



XPERTDOC **EBOOK** SERIES

# 5 Ways Microsoft Power Platform and Xpertdoc Team Up to Create Business Benefits

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## Introduction

Microsoft Power Platform is a system comprising three modules – Power Apps, Power Automate and Power BI – that enable organizations to create business applications, automate processes and report results using a low-code approach. No programming expertise is necessary. Business users with a minimal amount of technical skills can take advantage of these tools to easily build custom applications, automated workflows or any solutions they need, on their own.

Power Platform naturally integrates with other Microsoft products such as Azure, SharePoint, Outlook, or Dynamics 365, as well as with hundreds of data sources and applications, like Xpertdoc.

Xpertdoc is also a user-friendly platform focused on automating business processes. Non-technical staff members leverage the Xpertdoc document generation product to automate the creation, management, delivery, storage, approval, and e-signature of dynamic, data-driven documents – all without support from the IT department. It is only natural that these two systems should work together, and they do so seamlessly via the Xpertdoc connector for Microsoft Power Platform.

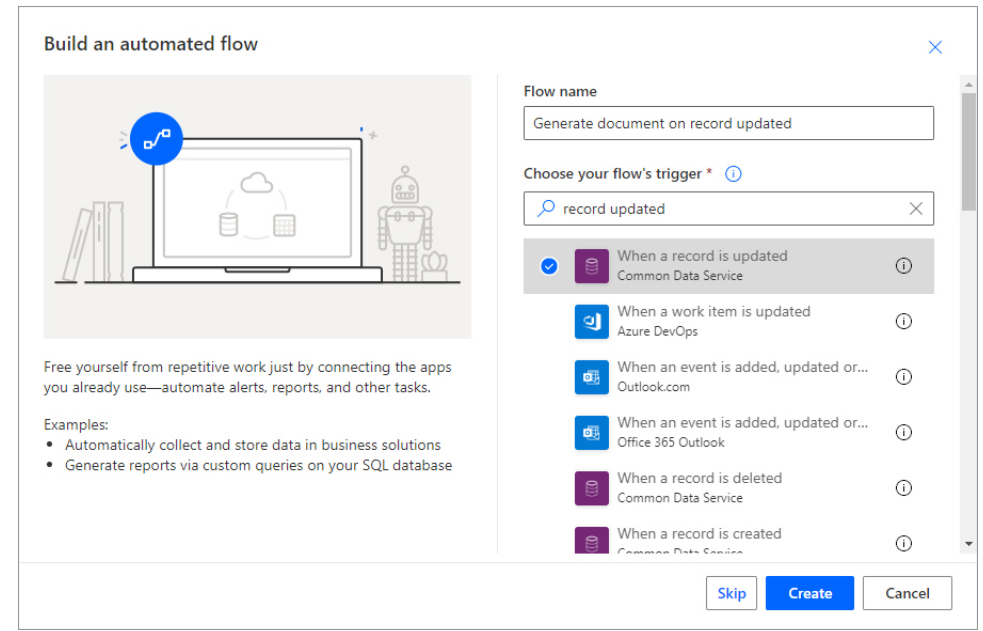
Why would you want to replace your current processes with versions powered by Xpertdoc and Power Platform? Here are five ways Microsoft Power Platform and Xpertdoc team up to help companies achieve business benefits such as savings in labor and time, compliance with regulatory requirements and customer service improvements, without ever involving their over-tasked IT resources.



# 1. Automate Document-centric Tasks to Streamline Complex Processes

Power Automate can watch for events and automatically begin running automated processes built by users. A change in a customer record that happens in Dynamics 365, for instance, can trigger a Power Automate flow.

The flow might access several data sources to gather the information necessary to create a quote, a proposal or other business document. Data incorporated in the dynamic document may come from a Dynamics 365 system, pricing and supplies databases, terms and conditions libraries, and other sources used in the organization. The automated flow may even request specific input or comments from a salesperson via text messages generated by Power Automate. Power Automate collects all the data and then connects with Xpertdoc.



Watch our demo to see how you can **quickly and easily complete document processes** with Xpertdoc and Microsoft Power Automate.



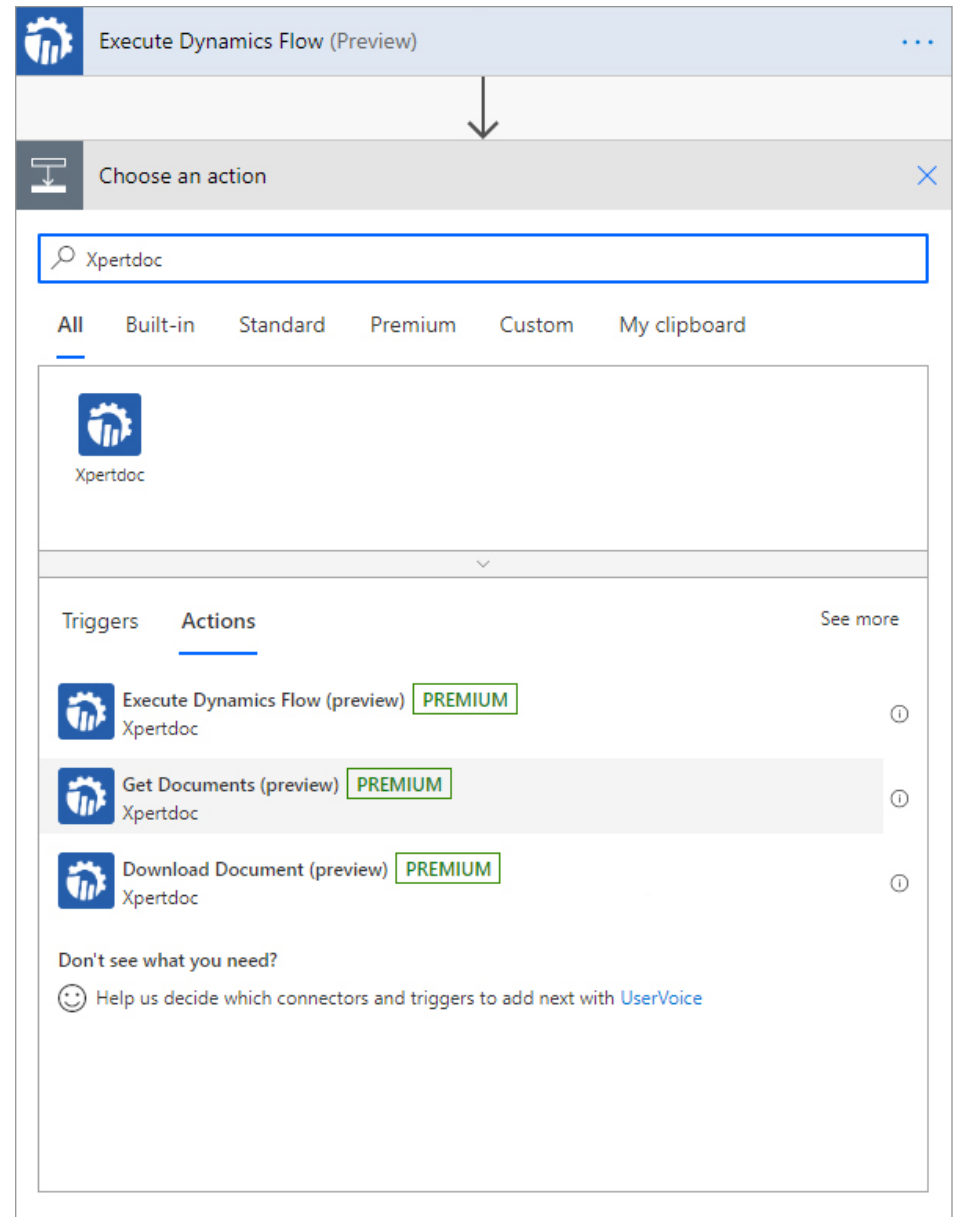
Xpertdoc handles the document generation based on data-driven templates. It also controls document review and approval tasks before connecting back to Microsoft's Power Automate to update the customer record in Dynamics 365 and send the quote or proposal to the customer, in a single streamlined and automated flow.

## 2. Replace Manual, Paper-based Document Processes

Many organizations still spend hours on repetitive, manual tasks that are heavily relying on paper forms, like processing employee expense reports. With Power Automate, they can develop a time-triggered flow that sends field workers reminders to submit their expenses at the end of each month via a mobile application created with Power Apps.

Microsoft Power Automate collects the data - employee ID and department, date of expense, expense category, amount, etc. - submitted from the mobile application. Through the Xpertdoc connector, this information is automatically incorporated in an expense report template.

The generated expense report documents are routed to managers for approval. Once approved, the flow continues without friction via Power Automate, which runs automated steps to record the expenses in the company's accounting system and issue employee reimbursements.



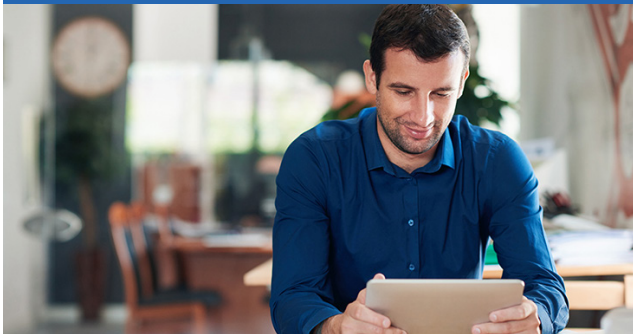
### 3. Ensure Timely Compliance with Regulations

Some regulatory bodies require businesses to periodically file reports. Missed deadlines can spark warnings, fines or other penalties. Microsoft's Power Automate can initiate the process to collect the data, triggered by an upcoming due date.

Once Power Automate connects with Xpertdoc, a company can automatically assemble reports based on templates, and send the resulting documents to the regulators. After the reports are sent, Power Automate records the compliance date and stores a copy of the documents in a connected file storage system such as Microsoft SharePoint, Microsoft OneDrive or Dropbox.



Watch our demo to see how you can **effortlessly store documents** using Xpertdoc and Microsoft Power Automate.



## 4. Automate Content Promotion in the News and Social Media

An organization might use Xpertdoc to create press releases automatically when it signs new customers. When a prospect in the Microsoft Dynamics 365 system changes to a "Closed-Won" status, the event triggers a Power Automate flow leveraging the Xpertdoc connector.

Xpertdoc generates a template-based press release that includes variable data pulled from the prospect record in Dynamics 365. The generated press release is sent to appropriate parties for approval. Once approved, Power Automate posts the press release to the company website and distributes the document to news outlets via email.

A second Microsoft Power Automate flow watches for newly posted press releases and generates social media posts for LinkedIn, Twitter and other selected social media platforms. The flow can also notify internal employees about the new customer by sending them an email with the press release attached.

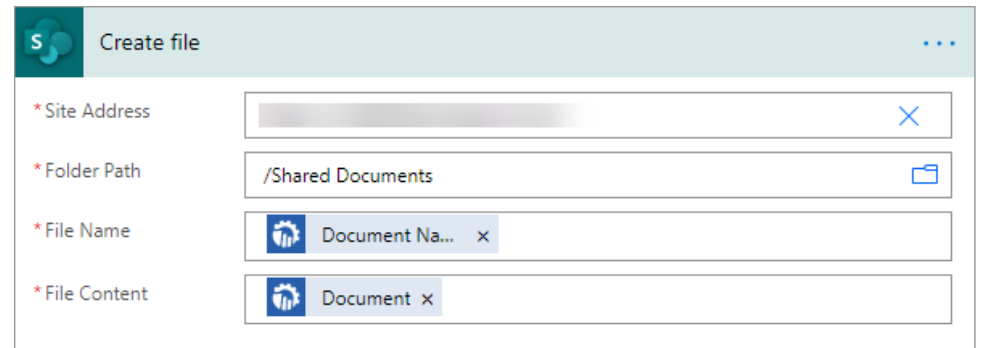


## 5. Archive Documents to Improve Customer Experience

Companies in all industries struggle to create 360-degree views of their customers. With customer transactions and communications stored in separate, unconnected systems, gathering all the information an organization has on each customer in a single location is a big challenge.

Many companies rely on individual employees to manually upload customer communications – often in document form – to a centralized repository, which can lead to errors and omissions. But Microsoft's Power Platform and Xpertdoc provide a better way.

Power Automate watches for any new documents generated via Xpertdoc as a result of an interaction with a customer, and copies them to an archive arranged by customer (Power Automate creates a single folder for each customer). By consolidating all documents issued across an organization, the folder records customer interactions that occurred in separate departments like sales, customer service, collections, operations, and legal, to create a 360-degree view of customers. This allows future interactions to be more relevant and informed, ultimately improving customer experience.



The screenshot shows a 'Create file' dialog box with the following fields:

- \* Site Address: [Empty text box]
- \* Folder Path: /Shared Documents
- \* File Name: Document Na... x
- \* File Content: Document x

Learn more about the **powerful key features** of Xpertdoc for Microsoft Power Platform.





## Conclusion

Microsoft Power Platform allows organizations to build apps and automated flows quickly and easily, while reducing dependence on busy IT resources. Connecting to data sources and business applications like Dynamics 365 and SharePoint, along with hundreds of other applications, makes Power Platform a versatile tool for companies of all sizes. When they combine Power Platform with Xpertdoc's document generation and automation capabilities, companies open the door to powerful functionality enabling them to dramatically accelerate processes, increase productivity, save money, and eliminate errors and delays.

Automation is on the mind of most businesses today. The need to automate processes was never more urgent than during the coronavirus pandemic, when companies were suddenly forced to re-invent business processes with their employees working from home. IT departments were overwhelmed with new requests for networking, support and security. Internal automation projects for the departments were not high on their priority list.

Fortunately for business units already using Xpertdoc, they could easily build automated processes that worked for their newly distributed workforce. They combined Xpertdoc's document generation capabilities with the extensive functionality of Microsoft Power Platform to develop, test and implement solutions right away, instead of waiting for IT resources to become available.

Companies understand that to grow and compete, they must empower business users to automate, streamline and digitize tasks they have traditionally managed by hand or relegate to the IT department. If you have yet to investigate Microsoft Power Platform and Xpertdoc, or you need help in identifying solvable automation challenges in your organization, contact us at [info@xpertdoc.com](mailto:info@xpertdoc.com).

