



Get out of  
the template jungle!

# Survival Guide

How to automate documents with smart templates!



#central template management #document automation  
#template management #corporate design management  
#document generation #output management



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## INTRODUCTION

### What are the benefits of the SmartDocuments template management system?

At first glance, many people mistake our SmartDocuments software for a document management system. At events, we often hear comments like, „Oh, another DMS!“ However, this is a misunderstanding. SmartDocuments is not a traditional DMS like those offered by our partners such as OPTIMAL SYSTEMS, CC e-gov, d.velop, and many others. We do not offer a competing product. Instead, SmartDocuments specialises in template management and document creation. Our intelligent software is designed to work in tandem with DMS solutions — not replace them. Through seamless interfaces, SmartDocuments integrates with DMS platforms to support fully digital, media-consistent document workflows.

#### „But what exactly does a template management system do and why does it make sense to introduce one?“

Typically, the first step is to assess the internal status quo of template management and document creation. In about 90% of cases, we hear a familiar response: „We create our templates in Microsoft Word. We use X templates in X different versions.“

#### But what about maintaining the templates? How do you ensure that the most up-to-date version is always being used?

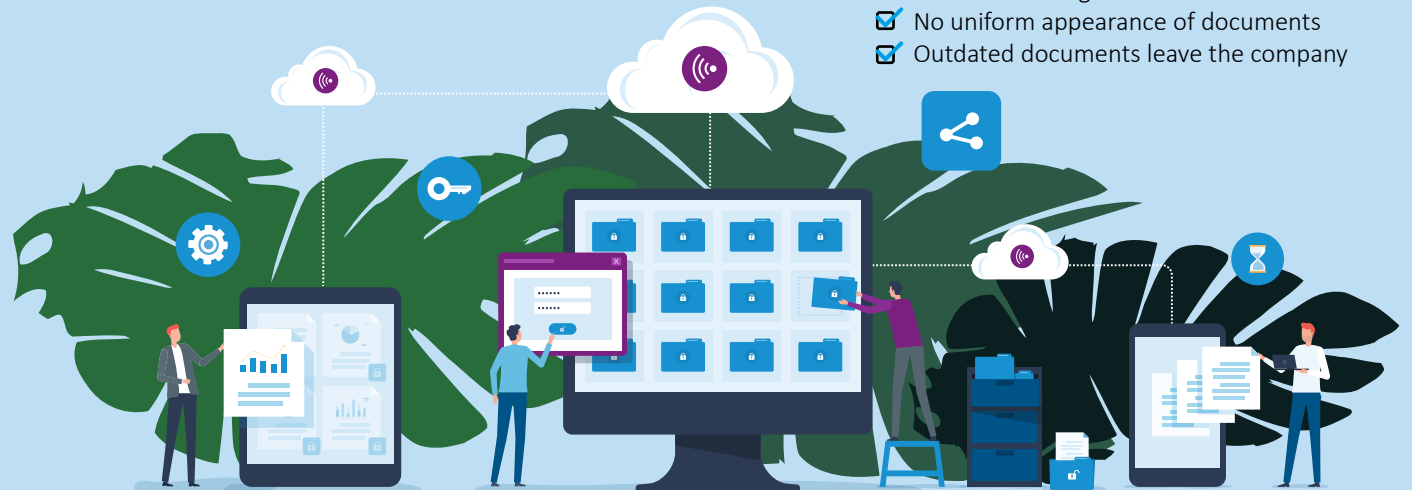
And this is where the first major challenge arises. Templates are usually offered and managed centrally, but maintaining a large number of them takes up an enormous amount of time. A new bank account, a new address, new shareholders, or even a new logo—by the time these updates are implemented across all documents, the next changes are already waiting.

On top of that, employees often save templates locally and don't realize that a new version—with updated text or a refreshed corporate design—has been available for months. As a result, outdated documents continue to be sent out. Templates aren't always a perfect fit either. Especially in sales departments, the trend is moving toward personalized proposals with project descriptions, custom agreements, and similar elements. A nightmare for marketing teams who spent hours fine-tuning the design, font sizes, spacing, and layout to create a polished document. „Let me just quickly add something...“ — a bit of copy & paste, and suddenly the text is in a different font, and the next four paragraphs are completely misaligned. „Never mind, it's going out anyway.“

The number of software tools used in companies is growing rapidly. For every challenge, there's a specialized application—many of which also generate documents. And each of these comes with its own templates. The result? A never-ending template overload.

#### Conclusion:

- ✓ Time-consuming maintenance
- ✓ No uniform appearance of documents
- ✓ Outdated documents leave the company

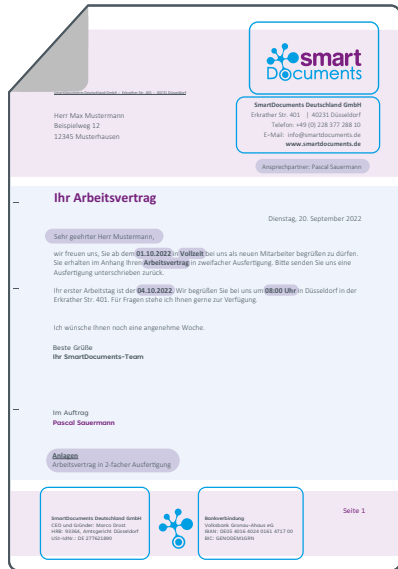


**Well, did you recognise your organisation?** This is exactly where our smart template management system comes into play. We say: „Get out of the template jungle!“ With our product overview, we offer you a „survival guide“ that gives you a brief introduction to our tools and additional custom solutions.

## THE PRODUCT

### The special features of SmartDocuments

With the SmartDocuments template management system, you can manage all your templates and documents centrally. SmartDocuments divides templates into four distinct categories:



**1. Corporate design:** This refers primarily to the header and footer content. The corporate design defines the entire visual appearance of your document, including:

- ✓ Font type, font size
- ✓ Colors
- ✓ Line spacing
- ✓ and much more

**2. Content templates:** This refers to the actual content of the document.

**3. Text blocks:** Reusable elements that can be linked to any number of templates.

**4. Variable data:** The data used to populate the template. This data is generated during the question-and-answer dialogue (SmartWizard).

**This structured approach makes maintaining your templates much easier and more efficient.**

### Corporate design

The marketing department can define and centrally manage the design of templates—such as logos, colors, fonts, font sizes, and more. When colleagues copy in text or change fonts during document creation (via SmartWizard), it has no impact on the final document. The document always appears in the predefined corporate design.

### Content templates

Templates often differ only in terms of a single sentence, section of text or similar. Employment contracts in particular have a standard version and then multiple additional versions for different jobs, departments or positions. With SmartDocuments, you only need one version of the template, as you can use rules to show or hide any text you like. This means you only have to maintain one template.



## Text blocks

Using building blocks makes adjustments within templates—such as updating an address—effortless. You only need to update the relevant block once, rather than editing each individual template.

## Variable data

Template users enter the relevant data using the question-and-answer format within SmartWizard. This allows you to precisely query the content that should populate the template and, if needed, provide helpful guidance—such as explanatory notes or input format requirements (e.g. postal code, date, numbers, text).

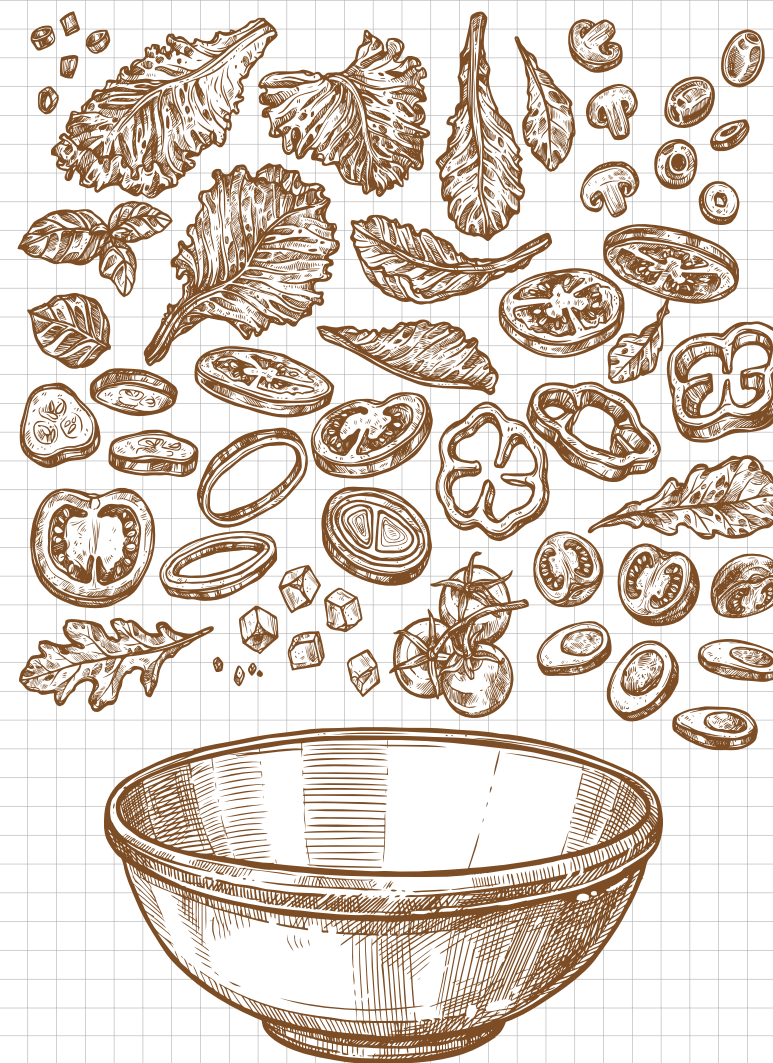
## Your advantages at a glance ...



- ✓ Uniform appearance of all documents
- ✓ Reduced number of templates – from a massive task to a simple solution
- ✓ Fast updates and easy maintenance of templates
- ✓ Minimized input errors  
– **User-friendly templates**
- ✓ Time and cost savings

## Open interface architecture

At SmartDocuments, this is exactly our approach. We see digitalization as the collaboration of different components. That's why we follow an open interface philosophy, allowing other software systems used within our customers' organizations to be seamlessly integrated. We specialize in template and output management—specifically, the easy creation of documents. SmartDocuments is typically used by our customers as a central template management system and can be connected to other applications such as document management systems, ERP systems, archiving solutions, specialized applications, workflow systems, and more — either upstream or downstream. This significantly reduces the effort required by customers to maintain templates, and also lowers the development and maintenance workload for software providers in the areas of template management and document generation.



## SmartDocuments

**Ingredients: The components of  
our SmartControl, SmartEditor  
& SmartWizard software.**





The SmartDocuments template management system includes three software components — SmartControl, SmartEditor, and SmartWizard — **all of which come standard with the product.**

## 1. smartControl

### Central administration of SmartDocuments

Within the interface, you can manage your document templates, define your corporate design, control user permissions, manage individual text blocks as well as header and footer texts, and configure system settings. It is fully browser-based, giving you the flexibility to manage your system anytime, anywhere — even on the go.

The structure and operation of the software are intuitive and user-friendly. Expandable tiles at the top of the screen provide a clear and well-organized overview of all functions

**With SmartControl, you always maintain full control and visibility over your templates and documents.**



## 2. smartEditor

### The template creation tool

**With SmartEditor, you can create your templates quickly and easily.** The actual document templates are designed as usual in Microsoft Office Word. Using the integrated SmartEditor, you then define the question structure for the SmartWizard: “Which data and information should be collected in the question dialogue?” Simply drag and drop the predefined questions or text blocks into the appropriate place in the document, and you are done!



No technical expertise or programming knowledge is required.

### Smart Questioning – The different question types

With our range of question types, you can cover a wide variety of scenarios —from free text input and numeric fields to database queries for importing existing data. Depending on the structure, you can also set up dependencies between questions or define alternative answers.

In SmartEditor, your defined corporate design is automatically applied and respected. Depending on user permissions, this design cannot be easily changed by all employees.

### 3. smartWizard

#### The interface for end users

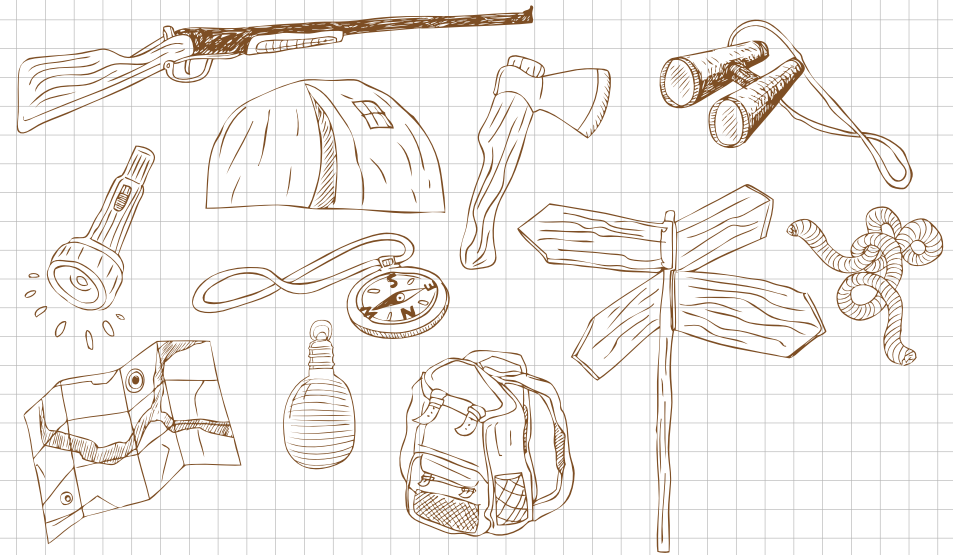
**With SmartWizard, templates are filled with content by users simply answering guided questions.** The process is entirely browser-based, allowing for system-independent and location-independent use.

SmartWizard always accesses the latest version of the template that has been released via SmartControl. This means your users can continue working with SmartDocuments even while you're making updates or improvements to the template in parallel.



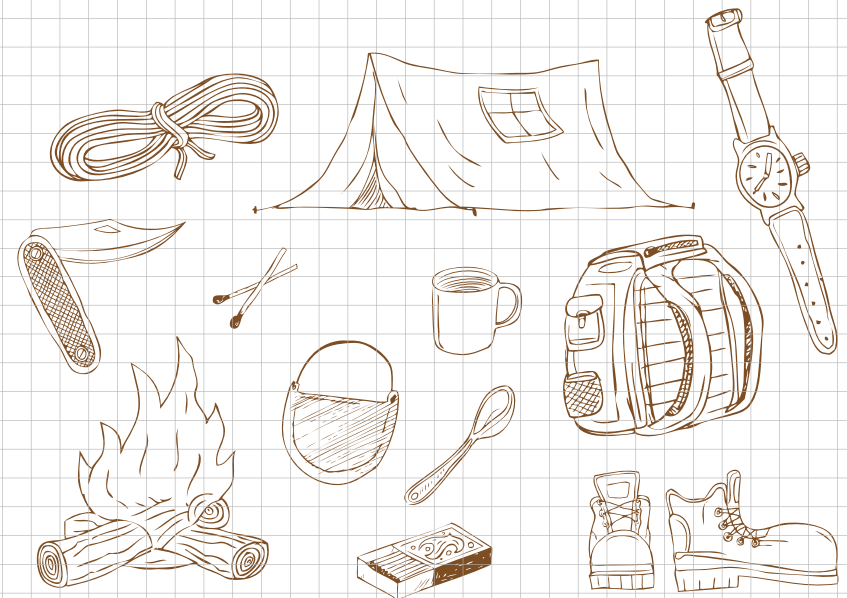
**Thanks to flexible automation, helpful guidance texts, and predefined input rules, creating documents with SmartDocuments is a breeze. Even without extensive prior training, users can easily generate new documents.**

Over the years, SmartWizard has been continuously improved — both in terms of functionality and user experience. For example, users always have access to a live preview of the template, and as they answer questions, the effects are visually highlighted in the document.



#### Add-on modules

**Smart tools to support your journey to „Get out of the template jungle!“**



## JOBS

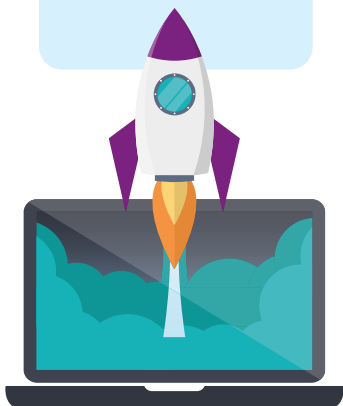


### MODULE

## Active directory for web synchronisation

### The advantages at a glance ...

- ✓ Minimise errors
- ✓ Reduce effort
- ✓ Save time!



### New hires, departures – in large organisations

For companies and organisations, processing personnel development is a mammoth task. In addition to drawing up contracts and preparing a wide variety of administrative processes, it is also necessary to register and deregister all these employees in the systems used within the company.

### Automate the import of users!

With the User Import Active Directory integration, you can synchronize employee contact data from your internal database with our template management system.

This ensures your entire workforce is automatically and up-to-date captured within the SmartDocuments environment. New employees are automatically added, and departing employees are removed. During document creation, SmartDocuments uses user data from Active Directory (e.g. job titles, contact details, etc.), which is automatically inserted into the document.

### MODULE

## Co-authoring

**Create documents together!** For example, cross-departmental documents that require input from multiple experts, or as part of approval processes where supervisors need to co-sign documents ...

With our Co-Authoring Module, you can easily set up “mini workflows.” It allows up to 10 people to collaboratively edit and create documents within SmartDocuments. Each section to be completed is processed in separate building blocks and assigned to individual authors. Assignment is done via a simple selection menu in the template properties — just one click, no programming skills required.

### Everything under control!

The co-authoring module automatically informs you of upcoming tasks. Once Person A has completed their part, Person B receives an email notification and can continue editing with a single click.

### MODULE

## Database query

**Smart integration** – Connect your internal databases (e.g. MSSQL, Oracle, MySQL, or PostgreSQL) with SmartDocuments.

With the Database Query Module, you can pull information directly from existing databases into your templates. During document creation with SmartWizard, users can search for records within the database.

This means data such as addresses, products, or similar information doesn't need to be entered manually in Smart Documents — making input easier and significantly reducing the risk of errors.





## MODULE

### Edit in Word

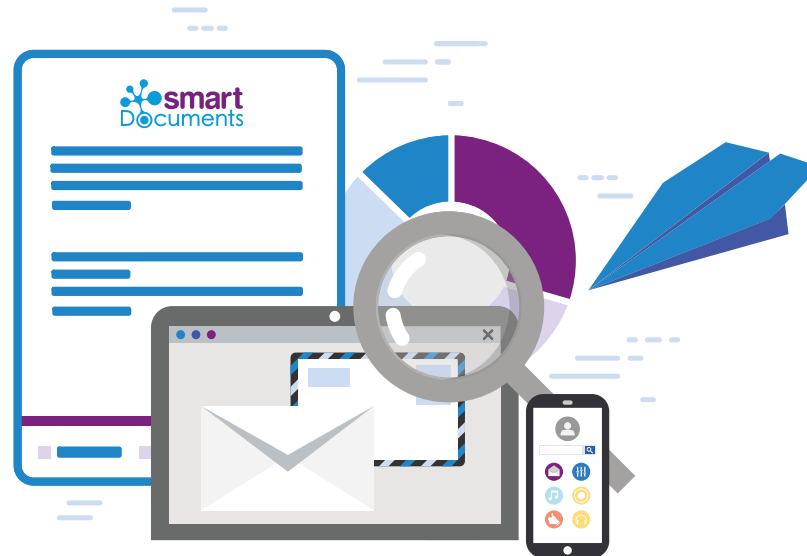
With our SmartDocuments software, you can design smart templates without any programming knowledge and thus create a wide variety of documents.

Thanks to various form-based question types, powerful features, and add-on modules, your creativity has no limits when it comes to implementing custom template scenarios. To ensure this flexibility continues, we've developed the "Edit in Word" add-on module. While document creation is highly adaptable, certain use cases may push the boundaries.

#### Example:

*For example, you may want to spontaneously add large amounts of free text within SmartWizard when creating a document, or mark individual words as „bold“ that differ from the template. Of course, in such cases, you could generate a „Word document“ after completion and then edit it again. But what if SmartDocuments has been configured in your organisation to generate only PDF documents, as these are automatically transferred via an interface to an ECM, DMS or archive system for audit-proof storage?*

That's exactly why we created the "Edit in Word" module. It allows you to download the document as a DOCX file during the Smart Wizard process, edit it in Microsoft Word, and then re-upload the updated version — without leaving the document creation workflow or losing connection to third-party systems.



Senden



## MODULE

### E-Mail-plugin

**Send emails in your corporate design directly from SmartDocuments!** Document templates give your internal and external communication a professional and consistent look. They help you create flawless business documents in no time, always aligned with your corporate design. But what about your email communication?

With the Email Plugin module, you can create outgoing emails based on templates and benefit from all the SmartDocuments advantages you already know.

No need to open an external email program, write a message, and attach your document manually. With the plugin, you can send documents created in Smart Documents directly via email—without leaving your workspace. The email is automatically styled in your corporate design and sent with a single click.

## MODULE

### High Volume

#### When document generation skyrockets...

SmartDocuments makes it easy to create well-designed, personalized documents—fully automated. Using intelligent, preconfigured templates, documents are generated and personalized either through a simple question-and-answer dialogue or automatically via XML/JSON files.



**smart Documents**

**Add-on modules**  
Smart equipment for your journey to „Get out of the template jungle!“

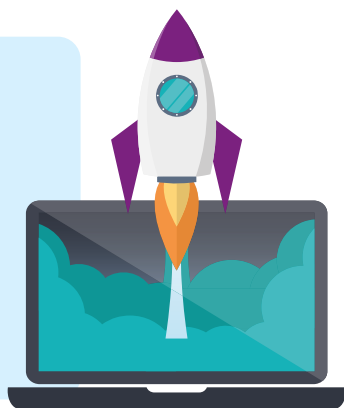
### Large numbers, complex documents ...

But what if you need to generate not just 10, 100, or 1,000 — but more than 10,000 documents at once? Imagine creating large volumes of complex documents like invoices, pay slips, or letters (e.g. rent increase notices), addressed to tens of thousands of recipients. Even our standard version starts to feel the pressure.

That's where our High Volume add-on module comes in. It enables fast and efficient generation of diverse documents using multiple XML files. Data retrieval, template population, document creation, and delivery are all separate processes — each critical when handling large volumes. To manage this complexity, the High Volume module uses multiple asynchronous queues to ensure smooth and scalable processing.

#### The advantages at a glance...

- ✓ Easy intervention if a process is not running correctly
- ✓ Display of which document or documents encountered an error
- ✓ Advance planning of processes
- ✓ Time and cost savings
- ✓ Error reduction



**You have complete control over the entire workflow of all your complex documents.**

## MODULE

### Concept storage

Depending on the application scenario or topic, templates can be more complex and may take longer to complete or respond to than initially planned. **The concept storage module allows you to save your progress at any time during editing** within the SmartWizard. With a clear structure and a unique name, saved templates can be easily found again in the SmartWizard. When you're ready to continue, the document opens exactly at the point where you last paused.

**Recurring documents?** Have you completed a document but need to use it again later based on the previously answered questions (e.g., due to changes in the template design)? You can also use the „concept storage“ function for this purpose.

## MODULE

### Multiple document output

**Create personalised form letters in just a few clicks!**

In today's flood of letters, emails, and promotional messages, personalized communication is more important than ever. Many organizations send out fully automated letters that still include personal data—thanks to the mail merge function.

With the Multiple Document Output add-on module, you can generate mailings directly within SmartDocuments in no time. Using a single document template, a large number of personalized documents can be created in one step. This is made possible by embedding variable data into the standard template.

*Examples of variable data: personal data (address, date of birth, etc.), energy consumption (letters from energy suppliers), place on the waiting list of the housing association, appointment arrangements, product data, special offers, and much more.*



## MODULE

### Search

**No detective work necessary ...** The Search Module makes template management much easier for application administrators. It allows you to run checks—such as whether names of former employees still appear in templates—without having to open each one individually. You can also verify whether a specific building block is still in use, and if so, where it's being used.

To simplify the process, the search includes features like autocomplete. For example, a search term may appear in multiple templates, as well as in linked headers, footers, or building blocks. The “Hits” column groups search results by specific template elements for easy overview.



## MODULE

### Single sign-on

#### **No more passwords to remember...**

As the number of software tools used within organizations grows, daily work can become increasingly complex. With Single Sign-On (SSO) technology, the workday becomes easier for both users and administrators.

**Once users authenticate at their workstation, no additional login is required for Smart Documents.**

This means users only need to remember one password. For administrators, user management becomes simpler—if someone forgets their login, it only needs to be reset once in a central location, not across multiple systems.



## MODULE

### XML / JSON

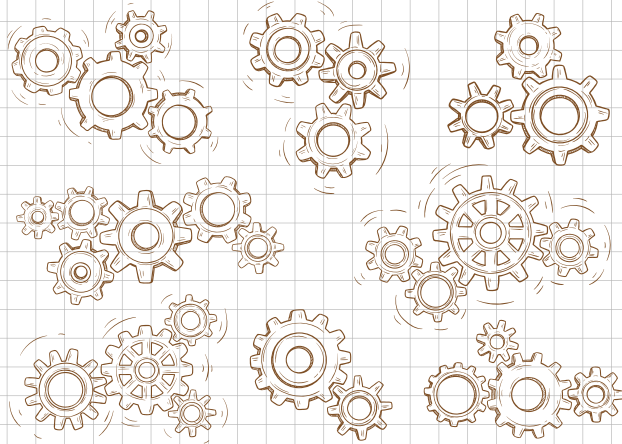
Today, XML plays a key role in document automation—and our software uses it to streamline the process. Templates are equipped with XML fields, each representing a “question.” The answers to these questions are typically stored in your internal database. Using XML technology, these answers are linked to the corresponding fields in the template with just a click.

So instead of manually entering that “Ms. Smith lives at house number 55 and was born on October 6, 1975,” SmartDocuments automatically fills in this data for you. The XML/JSON Module makes document creation and external communication significantly easier, faster, and more efficient—simplifying your daily work. **That's why this software extension is one of our most popular modules.**



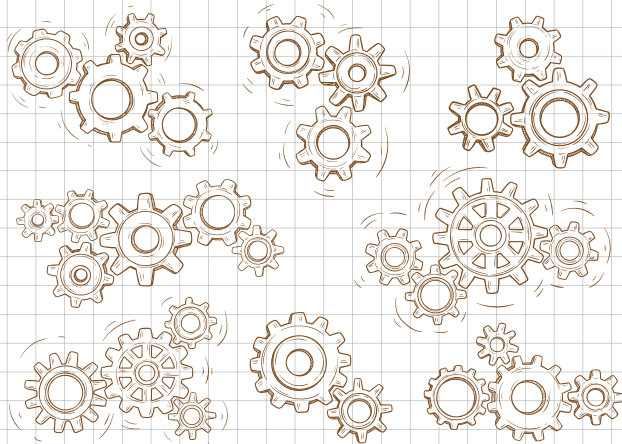
**smart  
Documents**

**Add-on modules**  
Smart equipment for your journey  
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# Interfaces

„Clever networking! How to achieve fully digital, media-break-free processes!“



## Digitalisation = Collaboration

The digital transformation offers numerous advantages and holds great potential for increasing efficiency.

A prime example is the digitization of documents: manual errors can be avoided, many work steps automated, and core business processes digitized. In organizations and companies, digital tools are becoming increasingly common—and most of them either generate documents or already include their own templates. Managing these templates in terms of content accuracy and adherence to corporate design becomes nearly impossible and extremely time-consuming.

To significantly reduce the effort involved in template maintenance and enable seamless, media-free processes, it is essential that individual applications can communicate with each other. That's why we embrace an open interface culture.

Do you use multiple applications with their own templates but want to create and manage all your templates centrally? No problem—SmartDocuments offers a comprehensive portfolio of interfaces to third-party applications, such as:

- ✓ Specialized procedures
- ✓ Document Management Systems (DMS)
- ✓ Workflow systems
- ✓ Business Process Management (BPM)
- ✓ Enterprise Resource Planning (ERP)
- ✓ Archiving systems
- ✓ ...and many more!



You can find an up-to-date list of our interfaces and partners on our website.

[smartdocuments.de](https://smartdocuments.de)





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