DATASHEET: DOCUMENTS APPLICATION

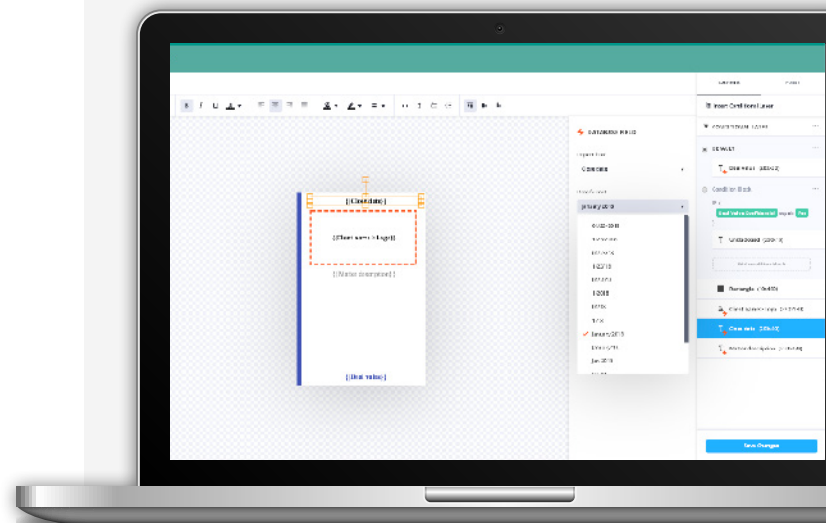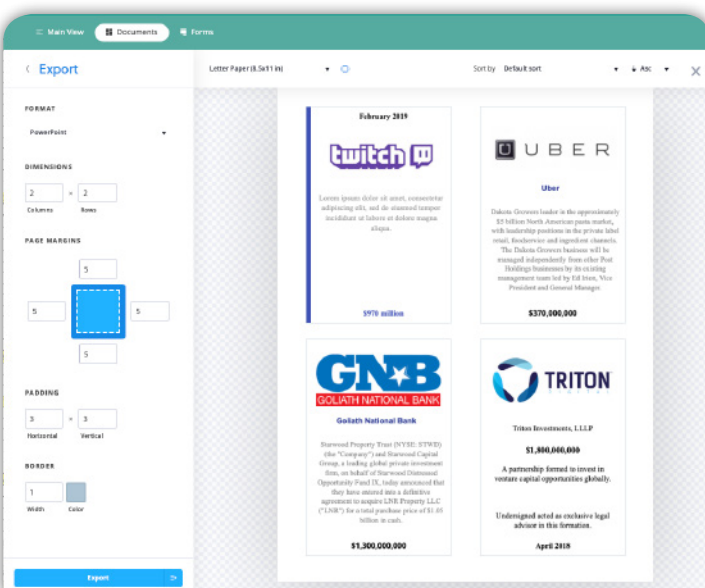# Real-Time, Data-Infused Documents at Your Fingertips

Create branded documents on the fly with the most up-to-date digital assets and information with Pitchly's Documents app that's built on our database platform to normalize and structure your business data.

Upload & Connect Data Sources

First, create one or more databases in Pitchly from scratch or using existing data by connecting your SQL server or importing Excel files (one Excel worksheet = a database). The data populates into multiple databases and are available to search, filter, and cross-reference for making strategic decisions, creating data-infused Microsoft™ PowerPoint slides for inclusion in pitch decks, marketing materials, reports, or any business function powered by your data.

Document Templates Merge Data & Assets

Create branded templates using our drag-and-drop visual designer based on the specific needs throughout your company. Whether it's marketing collateral, sales proposals, HR employee documents, you can ensure brand standards and the most current, up-to-date information is merged into the document and easily exported to PowerPoint to share externally or internally.

BENEFITS

STREAMLINE DOCUMENT DISTRIBUTION

Administrators can set up custom user permission for individuals, job roles, or departments. The templates are accessible for those with rights and can be exported in seconds for external distribution.

DYNAMIC INFORMATION & DIGITAL ASSETS

Team members no longer have to search on file servers, their desktops, or the web for logos, headshots, approved company photography, and imagery. It is saved with the pertinent data and is easy to insert into content pieces from databases.

COMPLIANCE ISN'T AN AFTERTHOUGHT

Create rules to restrict publishing confidential information and ensure templates include required legal disclaimer in the footer of documents.
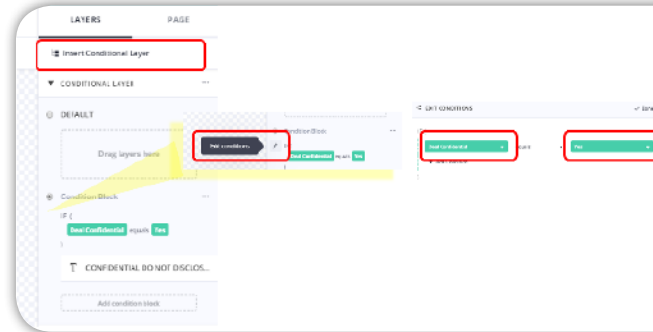
1

Create a template using database fields and digital assets with the following functionality:

- Select template size and insert elements like headings, borders, and shapes right where you want the information with the drag-and-drop visual designer.
- Insert fields from your database to automatically display the value stored in the database (e.g. client name, logo, deal value, won or close date).
- Adjust display settings for inserted fields including desired: currency format, date format, font, color, and styling.
- Save the template with a familiar name (e.g. "For Sale Marketing Flyer" or "Pitch Tombstone")
- Navigate to the connected database, select the records that should use the template, then select the template name from the drop-down list, click save and your content has been created!
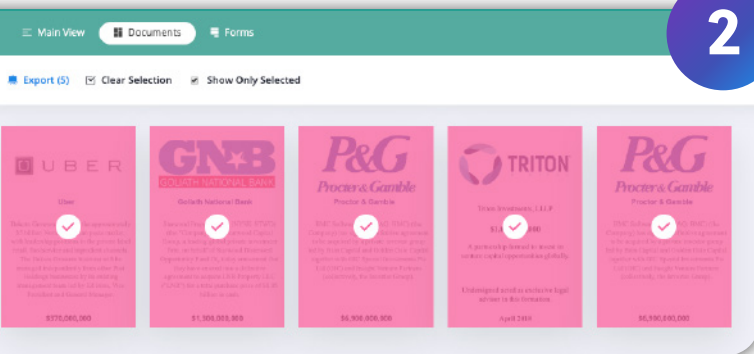

Create conditional presets for confidential information to display substitute preset data points (e.g. McDonald's is replaced with Fast Food Industry or deal value is replaced with Confidential).

2

Select the record(s) you want to export.

1. Select the desired page size for the template design (Letter Paper, Ledger Paper, A3 Paper, A4 Paper, B4 (ISO) Paper, B5 (ISO) Paper, 35mm Slides, Banner, On-Screen Show and Widescreen).
2. Determine how many columns and rows to determine how many records you want each page to display.
3. Adjust margin, padding, border color, order of content by a field (i.e. date) or by drag and drop according to your preferences.

3

Click export to PowerPoint.

Content from the Documents app is also editable in PowerPoint, so changing text, colors, shapes, and location is possible after export.

Be Ready for What's Next

The Documents App helps maintain brand standards among your team members while giving them access to the most current information and digital assets. Your company documents are ready for what's next.

SCHEDULE DEMO ❯

✈ **Pitchly**

in   𝕏   f   ⓞ   ▶

pitchly.com | info@pitchly.com | +1 800 484 2415