

Services Starter Packages

4 HOURS

Starter Package

Aimed at the customers with a CRM integration, who need training to get started on template design basics.

Environment: Xpertdoc training environment

Configuring your Project (1 hr):

- Create connectors
- Configure Template Builder in Microsoft Word

Smart Flows Basic Training (1 hr):

- Data sets, samples, templates, Flow Builder, running a flow

Template Builder Basic Training (1 hr):

- Mapping fields, formatting, styles, conditions, loops, formulas

Your First Document (1 hr):

- Discuss your document generation needs with the Trainer
- Receive helpful hints & tips

8 HOURS

Advanced Training

Aimed at the customers who will need training to include advanced flows and template design functionality.

Recommended for customers who also want to use the API.

Environment: Xpertdoc training environment

Configuring your Project (1 hr):

- Create connectors
- Configure Template Builder in Microsoft Word

Smart Flows Basic Training (1 hr):

- Data sets, samples, templates, Flow Builder, running a flow

Template Builder Basic Training (1 hr):

- Mapping fields, formatting, styles, conditions, loops, formulas

Your First Document (1 hr):

- Discuss your document generation needs with the Trainer
- Receive helpful hints & tips

Smart Flows Advanced Training (2 hrs):

- Custom data sets, schema data sets, compositions, conditional flows

Template Builder Advanced Training (2 hrs):

- Result sets, pseudo-fields, expressions, images, barcodes

8 HOURS

Advanced Workshop

Only sold in combination with an Advanced Training Package. Aimed at the customers with specific use cases or complex challenges like conditional compositions and flows, DocuSign, API, etc.

Environment: Customer's environment. Participants will be given tasks and challenges during the training.

Template Building Workshop (8 hrs):

- Build your templates and flows, guided by an Xpertdoc Specialist
- Optional topics: DocuSign, API

MINIMUM 16 HOURS*

Starter Package

For multi-party and/or on-premise implementations that require installation guidance and project management. Aimed at the customers with specific use cases, a large number of templates, and complex challenges, where specific assistance with building templates and flows is required.

Dedicated Project Manager (8 hrs):

- A single point of contact for the length of your project
- Kick-off meeting
- Status meetings and milestones

Project Documentation (4 hrs):

- Document generation needs analysis
- Implementation plan
- Tailored documentation

Installation Support (4 hrs):

- Guidance on installation and configuration of multiple environments
- Create connectors
- Configure Template Builder in Microsoft Word

**Project management services are sold with a minimum requirement of 16 hrs. Additional hours may be purchased as needed by the customer.*