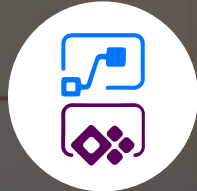


Xpertdoc for Microsoft Power Platform

Better, Faster Document Generation for Microsoft Power Platform

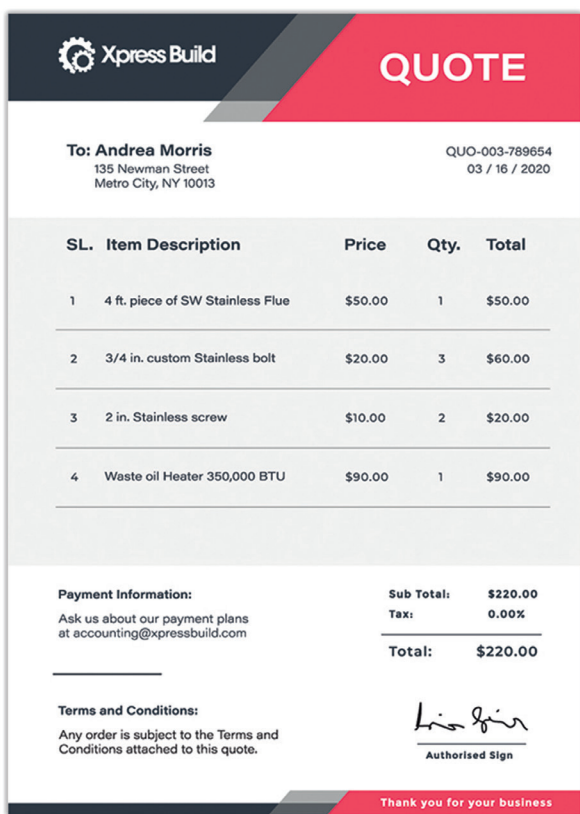
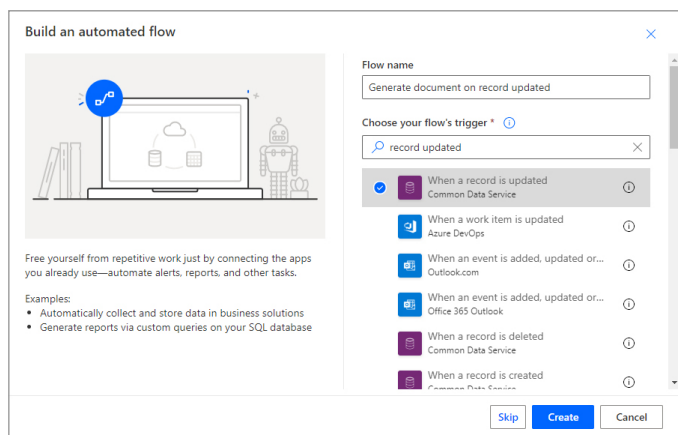


Seamlessly integrated with Microsoft Power Platform, Xpertdoc empowers your business users to easily build, automate and integrate streamlined, consistent document processes with your Power Apps and Power Automate flows – resulting in accelerated business processes, increased productivity and reduced dependence on IT.

Improve Productivity and Consistency with Streamlined, Automated Document Generation

Xpertdoc for Microsoft Power Platform lets you build any document generation, approval, delivery, and storage process, and seamlessly integrate them to your existing Power Apps and Power Automate flows. By arranging flow steps through the solution's intuitive user interface and defining conditional logic between these steps, your business users can easily configure and automate streamlined, sophisticated processes across your organization's systems and applications.

Plus, the seamless integration between Xpertdoc and Microsoft Power Platform not only enables you to automatically trigger a pre-built Xpertdoc flow from the Microsoft environment, but also start a Power Apps/Power Automate flow within the Xpertdoc solution. You can rest assured that your automated document processes are running with optimal efficiency and consistency throughout your connected technologies.



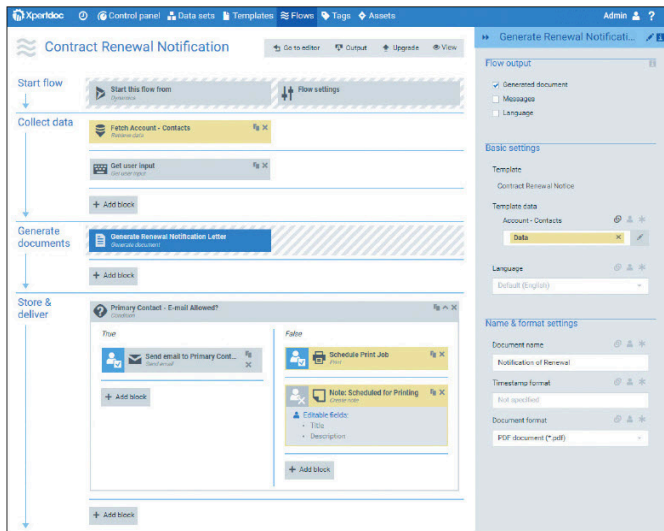
Reduce Dependence on IT and Empower Business Users with Robust Capabilities

Xpertdoc for Microsoft Power Platform features robust tools and capabilities that enable your business users to execute their document generation, approval, delivery, and storage tasks without coding skills.

Key Features

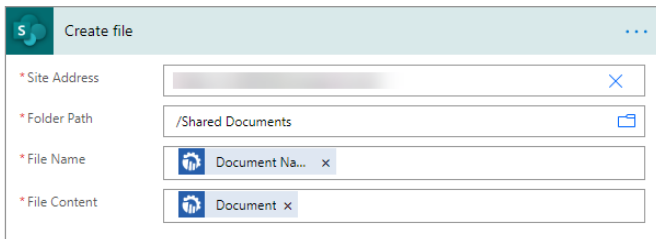
Conditional Document Flows

In the embedded Flow Builder, users can visually build automated document flows that contain conditional steps, such as sending generated documents by email, to a network printer or via an e-signature platform, creating Notes and Activities with attached documents, and storing generated documents in Xpertdoc Content Manager, Microsoft Dynamics 365 or SharePoint.



Seamless Integrations

Xpertdoc for Power Platform offers seamless integrations with any connectors built-in the Microsoft environment – Microsoft Dynamics 365/CDS, Microsoft SharePoint, Azure Blob Storage, Adobe Sign, Dropbox, Microsoft OneDrive, etc. It can also be connected to other Xpertdoc components such as Smart Forms and Content Manager.



Advanced Document Design

Featuring an added ribbon toolset and a mapping pane, the Xpertdoc Template Builder add-in for Microsoft Word allows users to create dynamic, 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 and QR codes, graphics, tables, multimedia content, and language variations. It also lets users add in expressions to incorporate calculations, as well as complex conditions for inclusion or exclusion of content.

Multiple Data Set Types

Multiple types of data set – standard Dynamics 365/ Common Data Service (CDS), user input and XML – can be created and combined in document templates. Standard Dynamics 365/CDS data sets include data from all standard and custom entities, with multiple levels of relationship, as well as all field types and virtual entities.

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 Power Platform, insertion of compositions can be conditional, and conditions can leverage data from Dynamics 365/CDS and user input.

N:N, 1:N or N:1 Relations

All data sets related to a template show up in the mapping pane of the Xpertdoc Template Builder. With the concept of pseudo relations, entities from one data set can be linked to entities from another to form N:N, 1:N or N:1 relations.

Modern, Responsive User Interface

Available in English, French and Dutch, the modern and responsive user interface of Xpertdoc for Power Platform allows for intuitive, straightforward navigation, enabling users to easily and efficiently accomplish their document generation tasks both on the web and on connected mobile devices.

Centralized Management Console

Xpertdoc for Microsoft Power Platform 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.

