



Microsoft
Dynamics 365



Easily Solve Your Document Challenges with Xpertdoc and Microsoft Dynamics 365

**PERSONALIZED
CUSTOMER
CORRESPONDENCE**

proposals

E-APPLICATION

quotes

**DIGITAL
SIGNATURES**

**OMNI-
CHANNEL
DELIVERY**

invoices

**SELF-
SERVICE**

**DOCUMENT
CREATION,
AUTOMATION
& DELIVERY**

contracts

Quotes • Proposals • Contracts • Invoices

With the Xpertdoc Connector for Dynamics 365, you can create, manage and deliver highly personalized, data-driven and engaging documents in a single click.

BETTER DOCUMENTS FOR BETTER CUSTOMER ENGAGEMENT

Organizations communicate regularly with thousands of internal and external clients through various types of documents – flyers, NDAs, proposals, quotes, and other correspondence, many of which lack brand consistency. Customer communications is a large undertaking that can strain personnel, budget, and technology resources.

DEPLOY AND DISTRIBUTE COMMUNICATIONS DIRECTLY FROM CRM/365

Using the Xpertdoc Customer Communications Management (CCM) platform coupled with our Connector for Dynamics 365, organizations can improve client communication by generating, managing, and delivering Omni-Channel communications with a single technology solution hosted either on-premise or in the Microsoft cloud.

XPERTDOC CCM FOR OMNI-CHANNEL CUSTOMER ENGAGEMENT

Supporting outbound communications through customizable and pre-packaged templates, e-applications/on-boarding and inbound through interactive Smart Forms, Xpertdoc CCM allows you to optimize every customer interaction whenever, wherever and however it takes place; mobile, tablet, web, SMS, email and print.

LEVERAGE YOUR MICROSOFT SKILL SET AND REDUCE IT DEPENDENCE

Reduce dependence on IT and leverage your Microsoft skill set with our Microsoft Word-based Template Designer. Creating visually appealing forms and documents has never been easier. And with bi-directional workflow capabilities, managing and storing your documents in a central location like Microsoft SharePoint, is easy.



Xpertdoc and Microsoft Dynamics 365. The Perfect Match.

- Improve customer experience by sending out contextual and relevant documents
- Drive customer loyalty and business growth
- Maintain brand consistency across departments