

dox42[®]
automate your documents
integrate your data

dox42 Overview

Lisa Pulsinger

Senior Technical Evangelist

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lisa.pulsinger@dox42.com



Business



IT



Marketing

Automate your documents, integrate your data

Flexible, powerful and intuitive

dox42[®]

automate your documents
integrate your data

600
Customers

100
Partners

HQ
Vienna

Innovative
Software Product
for Document Generation

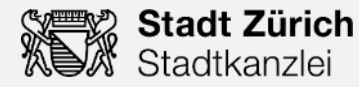
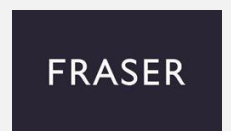
Intuitive Design for
Complex Documents in



Document Output



Flexible Integration



Companies in Manufacturing automate Documents with dox42

- ✔ Offers, Orders, Invoices
- ✔ Quality and Audit Reports
- ✔ Waybill with Barcodes
- ✔ Sales Presentations
- ✔ Project Management Reports
- ✔ Employment Contracts
- ✔ And much more

“Currently dox42 is utilized as document generator in our global sales and service platform that is based on Microsoft Dynamics CRM.

We are generating sales quotes, fully automated high-quality service reports and additionally we use the dox42 Excel automation for our new service product ‘Lifecycle-Care’.”



Marc Rieger
Business Process Representative



Intelligent Automation for Finance with dox42

- ✓ Financial Investment Proposal as PowerPoint
- ✓ Contracts, Rental Contracts, Employment Contracts
- ✓ Depot Evaluation
- ✓ Financial Reports
- ✓ Insurance Policies
- ✓ Real Estate Valuation
- ✓ And much more

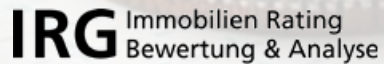
“dox42 has quickly established itself as useful and practical tool for the creation of validations and contracts for our customers within the Volksbank South Tyrol and it’s even fun to work with.”



Volksbank



Stefan Runggatscher
Information Systems Data Management



VolkswagenStiftung



TBFS

Hassle-free Document Automation for the Public Sector: dox42

- ✓ Contracts
- ✓ Employment Contracts
- ✓ Certificates
- ✓ Legal Documents
- ✓ Permits
- ✓ And much more

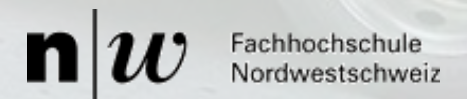
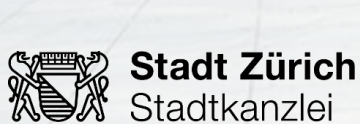
“From now on, our employees don’t have to worry about the structure and design of documents, they can rather focus on the essential contents.”



Stadt Zürich
Stadtkanzlei



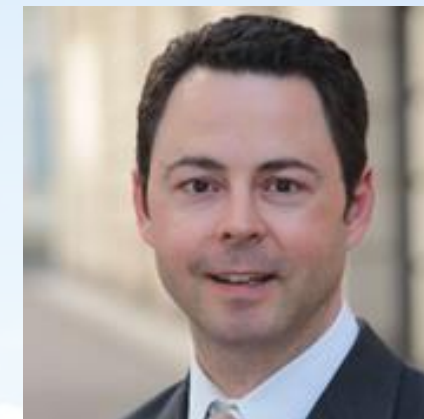
Michael Lamatsch
Vice Town Clerk



Intelligent Cost Savings - dox42 for Energy and Utilities

- ✓ Contracts
- ✓ Offers, Orders, Invoices
- ✓ Legal documents
- ✓ Mail Merge
- ✓ Project Management Reports
- ✓ And much more

“Whether it comes to sending automatized documents per mail, PDF-documents or even whole websites - with dox42, all thinkable tasks can be implemented quickly and easily.”



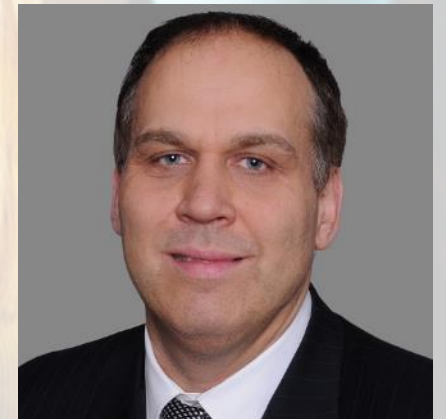
Wolfram Bürgel
Head of IT



Process Automation - dox42 for Professional Services

- ✔ Offers, Orders, Invoices
- ✔ Contracts, Employment Contracts
- ✔ Project Management Reports
- ✔ Sales Presentations
- ✔ Legal Documents
- ✔ And much more

“We like dox42 for its flexibility in combination with the opportunity to automate processes. We can now automatically generate our quotes individually adjusted for each customer in a very efficient way. This helps us keeping a good customer relationship, which increasingly gains in importance in digital environments.”



Andreas Muss
Senior Product Developer

Fast and reliable - dox42 for Retail and Food

- ✔ Offers, Orders, Invoices
- ✔ Legal Documents
- ✔ Employment Contracts
- ✔ And much more

“The Break-Even Point was reached after only four weeks.”



Elena Schneider
IT - Project Manager



“As part of the ERP System integration, dox42 provided a solution for generating documents and for various business departments to easily edit the document templates. dox42 has proven to be really effective, which is why we will continue to use the solution for generating our documents.”



Benjamin Biendara
Business Analyst



dox42 saves a lot of time in Education

- ✓ School Reports
- ✓ Certificates
- ✓ Class Lists
- ✓ Study Notices
- ✓ Employment Contracts
- ✓ Mail Merge
- ✓ And much more

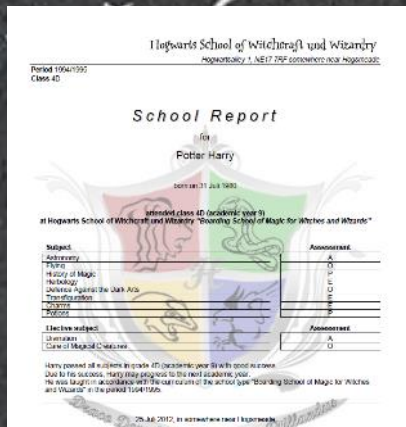
“As university we do have a number of documents which have to be produced regularly. Therefore, dox42 is the ideal automation-software, as our departments are able to generate the templates in the familiar Office-environment. Hence, training effort is reduced substantially and the IT department is relieved when it comes to layout and design issues.”



Kurt Rosivatz

Head Information Management

JKU
JOHANNES KEPLER
UNIVERSITÄT LINZ



BBRZ

n|w

Fachhochschule
Nordwestschweiz

OEGP

INSELGRUPPE

NBW

Betriebswirtschaftliche
Weiterbildung

dox42 is just right for Health Care

“Up until now, requirements were fulfilled by programming. Changes in the layout were only possible through the development department. With the use of dox42 it is now possible to integrate various documents and create the necessary templates intuitively and quickly in Microsoft 365 Office. It has required a minimal amount of effort to master dox42.”



Carmen Kretschmer
Solution Architect SAP

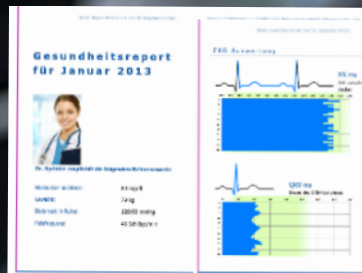
- ✓ Health Reports
- ✓ Patient Letters
- ✓ Care Documentation
- ✓ Project Management Reports
- ✓ Employment Contracts
- ✓ And much more

 INSELGRUPPE





 Debiopharm™



dox42 enables Cost Savings in Construction

- ✔ Offers, Orders, Invoices
- ✔ Integrate Maps, Plans and Images
- ✔ Quality Reports
- ✔ Project Management Reports
- ✔ Employment Contracts
- ✔ And much more

“We started looking for a tool that simply supports us in creating invoices, and we found what we were looking for with dox42. We connected it to our Dynamics 365 for Finance and Operations and that works very, very well.”



Raimund Heinle
Head of IT



“dox42 allows us to leverage our existing processes and systems to output professional, structured and automatic documents which provide us the ability to maintain a consistent approach across the company. Furthermore, the automation allows us to improve our compliance with external parties, reduce our document preparation times and enforce high standards of work.”



Jarrad Koppen
Business Solutions



dox42 for Transport, Tourism, Communication, Recreation and Art

- ✓ Travel Tickets, Event Tickets
- ✓ Offers, Orders, Invoices
- ✓ Letters, Mail Merge
- ✓ Vouchers
- ✓ Employment Contracts
- ✓ And much more



“Our HR department simply feeds employee data such as workload and hours worked into dox42 via an Excel file. The tool generates personalized documents from this data, which are then sent directly to the relevant employees for signing.(...) The collaboration with dox42 was extremely effective. The entire implementation, from the idea to the creation and dispatch of the 900 personalized documents, took place in just 10 days.”



Sarah Jackson
Country HR and Administration Manager

The easyJet logo is displayed in a large, orange, sans-serif font. It is positioned over a background image of an easyJet aircraft tail section, showing the red and white livery and the word 'Hispeed' in a smaller font.

High Quality Documents from Dynamics 365 with dox42

“With dox42 we were able to implement the solution we required very quickly, efficiently and to the satisfaction of all our users. We can now easily and intuitively produce very high-end documents, like sales presentations or brochures, from CRM in combination with SharePoint.”

FRASER

The Trusted Name in Yachting



Keith Fowler
CRM Project Manager



- ✓ High quality documents directly from Dynamics 365 CE | CRM or flow
- ✓ Include various content types like high-quality images
- ✓ Integrate data from many different data sources, including SharePoint



Sales_Report.docx - Word

File Home dox42 Insert Design Layout References Mailings Review View Developer Tell me Fabian... Share

Generate Data Map Data Insert Data Field Data Automate Range Automate Dynamic Column Automate Reload Text Blocks Connect Tutorials dox42.com Activate

sales report

Contact Information

Department

Development of total sales of medical equipment during the year

Sales of medical equipment per country

Country	Company sales	Sales	<input type="text" value="FirstName"/> 's share	Expected Sales
	All Employees	<input type="text" value="FirstName"/> <input type="text" value="LastName"/>	in company sales	<input type="text" value="End of Year"/>



Medical Equipment
Around The World

mediX Group

sales report **Celina Bentley**

Contact Information celina.bentley@medixgroup.com
+43 650 789 123 123 

Department Foreign Sales Department:
since 2014
(reporting to Senior Sales Manager)

Development of total sales of medical equipment during the year 2017



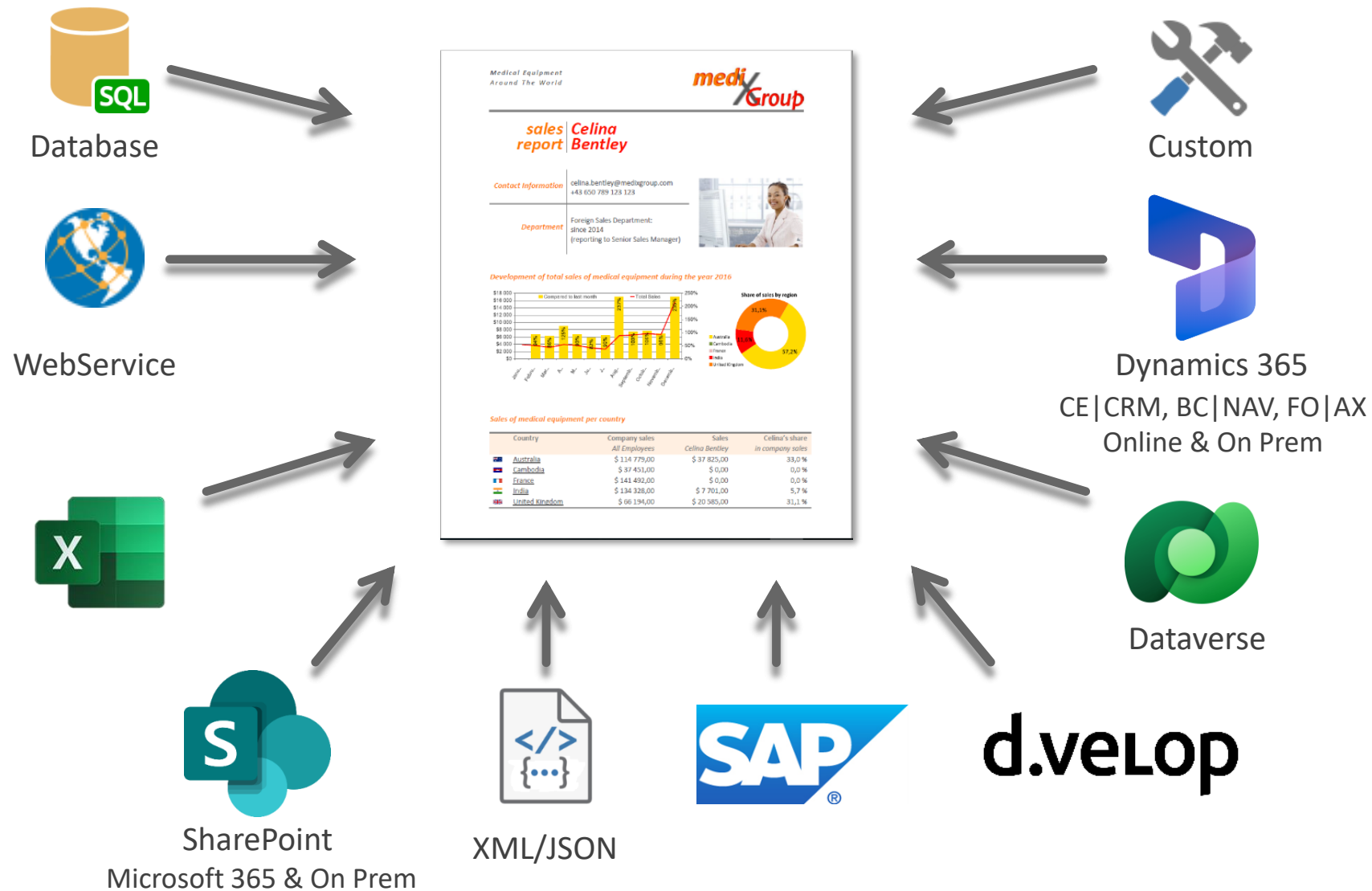
Month	Compared to last month (%)	Total Sales (\$)
Janu...	94%	~\$3,800
Febru...	86%	~\$3,500
Mar...	125%	~\$4,000
A...	93%	~\$3,800
M...	82%	~\$3,500
Ju...	90%	~\$3,800
J...	237%	~\$7,500
Septemb...	103%	~\$7,000
Octob...	106%	~\$7,200
Novemb...	0%	~\$0
Decemb...	0%	~\$0

Share of sales by region



Region	Share (%)
Australia	48.6%
United Kingdom	36.2%
India	15.2%
France	0%
Cambodia	0%

Template design in Microsoft 365 Office
Generate documents from Microsoft SharePoint, Dynamics 365
and SAP



Integrate data from various sources without programming

Data Map Designer

File | Data Sources

Input Parameter | Database Data Source | Excel Data Source | WebService Data Source | SharePoint Data Source | XML/JSON Data Source | SQR Generator

Word Data Source | CRM Data Source | SAP Data Source | Filter/Sort | Edit | Up | Down | Edit

Crypto Data Source | D365 BC | NAV Table | D365FO Report | Group Calculator | Dynamic Field

D365 BC | NAV Report | D365FO Entity

- Database Data Source: EmployeeNames
- Input Parameter: SelectEmployee
- Database Data Source: AvailableYears
- Input Parameter: SelectYear
- Database Data Source: EmployeeData
- Database Data Source: TotalSalesMonthEmployee
- Database Data Source: TotalSalesCountry
- Database Data Source: TotalSalesCountryEmployee
- Excel Data Source: ChartsIndividual
- Excel Data Source: AllSalesTable

Sales_Report.docx - Word

File | Home | dox42 | Insert | Design | Layout | References | Mailings | Review | View | Developer | Tell me what you want to do... | Fabian Huber | Share

Generate | Data Map | Insert Data Field | Automate Range | Dynamic Column | Reload Text Blocks | Tutorials dox42.com | 42 | Activate

Connect

sales report

FirstName

Contact Information

Email

Telephone

Department

Departmen... since Seniority (reporting to Superior)

Development of total sales of medical equipment during the year SelectYea...

Developme... Share

dox42 Data Fields

Filter:

- AccessDriver_Input
- SelectEmployee
- SelectYear
- AccessDriver
- EmployeeNames
- AvailableYears
- EmployeeData
 - Employee_ID
 - FirstName
 - LastName
 - Picture
 - Seniority
 - Email
 - Telephone
 - Department
 - Job
 - Superior
 - FullName
- TotalSalesMonthEmployee
- TotalSalesCountry

Integrate your data without programming

Insert data fields by drag & drop

Document1 - Word

File Home dox42 Insert Desig Layo Refe Maili Revisi Viewi Devisi Desig Layo Tell me Fabian... Share

Generate Data Map Automate Connect

Medical Equipment Around The World **mediX Group**

sales report **Celina Bentley**

Contact Information celina.bentley@medixgroup.com +43 650 789 123 123

Department Foreign Sales Department: since 2014 (reporting to Senior Sales Manager)

Development of total sales of medical equipment during the year 2016

Share of sales by region

Sales of medical equipment per country

Country	Company sales	Sales	Celina's share in company sales
Australia	\$ 114 779,00	\$ 37 825,00	33,0 %
Cambodia	\$ 37 451,00	\$ 0,00	0,0 %



SalesReport.xlsx - Excel

File Home dox42 Insert Page Layout Formulas Data Review View Power Pivot Tell me what you want to do... Fabian Huber Share

Generate Data Map Automate Connect

Compared to last month Total Sales

Share of sales by region

Month	Compared to last month	Total Sales
January	94%	
February	86%	
March	125%	
April	93%	
May	82%	
June	90%	
July	237%	
August	103%	
September	100%	
October	96%	
November		
December	237%	

Region	Share of sales
Australia	57,2%
United Kingdom	31,1%
India	11,6%
France	
Cambodia	



Presentation1 - PowerPoint

File Home dox42 Insert Design Transitions Animations Slide Show Review View Add-ins Tell me what you want to do... Fabian Huber Share

Sales Report Presentation

Development and Key figures for Celina Bentley during the year 2016:

Share of sales by region

Country	Sales
Australia	37 825,00 \$
United Kingdom	20 585,00 \$
India	7 701,00 \$
TOTAL:	66 111,00 \$



Automate Microsoft Excel as calculation and charting engine

Flux
mobile 4 everyone
Support: 987 234 534
Monday-Friday from 7-19


Aladdin
Disneyroad 1
88776 - Disneycity

Your Contract Details:
Contract Number: Contract_1
Invoice Number: 1
Phone Number: 0123/ 567 3222

Your Mobile Invoice 05/2013

Cost	Amount
Basic Charge	10,10 EUR
Roaming	5,10 EUR
Super Customer Discount	-5,00 EUR
Sum	10,20 EUR

Your contract has expired. Currently you can benefit from our special offer for customers prolonging their contract only:

 **Smartphone Pronto 354x**

- High Resolution Display
- 7 Megapixel Camera with x4 Zoom
- 32GB Internal Storage
- Superspeed 3G Internet Access

0,-

If you have chosen direct debit authorization you will be charged automatically from your given bank account. Otherwise please transfer the amount with your personal purpose "Contract_1" or pay now with your individual QR Code in the bottom section of this Invoice.

If you have any further questions please do not hesitate to ask us. You can contact us via our support hotline 987 234 534 from Monday till Friday from 7.00-19.00. Thank you for choosing flux - mobile 4 everyone.


Sincerely,
your flux mobile Team

flux - mobile 4 everyone | Randomaddress 4 | Randomcity
Company UID | Comanynumber
IBAN: AT342334231234567890 | BIC: STSBAYK0500

Page 1

10:16 📶 🔋

< New payment

Recipient
Flux Mobile Company 

IBAN
AT34 2334 2312 3456 7890


Save recipient

€ Amount
10,20

Payment reference (optional)

OR

Purpose (optional)

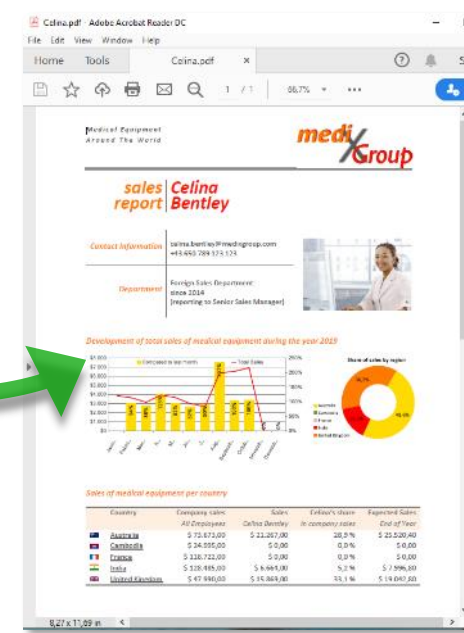
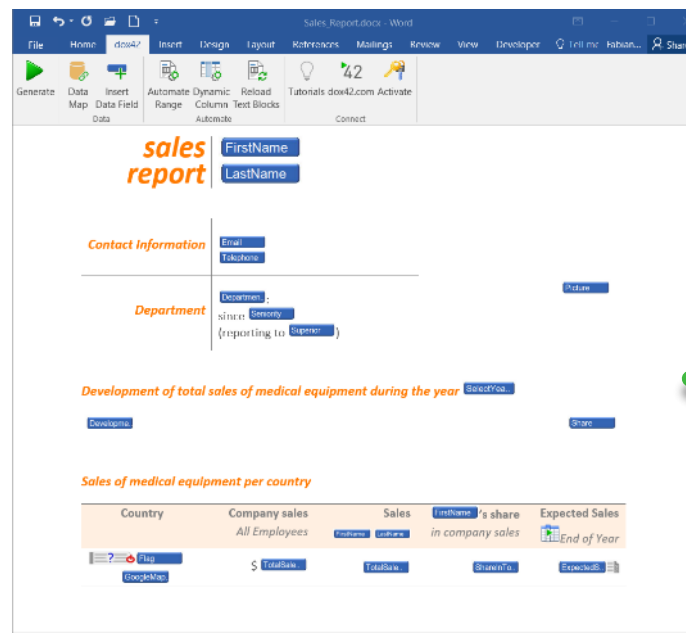
Schedule
One payment 
Today

> Review Feedback

QR-codes, bar-codes

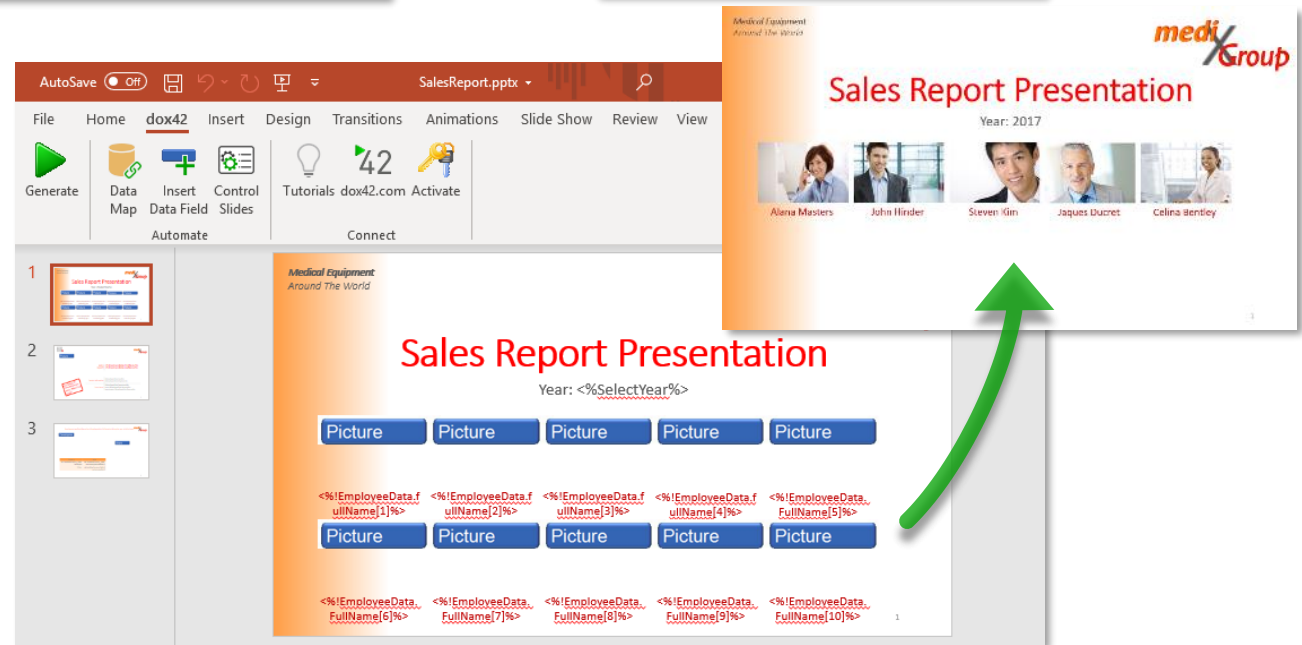
dox42[®]

Add-Ins



dox42[®]

- ✓ Template design in Microsoft Word, Excel, PowerPoint
- ✓ Integrate data from various sources



dox42 Add-Ins – create templates for generating documents



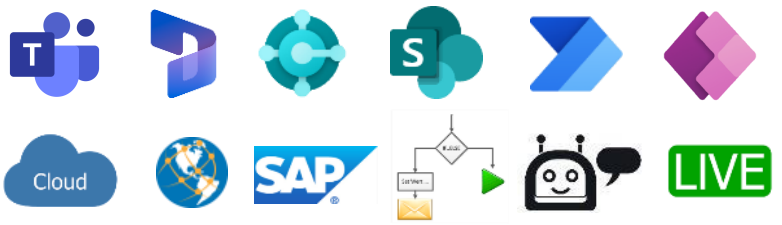
On Premise or pure cloud service



dox42[®]



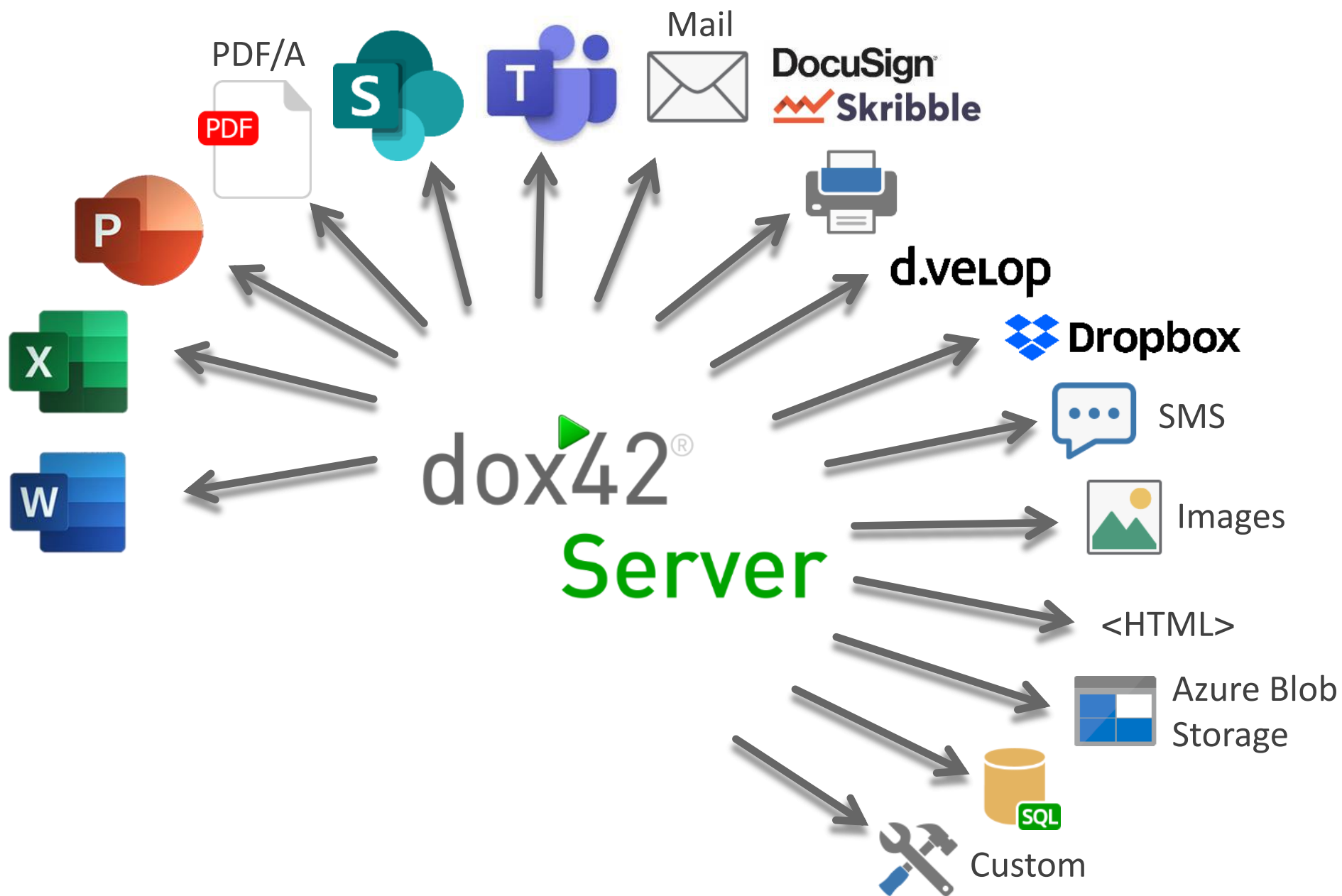
dox42 Server



Unlimited

Users
Documents
Channels

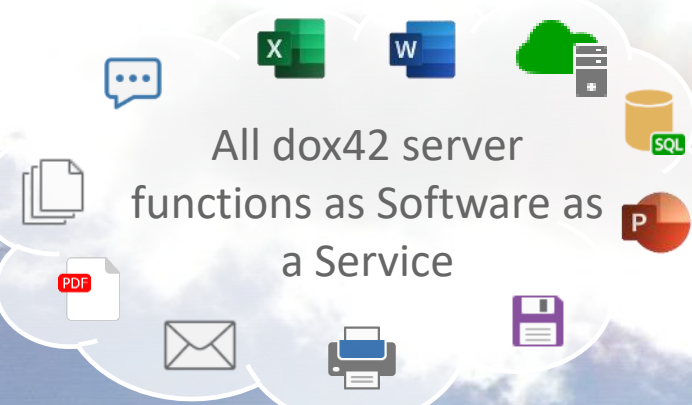
dox42 Server – generate documents from all applications




Automate your Output Management

dox42 Online

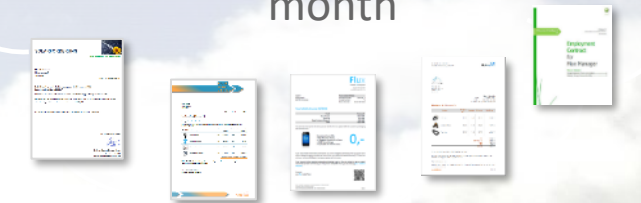
All dox42 server functions as Software as a Service



Azure AD impersonation:
no data visible on the server



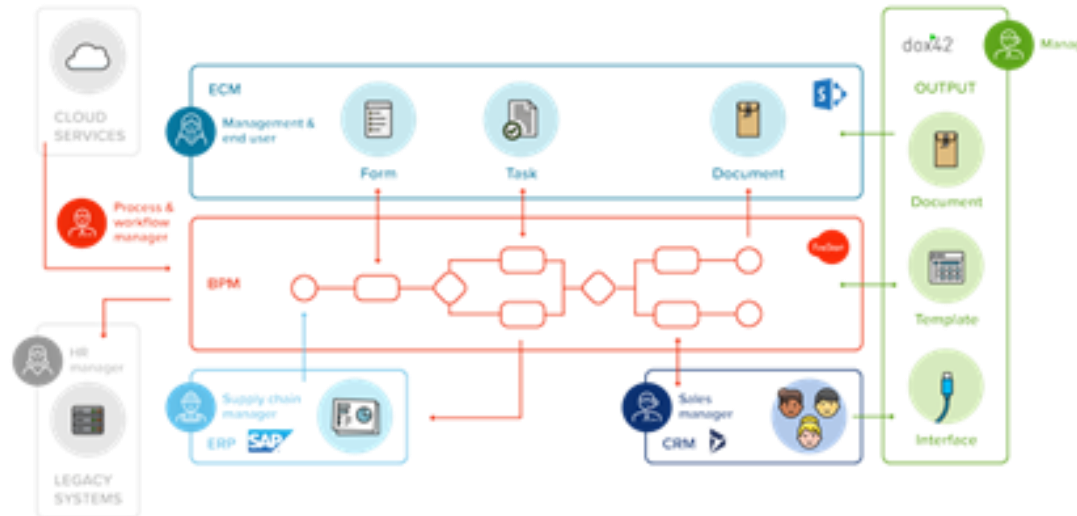
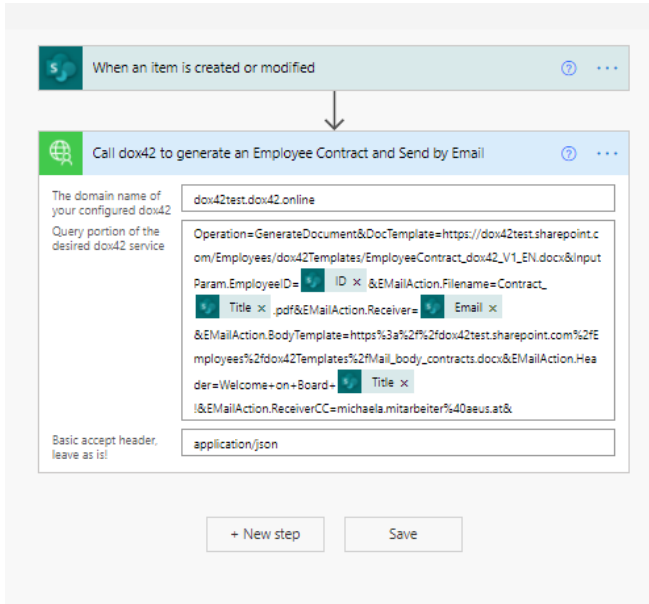
100.000 documents per month



Intelligent process automation needs document automation



Integrate dox42 in all common workflow tools



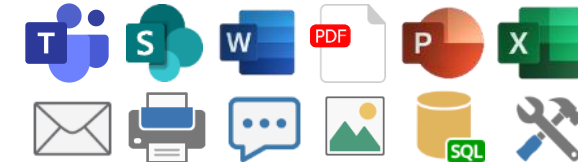
Automate your documents from business processes and workflows

The screenshot shows a Microsoft Teams channel named 'Solar Panels Deluxe'. A context menu is open over a table of products, listing actions such as 'Preview PDF with dox42', 'Email PDF with dox42', and 'dox42 Online Sales Quote'. The table contains the following data:

Produkte	Gruppieren	Produkt	Ra...	Erweiterte...
Solar...			0,00 €	4.046,00 €
Panel Ho...	Ni...	39,99 €	16,00000	0,00 €
Battery	Ni...	499,00 €	5,00000	0,00 €
				639,84 €
				2.495,00 €

Summary statistics shown below the table:

- Detailbetrag: 7.180,84 €
- (-) Rabatt (in %): 20,00
- (-) Rabatt: ---
- Rabattierter Betrag: 5.744,67 €



DocuSign

The screenshot shows a PDF document titled 'Quote_Solar Panels 2.0 Approved_ANG-01012-N8Y4P1_Flow.pdf' opened in a Microsoft Teams chat window. The document content includes:

- Adventure Co. contact information: Semperstr. 222, 7430, 7430 Germany.
- Quote information: Name: Solar Panels 2.0 Approved, Quote-ID: ANG-01012-N8Y4P1, Valid from: 01/05/2020 to 02/13/2020.
- Section: 'Sales Quote For Adventure Co.'
- Text: 'Your interest in our solar panels are showing that you are concerned about saving the planet as we are and you are willing to adopt the best measures to become an independent energy producer using SolarPowerDeluxe for highest quality solar panels as well as the free power of the sun. Especially in North sunshine hours are highly above the German and Swiss average.'
- Section: 'Average hours of sunshine in North'
- Section: 'Are you ready for the most efficient solar technique in the entire world?'
- Image: A house with solar panels on the roof.
- Text: 'In response of your inquiry SolarPowerDeluxe Ltd is very happy to send you the following quote.'

- ✓ Microsoft Teams as a central front door for your applications
- ✓ Increase team productivity
- ✓ Get rid of Copy & Paste



Automatically generate documents from Microsoft Teams

- ✔ Seamless integration
- ✔ Microsoft SharePoint Online, On Prem or Hybrid
- ✔ Connect to all lists and documents from Microsoft SharePoint
- ✔ External data sources
- ✔ Write meta data
- ✔ Workflow integration



SharePoint

Home

E Employees

Home

dox42Templates

Employee List

Modern EmployeeContr...

TargetLib

All_Contracts

Site contents

dox42CommandBar Config

Recycle bin

Edit

Modern EmployeeContracts

Title	Email	Phone	Position	SpecialAgreem...
Bodo Botschafter	bodo.botschafter@aeus.at	+42 34 44456	Sales Manager	Free coffee
Max Manager	max.manager@aeus.com	+43 897 999 888	Sales Manager	All travel fees in following areas are covered: Africa
Johannes Linder	johannes.linder@dox42.com	+43123456789	Developer	Super Funds!
Fabian Huber	fabian.huber@dox42.com	+436606641966	Sales Manager	

Please choose a template ...

- Save PDF Employee Contracts
- Open as PDF
- Send Employee Contract
- Open Mail Draft
- Send via DocuSign
- Save Word Employee Contracts
- Employee Contract Bulk_ohne AAD

Cancel OK

Welcome @ Intelligend IT

Information Technology Services | 100% SaaS

Employment Contract for Max Manager

TABLE OF CONTENTS

Private Statement of Terms and Conditions.....2

Remuneration Policy.....3



Generate documents from Microsoft SharePoint

Create, archive and send ...

dox42®



- ✓ Seamless integration in Dynamics 365
- ✓ Dynamics 365 for Customer Engagement, Business Central, Finance and Operations
- ✓ Use business logic and permissions
- ✓ Connect to external data sources

... intelligent documents from Dynamics 365 CE | CRM, FO | AX, BC | NAV



Template design in Microsoft Word, Excel, PowerPoint



Many output formats



Flexible system integration



Strong support through communities



Secure in the Cloud with dox42



Intelligent high quality documents



Up-to-date corporate design



Be able to react quickly



Save tons of time



Eliminate copy & paste errors



Reduce the number of templates



Extend dox42 yourself

dox42 Document Automation!

www.dox42.com

dox42[®]

automate your documents

integrate your data

Lisa Pulsinger

Senior Technical Evangelist

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lisa.pulsinger@dox42.com

