

Experlogix Document Automation for SugarCRM

BETTER, FASTER DOCUMENT GENERATION FOR SUGARCRM

Seamlessly integrated with SugarCRM, Experlogix Document Automation empowers your business users to easily build and automate simplified and optimized document processes from your environment – resulting in increased productivity, enhanced document quality and reduced dependence on IT.

Improve Productivity with Optimized, Automated Document Flows

Experlogix Document Automation for SugarCRM lets you build and run any document generation, approval, delivery, and storage process that leverages data from Sugar, Experlogix DA's web-based Smart Forms, and external data sources.

Leverage Accurate Data from Across and Beyond SugarCRM

With a single click, you can combine data from multiple sources across and beyond SugarCRM to deliver personalized, accurate and high-quality documents to your customers. Experlogix Document Automation for Sugar has no limitations on the data you can use and combine in your business documents.

Reduce Dependence on IT and Empower Business Users with Robust Capabilities

Experlogix Document Automation for SugarCRM features robust tools and capabilities that make the generation, approval, delivery, and storage of business-critical documents effortless.

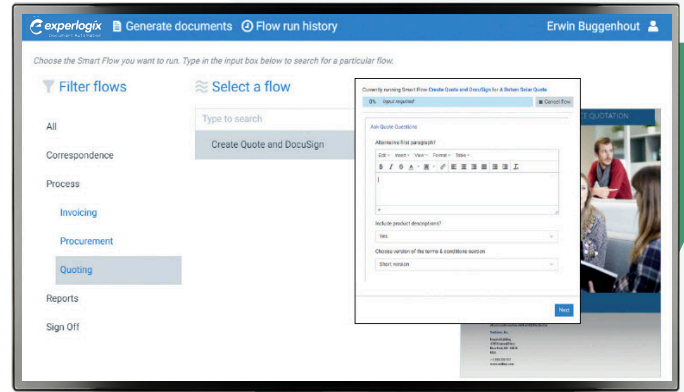


Key Features



01. Modern, Responsive User Interface

Available in English, French and Dutch, the modern and responsive user interface of Experlogix Document Automation for Sugar allows for intuitive, straightforward navigation, enabling users to easily and efficiently accomplish their document generation tasks both on the web and on connected mobile devices.



02. Conditional Document Flows

In the embedded Flow Builder, users can visually build automated document flows that contain conditional steps, such as sending generated documents by email, to a network printer or via an e-signature platform, creating Notes and Tasks with attached documents, and storing generated documents in Experlogix DA's Content Manager or the Sugar Document module.



04. Advanced Document Design

Featuring an added ribbon toolset and a mapping pane, the Template Builder add-in for Microsoft Word allows users to create dynamic, sophisticated and professional templates.



05. Document Storage Directly in SugarCRM

Users can create a new record in Sugar's Document module and attach a generated document. The document can be related to any other SugarCRM record in a sidecar module triggering the flow execution.



03. Centralized Management Console

Experlogix Document Automation for SugarCRM includes 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 into adoption, usage and performance.



06. Quick Flow Execution

From any sidecar module, users can use the Experlogix Document Automation's Quick Flow dropdown to start pinned document flows. Alternatively, flows can be selected and started from our intuitive, step-by-step Flow Execution panel.



07. Role-based Flow Selection

Flow selection can be filtered by security role to ensure that sales representatives, for instance, can only select and start document flows that are relevant to their role. This helps eliminate delays and errors associated with sending the wrong documents.

