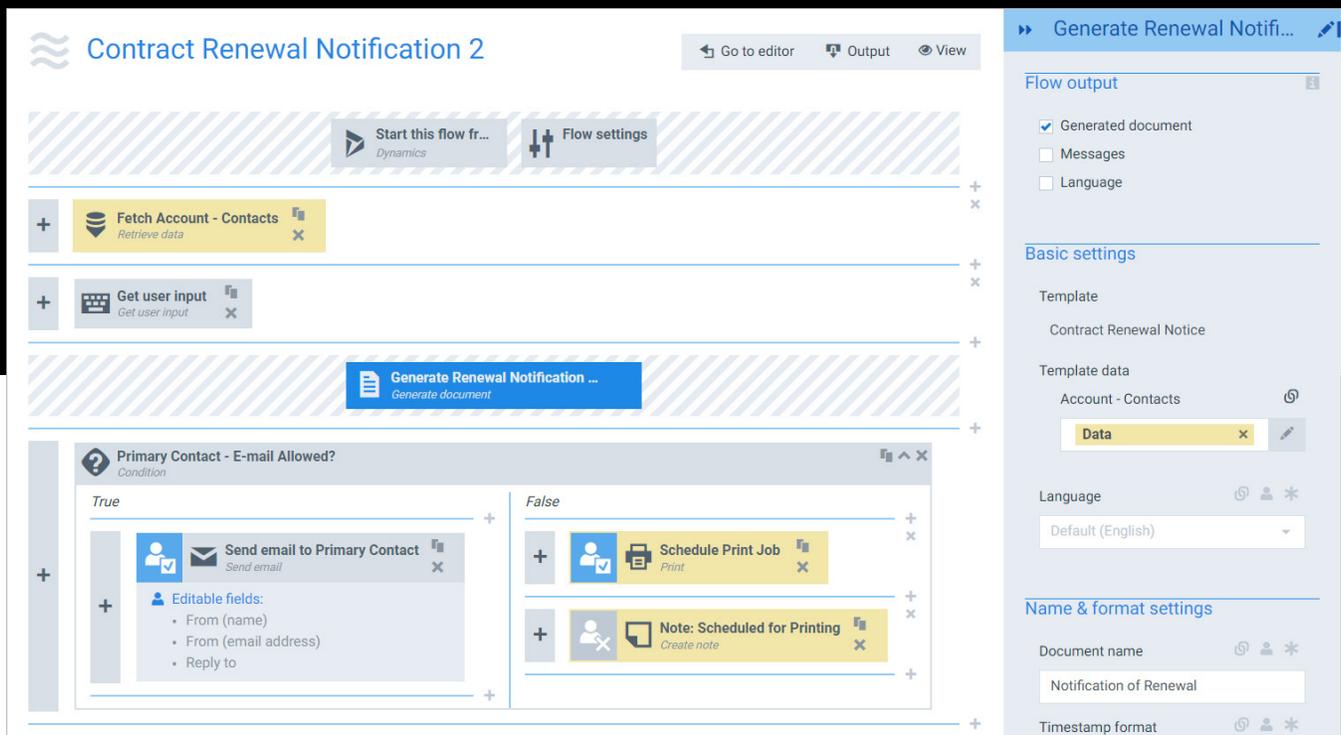# Xpertdoc Smart Flows

The Powerful and Intuitive Automated Document Flow Solution

Automated Document Flows Made Easy

Xpertdoc Smart Flows are easy-to-configure, automated processes for the creation, generation, management, storage, delivery, and e-signature of business documents. With the click of a button, you are empowered to create the most compelling quotes, contracts, invoices, reports, correspondence, or any other documents, guided through logic-based, optimized post-processing, approval, delivery, and archiving paths, to better engage with your customers all while increasing productivity.

Features to Streamline Your Processes

Xpertdoc's Smart Flows features powerful tools that enable business users to automate simple or complex, consistent document flows without coding skills, streamlining your processes from creation to delivery.

Intuitive Building Interface

Available in English, French and Dutch, the intuitive interface of Xpertdoc Smart Flows allows users to easily and visually build automated document flows by adding and arranging flow blocks each executing a specific action – generate, print, send an email, store, e-sign, and more.

Linked Flow Blocks

Flow blocks can need to be linked together to ensure the generated documents properly trigger the next steps, such as sending an email with documents attached or printing to a network printer. Linked blocks also provide further personalization capabilities through dynamic fields enabling the insertion of account information, custom message or e-signature link.
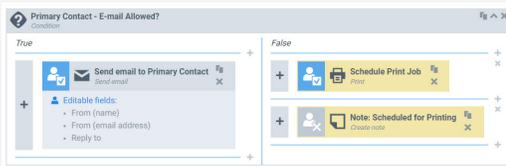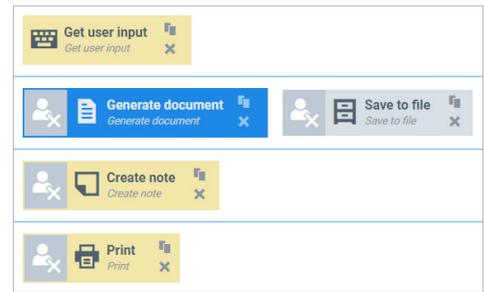
Conditional Document Flows

With Smart Flows, users can configure automated document flows that contain conditional steps. Depending on if a condition is true or false, the generated documents follow a different path – for example, sending documents by email or via an e-signature platform. Sub-conditions can also be created, bringing sophisticated flow control.

Consolidated Document Storage

Generated documents can be automatically stored in Xpertdoc Content Manager, Microsoft SharePoint or other content management system. When integrated with a CRM platform like Microsoft Dynamics 365, SugarCRM and Salesforce, users can create a new record in the corresponding Document section and attach a document.

Pause & Resume Function

Document flow executions can be temporarily paused while waiting for a user response (e.g. a user must provide additional data through an Xpertdoc Smart Form) or for an external event (e.g. a customer must e-sign a generated document sent by email). The executions of flows are resumed once the action has been performed.

Unlimited Data Sets

Multiple data sets – Microsoft Dynamics 365/Common Data Service, SugarCRM, Salesforce, ERP, CPQ, ECM, user input, XML, and other data sources – can be created and combined in documents during the flow execution. Xpertdoc Smart Flows has no limitations on the data you can use in your business documents.

Programmed Functionalities

Smart Flows comes with a REST API based on the OpenAPI Specification (OAS). Every functionality available in the component can be called from a series of programmed "get," "post," "put," and "delete" functions, providing flexibility to technical users.
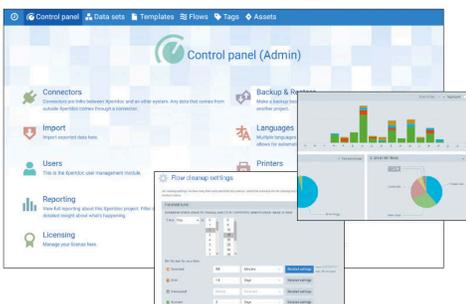
Centralized Management Console

Xpertdoc Smart Flows 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 in adoption, usage and performance.

Contact us at info@xpertdoc.com,
1-866-961-9111 or +32 52 52 27 70.
www.xpertdoc.com

Xpertdoc™
Better documents. Faster.