

# Dynamic Business Documents

Companies can now create and deliver personalized, highly professional documents on an as needed basis quickly and easily!



*Companies today are facing the challenge of creating spontaneous personalized documents for customer communication without wasting time and effort and without risking the loss of a customer because of unprofessional, confusing or even correspondence which contains errors.*

## Solution Description

Dynamic Business Documents is a correspondence management solution developed for the DocOrigin document generation engine. This solution allows companies to generate and preview documents in their ERP, CRM and other enterprise software systems and communicates with DocOrigin through its own web services.

With Dynamic Business Documents, authorized employees from a single department or the whole enterprise can use pre-approved document templates and content to create professional business correspondence and other personalized documents in only four simple steps through a user-friendly interface.

## Summary

- Dynamic Business Documents allows you to design, personalize, preview and generate documents in any ERP, CRM, EMR, or other enterprise system.
- Provides Omni Channel presentation and delivery.
- Empowers users to create personalized highly professional documents spontaneously on an as needed basis in real time using pre-approved document templates.
- Ensures brand integrity and content regulation every time, which minimizes the risk of losing a customer because of unprofessional, confusing or incorrect correspondence.
- DocOrigin is trusted by industry leaders such as AT&T, GE Healthcare, ISCS, Legal & General America, Pella Corporation, Tyler Technologies, WORLD PAC and thousands more!
- Our Customer Communication Management (CCM) software helps companies around the world improve personalized marketing and increase business efficiency.

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## How it Works:

**1** **Select Transaction**  
User searches for transactions requiring personal assistance.

First Name	Last Name	Address	City	Postal Code	Amount Due	Due Date
Chad	Heathcote	45801 Ritchie Heights	Davenport	05210-8282	755	1997-08-06
Wilfred	Grady	3068 Henderson Plains	Kistamouth	35581-9730	624	1983-10-08
Leah	Kub	762 Fay Forest	North Kaitlyn	14036-4952	77	1999-08-12
Chester	Mann	4433 Schowalter Place	Lake Elyssa	82394	611	1980-02-05
Larue	Hermiston	491 Doyle Turnpike	Fisherstad	94412-1550	613	1986-01-04
David	Holter	8100 Clark Summit	West Davenport	62866-3945	134	1991-05-28

**2** **Document Type Selection**  
User chooses from any pre-approved document template one which best meets the needs for this business communication.

Document Type	Description
Bloodpressure Exam Form	Bloodpressure Exam Form
Letter of Credit	Letter to provide customer creditworthiness
Change Inquiry	Unpaid bill transferred to a new account
NDA	Eclipse Non Disclosure Agreement

**3** **Channel Selection**  
User selects from omni-channel distribution methods such as email, fax, print, web, sms, archive etc.

**4** **Document Management**  
The user views the most current Health History Report for the patient, fills in the new values for today's BP test and clicks Update. The updated version is completed and automatically added to health care records and automatically delivered via email, fax or print based on the patient's preference.



**Jeff Gary**  
Business Development Manager  
678-408-1245 ext. 504  
[jeff.gary@eclipsecorp.us](mailto:jeff.gary@eclipsecorp.us)

[www.EclipseCorp.US](http://www.EclipseCorp.US)