

Document Automation

as Easy as 1, 2, 3

Experlogix Document Automation provides business users with all the components and capabilities they need to:



Simplify



Optimize



Automate

business-critical document processes.

Automate these steps with just a few clicks:

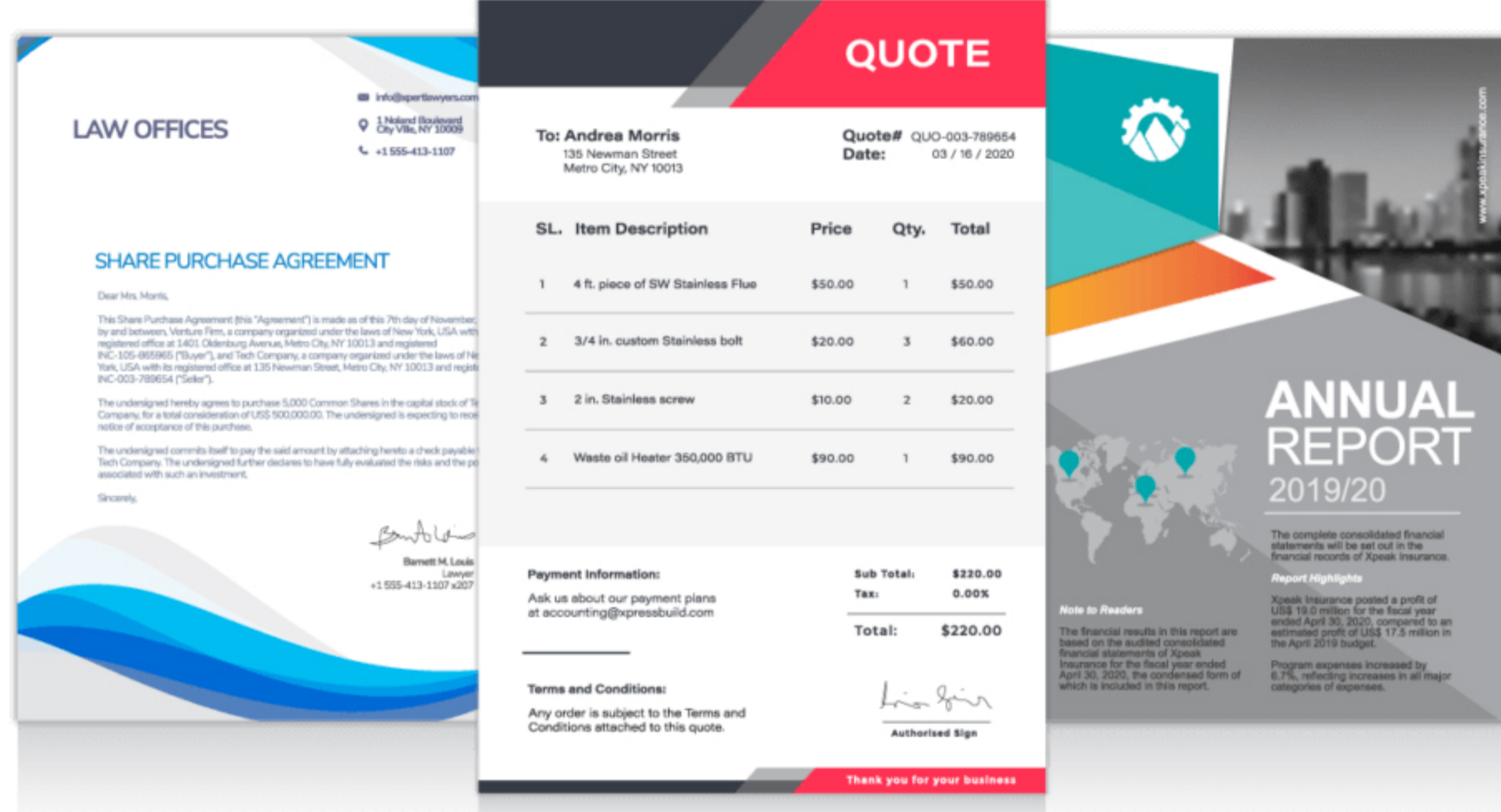
CREATE

GENERATE

SEND

E-SIGN

STORE



01 GET YOUR DATA



Pull data from multiple data sources – CRM, CPQ, ECM, ERP, and more – to create data sets



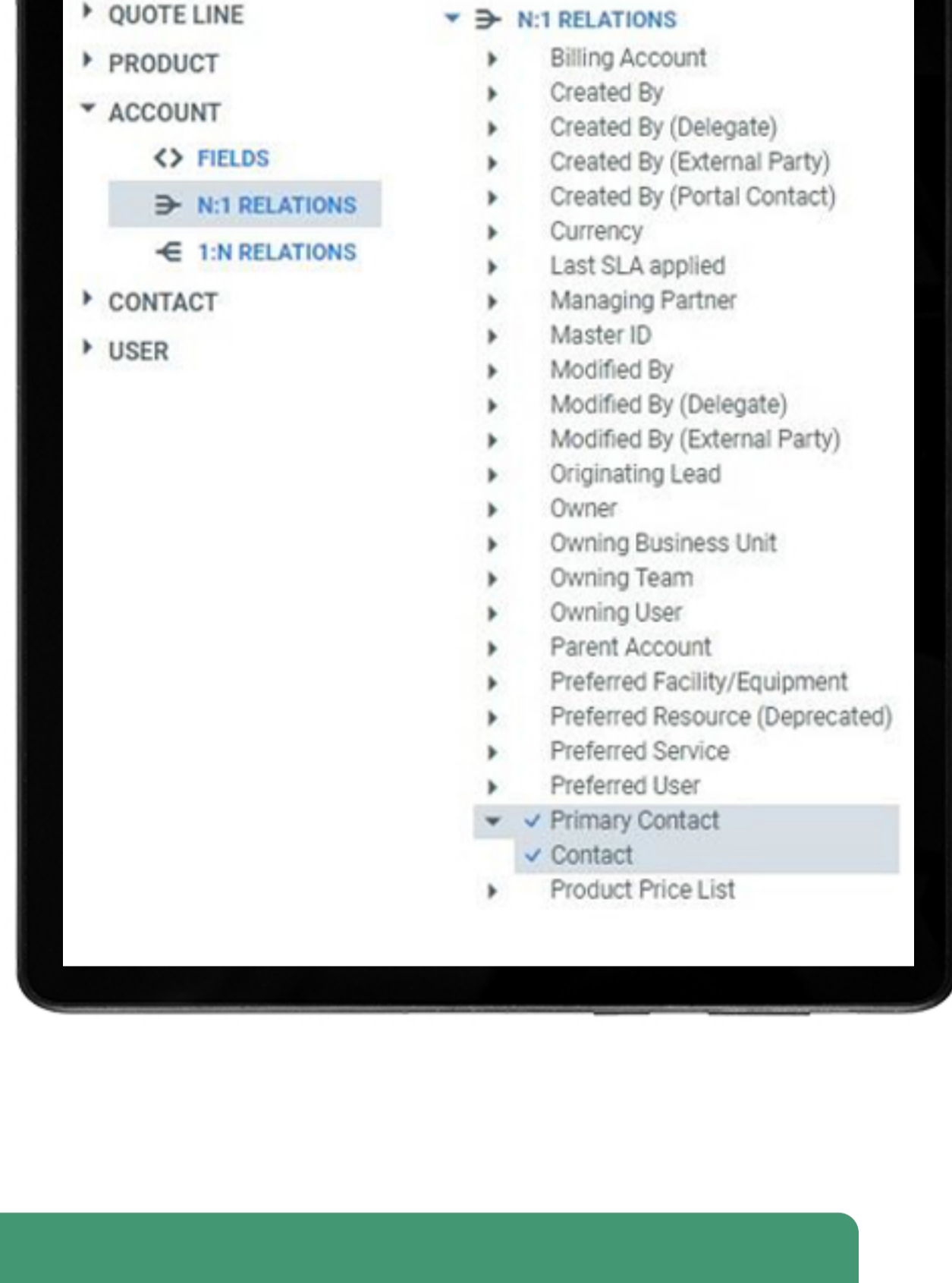
Fully integrate with Microsoft Dynamics 365/Dataverse, Salesforce and SugarCRM



Utilize external user input, XML and our API to connect to unlimited data sources

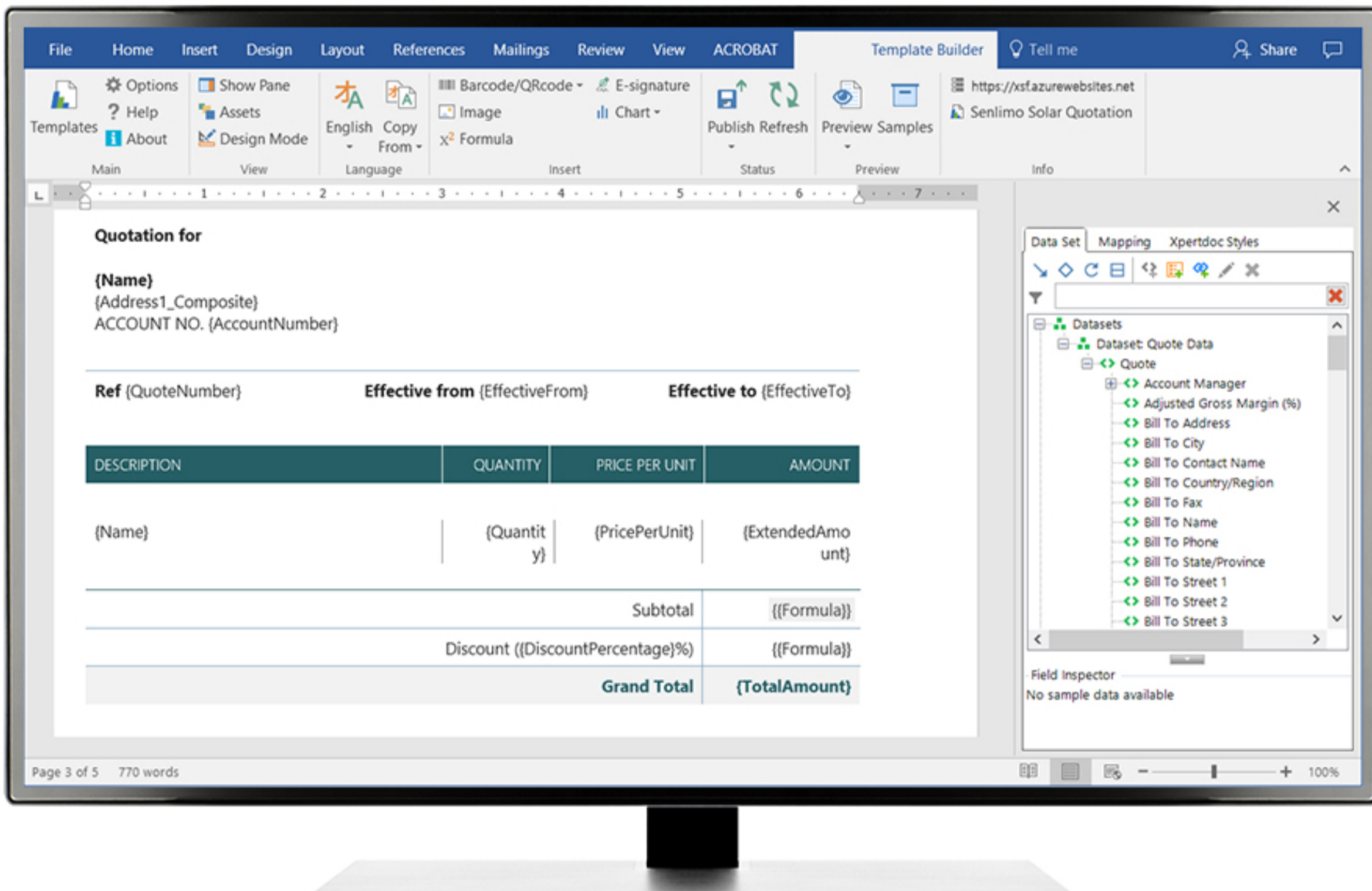
Input From:

- ✓ CRM
- ✓ Policies
- ✓ Contracts
- ✓ Claims
- ✓ Billing
- ✓ ERP
- ✓ ECM



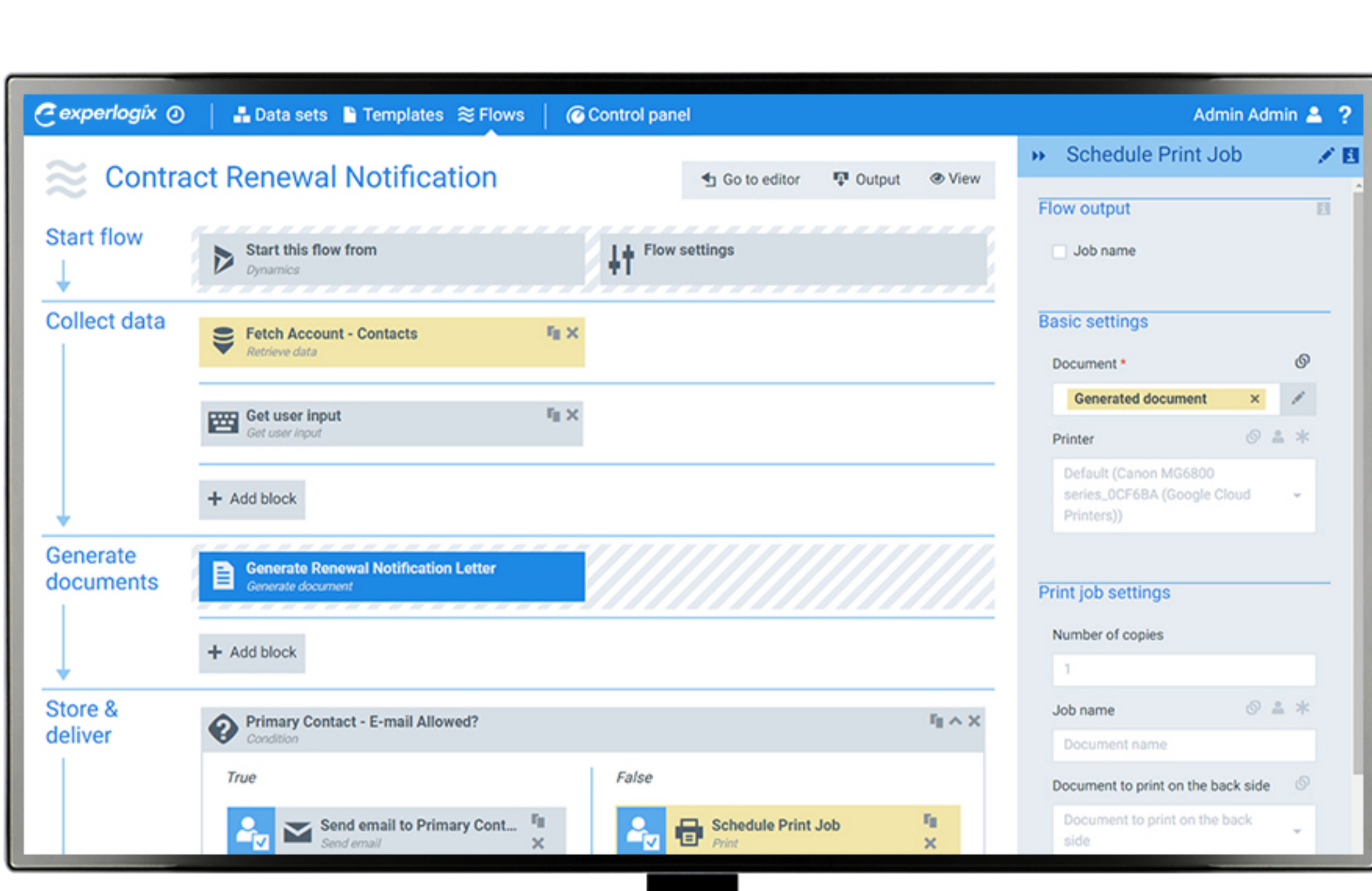
02 DESIGN YOUR TEMPLATE

Experlogix Document Automation's Template Builder add-in for Microsoft Word gives you the tools and guided functions you need to create dynamic, sophisticated and professional templates, and configure complex workflows and business rules – without IT. You can quickly and easily generate data-driven and compelling documents with accurate content, terminology, corporate branding, and format, resulting in increased efficiency and improved document consistency.



03 CREATE YOUR FLOW

Experlogix Smart Flows are easy-to-configure, automated processes for the creation, generation, management, storage, delivery, and e-signature of business documents. With the click of a button, you are empowered to create the most compelling quotes, contracts, invoices, reports, correspondence, or any other documents, guided through logic-based, optimized post-processing, approval, delivery, and archiving paths, to better engage with your customers all while increasing productivity.



Deliver accurate, completed, signed documents to customers through automated flows.



STORE documents in multiple systems



E-SIGN from many applications



GENERATE documents in batches



PRINT through any services



DELIVER documents via all channels

Easily, efficiently, without IT.



Get a demo