



Customer

EZUnsecured
200 S Virginia Street, 8th Floor
Reno, NV 89501
www.ezunsecured.com

background

Industry: Sourcing business finance
Solution: Integrate Inforama with Salesforce to automatically merge contact and account data and return to users.

Introduction

EZUnsecured.com specialize in helping small business owners and entrepreneurs obtain the capital they need to succeed. They use the popular and powerful Salesforce CRM system to store customer and prospect information.

Background

Part of the process of applying for capital on behalf of customers is filling out application forms provided by financial institutions. Anyone who has applied for finance or insurance will be familiar with how labour intensive, tedious and error prone this process can be. EZUnsecured.com needed a solution that could integrate with Salesforce allowing a contact or account details to be merged with third party PDF forms.

Solution

Inforama was selected as the technology which should be used to carry out the mail merge on the PDF forms for the following reasons...

- Inforama is tried and tested in high volume production environments
- It has the necessary web service infrastructure required to make calls from the Salesforce Apex code
- It's is a low cost solution
- Deployment is straightforward
- Management of the Inforama projects is simple

Result

EZUnsecured can now bind Salesforce account and contact fields to PDF form fields simply by matching the names. New forms can be uploaded to the Inforama server and selected by the EZUnsecured Salesforce team for data merging.

Inforama will continue to serve up more and more PDF forms as the demands of this company grow.

“Inforama has dramatically reduced the time we spend processing forms. This has not only cut our overall costs but has also increased our efficiency in dealing with clients.”

Marcio Andrade
Owner
EZUnsecured.com



Customer

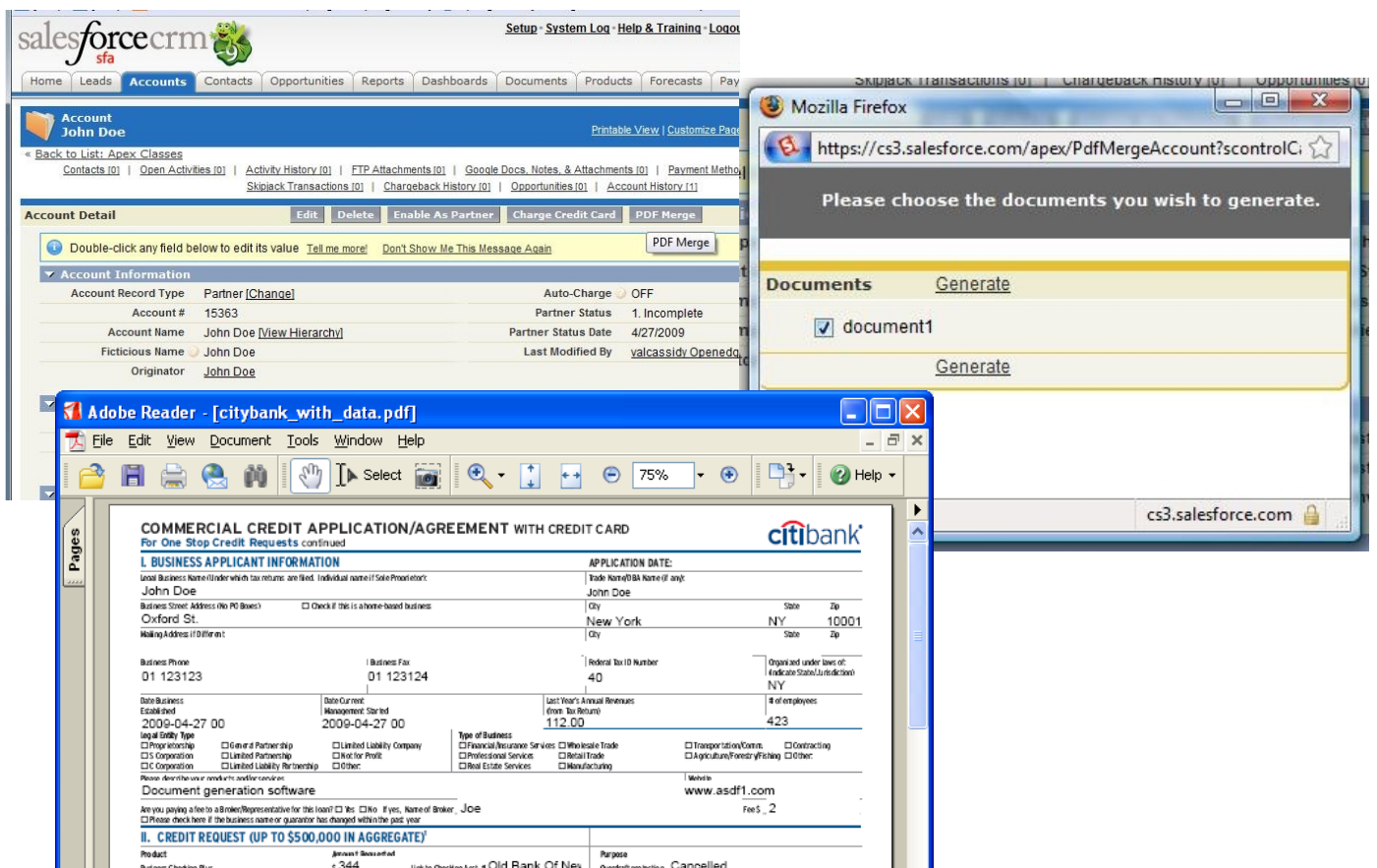
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Salesforce Customization

The account and contact pages in Salesforce were customized to include new 'PDF Merge' buttons which when clicked present the user with a popup listing documents which are present on the Inforama server. The user selects the documents they wish to generate and clicks the Generate button. If a single document is selected the generated PDF document is returned to the user and if more than one document is selected they are returned in a single zip file.



PDF forms can be added to the Inforama server at any time and are available to the Salesforce users immediately.

For more information on Inforama contact
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