

Experlogix CPQ with Experlogix Document Automation for Microsoft Dynamics 365

Better, Faster Document Generation

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

Improve Productivity with Optimized, Automated Document Flows

Experlogix Document Automation 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), Experlogix Document Automation'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.

Benefits

- Modern, Responsive User Interface
- Centralized Management Console
- Advanced Document Design
- Composed Templates
- N:N, 1:N or N:1 Relations
- Conditional Document Flows
- Seamless Integrations
- Programmed Functionalities

“Experlogix Document Automation transforms business processes with powerful document automation technology. The solution helps customers worldwide simplify the transformation of their document-centric processes and stay ahead of their competition.”

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. Experlogix Document Automation 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 Experlogix Document Automation 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 life cycle management, and more. Plus, you can easily collect XML data from RESTful web services with the Experlogix Document Automation Flow Builder component.

Reduce Dependence on IT and Empower Business Users with Robust Capabilities

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

Adding the “Q” to CPQ

Experlogix Document Automation’s API is a ready-to-use server-side component adding document generation and document automation functionalities to your software applications. Create and deliver highly configurable quotes and proposals that drive customer engagement, through the advanced quote generation feature of our CPQ solution.

Generate Personalized Quotes Faster and With More Accuracy

An advanced feature of Experlogix CPQ, the quote generation functionality powered by Experlogix Document Automation allows you to create, generate, manage, deliver and e-sign highly personalized, accurate, and compelling quotes and proposals through automated and consistent processes. This allows you to deliver personalized documents faster than your competitors and better engagement with your customers.

