

# Experlogix Document Automation for Salesforce

**CREATE, MANAGE AND DELIVER BETTER DOCUMENTS FASTER, SEAMLESSLY INTEGRATED WITH SALESFORCE.**

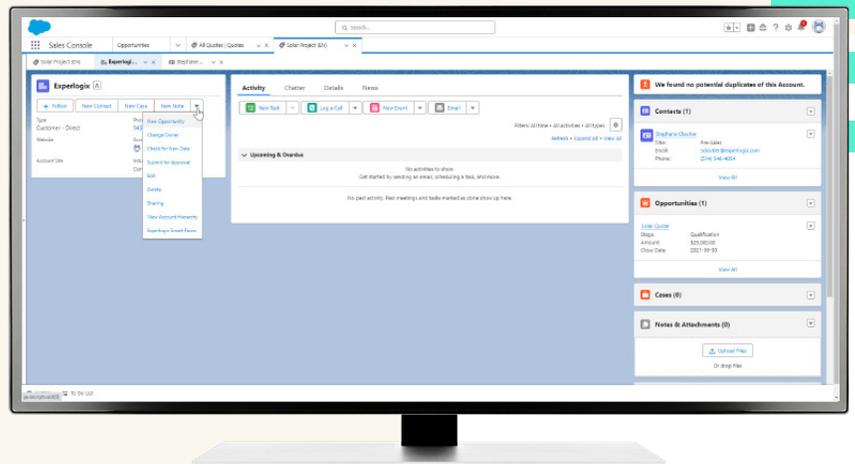
Experlogix Document Automation empowers your business users to easily build and automate optimized document processes from your Salesforce environment – resulting in increased productivity, enhanced document quality and reduced dependence on IT.

## Automated Document Flows Optimized for Salesforce

Experlogix Document Automation for Salesforce lets you build and run any document generation, approval, delivery, and storage process that leverages data from Salesforce, web-based Smart Forms and external data sources – all without code.

## Leverage Data from Across and Beyond Salesforce

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

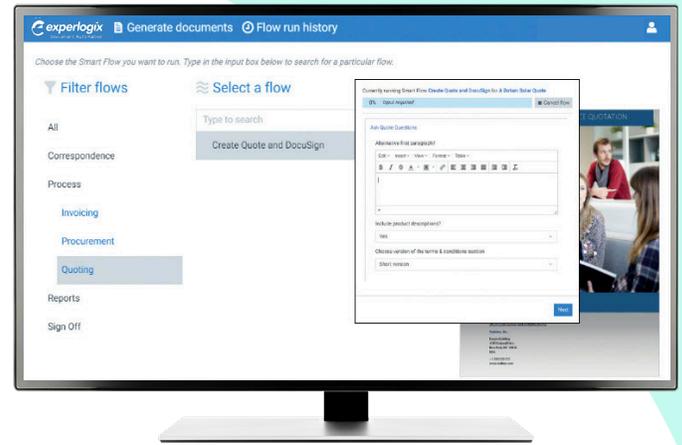
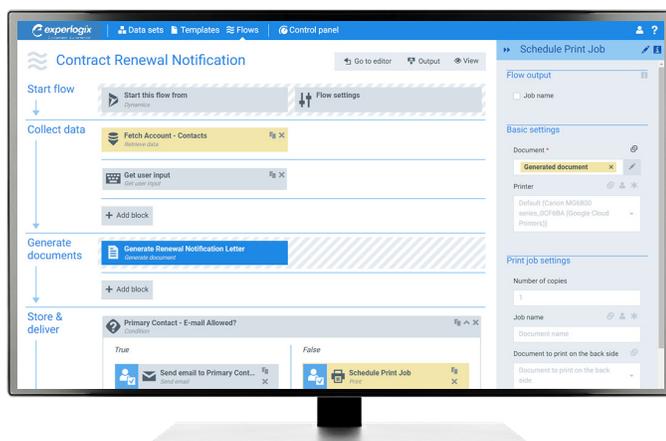


## Plug and Play Integration

Experlogix Document Automation turnkey integration with Salesforce automates the creation, management and delivery of documents within a Salesforce workflow with minimal dependence on IT. Manually trigger flows with a single click in Salesforce Lightning or Salesforce Classic.

## Features

TEMPLATE DESIGN
Loop (grouping, filtering, sorting)
Conditions based on user input
Conditional formatting
Field format (date, time, number, currency, etc.)
Re-usable styles for date, time, number, etc.
Dynamic integration of images from sources
Append existing documents (.doc, .docx, PDF, etc.)
Calculations
Calculations and calculate pseudo-fields
Chart generation and insertion
Bar code and QR code
Multi-language support
Composed templates (header, footer, body, inserts)
Template versioning with comments and rollback
OUTPUT MANAGEMENT
19 document formats
Print to a local printer
PrintNode
Preview and approval process
Flow execution reporting
AUTOMATION
Smart Flows visual flow builder
Workflow management (third party workflow tool req.)
Preview and approval workflow
Manual or automatic flow triggers



## Unlimited Data Collection

Collect data from all Salesforce objects, with an unlimited degree of relationships between the objects. Easily aggregate Salesforce data with other data sources and utilize Experlogix Smart Forms to capture user or other stakeholder information during the document flow execution.

## Automated Document Flows

Experlogix Smart Flows allow users to visually build automated document workflows that contain conditional steps, such as storing generated documents as an attachment to a Salesforce record, creating activity records, delivering documents by email, and tracking these emails in Salesforce.

## Experlogix Smart Flows & Salesforce

Easily choose which Salesforce objects are Smart Flows enabled. Experlogix works with the Salesforce security system by authenticating users and filtering flow selections based on the active user's permission set assignments.

## Automated Document Flows

Experlogix Document Automation for Salesforce provides an integrated control panel where users can access and manage project settings, controls, configurations, and flow errors. A reporting interface offers detailed insights into adoption, usage and performance.