

Xpertdoc Template Builder

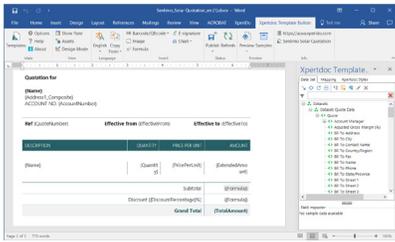
The Robust and Intuitive Template Design Add-in for Microsoft Word

Dynamic, Data-driven Template Design

The Xpertdoc Template Builder add-in for Microsoft Word leverages your familiar word-processing skill set and the software's powerful functionalities for document composition, while adding an intuitive template designer experience.

Featuring a ribbon toolset and a mapping pane, Template Builder gives you the tools and guided functions you need to create dynamic, sophisticated and professional templates, and configure complex workflows and business rules – without code. You can easily generate data-driven and compelling documents with accurate content, terminology, corporate branding and format, which results in an accelerated document creation process and improved document consistency.

Template Builder's Key Features

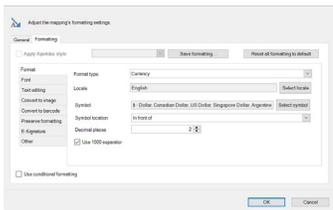


Dynamic Data Integration

Combine customer information and data from multiple sources such as Microsoft Dynamics 365/CRM, ERP, CPQ, Excel, policy administration, and more, and map them to appropriate data fields that can be dynamically integrated with document templates.

Pseudo-fields & Resultsets

Create pseudo-fields and add them to your templates to execute functions such as calculating totals, editing text, defining complex conditions, and more. Resultsets, a type of pseudo-field, can be used to filter through a list of items based on pre-defined conditions.

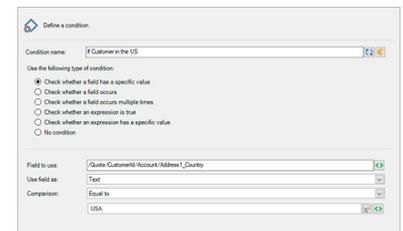


Field Formatting

Apply pre-defined formatting to date, time, number, and currency fields mapped in document templates. Specific customized formatting can be set based on configurable conditions.

Conditional Content

Using the Condition wizard, easily configure conditions for inclusion or exclusion of content and apply them to mapped fields, whether it is a single character, a word, a table row, an image, a paragraph, or a document section.



Composed Templates

Drag and drop composed templates, called “compositions”, into a document body, header, footer, and insert zone during template design. Insertion of compositions can be conditional.

Embedded Digital Content

You can automatically insert barcodes and QR codes, digital images, graphics, multimedia content, and files of any common format – such as DOCX, PDF and HTML – in document templates.

Subgrid Loops

Create standard, grouped or filtered loops to build lists and tables with recurring input data, within document templates.

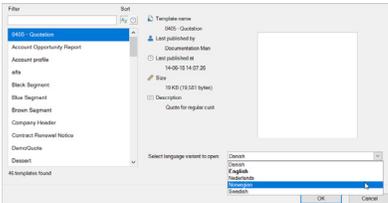
Expressions

Use the Expression wizard to easily incorporate calculations, complex conditions for inclusion or exclusion of content, as well as to determine the business flow of a template.

```
Insert Function  Insert Field  Validate  Pretty print
or {
  eq(
    ${warehouse/product/type},
    'pencil'
  ),
  and(
    eq(
      ${warehouse/product/type},
      'marker'
    ),
    eq(
      ${warehouse/product/description},
      'red'
    )
  )
}
```

Language Variations

A template can have multiple language variations; you can automate document language selection based on customer preference, jurisdiction or country.



Version Control & Preview

Templates can be checked-in while they are being worked on, previewed to show the documents with data samples, and checked-out when completed. This function also enables you to return to previous versions, compare and see where changes have been made.



Better documents. Faster.

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