

# Experlogix Document Automation Smart Flows

**THE POWERFUL AND INTUITIVE AUTOMATED DOCUMENT FLOW SOLUTION**

## Automated Document Flows Made Easy

Experlogix Document Automation Smart Flows are easy-to-configure, automated processes for the creation, generation, management, storage, delivery, and e-signature of business documents, correspondence, or any other documents.

## Features to Streamline Your Processes

Experlogix Document Automation's Smart Flows feature powerful tools that enable business users to automate simple or complex document flows without coding skills, streamlining your processes from creation to delivery.

## Smart Flows Features



### 01. Intuitive Building Interface

Available in English, French and Dutch, the intuitive interface of Smart Flows allow users to easily and visually build automated document flows by adding and arranging flow blocks each executing a specific action – generate, print, send an email, store, e-sign, and more.





## 02. Programmed Functionalities

Smart Flows comes with a REST API based on the OpenAPI Specification (OAS). Every functionality available in the component can be called from a series of programmed “get,” “post,” “put,” and “delete” functions, providing flexibility to technical users.



## 05. Linked Flow Blocks

Flow blocks can be linked together to ensure the generated documents properly trigger the next steps, such as sending an email with documents attached or printing to a network printer. Linked blocks also provide further personalization capabilities through dynamic fields enabling the insertion of account information, custom message or e-signature link.



## 03. Unlimited Data Sets

Multiple data sets – Microsoft Dynamics 365/Common Data Service, SugarCRM, Salesforce, ERP, CPQ, ECM, user input, XML, and other data sources – can be created and combined in documents during the flow execution. Smart Flows have no limitations on the data you can use in your business documents.



## 06. Conditional Document Flows

With Smart Flows, users can configure automated document flows that contain conditional steps. Depending on if a condition is true or false, the generated documents follow a different path – for example, sending documents by email or via an e-signature platform.



## 04. Consolidated Document Storage

Generated documents can be automatically stored in Experlogix Document Automation’s Content Manager, Microsoft SharePoint or other content management system. When integrated with a CRM platform like Microsoft Dynamics 365, SugarCRM and Salesforce, users can leverage Smart Flows to create a new record in the corresponding Document section and attach a document.



## 07. Centralized Management Console

Experlogix Document Automation Smart Flows include a centralized management console, providing an integrated control panel where users can access and manage project settings, controls, configurations, and flow errors. A reporting interface offers detailed insights in adoption, usage and performance.

