

Requirements

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Smart Flows for Dynamics CRM

Smart Flows for Dynamics CRM will only work with **Microsoft Dynamics 2016 (8.0) or higher**.

While you may see buttons in the Dynamics 365 mobile apps, these will not work as Microsoft does not allow 3rd parties to open and run code in windows outside Dynamics. This means that if you want to use Smart Flows for Dynamics, you need to use the web client in the browser, also on mobile devices. Xpertdoc Smart Flows is compatible with Unified Interface Apps, which have a responsive design and render beautifully on any device.

Smart flows for SugarCRM

Smart Flows for SugarCRM will only work with **SugarCRM 8.*, 9.0.* and 9.1.***

The Template Builder

Using the Template Builder add-in requires a few things on your computer:

System requirements

- **Operating system:** The add-in will only work on Windows 7, 8.1, 8 or 10.
- **Memory:** At least 512 MB.
- **Disk space:** At least 120 MB.
- **Access to the Smart Flows server.** If you're using Smart Flows on premise, this does not necessarily mean you're connected to the internet, as long as your computer and the Smart Flows server can communicate.

Software prerequisites

The installer will verify that the following prerequisites are present on your system before installing the add-in.

- Windows Installer **3.1+**
- Internet Explorer **5.01+**
- Microsoft Word **2010/2013/2016**
- [Microsoft .NET Framework 4.6.2](#)
- [Microsoft Visual Studio 2010 Tools for Office Runtime](#)

Smart Flows on premise / private cloud

To install Xpertdoc Smart Flows on dedicated infrastructure, please consider the below recommendation for server configuration.

Recommended Server Configurations

- **Basic setup:** This setup is relevant if you expect relatively low document volumes and a limited number of coinciding document generation requests.
 - 1 server, 2 cores
 - Memory: 3.5 GB RAM
 - Disk Space: 50 GB
- **Intermediate setup**
 - 2 server, 2 cores
 - Memory: 3.5 GB RAM per server
 - Disk Space: 50 GB per server
- **High setup:** This setup is relevant if you expect relatively high document volumes and a high number of coinciding document generation requests.
 - 2 server, 4 cores
 - Memory: 8 GB RAM per server
 - Disk Space: 50 GB per server

Software prerequisites

- **Windows Server 2012 or higher.**

- **Java Runtime Environment (JRE) 8 or higher.** Java Development Kit (JDK) is recommended since it allows for easy debugging in case of problems. You can download Java [here](#).
- **.NET Framework 4 or higher.** This comes installed with Windows Server 2012 and higher, so it should be present on the server already.
- **SQL Server 2016 or higher.** Any setup works, from SQL Server Express on the same machine to an SQL Server database on Azure. For operational purposes it is recommended to use a separate SQL Server machine or cluster.