

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.

Leverage Accurate Data from Across and Beyond SugarCRM

With a single click, you can combine data from multiple sources across and beyond SugarCRM to build and run any document generation, approval, delivery, and storage process. Experlogix Document Automation for Sugar has no limitations on the data you can use and combine in your business documents.



Increase Productivity



Enhance Document Quality



Reduce Dependence on IT



Deliver High-Quality Documents



Generate Personalized and Accurate Documents

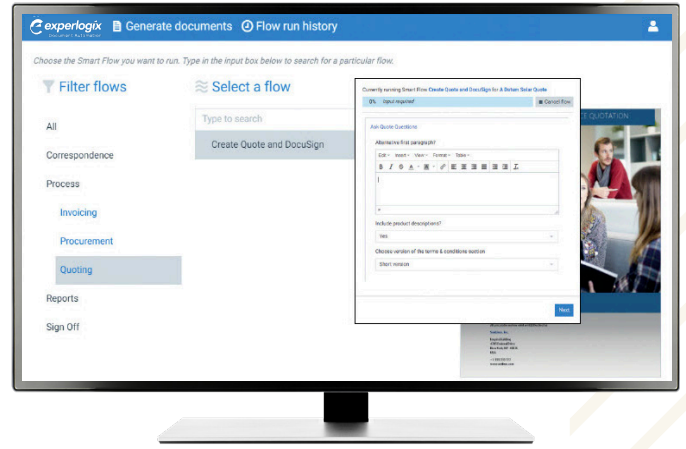


Minimize Delays and Errors



Key Features

TEMPLATE DESIGN
Loop (grouping, filtering, sorting)
Conditions based on user input
Conditional formatting
Field format (date, time, number, currency, etc.)
Re-usable styles for date, time, number, etc.
Dynamic integration of images from sources
Append existing documents (.doc, .docx, PDF, etc.)
Calculations
Calculations and calculate pseudo-fields
Chart generation and insertion
Bar code and QR code
Multi-language support
Composed templates (header, footer, body, inserts)
Template versioning with comments and rollback
OUTPUT MANAGEMENT
19 document formats
Print to a local printer
PrintNode
Preview and approval process
Flow execution reporting
AUTOMATION
Smart Flows visual flow builder
Workflow management (third party workflow tool req.)
Preview and approval workflow
Manual or automatic flow triggers



01. 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.

02. Conditional Document Flows

In the embedded Flow Builder, visually build automated document flows that contain conditional steps, such as sending generated documents by email, to network printer or via an E-sign platform. Create Notes and Tasks with attached documents and store generated documents in the Sugar Document module.

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.

05. Document Relation 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.

