

Experlogix Document Automation Template Builder

Dynamic, Data-driven Template Design

Experlogix Document Automation's Template Builder add-in for Microsoft Word gives you the tools and guided functions you need to create dynamic, sophisticated templates, and configure complex workflows and business rules – without IT. You can quickly and easily generate data-driven documents with accurate content, terminology, corporate branding, and formatting, resulting in increased efficiency and improved document consistency.

Features to Accelerate Document Creation

In addition to leveraging Microsoft Word's functionalities for document composition, Template Builder provides dynamic and automated user-friendly features that simplify and accelerate your document creation process.

Experlogix and Salesforce Benefits



01. Dynamic Data Integration

Customer information and data from multiple sources – Microsoft Dynamics 365, Common Data Service, CRM, ERP, CPQ, ECM, and more – can be mapped to appropriate data fields and dynamically integrated with templates.





02. Field Formatting

Pre-defined formatting can be applied to date, time, number, and currency fields mapped in document templates. Specific customized formatting can be set based on configurable conditions.



03. Embedded Digital Content

Barcodes and QR codes, digital images, graphics, multimedia content, and files of any common format – DOCX, PDF, HTML, etc. – can be automatically inserted in document templates.



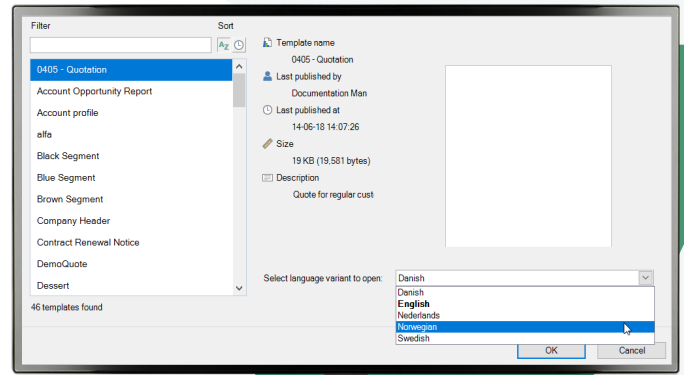
04. Expressions & Conditions

Wizard-driven expressions can be configured to incorporate calculations and complex conditions, as well as to determine the business flow of a template. Conditions for inclusion or exclusion of content are easily set and applied to mapped fields, whether they are a single character, a word, a table row, an image, a paragraph, or a document section.



05. Data-driven Tables

Users can create standard, grouped or filtered subgrid loops to build lists and tables with recurring input data, within document templates.



06. Composed Templates

Composed templates, called “compositions”, can be dragged and dropped into a document body, header, footer, and insert zone during template design. Insertion of compositions can be conditional.



07. Pseudo-fields & Result Sets

Users can create pseudo-fields and add them to templates to execute functions such as calculating totals, editing text and defining complex conditions. Result sets, a type of pseudo-field, can be used to filter through a list of items based on pre-defined conditions.



08. Language Variations

A template can have multiple language variations; document language selection can be automated based on customer preference, jurisdiction or country.



09. Version Control & Preview

Templates can be checked-in while they are being worked on, previewed to show the documents with data samples, and checked-out when completed. This function also enables users to return to previous versions, compare and see where changes have been made.

