

Xpertdoc Smart Flows 4.3/Downloads

Download the different components of Xpertdoc Smart Flows from this page. Follow the info links for guidance on the installation procedure.

- [Xpertdoc Template Builder](#)
- [Xpertdoc for Microsoft Dynamics 365 for Customer Engagement \(aka. Microsoft Dynamics CRM\)](#)
- [Xpertdoc for Sugar](#)
- [Xpertdoc Smart Flows Server \(only for On Prem/Private Cloud Deployments\)](#)

Xpertdoc Template Builder

Xpertdoc Template Builder is an add-in for Microsoft Word. Xpertdoc Smart Flows users who have been granted the designer role need this add-in to design document templates. When upgrading to a new minor version (e.g. from 4.2.x to 4.3.x), first uninstall the version you have and then install the new version. When you have used the online installer, upgrading to a new patch release (e.g. 4.3.0 to 4.3.1) is automated. If you can't use the online installer, download the offline package and uninstall-reinstall each update (both minor and patch).

Download

- [Download Xpertdoc Template Builder 4.3 \(Recommended - with automated patching\)](#)
- [Download latest Xpertdoc Template Builder 4.3 Offline Installer](#) (not recommended - no automated patching)

Instructions

- [Xpertdoc Template Builder Installation - Instructions](#)
- [Offline Installer - Instructions](#)

Xpertdoc for Microsoft Dynamics 365 for Customer Engagement (aka. Microsoft Dynamics CRM)

The Xpertdoc Managed Solutions for Microsoft Dynamics 365 for Customer Engagement provide a turn-key integration of Xpertdoc's document flow automation capabilities with Microsoft's leading customer engagement platform.

Download

Managed Solutions for Microsoft Dynamics 365 v9

- [Download Xpertdoc for Microsoft Dynamics 365 v9 Core Managed Solution 4.3.3.33](#)
- [Download Xpertdoc for Microsoft Dynamics 365 v9 Workflows Managed Solution 4.3.3.33](#)

Managed Solutions for Microsoft Dynamics 365 v8 or Earlier

- [Download Xpertdoc for Microsoft Dynamics 365 v8 Core Managed Solution 4.3.3.33](#)
- [Download Xpertdoc for Microsoft Dynamics 365 v8 Workflows Managed Solution 4.3.3.33](#)

Instructions

- [Xpertdoc Connector Apps for Microsoft Dynamics 365 Installation - Instructions](#)



If you can't see the Smart Flows buttons in the Unified Interface after upgrading to this version, verify the '[Buttons for Unified Interface Apps](#)' setting on your configuration record.

Xpertdoc for Sugar

The Xpertdoc Package for Sugar provides a turn-key integration of Xpertdoc's document flow automation capabilities with SugarCRM's leading customer engagement platform.

Download

- *Creation of a Sugar package, which can be uploaded into Sugar via Admin > Module Loader, is part of the connector configuration process.*

Instructions

- [Xpertdoc Connector App for Sugar - Instructions](#)

Xpertdoc Smart Flows Server (only for On Prem/Private Cloud Deployments)

Xpertdoc Smart Flows Server is the core server component of the document flow automation product.

Download

- *The installer for Xpertdoc Smart Flows Server is available via your [MyXpertdoc](#) account. Don't have an account? Please reach out to our Customer Success Team via support@xpertdoc.com*

Instructions

- [Xpertdoc Smart Flows Server Update - Instructions](#)
- [Xpertdoc Smart Flows Server Fresh Install - Instructions](#)