Xpertdoc for Microsoft Dynamics 365

Better, Faster Document Generation for Microsoft Dynamics 365

Seamlessly integrated with Microsoft Dynamics 365, Xpertdoc empowers your business users to easily build and automate simplified and optimized document processes from your environment – resulting in increased productivity, enhanced document quality and reduced dependence on IT.

Improve Productivity with Optimized, Automated Document Flows

Xpertdoc for Microsoft Dynamics 365 lets you build and run any document generation, approval, delivery, and storage process that leverages data from Dynamics 365/Common Data Service (CDS), Xpertdoc's web-based Smart Forms and external data sources. Your business-process owners can easily model and deploy simple or complex document flows by arranging flow steps through the solution's intuitive user interface, and by defining wizard-driven logic between these steps – without code.
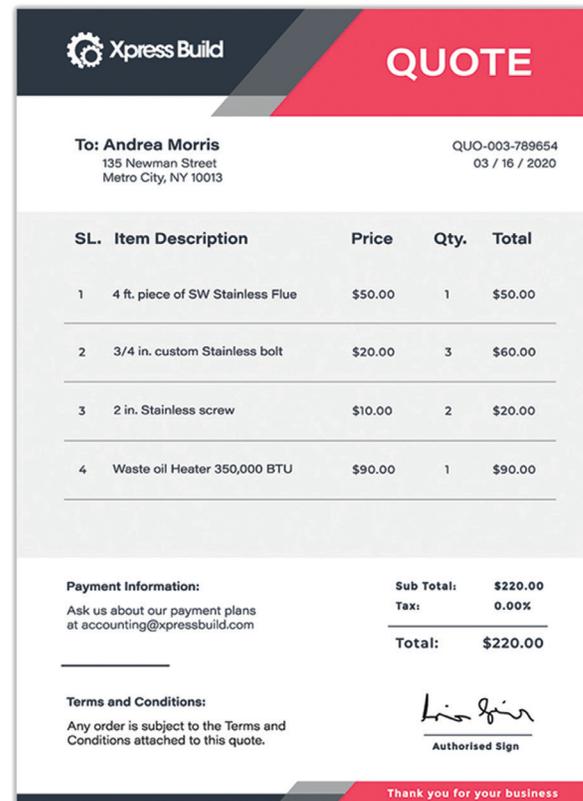
Immersed into the Dynamics 365 experience, your business users are empowered to create highly personalized and compelling quotes, proposals, contracts, invoices, reports, correspondence, and any other documents, guided through optimized and automated post-processing, approval, delivery, and archiving paths to efficiently engage with customers.

Leverage Accurate Data from Across and Beyond Microsoft Dynamics 365

With a single click, you can combine data from multiple sources across and beyond Microsoft Dynamics 365 to deliver personalized, accurate and high-quality documents to your customers. Xpertdoc for Dynamics 365 has no limitations on the data you can use and combine in your business documents.

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

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

External data: You can connect data stored in your enterprise core systems such as ERP, CPQ, product lifecycle management, and more. Plus, you can easily collect XML data from RESTful web services with the Xpertdoc Flow Builder component.
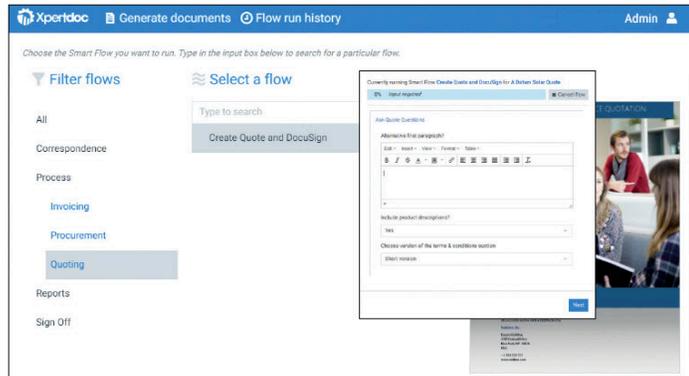
Reduce Dependence on IT and Empower Business Users with Robust Capabilities

Xpertdoc for Microsoft Dynamics 365 features robust tools and capabilities that make the generation, approval, delivery, and storage of business-critical documents effortless.
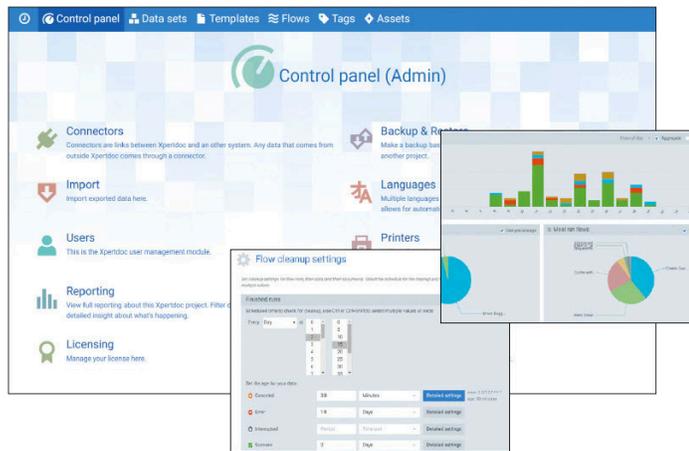
Key Features

Modern, Responsive User Interface

Available in English, French and Dutch, the modern and responsive user interface of Xpertdoc for Dynamics 365 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 Dynamics 365 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.
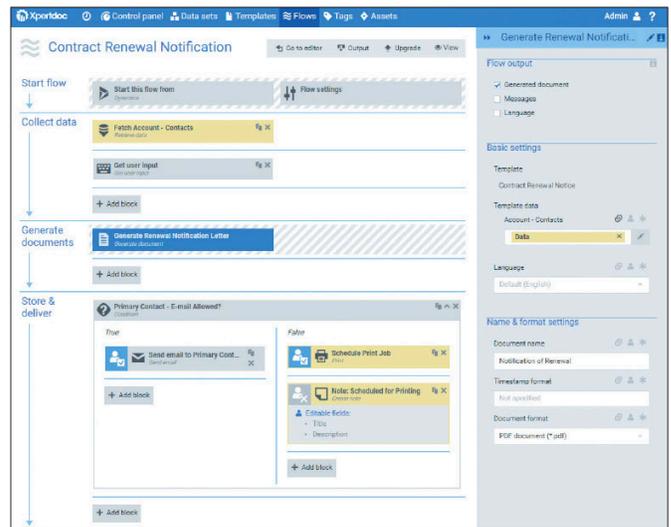
Advanced Document Design

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.

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 data from Dynamics 365 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.

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

Programmed Functionalities

Xpertdoc for Microsoft 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, providing flexibility to technical users.

Better documents. Faster.

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