and PDF format from the Oracle CRM On Demand user interface. All base and custom objects are supported and parent/child relationships can be maintained.

 **Email MOD** Data can be merged on the fly into HTML-formatted e-mail templates and then sent to multiple addressees, all from the Oracle CRM On Demand UI. Smart lookup helps users find existing contacts and templates by bringing back possible matches after a few characters have been entered. Multiple attachments can be added and sent in a single e-mail.

 **Attachment MOD** Attachments can be added to any object in Oracle CRM On Demand using drag and drop, bypassing the need to browse the user's file system. If a file with the same name is added a second time, this is identified and the user can resolve it quickly by choosing to add a revision of the file, manually rename, overwrite the existing file, or cancel.

Integration Details

Merge On Demand leverages the Oracle CRM On Demand Web Services API to extract and leverage specific data for integration into Word documents and e-mail templates and to provide attachment management, such as drag and drop. Merge On Demand Web applets are inserted on the desired page layouts of objects, allowing users to add Merge On Demand functionality to those objects.

When a user makes a request, applets make a secure Web service call to Merge On Demand servers, requesting that a specific function be executed. The server processes the request and returns information back to Oracle CRM On Demand via the Web applet. In some cases, the function requested by the user requires a Web service call to Oracle CRM On Demand to request data. This data is consumed as part of the request. Documents are also converted into PDF format, allowing users to choose between the two formats based on business need; e-mails are sent and activity records are automatically generated and attachments are uploaded to Oracle CRM On Demand servers.

Support

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support.mergeondemand.com

AttachmentName	AttachmentSize	Extension	UpdatedBy	FileName	ModifiedDate	RowId
Claim AAG RETAINER FAX	24791	docx	MOD Admin	Claim AAG RETAINER FAX	2011-07-29T18:34:17Z	AAPA-9TYIV5
Claim AAG RETAINER FAX-1	24791	docx	MOD Admin	Claim AAG RETAINER FAX-1	2011-07-29T18:30:28Z	AAPA-9TYADS
Claim Loss Notice Cover2	22811	docx	MOD Admin	Claim Loss Notice Cover2	2011-07-29T18:23:35Z	AAPA-9TXHNN
New Claim AAG RETAINER FAX	24791	docx	MOD Admin	New Claim AAG RETAINER FAX	2011-07-29T18:37:57Z	AAPA-9TYLF3
Sean	24791	doc	MOD Admin	Sean	2011-07-29T18:41:16Z	AAPA-9TYLGRrefresh

Merge On Demand e-mail tool, with multiple attachments, smart lookup for recipients, and smart lookup for template name.

Environment

upsourcIT Environment

Merge On Demand Version 1.5

Oracle Environment

Oracle CRM On Demand 19

For additional information about partnering with Oracle, please contact opninfo_us@oracle.com or visit partners.oracle.com

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