

# Experlogix Document Automation for Salesforce

## EFFICIENT DOCUMENT GENERATION, SEAMLESSLY INTEGRATED WITH SALESFORCE

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

## Automated Document Flows Optimized for Salesforce

Experlogix document automation for Salesforce lets you build and run any document generation, approval, delivery, and storage process that leverages data from Salesforce, web-based Smart Forms and external data sources – all without code.

## Leverage Accurate Data from Across and Beyond Salesforce

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

## Experlogix and Salesforce Benefits



### 01. Modern, Responsive User Interface

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





## 02. Conditional Document Flows

In the embedded Flow Builder, users can visually build automated document workflows 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 the Experlogix DA Content Manager or the Salesforce Documents tab.



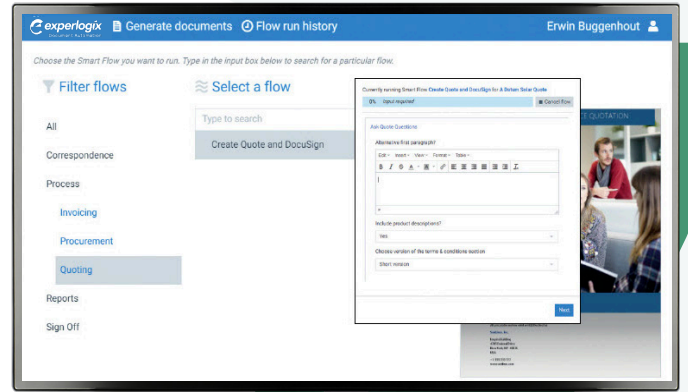
## 03. Centralized Management Console

Experlogix Document Automation for Salesforce provides 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.



## 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 document templates. Users can also add in expressions to incorporate calculations, as well as complex conditions for inclusion or exclusion of content.



## 05. Quick Flow Execution

From any Salesforce object, users can use the Quick Flow dropdown to start pinned document workflows. Alternatively, flows can be selected and started from our intuitive, step-by-step Flow Execution panel.



## 06. Seamless Integrations

Experlogix Document Automation for Salesforce offers seamless integrations with leading applications and enterprise core systems – ERP, CPQ, ECM, file storage and sharing, and electronic signature. It can also be connected to other Experlogix DA components such as Smart Forms and Content Manager.



## 07. Programmed Functionalities

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

