Xpertdoc vs Out-of-the-Box Dynamics 365
A Head-to-Head Document Generation Comparison

You need to generate personalized customer-facing documents and are already using Microsoft Dynamics 365, but how do you know it is the right fit for your business' document generation and document automation requirements?

Here is a comparison guide highlighting the capabilities of Xpertdoc for Dynamics 365 and out-of-the-box document generation features found in Microsoft Dynamics 365. It will help you determine the best option for your business.

TRIGGERING THE DOCUMENT CREATION PROCESS

Features	Xpertdoc	OOTB Dynamics 365
Via user interaction (command bar)	✔	✔
Via Dynamics 365/CRM workflows	✔	✔
From external code (REST API call)	✔	

OUTPUT OPTIONS

Features	Xpertdoc	OOTB Dynamics 365
Create documents in other formats than .docx (.doc, PDF, html, .rtf, .xps, .txt, etc.)	✔	
Create documents with dynamic names	✔	
Create documents in the right language based on CRM field value	✔	
Convert documents with additional settings (e.g., output quality settings, access and security settings)	✔	

POST-PROCESSING OPTIONS

Features	Xpertdoc	OOTB Dynamics 365
Use visual designer to manage document generation, delivery and storage flows, with conditional logic	✔	
Save to Microsoft SharePoint (select storage location, with or without metadata)	✔	
Store on external drive (FTP over SSH, Local Filesystem, WebDAV, Windows Share, etc.)	✔	
Create Task/Letter/Email Activity and attach generated document	✔	
Create Note and attach generated document	✔	Only when generated via workflow
Use generated document to populate the email body instead of attachment	✔	
Use another document to populate the email body	✔	
Attach and email via SMTP	✔	
Print to a network printer or Google Cloud Print	✔	
E-sign generated document with DocuSign or Sertifi via email	✔	
E-sign generated document in person with DocuSign or Sertifi, using stylus on tablet	✔	

DATA SELECTION

Features	Xpertdoc	OOTB Dynamics 365
Include all entity types, all field types, and all relationship types	✔	✔
Include multiple levels of relationship	✔	
Extend data set with user input during document creation process	✔	
Merge external data in documents (schema based data sets, data retrieved from URL)	✔	

Contact us at info@xpertdoc.com,
1-866-961-9111 or +32 52 52 27 70
www.xpertdoc.com

TEMPLATE DESIGN

Features	Xpertdoc	OOTB Dynamics 365
COM add-in for Microsoft Word	✔	Via Developer ribbon
Map fields by display name	✔	
Loop sub-grids	✔	One level deep
Sort and limit loops	✔	
Group loops (e.g., products per product type)	✔	
Loop filtered result sets	✔	
Conditional content	✔	
Apply conditions based on user input during document generation process	✔	
Conditional formatting	✔	
Field formatting for date, time, number, currency, percentage, etc.	✔	
Re-usable styles for date, time, number, currency, percentage, etc.	✔	
Convert case (e.g., ALL CAPS to Sentence case)	✔	
Find, replace and/or insert text in mapped value	✔	
Dynamic integration of images from CRM, URL or lookup table	✔	Only entity images
Insert dynamic hyperlinks	✔	
Insert existing documents (.doc, .docx, PDF, html) from CRM or URL	✔	
Do calculations	✔	
Create calculated pseudo fields and pseudo relationships to connect data points from various sources	✔	
Create charts showcasing your data	✔	

Contact us at info@xpertdoc.com,
1-866-961-9111 or +32 52 52 27 70
www.xpertdoc.com

TEMPLATE MANAGEMENT

Features	Xpertdoc	OOTB Dynamics 365
Template store location	Xpertdoc server	Microsoft Dynamics 365/CRM
Compose templates with template segments for header, footer, body and insert zone	✓	
Sub-categorization of templates (sub-folders, tags)	✓	
Clone templates	✓	
Manage template access restrictions	By security role, by business unit and by team	By user
Enable template versioning with comments and rollback	✓	
Manage translations per template	✓	
Promote templates (DEV-UAT-PROD) across one or more servers	✓	
Provide detailed logging and reporting	✓	

IT

Features	Xpertdoc	OOTB Dynamics 365
Fully documented REST API	✓	
Extensibility via custom document post-processing configurations	✓	

Request a free 30-day trial
of Xpertdoc's powerful document generation and document automation solution!

Xpertdoc