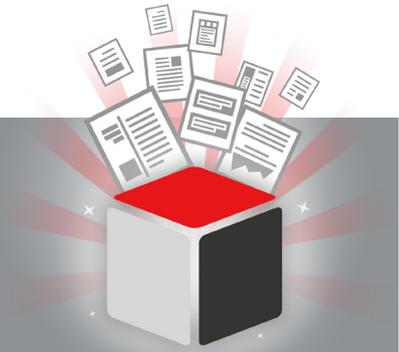# XperiDo
Server-side document automation for Sugar

If you want to generate white print documents with a couple of clicks, straight from your favorite CRM system, then look no further. Think of documents like quotes or invoices, or correspondence, reports, marketing materials even, event invitations, visitor badges… all your documents really. With XperiDo you can generate all the documents you'll ever need and deliver them via e-mail and print.
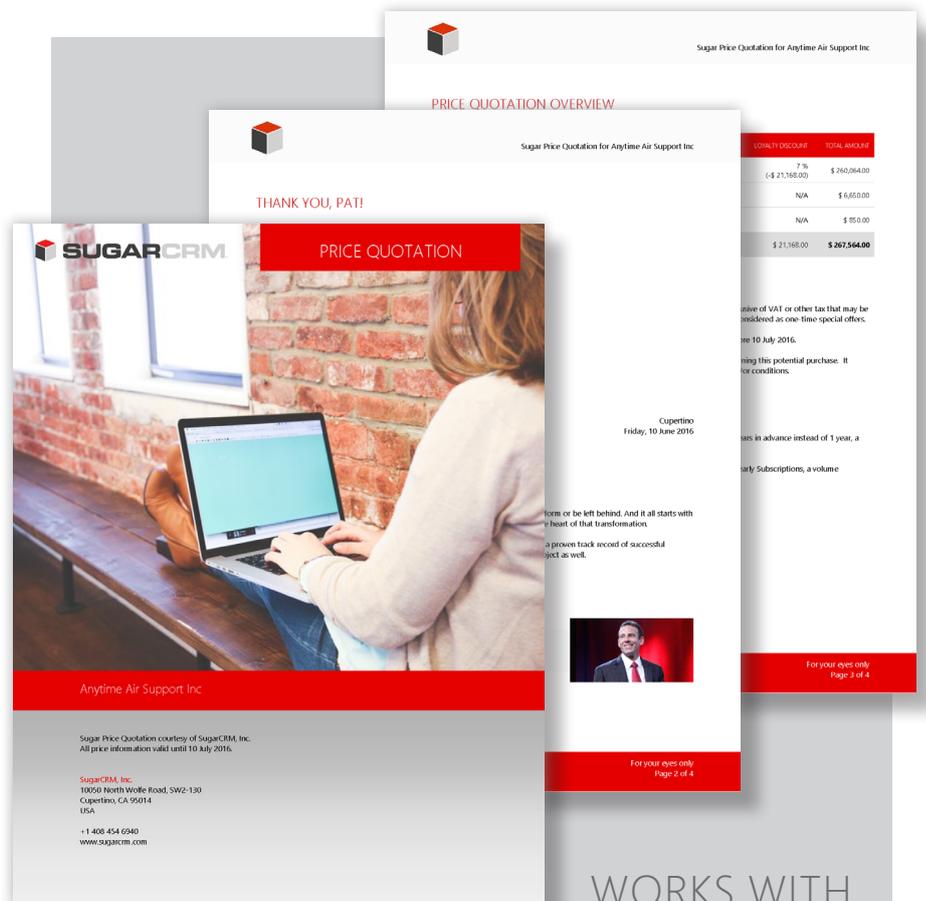
IT'S A POWERFUL THING

Watch out. XperiDo is not just a wee little desktop tool for mail merge. It's a robust server-side solution that can manage high volumes. If you have a DTAP set-up XperiDo can support that as well, allowing you to promote your templates from your development org all the way through to production.

But even if you just need to create a couple of documents per day and you don't have an enterprise DTAP lay-out, XperiDo will save you time, and help you interact more directly and consistently with your stakeholders.

TEMPLATE DESIGN YOU'LL LOVE

The XperiDo template design Add-in for Microsoft Word turns your familiar word processor into a dream-come-true for template designers. Adding an extra ribbon toolset and a mapping pane, it allows any Word user to create awesome templates.

- Make content and lay-out conditional
- Loop subpanel data to create lists & tables
- Retrieve data from related standard or custom modules and their subpanels or related modules
- Group items per category & create filters
- Do calculations and logical expressions
- Dynamically insert pictures, barcodes and QR-codes
- Create the greatest-looking charts
- Insert content snippets from Word documents, PDFs and webpages
- Create translated versions to support multiple language variants of your templates
- Preview your templates at any time with relevant Sugar data.

WORKS WITH

▶ *Microsoft Word 2007-2016*
▶ *Sugar 7.x (including BWC modules)*
▶ *Server component available on premises or in the cloud*

E-MAIL, PRINT AND E-SIGN

Engaging with your customers or other stakeholders has never been easier. With XperiDo you can deliver your generated documents via the preferred channel. Whether that be print or e-mail attachment. You can even use XperiDo to populate the body of your e-mail.

And what's more, XperiDo integrates with leading e-signature platform providers like DocuSign and Sertifi. So you can get rid of pen-on-paper signing processes and enjoy the ease and speed of electronic signing.

DESIGN

Template design has never been easier. In come the marketing guys, out goes IT.

SALES SCENARIOS

Quotations

Do you have complex products, flexible pricing with all sorts of volume, loyalty, partnership or other discounts? Do you want different tables in your quotes per product or service type, with category subtotals and calculate discounts, margins, tax amounts and so on? Do you want to insert the relevant fact sheets or product overviews in the right place? Do you want to start your quotations with a personalized cover letter?

Invoices, Order Confirmations, Contracts, Policy Documents...

Many sales-related documents are legally binding. They need to be well-structured and absolutely correct. Are you spending precious time on creating contracts that contain all the right clauses and leave out those that are irrelevant? Are you bugging your customers with traditional pen-on-paper signing? Let XperiDo automate the generation of your legal documents and deliver them for e-signing with DocuSign or Sertifi.

CONTACT US

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XperiDo is a Xpertdoc product.

MARKETING SCENARIOS

Events

Do you want to invite your customers, prospects and partners to an event? Why not use XperiDo to generate a personalized invitation, or even generate an entrance ticket with a barcode? You'll probably want to print a badge for all your attendees as well? Let XperiDo handle all that for you.

Direct Mail

Even in this day and age, sending out a good old-fashioned letter still works miracles sometimes. Why not back up your e-mail and social campaigns with an engaging letter? XperiDo can do that for you.

GENERATE

In just one or two clicks all your users can produce the most amazing documents.

SERVICE SCENARIOS

Field Service

Are your field service reps spending too much time on paperwork? With a simple tap on their phone or tablet they can create a service report and have the customer sign it off on the spot. A copy of the signed document will be in the customer's mailbox before your service rep has even left the building.

Packing slips

Do you need to re-equip your service reps after an intervention? Why not let XperiDo generate a packing slip with barcodes and quantities for all used materials and send it off to your warehouse printer?

MANAGEMENT REPORTING

Overall Reports

Who doesn't want to come to the board room with a nicely crafted report that contains all the figures that matter? XperiDo can bring data to life with awesome trend and aggregation charts and summary tables. It's the perfect in-between if you want to escape from Excel hell and just want to hold off the investment in full-blown BI.

Detail Reports

Do you want to have a 360-degree overview of all your team's interactions with a certain contact or customer? Do you want to gain insight in a certain case or opportunity, or the history of a certain customer. XperiDo can deliver you any detail report in seconds. It gives you something to read when you're on your way to your next meeting.

STORE & DELIVER

Save your generated documents back into the Documents Subpanel of any module and deliver them via print, e-mail or e-sign.

TEST DRIVE XPERIDO

Why don't you give it a go yourself? We're happy to provision your Sugar org for XperiDo and walk you through the basics of template management and design.

www.xpertdoc.com/sugar

Xpertdoc™
Better documents. Faster.