



Effective 1 November 2018

# Xpertdoc for Business

Recommended  
End User Pricing  
Canadian Dollar (\$)

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# Software Editions

Xpertdoc for Business comes in different forms and shapes, designed to match your specific needs as a unique organization at any given point in your digital transformation journey.

## STANDARD EDITION

Are you a small or medium-sized organization looking to digitize some of your document creation processes (quoting, sending correspondence, reporting...)? Do you have up to 50 users, and expect to generate up to 6,000 documents per year?

Then the **Standard Edition** is just right for you. It gives you access to the broad capabilities of Xpertdoc Smart Flows as a service, fully integrated with your CRM system.

## PREMIUM EDITION

Are you a medium-sized organization looking to digitize document creation processes (quoting, sending correspondence, reporting...), data capture and/or document management? Do you have up to 100 users, and expect to generate up to 60,000 documents per year?

Then the **Premium Edition** is the perfect match. It gives you access to the broad capabilities of Xpertdoc Smart Flows as a service, fully integrated with your CRM system and your other systems of data. And you can extend your subscription with access to Smart Forms for data capture and the Content Manager for document management on the Xpertdoc Extended Business Cloud.

# Software Editions

## ULTIMATE EDITION

Are you a medium-sized or larger organization looking to digitize document creation processes (quoting, sending correspondence, reporting...), data capture and/or document management on demand or in bulk? Do you expect to generate up to 600,000 documents per year?

Then the **Ultimate Edition** is the perfect match. It gives you access to the broad capabilities of Xpertdoc Smart Flows on dedicated infrastructure, fully integrated with your CRM system and your other systems of data.

And you can extend Smart Flows with access to Smart Forms for data capture and the Content Manager for document management, Document Services for customized document delivery patterns and support for high-complexity/high-volume template executions on the Xpertdoc Extended Business Cloud.



# Detailed Software Editions Overview

## ACCESS TO FEATURES

### CORE FUNCTIONALITY

	<u>STANDARD</u>	<u>PREMIUM</u>	<u>ULTIMATE</u>
Manage your project with data sets, templates and flows in the Xpertdoc Smart Flows Project Console	✓	✓	✓
Start flow execution with user input from the Flow execution panel	✓	✓	✓
Edit templates (Smart Flows project) with Xpertdoc Template Builder for Microsoft Word	✓	✓	✓
Edit templates (Template Manager) with Xpertdoc Template Designer for Microsoft Word			✓

### MICROSOFT DYNAMICS/SHAREPOINT INTEGRATION

	<u>STANDARD</u>	<u>PREMIUM</u>	<u>ULTIMATE</u>
Start flow executions from MsDyn365 user interface	✓	✓	✓
Start flow executions from MsDyn365 workflow	✓	✓	✓
Create notes & activities (email, letter, task) in MsDyn365 with attached documents	✓	✓	✓
Store generated documents in Microsoft SharePoint	✓	✓	✓

# Detailed Software Editions Overview

## DATA CAPTURE

	<u>STANDARD</u>	<u>PREMIUM</u>	<u>ULTIMATE</u>
Merge MsDyn365 data in documents (all field types, all entity types, unlimited depth of relationship)	✓	✓	✓
Merge user input data in documents	✓	✓	✓
Merge external data in documents (schema data sets, retrieve data from URL)		✓	✓

## SERVICE DEPLOYMENT

	<u>STANDARD</u>	<u>PREMIUM</u>	<u>ULTIMATE</u>
Infrastructure	shared	shared	dedicated
Deployment mode: Public Cloud - multitenant (managed)	✓	✓	
Private Cloud - single tenant (managed) <sup>1</sup>			✓
Private Cloud/On Premises (unmanaged)			✓
ALM/multiple environment setup (dev, UAT, staging, ..., production project)		✓	✓
Multi-server production setup (load balancing, failover)			✓

<sup>1</sup> For volumes higher than 600,000 documents/year, Xpertdoc recommends an Enterprise License Plan that includes an implementation of Xpertdoc Portal on dedicated infrastructure.



# Detailed Software Editions Overview

## INCLUDED CONNECTORS

	<u>STANDARD</u>	<u>PREMIUM</u>	<u>ULTIMATE</u>
Store documents on fileserver (FTP, FTP over SSH, WebDAV, Windows share)	✓	✓	✓
Print documents (local printer or Google Cloud Print)	✓	✓	✓
Email generated documents (SMTP)	✓	✓	✓
Start flow execution from external code (Rest API call)		✓	✓

## OPTIONAL CONNECTORS

	<u>STANDARD</u>	<u>PREMIUM</u>	<u>ULTIMATE</u>
Deliver documents for e-signing (DocuSign or Sertifi)	✓	✓	✓
Xpertdoc Extended Business Cloud Light (Smart Forms + Content Manager)		✓	
Xpertdoc Extended Business Cloud Full (Smart Forms + Content Manager + Document Services + Xpertdoc Template Designer Template Execution)			✓

# Detailed Software Editions Overview

## DOCUMENT VOLUME & USER COUNT

### YEARLY DOCUMENT VOLUME

	<u>STANDARD</u>	<u>PREMIUM</u>	<u>ULTIMATE</u>
Number of generated documents per year included in plan	6,000	12,000	60,000
Max number of generated documents per year	6,000	60,000	600,000 <sup>1</sup>
Access to additional volume allowance packages:			
5,000 documents		✓	
25,000 documents			✓

### USER COUNT

	<u>STANDARD</u>	<u>PREMIUM</u>	<u>ULTIMATE</u>
Number of Smart Flows users included in plan (native + connected) <sup>2</sup>	5	10	30
Max number of Smart Flows users (native + connected)	50	100	unlimited

<sup>1</sup> For volumes higher than 600,000 documents/year, Xpertdoc recommends an Enterprise License Plan that includes an implementation of Xpertdoc Portal on dedicated infrastructure. <sup>2</sup> Included in Plan Package.



# Recommended Software Pricing

## BASE PLAN

	<u>STANDARD</u>	<u>PREMIUM</u>	<u>ULTIMATE</u>
Plan Package (price per month)	\$90	\$375	\$1,215

## ADDITIONAL USERS, DOCUMENTS AND CONNECTORS

	<u>STANDARD</u>	<u>PREMIUM</u>	<u>ULTIMATE</u>
Additional user (price per user per month)	\$18	\$18	\$18
Document volume allowance packages:			
5,000 documents		\$1,500	
25,000 documents			\$3,750
Additional connectors: DocuSign or Sertifi (price per user per month)	\$4.5	\$4.5	\$4.5
Xpertdoc Extended Business Cloud Light		\$9	
Xpertdoc Extended Business Cloud Full			\$12

## SMART FLOWS DEDICATED MANAGED CLOUD INFRASTRUCTURE <sup>1</sup>

	<u>STANDARD</u>	<u>PREMIUM</u>	<u>ULTIMATE</u>
Private cloud managed (price per month) - Basic			\$470
Private cloud managed (price per month) - Intermediate			\$690
Private cloud managed (price per month) - High			\$1,185

<sup>1</sup> Please visit <https://kb.xpertdoc.com/pages/viewpage.action?pagelD=24579432> for detailed configuration specs.

# Frequently Asked Questions (about software)

## **Do I need to buy a subscription for all my CRM users?**

No, only the users who are granted an Xpertdoc Smart Flows security role in your connected CRM system and the native Xpertdoc Smart Flows users need a subscription. These numbers can be a subset of your total CRM user count. Each edition comes with a number of users included. Additional user subscriptions can be purchased. The Standard and Premium editions also have a maximum number of users. The Ultimate edition doesn't.

## **Is there a difference in license/subscription pricing between Administrators/Template Designers/Regular Users?**

No, all Xpertdoc Smart Flows security roles are priced equally. Every Xpertdoc Smart Flows role you grant to a user consumes one subscription. The roles are cascading. So you only need to grant one role per user.

## **Are there any associated installation costs?**

There is no cost associated with the activation of your account on the multitenant Xpertdoc Smart Flows Cloud (Standard and/or Premium Edition) or the Xpertdoc Extended Business Cloud. Installation of Xpertdoc Smart Flows on dedicated infrastructure can be carried

out by Xpertdoc's professional services team and will be charged at standard support rates. Alternatively, the software can be installed by the customer or by an Xpertdoc certified partner.

## **Am I entitled to receive updates?**

Yes, access to updates is included in the monthly subscriptions or yearly maintenance fees. Feature releases are distributed three times a year. Minor updates in between are distributed with a higher frequency.

## **When does my software or maintenance subscription start?**

Subscriptions always start from the date of license key activation. The software cannot be used legitimately without a valid license key.

## **How many documents am I allowed to generate?**

Every pricing plan includes a yearly document volume allowance: 6,000 for Standard; 12,000 for Premium; 60,000 for Ultimate. Upon yearly renewal of your subscription, your plan-included volume allowance will be reset without transfer of any remainders. If you require additional document volume before your yearly renewal date, you can either upgrade to a higher plan or – if you are on the Premi-

# Frequently Asked Questions (about software)

um or Ultimate plan - purchase additional document volume allowance packages. These additional packages can be used in full and do not expire.

## How are the documents counted?

Xpertdoc Smart Flows has an embedded counting mechanism that will increase a counter with one digit every time the “Generate Document” service is triggered from a flow execution or via a direct API call. The flow steps that can trigger the Generate Document service are:

- Create document
- E-mail (Dynamics)
- E-mail (smtp)

The counter is not increased if the Generate Document service is triggered from the Preview function in the Project Console or from Template Builder.

## Where do I download the Xpertdoc Template Builder Add-in for Microsoft Word and other solution components?

You can download Template Builder and other solution components, such as integrated apps for CRM systems at <https://smartflows.xpertdoc.com/downloads>.

## Where can I get support?

The main sources of support are the Xpertdoc partner and user communities and the support portal at <https://kb.xpertdoc.com>. Xpertdoc also has an interactive support ticket service. You can purchase support credits in prepaid packages.

## Where can I get training?

Xpertdoc offers online training video and step-by-step tutorials on the support portal at <https://kb.xpertdoc.com>. Many of our certified partners have training offerings for Xpertdoc products. If you require advanced or specific training, Xpertdoc can provide tailored trainings and workshops.

# Frequently Asked Questions (about software)

## **Where can I find hardware and software prerequisites for Xpertdoc products?**

The software and hardware prerequisites for all of the Xpertdoc Smart Flows components are listed on the support portal at <https://kb.xpertdoc.com>. Standard and Premium Editions are always deployed in the Xpertdoc multi-tenant business cloud on Microsoft Azure. The Ultimate Edition of Xpertdoc Smart Flows is set up on dedicated infrastructure. This infrastructure can be owned and hosted by you or by a hosting service provider who is engaged by you.

Alternatively, the dedicated infrastructure can be managed by Xpertdoc Technologies, Inc. In that scenario, Xpertdoc will host and manage the solution on dedicated Microsoft Azure infrastructure. The associated cost depends on the server configuration. As a guiding principle, Xpertdoc offers three predefined infrastructure set-ups: Basic, Intermediate and High. Which one fits best, depends on factors such as document volume, document size, flow complexity, request density, density of concurrent requests, etc. Configuration details are available on the Xpertdoc knowledge base at <https://kb.xpertdoc.com>.

## **Can I buy a perpetual use license instead of a subscription?**

Yes, you can. Instead of the subscription-based model, you can opt for a traditional perpetual license. In that case, you will pay a one-time charge for the use license plus a yearly maintenance fee, which is 20% of the use license fee. The initial one-time fee is based on the start-up fee plus the aggregate of 36 months of equivalent subscription fees. Perpetual licensing is available for Xpertdoc Smart Flows Ultimate Edition deployments, not for Standard or Premium Edition deployments.

Please contact your Xpertdoc sales rep for a personalized quotation.

# Complementary Training Offerings

We offer 3 different training packages. A quick start video training, where you learn the basics. Two template design workshops, where you learn how to design templates - including some help making your own templates.

## QUICK START VIDEO ON DEMAND TRAINING

Learn the basics of Xpertdoc Smart Flows in a few hours; all you need to know to get started as soon as possible.

### CONTENTS

- End user experience
- Template management basics
- Template design basics

### FORMAT

- Video on demand



# Complementary Training Offerings

## TEMPLATE DESIGN WORKSHOP 8 HOURS

Beginning with the Xpertdoc Smart Flows basics, all the way up to advanced template design: perfect for learning how to create more complex templates. Also includes some help with setting up your first templates.

### CONTENTS

- End user experience
- In-depth data set/template/flow management
- Advanced template design
- Getting started with your first templates and flows

### FORMAT

- Dedicated online or in house





# Complementary Training Offerings

## ADVANCED TEMPLATE DESIGN WORKSHOP 16 HOURS

The most advanced training: all the way from the basics up to the most complex features of template design, with an additional workshop day fully dedicated towards creating your own templates. The ultimate path towards the most complex templates you can imagine!

### CONTENTS

- End user experience
- In-depth data set/template/flow management
- Advanced template design
- An extra day of working with your templates and flows

### FORMAT

- Dedicated online or in house





# Recommended training pricing

Quick Start Video On Demand Training	<b>free</b>
Template Design Workshop (8 hours)	<b>\$1,800</b>
Advanced Template Design Workshop (16 hours)	<b>\$3,600</b>

# Frequently Asked Questions (about training)

## **Where do I find the video trainings and tutorials?**

All training materials are accessible through the Xpertdoc Training on Demand Portal, accessible via the Training section at <https://kb.xpertdoc.com>.

## **Where do workshops take place?**

Trainings can be hosted either online via webinar software or conducted on a location provided by you. In the latter case, travel and accommodation costs may apply.

# Complementary Professional Services Offerings

## STANDARD PROFESSIONAL SERVICES

Prepaid or hour-based support entitlements give you access to assistance on template design, data set and flow building and monitored support within Xpertdoc's standard support hours.

## ADDITIONAL OPTIONS

Extend your support entitlement to a custom support hour window for critical issues.

# Recommended Professional Services Pricing

## STANDARD SUPPORT

16-hour Prepaid Support Package	\$3,360
32-hour Prepaid Support Package	\$6,480
48-hour Prepaid Support Package	\$9,360
1-hour Consultancy/Support	\$225/hour

## EXTENDED SUPPORT

Premium Support with Custom Support Hour Window for Critical Issues	\$10,350/year
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# Frequently Asked Questions (about services)

## **What are the standard support hours?**

The standard service window is 9.00 am - 11.00 pm CE(S)T (Brussels) | 3.00 am – 5.00 pm EDT (New York). You can extend or customize the support window for critical issues via the Premium Support option.

## **Do I have to pay to receive support?**

Only interactive support is payable. Support activities resulting from unknown issues that could be characterized as bugs in the software are resolved free of charge.

## **For which types of services and support can the prepaid packages be used?**

Typical activities you can use your prepaid service/support packages for include software update rollout, template design assistance, assistance with data set, template and flow configuration.

## **How do I post a support ticket?**

You can post a support ticket via the interactive support widget on the Xpertdoc knowledge base portal at <https://kb.xpertdoc.com>.

## **When does my support package expire?**

Prepaid support packages have no expiration date. As long as they are not used up, they remain available.



**Xpertdoc**<sup>TM</sup>

Better documents. Faster.