

CRMDocs™ Product Sheet

CRMDocs is a comprehensive optimization tool for your Oracle® CRM On Demand system.

CRMDocs tames your mature Oracle CRM On Demand system by providing a complete inventory of your customized system, clearly identifying which data fields are being used, which roles and layouts have access to those fields, and how many more fields are available for creation.

Regardless of attrition or faulty documentation, you'll never again spend time researching how your system is configured, how many fields you have available, or how a field is defined and used. CRMDocs brings IT-style discipline into a user-directed tool.

Use CRMDocs on demand via the cloud and gain certainty, control, and oversight of your CRMOD deployment.

Gain Certainty

Automatically inventory and cross-reference your objects or record types, fields, page layouts, workflows, related information, users, roles, and CRM. Quickly identify unused fields or misleading field designations in summary, and detail.

Gain Clarity

Capture metadata on key characteristics of objects, fields, and forms: types, users, workflow participation, how the element should be used in your business environment. This information will appear in help screens for users, and in richly detailed reference information for administrators within CRMOD.

Gain Control

Centralize your document storage for additional supporting documents. The ability to link to those documents from different layouts helps ensure that users always have the information they need, no matter where they are in the world.

Gain Standardization

Standardize the look and feel of your new layouts, specify what information you require when you document a field, or use templates to dynamically gather all the values used by pick lists as reference when you create a new pick list.

Features and Benefits

- Administrators discover a complete inventory with a click:
 - How many fields, page layouts, or workflows have been created to date
 - How many fields are in use and where your fields are used
 - Which fields have feeds in/out
 - Which users or roles have access to fields or layouts
 - In which workflow rule or action these fields exist
 - Original or customized object names
 - Which trigger events are associated with which workflows
 - A complete list of CRM Reports
- Document your system:
 - Define online help for end-users related to page Layouts, fields, and related information
 - Link to supporting documents you've uploaded to our centralized documentation library, from within page layouts
 - Take advantage of unlimited online document storage
 - Administrator online help links to a completely cross-referenced view of every piece of related information

NEW FEATURES:

- DocCompare™, powered by CRMDocs™:
 - Compare two instances, bi-directionally, to see exactly where the discrepancies lie, before your next refresh
- DocExport™, powered by CRMDocs™:
 - Annual Users may download virtually all system information to an Excel Workbook. View all information, just those elements in use, or filtered results

Let us do the heavy lifting.

Our team can work with you to document your CRM On Demand system for end users, link system information for Admins, fully document all business processes, and define and deploy best-practice standards (using DDLC) going-forward.