



Better Proposals and Contracts for Manufacturers

Create, manage and deliver complex manufacturing documents and communications, quickly and easily.

From compiling complex quotes and creating detailed invoices to generating contracts and customer letters, Xpertdoc enables manufacturers to solve industry-specific document challenges through features that make creating, managing and delivering documents better, faster.

BENEFITS FOR MANUFACTURERS

Xpertdoc easily integrates with enterprise core systems such as CRM, ERP, CPQ, spreadsheets, and other platforms to pull the most current, accurate and real-time data into your documents. With prebuilt integrations to eSignLive, AssureSign and DocuSign, capturing signatures is done in minutes, accelerating transaction times and improving customer experience.

- **Reduce** time spent on document creation
- **Automate** the creation of standard forms and documents with templates
- **Eliminate** document errors
- **Enforce** branding and formatting
- **Streamline** business processes
- **Improve** customer experience

THE XPERTDOC PLATFORM IS IDEAL FOR



Proposals



Contracts



Invoices



Purchase Orders



PDF Forms



Agreements



Quotes



Offer Letters



Statements of Work



Renewals

THE XPERTDOC PLATFORM

Xpertdoc's award-winning platform enables manufacturers to create, manage and deliver highly personalized, omnichannel documents across the entire customer lifecycle.

Key Features	
Document Generation	Start from a pre-built document template or create a brand new document to address almost any use case.
Data Merge	Merge data from any enterprise core systems and data sources (CRM, ERP, CPQ, in-house databases, spreadsheets, and more) into your documents.
Template Design	Create responsive, data-driven templates that integrate graphics and multimedia content, and configure complex workflows and business rules – quickly and easily using Microsoft Word.
Conditional Content	Ensure documents have the right messaging with logic-based rules for including or excluding content.
Workflows	Leverage existing workflows and business rules to deploy, send, and store documents.
Delivery Options	Omnichannel delivery options include the ability to send documents via email, e-signature applications, print, fax, SMS or using our APIs, save documents as attachments in your CRM or store documents in SharePoint.
Document Repository	Archive and house all generated documents in a secure and central location.
Company Branding	Add your company logo, change colors or insert rich media.
Mobile Support	Create, edit, negotiate and sign documents anywhere, anytime, from any device.
Document Formats	PDF, .doc and .docx, html, and more.