

XPERTDOC FOR MICROSOFT DYNAMICS 365

Better, Faster Document Automation for
Microsoft Dynamics 365



Do you want to power up your Microsoft Dynamics 365 environment with an easy-to-use and seamlessly integrated document automation solution?

Xpertdoc for Dynamics 365 replaces manual and error-prone document processes, and empowers business users to optimize and automate document flows – from creation to delivery – resulting in better business documents, faster.

POWER TO THE BUSINESS USER

Xpertdoc for Microsoft Dynamics 365 lets you build and run any document creation, generation, approval and delivery process that leverages data from Dynamics 365, user input captured via web forms, and external data sources. Whether your organization requires simple or complex document flows, business process owners can easily model and deploy them by arranging flow steps through the solution's intuitive user interface, and defining wizard-driven logic between these steps.

Immersed into the Dynamics 365 experience, business users can quickly run document flows deployed to their production environment. With the click of a button, you are empowered to create the most compelling quotes, contracts, invoices, reports, correspondence or any other business documents, guided through optimized post-processing, approval, delivery and archiving paths to efficiently engage with your customers via their preferred delivery channel.

LEVERAGE DATA FROM ACROSS AND BEYOND MICROSOFT DYNAMICS 365

Generated documents can combine data from multiple sources across and beyond Microsoft Dynamics 365, collected either via out-of-the-box connectors or RESTful web services. Xpertdoc for Dynamics 365 has no limitations on the data you can use and combine in your business documents.

Microsoft Dynamics 365 data: You can collect and include data from all standard and custom Dynamics 365 entities, with multiple levels of relationship, as well as all field types and virtual entities.



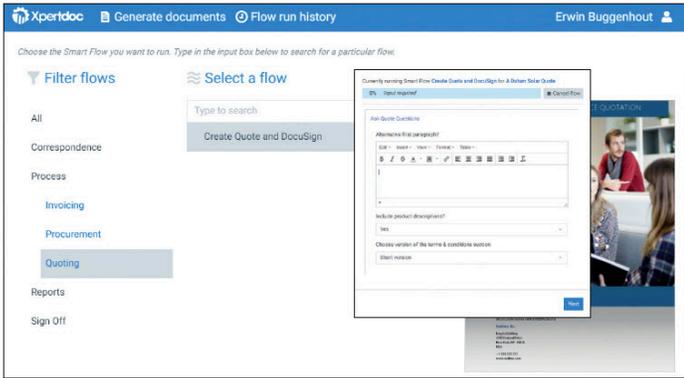
User input: You can use custom data sets or connect with Xpertdoc Smart Forms to prompt the user for input during a flow execution process. The data can be inserted into generated documents, or drive content and layout conditions in document templates and flows.

External data: You can connect data that resides in any of your enterprise core systems – ERP, CPQ, product lifecycle management, and other data sources – to collect even more data. You can easily collect XML data from RESTful web services with the Xpertdoc Smart Flow Builder.

POWERING UP MICROSOFT DYNAMICS 365

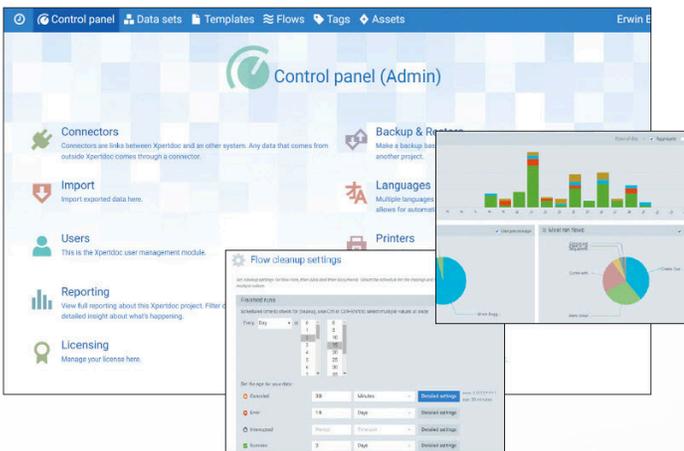
Modern, Responsive User Interface

Available in English, French and Dutch, the modern and responsive user interface (UI) of Xpertdoc for Dynamics 365 is available in the classic web UI as well as in the new Unified Interface in Dynamics 365. The single-window interface allows for clear, straightforward navigation, enabling your business users to easily and efficiently accomplish their document automation tasks both on the web and on connected mobile devices.



Centralized Management Console

Xpertdoc for Microsoft Dynamics 365 includes a centralized management console, providing an integrated control panel with access to project settings, controls and configurations. A reporting interface offers detailed insights in adoption, usage and performance of the solution. Possible errors within flows can be easily found and resolved directly from the control panel to offer increased efficiency.



Advanced Document Design

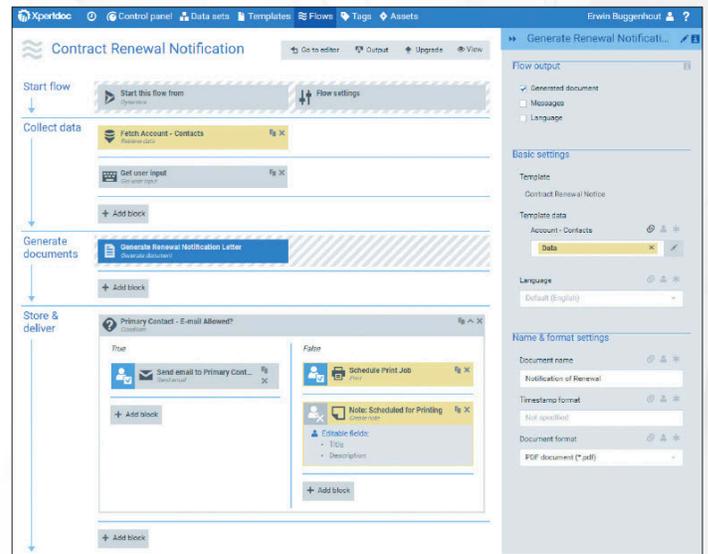
Featuring an added ribbon toolset and a mapping pane, the Xpertdoc Template Builder add-in for Microsoft Word allows users to easily create sophisticated and professional templates. In addition to leveraging Word's powerful functionalities for document design, our Template Builder automates the integration of data from multiple sources, barcodes/QR codes, graphics, tables, multimedia content, and language variations. It also lets users add in expressions and statements to incorporate calculations, as well as complex conditions for inclusion or exclusion of content.

Composed Templates

Composed templates, called "compositions", can be dragged and dropped into a document body, header, footer, and insert zone during template design. With Xpertdoc for Microsoft Dynamics 365, insertion of compositions can be conditional, and conditions can leverage Dynamics 365 data as well as user input.

Conditional Document Flows

In the Xpertdoc Smart Flow Builder, users can build and deploy simple or complex automated document flows – from initial trigger to final delivery of one or more documents – that contain conditional scenarios, such as sending documents by email, to a print service or for e-signature via a variety of platforms, and storing documents in Xpertdoc Content Manager, Microsoft Dynamics 365 or SharePoint.



Seamless Integrations

Xpertdoc for Dynamics 365 offers seamless integrations with the Microsoft and Dynamics 365 ecosystems – Microsoft SharePoint, DocuSign, Adobe Sign, OneSpan Sign. It can also be integrated with other Xpertdoc components such as Smart Forms and Content Manager.

Programmed Functionalities

Xpertdoc for Dynamics 365 comes with a REST API based on the OpenAPI specification (OAS). Every functionality available in the solution can be called from a series of programmed "get", "post", "put," and "delete" functions.

Flexible Deployment Options

Xpertdoc for Microsoft Dynamics 365 can be deployed on-premise, or in a public or private cloud environment, so you have the flexibility to choose which one works best for your organization.

