Experlogix Document Automation Smart Flows

THE POWERFUL AND INTUITIVE AUTOMATED DOCUMENT FLOW SOLUTION

What is Experlogix Smart Flows?

Experlogix Smart Flows are easy-to-configure automated processes for creating, generating, managing, storing, delivering, and e-signature of business documents. Easily automate simple or complex, consistent document flows without coding.

Streamline Your Process From Creation to Delivery

Create compelling quotes, contracts, invoices, and more using the built-in flow builder. Increase productivity and better engage with your customers with logic-based and optimized post-processing, approval, delivery, and archiving paths for your documents.

Smart Flows Features

✓ Generate documents with detailed information using unlimited data sets, combined from multiple data sources.

✓ Configure automated document flows that contain conditional steps to correctly route documents.

✓ Add, arrange, or link Flow Blocks to execute personalized actions and easily send, print or store any document.

01. Seamless Integrations

Experlogix Smart Flows seamlessly integrates with Microsoft Dynamics365/Dataverse, SugarCRM, and Salesforce.

02. Unlimited Data Sets

Multiple data sets – Microsoft Dynamics 365/Dataverse, 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.

03. 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.

04. 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.

05. 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.

06. 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.

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