XpertDoc Brief Review

From the information on their website, Xpertdoc indicates it will serve the needs of enterprises that deal with huge volumes of documents every day like insurance companies, banks, medical facilities, and law firms. Also, the company claims it can be used by small and medium businesses for daily tasks like generating emails, invoices, and reports. We decided to take a closer look at the innards of their document generation software (albeit, they didn't respond to our requests for a free trial version).

On the surface, Xpertdoc offers the following features:

- Template creation and selection

- Document management

- Data export and import

- Processing in batches

- Task collaboration

- User tracking

- Multiple output formats

Among these features, three of them stood out as they are key when it comes to dealing with documents and in our opinion, those can make or break the software ---- the Template Design, Document Automation, and Document Generation.

Let us take a closer look:

Xpertdoc Template Design

The first thing we liked about the template design is that we were able to create templates using Microsoft Word. This is something we are already familiar with which means we do not have to start by learning how to use a new program. Xpertdoc actually integrates with various applications so it doesn't matter what you are used to, chances are it will integrate with it.

Template design also seems to be well automated which saved us a lot of time. In comparison to the hours and days it would take us to come up with a template while using other options, this one was fast since most of the stuff is already thought of and we simply need to click on what we want and the software will add it to the design.

With this template designer, we were able to use data from different sources and integrate various designs to come up with a custom made template that includes what we would think are stunning like colored graphs, flow charts, and 3D logos. The possibilities here seem to be endless, we were indeed impressed by this.

If you are not so particular about what your templates look like, then you will appreciate the fact that there are already designed templates that you can just click on and use. This is convenient for simple documents like an email that may not need a lot of customization.

Also, we think if you don't really know your way around the template design and you are running a small business, the pre-designed template comes in handy as you get used to the software.

These were some of the impressive features we discovered but Xpertdoc also highlights the following:

- The ability to insert files of different formats which includes barcodes, QR codes and multimedia content.

- The option to make templates available in different languages

- Version control which allows users to switch between different versions and   choose the best and most accurate

- Complex calculations can be included in the template using the Expression   wizard

Pros

- Template design can be automated

- It comes with predetermined design

- You do not have to translate manually since it can translate to different languages

Cons

- Languages available are limited

- It feels like it should be faster

Document Automation

The automation process is fairly easy, it is more about choosing what you would want done and how it should be done. The common industries that would need to automate their processes are well taken care of so you simply need to choose your industry and the automation process will be done straight away. There is no need to involve IT or learn to code.

Some of the common industries you can choose from include:

- Banking

- Insurance

- Governance

- Communication

- Retail

We did not go through all the industry options but we realize that the document automation can handle anything from very complex to simple document tasks and it does this quickly. If for example, you wish to automate a banking loan process form, it can take less than 2 minutes.

Automating the document generation system requires that you integrate Xpertdoc to your CRM system and it will be able to access all the information on the CRM. with a few clicks, you will be ready to go.

The success of this is mainly down to the amount of data you have, we realize it can use data from different sources, so even if you choose to use cloud storage, it should be possible to have access to the data.

We were a bit worried though by the fact that you can also link it to internet data, since the web is also full of inaccurate data as well as accurate. It would be important to specify sources of data online that you will use, otherwise your documents could end up with inaccurate data.

Pros

- There is a lot of helpful tech support available at any stage of automation

- You can use various sources of data

- Most of the work is already done so you just click on what you want

Cons

- It can be slow at times

Document Generation

It is impressive at how dynamic the document generation gets with Xpertdoc. You can try out different documents and they will be generated, right from a simple letter saying 'thank you' to something more complex like a detailed 'sales report' or a 'research paper.'

How the document comes out depends on the template you designed earlier or if you choose to use the templates that are predesigned by Xpertdoc.

Generating a document is as simple as specifying the type of document you would want to create, choose the data source, and include whatever variables you may require. There is also the option of dragging and dropping parts of a template into a document, for example, if you would like to use a one-off graph in your proposal, you can add that to a template just for that particular proposal but that does not mean there will always be a graph in other similar documents.

It took us some time getting used to the positions of different tabs and buttons but once you get the hang of it, it should be a lot faster to generate a document.

We would have preferred it though if they provided more detailed error messages that make it easier to solve a problem on my own without having to ask tech support. It takes up time, especially for someone who is new to the Xpertdoc document generation.

Xpertdoc website talks of having a responsive interface and so we tried it out on a mobile device. Yes, it is responsive, but if you have a phone with a small screen (5inches or less), you might find it takes longer to generate a detailed document since there is a lot of scrolling that will be needed. It is however okay on a tablet. We find it easier to touch the screen as opposed to moving a mouse and then clicking.

The bottom line though is that whether you use a mobile device or a desktop computer, the documents come out looking the same.

There are a number of demos and blogs that can provide users with valuable information on how to get the best out of Xpertdoc especially when using "Smart Flows" which is what makes generating documents with this software a lot easier. We found the video and webinar helpful to get a better understanding of Smart Flows. With this, you can easily use Adobe Sign, which is the most common e-signature tool. This is actually available only on the upgraded Smart Flows 4.2.

Pros

- Intuitive interface that allows you to use different devices to generate documents

- You can get documents approved easily and fast since it allows collaboration

- The document quality is impressive and integrates with existing applications

- You do not need to install any new application to be able to generate or access documents

- Documents can be automatically translated so even if you generate a document in English and send it to a client in France, they will be able to read it in French

- It is a professional product that can be used in large enterprises as well as small businesses

- It integrates with a number of data sources

Cons

- It takes some time to get used to navigating

- It is not easy to use on small screens since you have to scroll a lot

Xpertdoc Security

We are no expert on security so it is really hard for us to give an opinion but based on the assurance given on the product website and information from some IT friends of ours, the security is good. You can choose who has access to documents and how much access they can have. Xpertdoc will also record when someone accessed a document and what changes they have made (if any).

Final Words

We would give it the thumbs up and recommend it to other people who are looking for a reliable document automation system. It has come a long way from the time it was first released as Xperido to what it is now. We can expect to see more developments with better performance.

On the flipside, it will also help if set up is made even faster with less need for IT help. At the moment a person who is new to this software may need constant support. Although Xpertdoc indicates it does have round the clock support and demos to teach you how to use it effectively.