

Flexible Document Generation for SugarCRM



FLEXIDOCs
DOCUMENT GENERATION MADE EASY

Experience the most powerful document creation platform,
seamlessly integrated into your daily workflow

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1. PRODUCT

What is Flexidocs?

Flexidocs allows users to generate contracts, quotes and letters with a single click in their CRM system, leveraging the power of the CRM metadata framework to automatically pull in fields and related records into a document, which can then be emailed or shared with the customer, or sent directly for electronic signing, which can be done on computer, smartphone or tablet. All key signing events are captured back into the CRM in **real time** and can be used to quickly identify where a signing process is up to, and the final, signed contract is automatically stored back into the CRM.

By automating this process, Flexidocs reduces the number of processes associated with generating documents for customers, partners, or even internal stakeholders. This process reduces administration time, and provides a much improved customer experience when signing contracts and collaborating on documents and quotes.

Currently, there are a number of different packages available on the Flexidocs platform as shown below.

Price per month	Available Merges per month	Electronic Signing included
\$59	100	✗
\$199	500	✓
\$299	1,000	✓
\$599	5,000	✓
\$999	10,000	✓

2. FEATURES

Flexidocs has a number of notable features that are aimed to improve the document and contract management system of a company. These include:



Full Creative Control

Having full and unlimited creative control over how a document looks and feels can be the difference between a professional looking document and a simple, unimpressive one. By being able to create the templates for documents in MS word, excel or powerpoint, users are able to utilise the programs that they already know how to use and create documents which have the right look and feel to suit their company's needs, without the need to use any coding or graphic design programs.



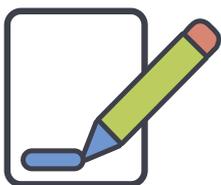
Interactive Fields and Configurable Workflow

Flexidocs supports a number of advanced features in it's templating engine, including the ability to have conditional sections, looped sections (driven by relationship data in the CRM), formatting modifiers, and interactive fields, where customers are prompted to complete a required input before generating a document.



Multi-format Support

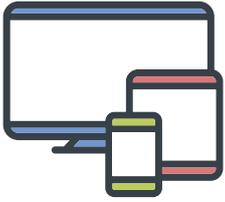
Flexidocs supports the ability to create documents in multiple different formats (MS word, powerpoint, excel or PDF), which allows users to automate the process of generate documents, spreadsheets, and even tailored client presentations in their CRM.



E-signing

Flexidocs supports all three of the major electronic signing platforms (HelloSign, DocuSign and EchoSign), allowing the user to determine which platform will best suit their needs and requirements. Electronic signing allows users to send documents, directly from their CRM, to their clients for remote signing without needing to print or scan the document first.

Mobile or Desktop Signing



In addition to the ability to send documents, clients can also sign documents on their desktop, mobile or tablet. This allows for a simple and fast turnaround of document completion, allowing for sales to close faster. On top of this, users are able to take documents out to client sites and have them sign contracts 'on the spot' on a tablet or smartphone, decreasing the time taken for a document to be signed and delivered.

Mass Generation



The Flexidocs platform allows for the mass generation of documents from any object within the user's CRM platform, giving the user the opportunity to create and send multiple documents simultaneously.

Dynamic Templating



Flexidocs allows for functionality outside of basic 'pull fields' within its templating structure. The platform allows users to create conditional sections (if/then structures), looped data and formatting macros (manipulating a document's format, etc.). In addition, the templating engine also supports rules and restrictions dependent on the required data. This flexibility allows users to expand the depth of their documents beyond the use of simple fields and sections.

Merge Field Wizard



When creating document templates, Flexidocs provides a library of merge field tags that identify the fields that you would like to include in your template. This removes the need for users to navigate complicated tags or code to create their different documents, and provides a very user intuitive experience.

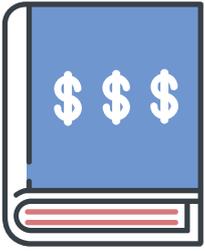
Quoting



Flexidocs comes with a beautifully designed and user intuitive quoting module included in the platform, providing users with an easy way to manage their quotes, and drive instant updates to their line managers around their forecasted revenue.

- Quoted Line items feed into your Opportunity 'Likely Value' for forecasting
- For SugarCRM Enterprise, Quoted Line Items translate into Revenue Line Items when quotes are updated

Pricebooks



Always wanted multiple pricing tiers for when preparing quotes for your customers? We have you covered!

- ✓ Define multiple price books with a default discount rate applied against your master unit prices
- ✓ Pricebook selection built into the quoting module. Just select your pricebook from the drop down, and the correct unit pricing will be reflected.

3. FLEXIDOCs CONSOLE

“Easily manage your document templates”

The screenshot shows the Flexidocs console interface. At the top left is the Flexidocs logo with the tagline 'DOCUMENT GENERATION MADE EASY'. To the right are navigation tabs: DOCUMENTS (selected), MANAGE PLAN, SETTINGS, and REPORTS, along with a user profile icon. Below the navigation is a 'New Document' button and a search bar labeled 'Search by name' with a 'Search' button. The main content is a table with columns: Name, Module, Date Created, Modified, Status, and Signers. The table lists eight document templates, all with a status of 'active'.

Name	Module	Date Created	Modified	Status	Signers
CRM Sign Off	Opportunities	2015-11-17 16:35:47	2016-05-31 20:12:57	active	2
General NDA	Accounts	2016-05-19 12:44:06	2016-05-27 11:31:13	active	2
Intellidocs Partnership Agreement	Accounts	2016-03-08 10:15:13	2016-05-18 13:18:35	active	2
Opportunity Template	Opportunities	2016-05-12 10:09:13	2016-05-31 17:32:43	active	0
Outsourcing Agreement	Opportunities	2016-04-28 17:00:05	2016-05-13 17:49:51	active	1
RSVPselling License Agreement	Opportunities	2016-04-28 16:05:53	2016-04-28 16:11:32	active	1
Simple Services - Two Signers If Needed	Opportunities	2016-05-03 19:56:00	2016-05-04 22:59:52	active	2
Simple Services Agreement	Opportunities	2015-11-09 10:34:54	2016-06-01 14:57:34	active	1

The Flexidocs console is where users manage all of their document templates. The focus was on providing a clean and intuitive interface for users, and ensuring there is clear visibility across the types of documents generated in the CRM.

- ✓ Download your current templates to update them
- ✓ Upload revisions of your templates
- ✓ Track Version History

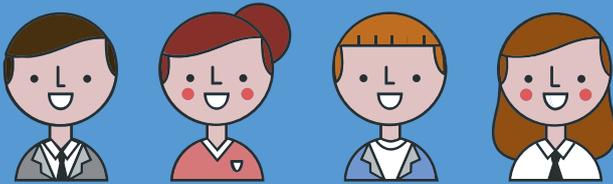
4. CONTRACT AND DOCUMENT AUTO-ARCHIVING

One of the main issues that organisations face is the need to archive and centrally store contracts and relevant documents that are easily searchable and accessible at any time. During the development of Flexidocs, this issue was looked at from a number of viewpoints, with the main need of being able to ensure that there was an automated process for archiving documents once they are signed, or once they had been generated in the CRM.



- ✓ Merging events
- ✓ A time-line view of signing events
- ✓ Quick access to download previously generated documents

5. END USER BENEFITS



“Support your staff with a platform that significantly reduces their administrative overhead”

Flexidocs provides a number of lasting benefits to users through it’s innovative design and intuitive interface, working to improve the day-to-day lives of sales and administrative staff in a variety of different industries. Each of these end-user benefits are outlined below.

By streamlining the document creation process, Flexidocs makes it simpler to generate contracts, quotes, certificates and letters directly from their CRM system. This removes the need to manually enter details into documents, speeding up the document creation process, and increasing the accuracy of documents by reducing the amount of human error that can occur in this process.

In addition to a more streamlined and accurate document management system, Flexidocs also creates an environment that increases compliance and reduces the legal risk of document storage and signing. This is managed through the electronic signing platforms, removing the need for physical delivery and signing of documents, whilst also capturing the signed documents directly back into the user’s CRM.

This easy storage allows users to have easy access to the documents, whilst also reducing the possibility of misplacing the signed document at any stage throughout the signing process. This electronic storage also means that the documents can easily be referred to at a later date as they are kept in a secure and accessible location for the user’s discretion.



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