experlogix
Document Automation

Experlogix Document Automation for Microsoft Dynamics 365

BETTER DOCUMENTS, FASTER

Enhance the quality of your documents, increase productivity and eliminate errors with minimal dependence on your IT team

Integrate Experlogix Document Automation with your Microsoft Dynamics 365 solution and easily create customized document templates, automate business rules and integrate your customer data – all with a single click and zero coding.

Generate quotes, sales proposals, reports, insurance policies, financial statements, or other types of documents from within your MD365 Platform.

- Improve productivity with optimized document flows

- Leverage data from across and beyond Microsoft Dynamics 365 for detailed documents

- Create data-driven, professional documents and workflows to improve customer engagement

- Enable users with powerful tools and intuitive features, minimizing their reliance on IT support

DESIGN & GENERATE

Key Features

01. Microsoft Word Plugin Template Designer

Experlogix Template Builder extends Microsoft Word with all you need to design compelling and professional templates. Utilize all of Microsoft Word's extensive features such as intuitive data field mapping and formatting, conditional content and layout settings, auto-expanding tables, charting options and more.

02. Out-of-the-Box Functionality

Experlogix Document Automation utilizes the low-code/no-code approach towards automation. Build simple or more complex flows with conditional branches and try/catch patterns with the built-in functionality of flow blocks to collect data, generate and convert documents and store and deliver them.

03. Plug and Play Integrations

Seamless integrations with Microsoft Dynamics 365 solutions allow document flows to be executed from within familiar desktop or mobile host systems. Additional integrations to solutions such as model driven Power Apps, Dataverse, SharePoint, EntraID, and Office provide familiarity to users.

FINANCE

SALES

BUSINESS CENTRAL

POWER PLATFORM

04. Automatic Flow Triggers

Run flows with the click of a button or trigger flows from the background. Utilize Microsoft Power Automate actions to start a flow execution and quickly collect the results or trigger Power Automate flows. Developers can target Experlogix Document Automation REST API directly to build flow execution logic into an application code.

05. Advanced Output and Delivery

Take advantage of secure connections with popular e-signing platforms like DocuSign, Sertifi, OneSpan Sign, ConsignO Cloud, and Adobe Sign. Connect with online printing platforms such as PrintNode, and document management platforms such as Microsoft SharePoint. Leverage e-mail capabilities of Dynamics 365 CE, Finance and Power Apps and create activities in the timeline of your records.

06. Data Capture

Bring together data from your Microsoft Solutions or existing systems directly into your documents. Regardless of where your information is stored, you can create and integrate multiple data sets—both custom and standard entities—into a single document. Experlogix also provides web-based smart forms to help you easily collect and store information.

experlogix
Document Automation

experlogix.com/document-automation