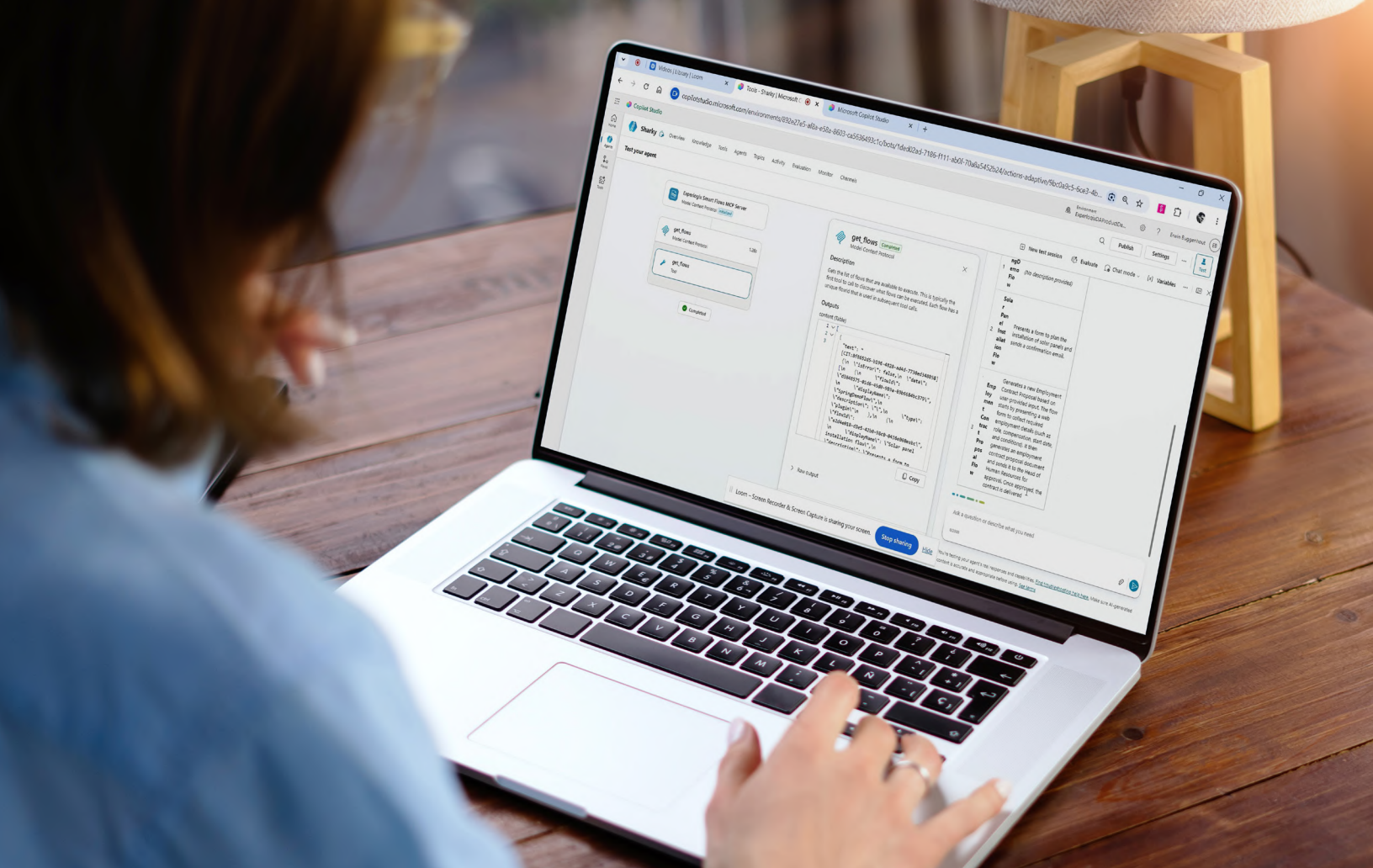




Experlogix Smart Flows MCP Server

Empower Your AI Agents with Document Automation Brains and Muscles

Connect your AI agents to Experlogix Document Automation and extend their capability to execute your document automation workflows.



What is Experlogix Smart Flows MCP Server?

- Experlogix Smart Flows MCP Server provides your AI assistants access to the workflows and document automation processes that power your business.
- It ensures every document automation action performed by your AI agents follows the same business rules, approvals, data validations, and compliance requirements that your team members follow today—without custom development.
- Compatible with Salesforce Agentforce, Microsoft Copilot Studio, and other MCP-enabled platforms, it helps organizations move beyond chat-based AI and empower agents to take meaningful, auditable action.

“USB-C for AI”

An MCP (Model Context Protocol) Platform is an open-standard architecture that acts as a universal bridge between Large Language Models (LLMs) and external data sources, applications, or developer tools.



How it Works

Discover Available Flows

Agents can identify what flows are accessible based on their permissions.

Understand Required Inputs

Agents can identify what inputs/data are needed to execute the flow.

Execute Document Workflows

Agents can trigger flow execution without bypassing existing security, approvals, or governance controls.

Retrieve Workflow Results

Agents provide a direct link to the Flow Execution Panel for full results and generated documents.



Step by Step

1. User Requests an Action

An employee, customer, or agent interacts with an AI assistant.

2. AI Agent Calls Experlogix

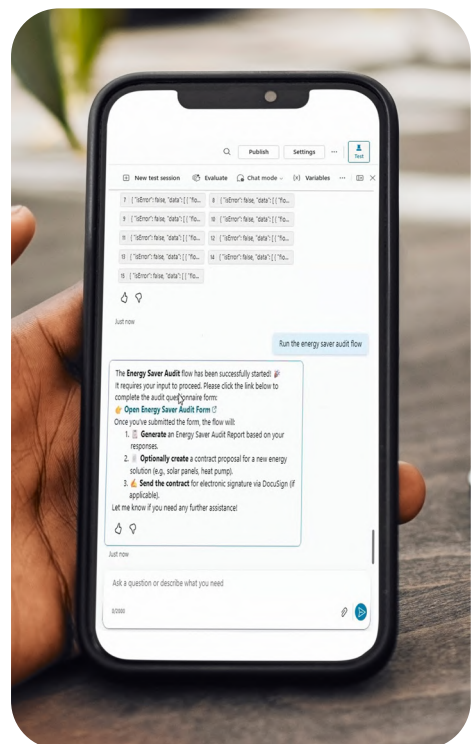
Using the MCP Server, the AI agent securely accesses approved Smart Flows tools and workflows.

3. Smart Flows Executes the Process

Experlogix retrieves data, generates documents, launches workflows, and orchestrates business processes.

4. Results Delivered Instantly

The completed document or workflow outcome is returned directly to the user within the chat.



Key Benefits

Extend the power of Experlogix Document Automation's robust, scalable document generation with the ease of natural language AI.

- **Empower AI to take Action**
Move beyond question-and-answer. Agents can execute real business processes, not just talk about them.
- **Accelerate Document Generation**
Generate complex, multi-source documents in seconds instead of hours.
- **Maintain Consistency and Compliance**
Every document follows approved templates, business rules, and governance automatically.
- **Have Full Visibility**
See execution status, results, and generated documents without leaving your conversation.
- **Eliminate Workflow Silos**
Trigger existing automation directly from the tools your teams already use, no rip and replace.

Common Use Cases



Sales

A rep asks Copilot AI to draft a contract using the latest CRM data on an existing account. Smart Flows pulls the details, applies the correct template, and returns a ready-to-send document.



Banking

A loan manager asks an AI agent to generate a loan agreement using the latest applicant data. Smart Flows assembles the document, applies compliance rules, and routes it for approval.



Insurance

An insurance broker needs to produce a policy quote or binder using current policyholder data. Through the agent, Smart Flows generates the document and delivers it ready for client review.



Customer Service

A customer requests a quote or information via a company's website's AI chatbot. The chatbot can engage with the customer, generate the needed documents, and deliver documents in minutes.

The Experlogix Smart Flows MCP Server enables organizations to extend their AI agents with process document automation, document generation, and business workflow orchestration.



To learn more, visit [Experlogix.com](https://www.experlogix.com)