






## Sugar Document Automation

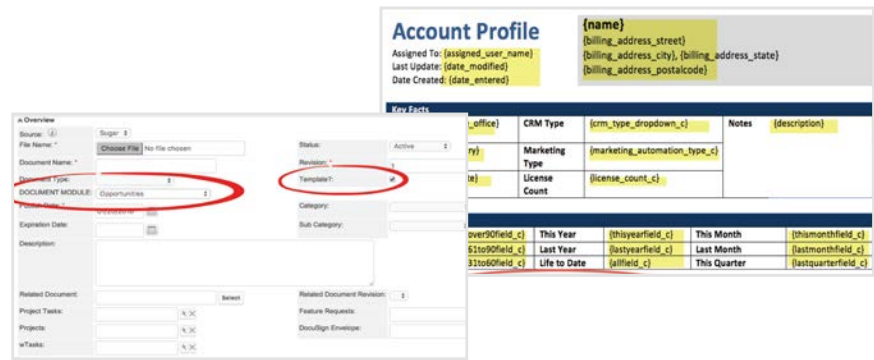
SugarCRM enables businesses to create customers for life with the world's first intelligent, no touch customer experience (CX) platform. W-Systems offers a series of add-ons to Sugar to extend its core capabilities.

## Meet wDocs: Sugar Document Automation

A common need among Sugar users is the ability to create letters, contracts, proposals, mailing labels, and forms. Meet wDocs, a tool to quickly create Microsoft Word templates that can be used to merge information from any module in Sugar into a presentation-quality document.

### Sample documents include:

-  Account Profiles
-  Casework Orders
-  Contracts
-  Mailing Labels
-  Proposals



**Account Profile**

(name)  
 (billing\_address\_street)  
 (billing\_address\_city), (billing\_address\_state)  
 (billing\_address\_postalcode)

Assigned To: (assigned\_user\_name)  
 Last Update: (date\_modified)  
 Date Created: (date\_entered)

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**Key Fields:**

(office)	CRM Type	(crm_type_dropdown_c)	Notes	(description)
(ry)	Marketing	(marketing_automation_type_c)		
(e)	License	(license_count_c)		

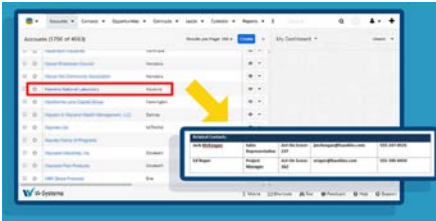
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(over90field_c)	This Year	(thisyearfield_c)	This Month	(thismonthfield_c)
(\$top90field_c)	Last Year	(lastyearfield_c)	Last Month	(lastmonthfield_c)
(\$top60field_c)	Life to Date	(allfield_c)	This Quarter	(lastquarterfield_c)

## Features

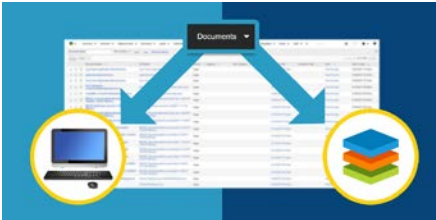


Create Polished Microsoft Word Documents Natively from Sugar Easily and automatically generate documents your users need from Sugar. Examples of files can include (but are not limited to) Letter Templates, NDA Agreements, Quotes, Statements of Work, Account Visit Planning Reports and more.



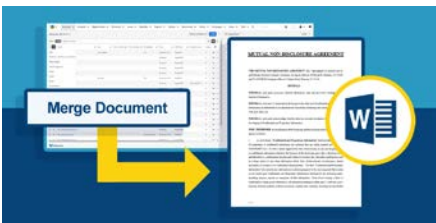
## Merge Multiple Records from Related Tables

Create documents with merges of data from one-to-many relationships. For instance, when merging a document from the Account module, include information from the related contacts or meetings modules for the account.



## Merge to Your Local Computer as a Sugar Linked Document

Keep all documents within your Sugar instance as linked documents instead of downloading to your local computer. The files then will be accessible by anyone within Sugar. wDocs will merge and directly attach the merged document as a linked document in Sugar.



## Merge Information from any Combination of Modules

The document automation module can merge any module related data from Sugar into a predefined Word template. For instance, from the Accounts module, quickly generate a contract or letter template.



## Mass Record Merge from Module List Views

From Sugar list views, select multiple records to create multiple merge documents. When in the Accounts list view, select multiple accounts and generate a merge of address labels or letter templates for those accounts.



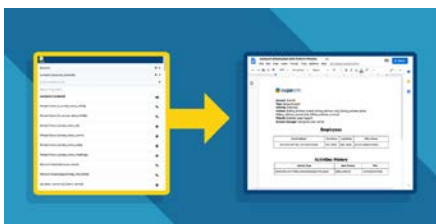
## Merge Using Microsoft Word Template and Auto Convert to PDF

Once your Microsoft Word Template is uploaded, you can choose between downloading the final merged file as either an MS Word or PDF document. Design your templates in Word but output directly to PDF formatting.



## Generate Labels

This feature allows you to merge multiple records into label documents or labels. You may customize the content of labels by creating document templates.



## Document Template Builder

Easily create your own formatted Google Docs or Microsoft Word documents from module or related module fields. You can also quickly generate tables and format various field types including date, boolean and text.