

UNLOCK YOUR CUSTOMER DATA

CRM & POWER PLATFORM CUSTOMER DAY 2023

Make Attractive CRM Sales Quotes
with Experlogix - Document
Automation



Hi!

**Ben Humphries – Tecman – Dynamics 365 CRM
Consultant**

Daryl Badla – Experlogix – Sales Director

Jimmy Feltsadas – Experlogix – Solution Engineer

Dimitry Ledin – Experlogix – Director, EMEA Partnerships

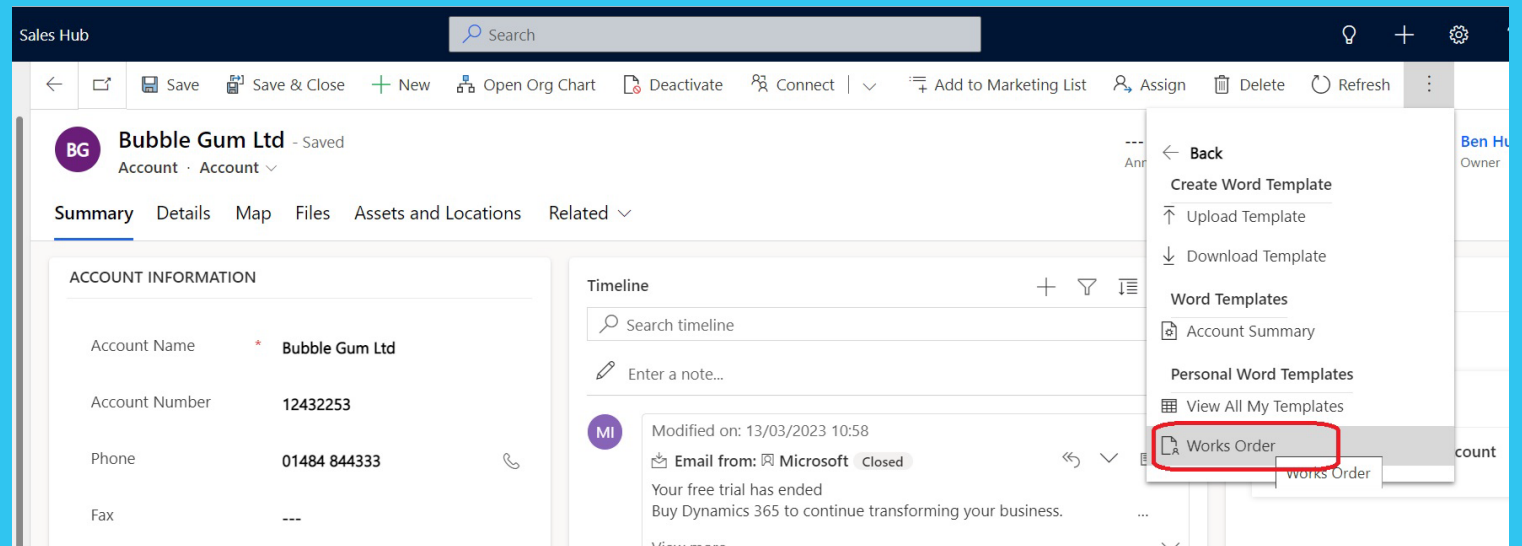
What we'll cover

1. Experlogix & Tecman
2. Out of the Box Templates
3. Advantages vs Disadvantages
4. Demo
5. Intro in to Document Automation
6. Benefits of Document Automation
7. OOTB templates VS Document Automation Matrix
8. Customer Success
9. Document Automation Demo



Out of the Box Templates

- Included as part of Core CRM.
- The ability to create Microsoft Word, Excel and PDF Templates on OOTB and Custom Tables
- The ability to standardize company communication and branding
- Staff save time in sending dynamic information to customer.
- Examples of common use
 - Company Terms and Conditions
 - Contract Agreements
 - Quotes
 - Terms of service
 - Mail Merge
 - Excel Sales Figures
- Save to SharePoint or Email



Advantages vs Disadvantages

Advantages

- The ability to have personal or organisational templates
 - Organisation - Centrally managed
 - Personal – Created, managed and shared by users
- Export to Word , Excel or PDF
- Save to SharePoint (related to the record you are on)
- Comes as standard out of the box.

Disadvantages

- Organisational templates cannot be tied down to specific staff members.
- Unable to dynamically select template based on CRM record information.
- Multiple templates are required for different information.
- Unable to link dynamic images. Example might be a picture of the product on quote.
- Word Designer - Can be clunky at times.
- Using DocuSign as part of the process is complex to setup.
- A requirement to keep the templates saved outside CRM if they need to be updated at a later date.

Out of the Box Template Demo

Example Scenario

As part of the onboarding of each customer, the business needs to send a Contract to each client they engage with, to ensure they agree to the company's terms of service.



Document Automation

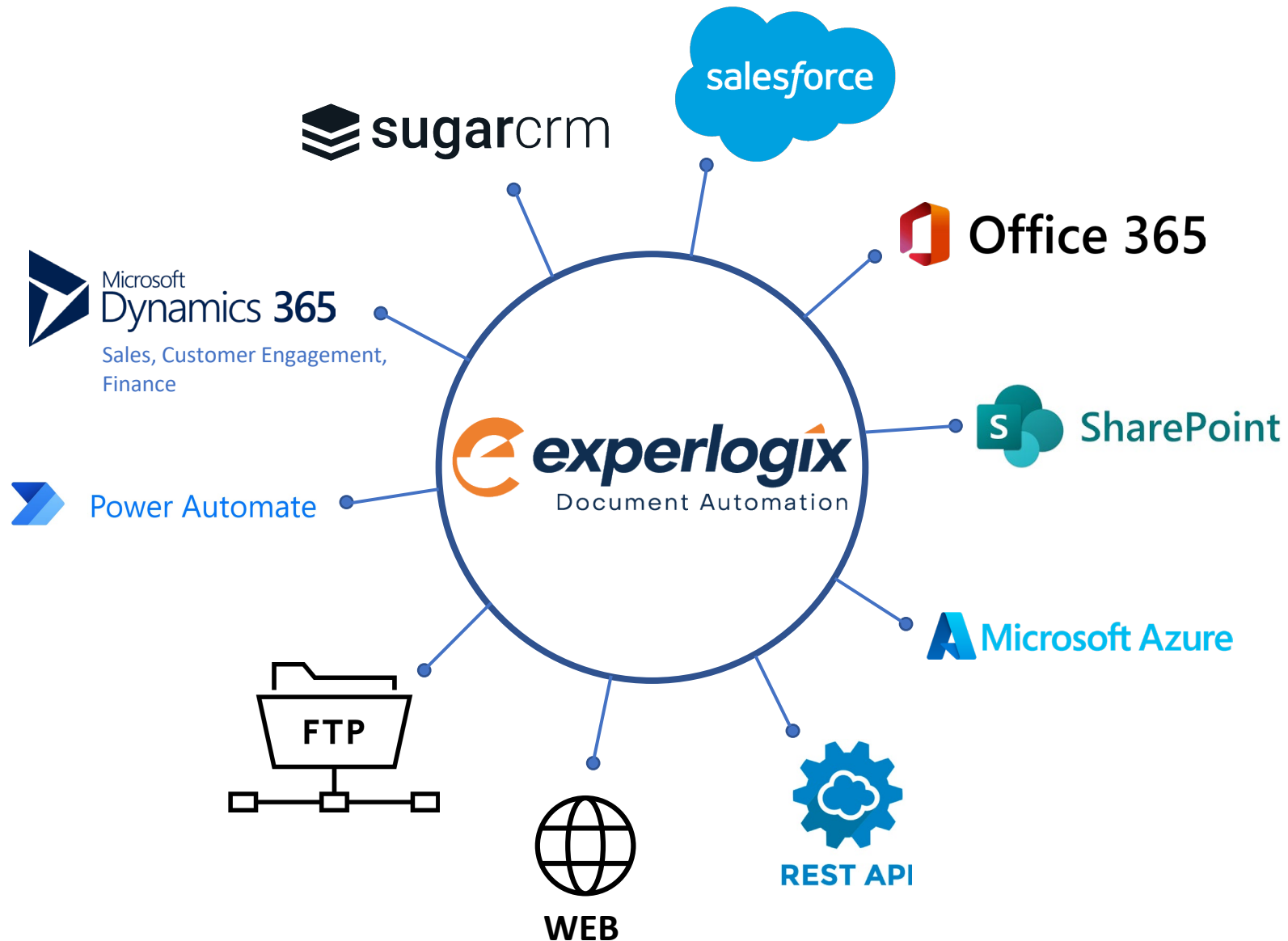
Solution

“Experts”

Since 2002

Empower businesses by simplifying, optimizing and automating digital documents.

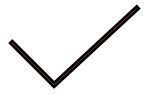




Digital Transformation is happening now

Solve your document challenges, update legacy workflows, gain productivity

Benefits of the Document Automation Solution



Transform the complex to simple with a few clicks



Reduce dependence on IT



Increase productivity & efficiency



Automate compliance business rules



High quality, versatile documents in one tool



Make the most of your data, from multiple sources

How we compare

Features	Experlogix	D365
Via user interaction (command bar)	✓	✓
From external code (REST API call)	✓	✗
Create documents in the right language based on CRM field value	✓	✗
Include all entity types, all field types, and all relationship types	✓	✓
Extend data set with user input during document creation process	✓	✗
Insert existing documents (.doc, .docx, PDF, html) from CRM or URL	✓	✗
Enable template versioning with comments and rollback	✓	✗
Conditional content	✓	✗
Apply conditions based on user input during document generation process	✓	✗
Promote templates (DEV-UAT-PROD) across one or more servers	✓	✗
Provide detailed logging and reporting	✓	✗

Real Documents



Account Valuation Summary

Prepared For

Client Fact Find

Aberdeen Standard SICAV I - Asia Pacific Equity Fund

A Acc USD
Performance Data and Analytics to 31 May 2019

Summary investment objective

To achieve a combination of income and growth by investing mostly in shares of companies based, or carrying out much of their business, in Asia Pacific countries (excluding Japan).

For full investment objective and policy details refer to the Prospectus.

Performance (%)

	1 month	3 months	6 months	1 year	3 years	5 years	Launch
Fund	-5.71	-0.54	4.81	-5.50	8.62	138	9.29
Benchmark	-6.94	-3.81	2.70	-8.51	10.04	3.56	8.22
Difference	1.23	3.26	2.11	3.01	-1.53	-2.37	1.07
Sector average	-6.84	-3.70	2.35	-10.28	7.75	2.21	7.17
Sector ranking	17/627	85/420	123/618	108/602	219/518	336/415	47/6
Quartile	2	1	1	1	2	3	1

Annual returns (%) - year ended 31/05

Fund	2019	2018	2017	2016	2015
Fund	5.50	10.84	22.33	17.58	0.43

Calendar year performance (%)

	Year to date	2018	2017	2016	2015
Fund	6.67	-11.20	32.45	3.75	-14.92
Benchmark	5.60	-13.68	37.32	7.06	-9.12
Difference	1.08	2.49	-4.87	-3.29	-5.80
Sector average	5.59	-15.30	35.59	3.52	-8.84
Sector ranking	182/419	95/595	395/595	273/599	57/609
Quartile	2	1	3	2	4

Performance prior to 31st Dec 2015: Source: Lipper, based on total returns, NAV to NAV, net of annual charges, gross income reinvested, (EQUO). Performance from 1st Jan 2016 to 31st May 2019: Source: Lipper, based on total returns, NAV to NAV, net of annual charges, gross income reinvested, (EQUO). The comparison between the fund's performance and the benchmark is not an integral part of the Objective and Investment Policy for the fund and should not be considered as such. All return data include investment management fees, performance fees, and operational charges and expenses, and assume the reinvestment of all distributions. The returns provided do not reflect the total value change and, if included, the performance shown would be lower. Past performance is not a guide to future results.

Country	Breakdown (%)
China	24.6
India	16.1
Hong Kong	16.0
Singapore	9.1
Australia	8.8
South Korea	6.9
Taiwan	5.3
Indonesia	5.0
Thailand	3.7
Philippines	3.3
Other	2.6
Cash	0.2
Total	100.0

Sector	Breakdown (%)
Financials	39.7
Information Technology	13.7
Communication Services	10.3
Materials	9.9
Real Estate	8.4
Industrials	5.9
Healthcare	5.5
Other	9.9
Cash	0.2
Total	100.0

Key Information: SICAV I - Asia Pacific w. Asian
Sector: Asian Equities Asia Pacific w. Asian
Fund Size: USD 2.6 bn
Share Class: Performance Launch: 20 April 2008
Date: 20 April 2008
Investment team: Asia Pacific Equity

www.aberdeenstandard.com

IMPORTANT INFORMATION OVERVIEW

Aberdeen Standard Investments



Top ten holdings

Company	Country	%
Aberdeen Standard SICAV I - China Share Equity	China	6.6
Tencent Holdings Ltd	China	5.7
Samsung Electronics Co Ltd	South Korea	5.1
Shanghai Semiconductor	Taiwan	4.3
Manufacturing Co Ltd	India	3.7
Infosys Development	India	3.3
Franklin Corp US	Hong Kong	3.2
Logistics Strategic Holdings	US	3.0
AAM Group Ltd	Hong Kong	3.0
Ping An Insurance Group Co of China Ltd	China	2.9
China Resources Land Ltd	China	2.5
Tata Consultancy Services	India	2.5
US		2.1
Total		39.4
Total number of holdings		63

*Where the fund invests in an open ended collective investment scheme which is operated or managed by the Client Manager or an associate of the Client Manager, no additional annual management charges will be incurred by the fund in such an investment.

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Market & Economic Update



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Welcome to our latest market and economic update, which looks back over the month of January 2018.

Market Commentary

Global equity markets started 2018 in the same positive fashion that they ended 2017, with the US market notably strong. However, late January saw a spike in volatility and a fall in equity markets, as European and US bond yields rose to multi-year highs. The movements were largely a result of inflationary concerns and increased investor speculation that global Central banks were set to tighten their monetary policies further, as the global economy continued to strengthen and equity market exuberance reached fresh highs.



Chris Godding
Chief Investment Officer



Louise French
Senior Research Analyst

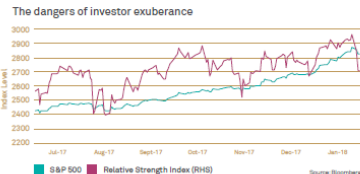
In the latest Chart of the Month, we have highlighted how investor exuberance was a key factor in the late-January market wobble.

Analysts often use the Relative Strength Index as a value indicator, highlighting when an asset is overbought and oversold. A reading above 70 could be interpreted as an overbought position, while a reading below 30 could be viewed as an oversold position.

Market volatility, as measured by the VIX volatility index, had been stuck at unusually low levels for most of 2017 and the extraordinary rally for most of January in the US seemed to confirm investor complacency.

We view the correction as a symptom of a stretched bull market that has been moving up in the face of higher oil prices, rising inflation and higher interest rates, and we believe it was overdue.

Pricing these issues into equities is appropriate but in themselves they do not prestage a bear market. The global economy is performing very well, monetary policy remains very accommodative and equities still offer meaningful returns for long-term investors in diversified portfolios.



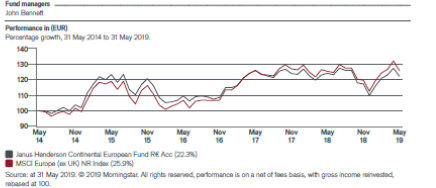
Janus Henderson CONTINENTAL EUROPEAN FUND R€ ACC

Fund facts at 31 May 2019

Structure: Luxembourg SICAV
Fund launch date: 29 September 2000
Base currency: EUR
Fund size (EUR): 1,050
Benchmark: MSCI Europe (ex UK) Index
Share class launch date: 29 October 2004
Minimum investment (EUR): 2,500
NAV (EUR): 10.17
Historic yield: 1.25%
Maximum initial charge: 5.00%
Annual management charge (AMC): 1.50% pa
Ongoing charge AMC included: 1.50%
Performance fee: Nil
Risk: Nil
Codes: ISIN: LU0030789000
SEIS: BE02014
Bloomberg: GAE:FEAD LX
Value: 1054657
WKN: A0CL4B
Rating: Morningstar: ****

Fund aim
The Fund aims to achieve a long term return, in excess of the long term return that is typically achieved from Continental European equity markets, by investing at any given time at least two thirds of its net assets in:
- companies having their registered office in Continental Europe;
- companies that do not have their registered office in Continental Europe but either (i) carry out a predominant proportion of their business activity in Continental Europe, or (ii) are holding companies which predominantly own companies with registered offices in Continental Europe.
The return will be a combination of capital and income returns.

Additional information
Please note that with effect from 30 January 2019, Andrew McCarthy no longer manages this fund. John Bennett is now the sole fund manager.
This is a Luxembourg SICAV Fund, regulated by the Commission de Surveillance du Secteur Financier (CSSF).
Note that any differences among portfolio securities currencies, share class currencies, and your home currency will expose you to currency risk. To obtain our prospectus and any additional information please visit our website on: www.janus-henderson.com.



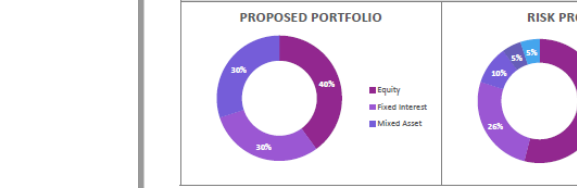
Source	ISIN	Value
Janus Henderson Continental European Fund R€ Acc (22.2%)	LU0030789000	1054657
MSCI Europe (ex UK) NR Index (25.2%)	0000000000	1054657

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Janus Henderson Continental European Fund R€ Acc (22.2%)	LU0030789000	1054657
MSCI Europe (ex UK) NR Index (25.2%)	0000000000	1054657



My specific investment recommendation at this point will be to invest the portfolio as follows:

Investment Name	Asset Sector	% of Portfolio	Amount
AB I Dynamic Diversified Portfolio AX USD	Mixed Asset	30%	AUD300,000
AB Select US Equity Portfolio 51 H EUR	Equity	40%	AUD400,000
AB Short Duration High Yield Portfolio ATH GBP	Fixed Interest	30%	AUD300,000
Total			AUD1,000,000



objectives, whilst taking into helping you meet your

investments and utilising an ets to give solid and stable

as you have full investment for and achieves strong discretionary management as

t choices and quality fund titment.

for you and achieves strong

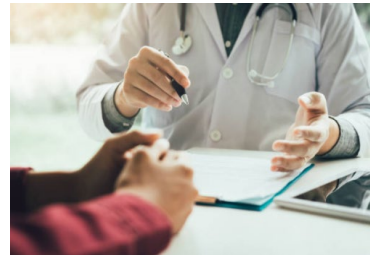
ange for the portfolio to be ewns then ensure that your ongoing review is essential

Industries

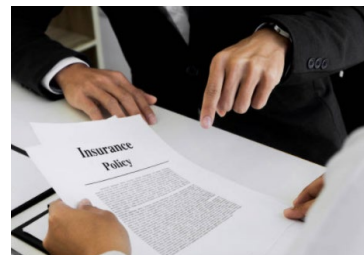
Document Automation can be deployed to meet a wide variety of customer needs. We work with industries where simplifying, optimizing and automating digital documents is a major need.



Financial Services



Health Care



Insurance



Higher Education



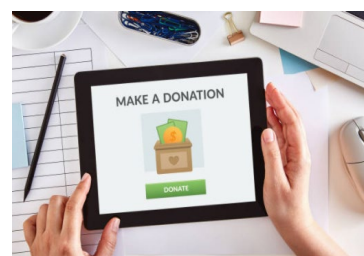
Manufacturing



Energy & Utilities



Government



Non-Profit



Real Estate



Legal



A World of Document Automation Experience



✦ Kelly Roofing

"Once we deployed Experlogix Document Automation, we realized there were lots more opportunities for using the solution. It was really worth it to us to continue to build it out."



Demonstration

Thank you.

