

doxee

Doxee APP

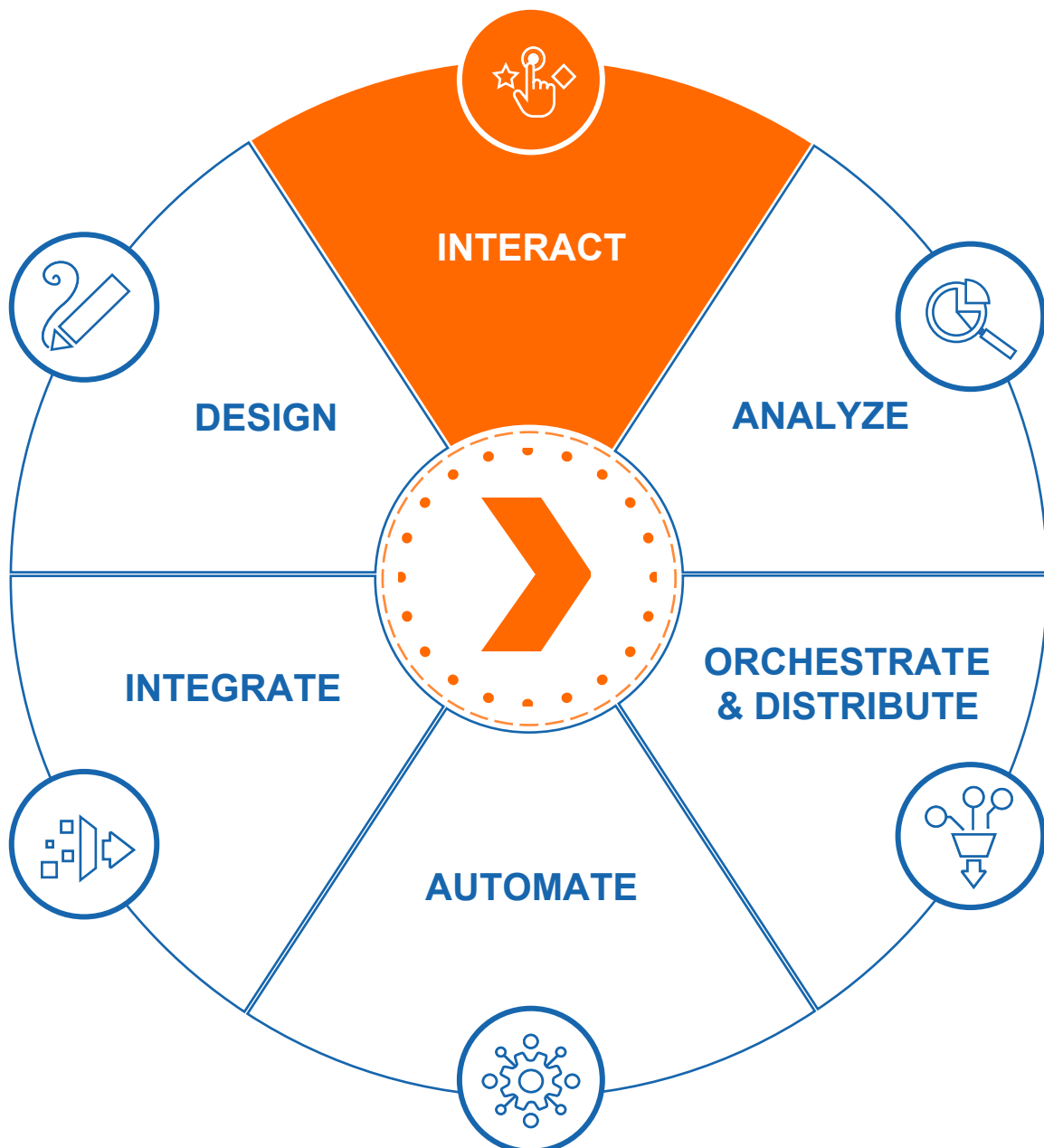
for Salesforce®



PRODUCT OVERVIEW

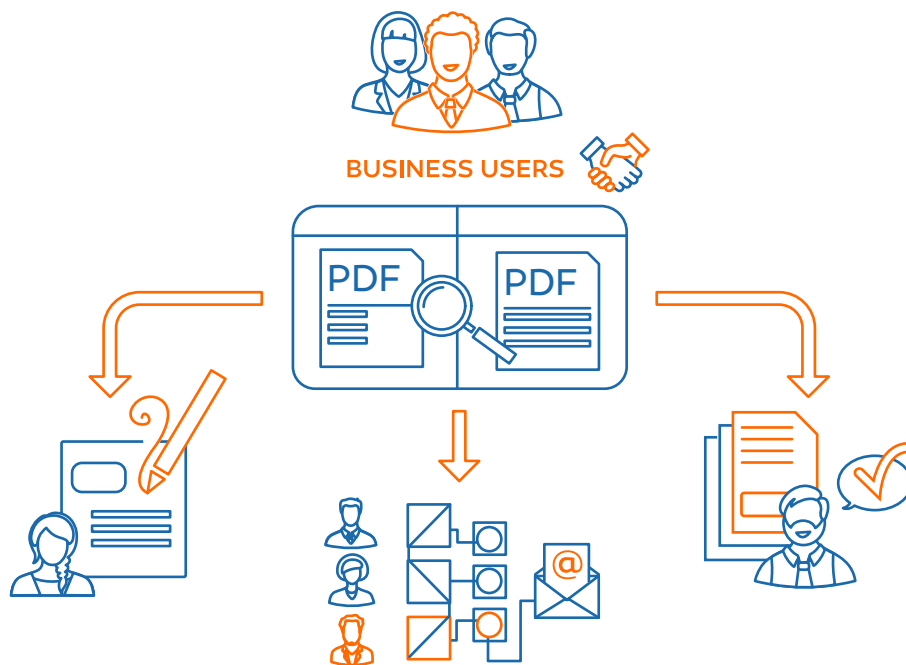
Overview

Doxee APP revolutionizes document generation for designers, operators, and agents by providing seamless access to **Doxee Platform®**'s Workplace and Composer modules directly from **SalesForce®** CRM. These modules enable users to effortlessly manage templates, create documents interactively, and execute workflows. Click [here](#) to discover more about Doxee Platform®.



The Doxee Platform behind Doxee APP for CRMs.

Behind Doxee APP user-centric interface, stand the Doxee Platform® 's robust design components, including Process Designer and Business Designer, offer powerful capabilities for configuration and customization.



Process Designer

The Process Designer empowers power users to define intricate, user-driven interactive document generation processes. It utilizes BPMN standard elements, allowing configuration and organization of activities and human tasks. These processes can include diverse elements such as start/end events, mapping states, decisions, loops, and connections. Custom activities can be added for extended functionality, all seamlessly integrated into the Doxee Platform's open architecture.

Business Designer

The Business Designer, a web-based application, facilitates the creation and management of templates with a strong reuse concept. Templates, based on an element-based model, translate to a fully standardized XSL-FO format. The designer can create templates and template packages, centralizing content for reuse. Various elements like tables, lists, images, barcodes, loops, conditions, and more are supported. Power users can utilize specialized views for tasks such as design, preview, page master, styles, variables, and test data.

Doxee APP: Workplace and Composer

Doxee APP offers on-demand interactive productivity directly through the user's CRM, providing access to Workplace and Composer modules of the Doxee Platform.

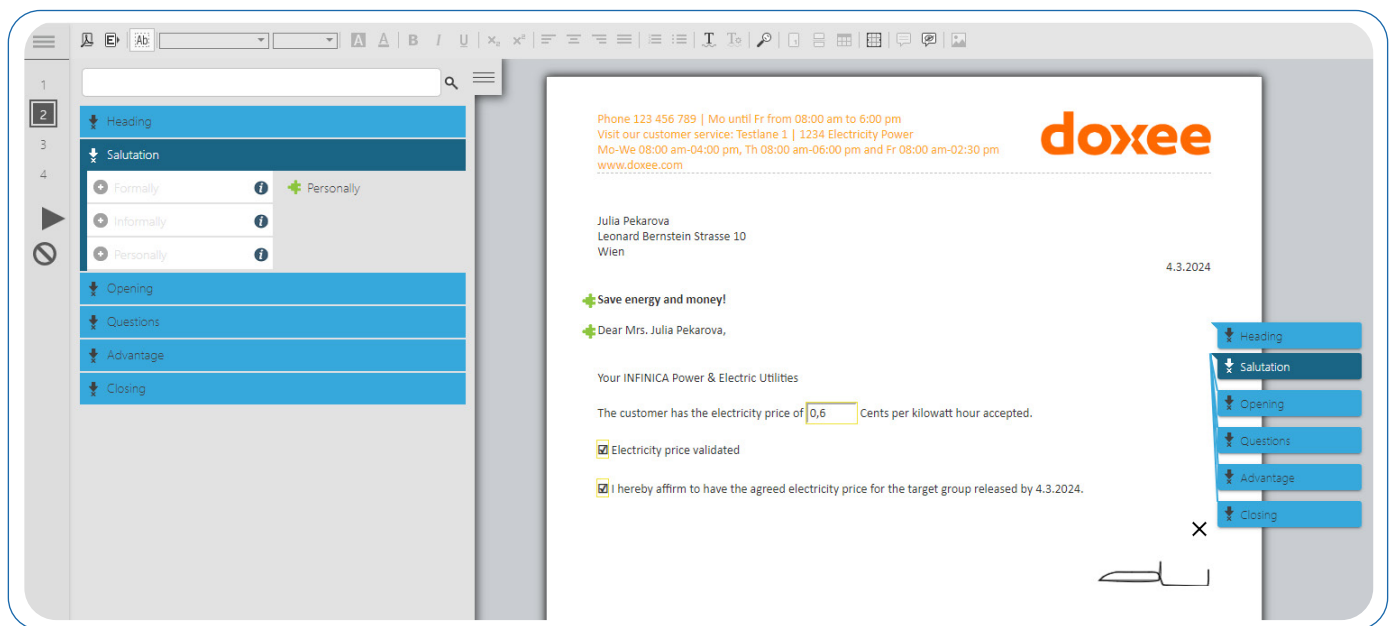
Workplace

Process-Driven Document Creation: PowerUsers can define flexible document workflows using Doxee Platform Process Designer.

Standard Tasks: Workplace supports various tasks, including template selection, data collection, interactive document editing, preview options, attachment management, and more.

Additional Features: Users can include comments and attachments within the document workflow, enhancing collaboration.

Composer



Role-Based Editing: Composer enables role-based editing, showing users where changes can be made based on template configurations.

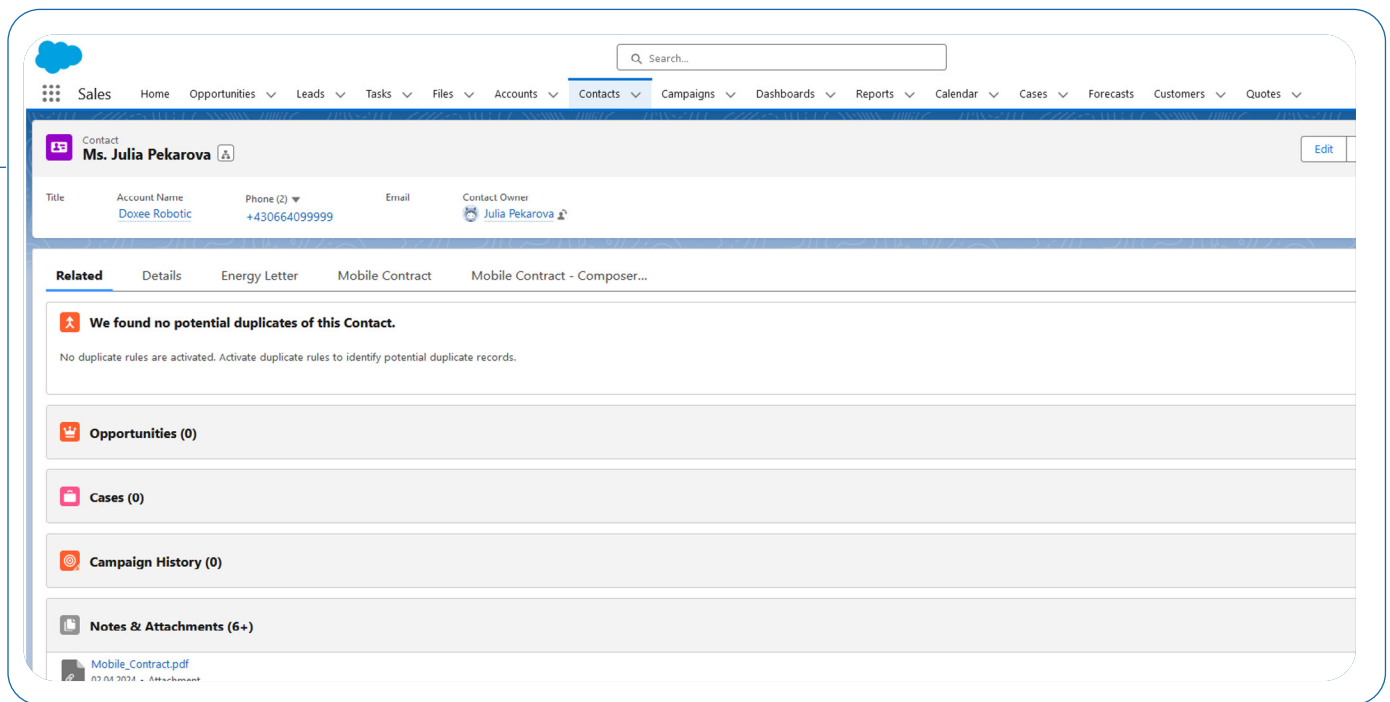
Configurable Format Options: Users can configure font size, font, and other format options easily.

Comments and Help Texts: Mouse-over events provide additional information to aid users.

Text Area Highlighting: Users can quickly identify areas they can change based on their authorization.

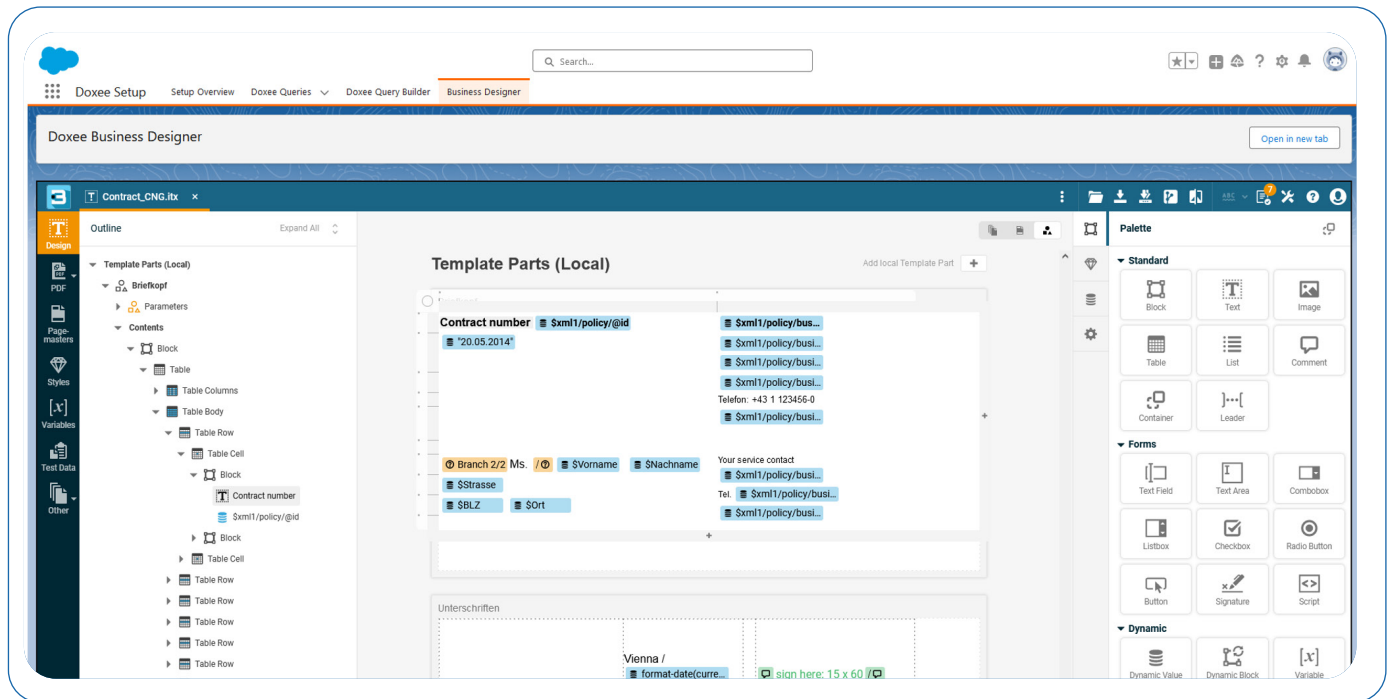
Doxee APP: CRM Integration

Doxee APP is accessible and configurable in CRMs thanks to the components described below.
Configuration management: enables the user to configure all necessary technical configurations directly in the app.

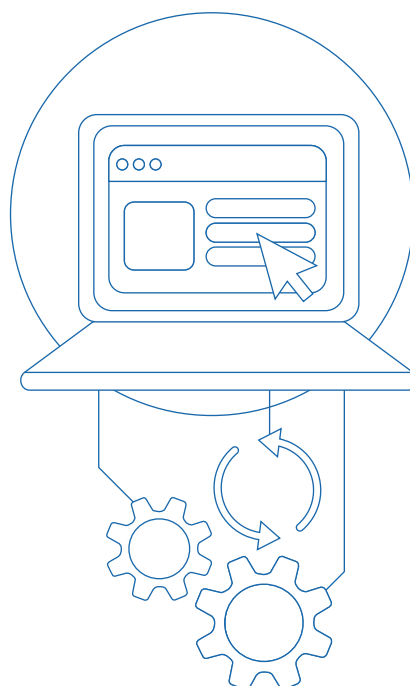


Query builder: simple tool that maps CRM data with Business Designer. In the Query builder user selects what CRM data he wants to use in a template. Output is an XML document that can be used in the Business Designer to populate dynamic fields.

Business designer: full version is embedded to the app. The user can design templates from scratch or amend any of the already created templates. The Business Designer is connected to a repository giving the user possibility to store and browse template and external template parts such as graphic parts.



CRM Plug-in: Doxee APP plugin can be configured in any CRM entity such as Contacts, Customers, Accounts, Orders... Users can use CRMs' native technology to configure the entity objects. In praxis it means that the Doxee plugin (Lightning component) will be displayed as an additional tab in any entity allowing also to configure multiple tabs for different use cases. For each tab an individual process is selected allowing different workflows. During the runtime, when the CRM user clicks on the tab, process is started and Workplace component is displayed.



Doxee APP and Salesforce®: Benefits

The main advantages of integrating the Salesforce® Sales Cloud with Doxee Platform's document generation application includes:

1

PERSONALIZATION:

The Doxee Business Designer allows to customize the appearance and functionality of the CRM to fit company's specific needs. Create layout templates, forms, and views that reflect the unique workflows and business processes.

2

IMPROVED USER EXPERIENCE:

A customized and intuitive design improves the CRM user experience. It is possible to create a more user-friendly interface, simplifying navigation and organizing data in a more accessible and understandable way. The Doxee Workplace Lightning component allows you to include interactive document generation on any Salesforce® page.

3

OPERATIONAL EFFICIENCY:

The Doxee Platform's Business Designer allows to automate processes and activities within CRM. It is possible to create predefined templates for creating documents, sending notifications, or performing specific actions to simplify and speed up daily operations. The Doxee Query Builder provides graphical access to all Salesforce® data objects, which are then available in the template design.

4

SCALABILITY:

App for Salesforce® gives the flexibility to adapt your CRM as the business needs evolve. It is possible to easily add new fields, models, and templates, adapting the communications style in real time as the business grows.



Contact the leader in cloud Customer Experience

At Doxee, we transform the customer experience with innovative technologies that help enterprises communicate and engage with their customers more effectively, creating stronger relationships that drive sustained business growth. Our native cloud-based customer communications management and customer experience solutions give our partners and customers a competitive advantage. We provide a positive experience and added value at both the enterprise and end-user customer level.

Discover more about Doxee!

DOWNLOAD

They chose Doxee's **Customer Communications Management** product:



Our Certifications

