

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.

Beginning August 17, 2021, Smart Flows in Microsoft Dynamics will no longer support IE 11

Smart flows for SugarCRM

Smart Flows for SugarCRM will only work with **SugarCRM 8.*, 9.* and 10.0**

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 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.

- Microsoft Word **2013/2016/2019/365 (No support for Word Online)**
- [Microsoft .NET Framework 4.6.2](#)
- [Microsoft Visual Studio 2010 Tools for Office Runtime](#)

Smart Flows on premise / private cloud

Please take a look at this page for more info regarding the prerequisites and the requirements: [Xpertdoc Smart Flows Server Installation](#)