Automate document creation with SmartDocuments while working in Platina

Increase efficiency by automatically populating documents with content, using the SmartDocuments Connector for Platina.

Platina is one of the most powerful software solutions for case and document management on the market today. However, like any other similar tool, template management and content automation are not the top key functions that Platina was originally designed for. Luckily, SmartDocuments is!

What if you could automatically create ready-to-go documents from Platina, saving time and costs? Platina ensures that each document is populated with the data from the current case. However, a document consists of more than data only before it is completed, can be approved and filed. Currently, Platina generated documents can be populated with content in one of the following ways:
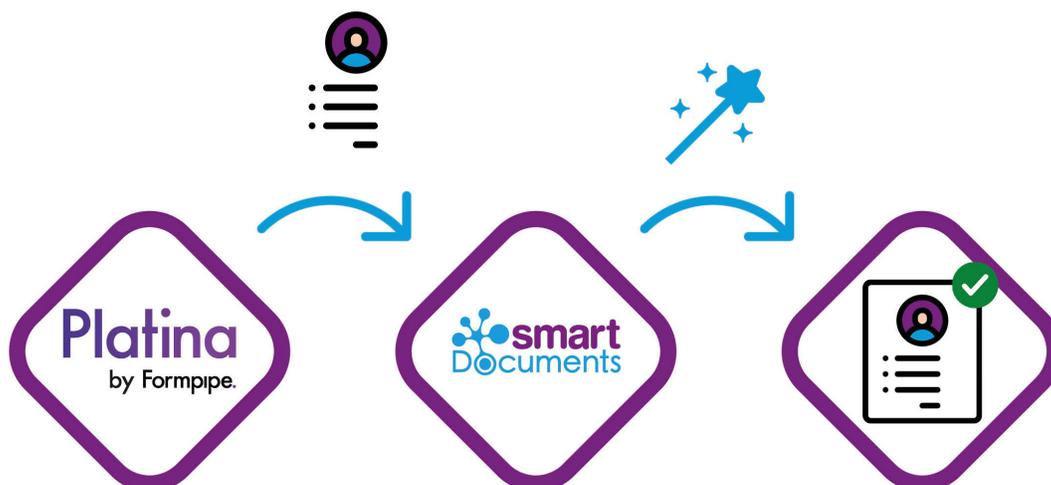
- Create one template for each possible document variant, which would result in a high volume of templates that all need maintenance.

- Have users enter content manually, a task that is prone to errors and time-consuming. There is no way to ensure the content is correct, up-to-date and entered in the correct place and format.

- Create entry fields, selections and check boxes in Platina so that the user can enter and select content. However, you would need to hire an (external) consultant to create these entry fields, selections and check boxes, which can be costly and time-consuming

Besides data and content, your document also consists of your organization's corporate identity. Imagine the corporate identity is being changed and the new layout needs to be implemented in all templates. Or think of a standardized text that can be found in multiple templates and imagine that one day this text needs to be updated. How many templates do you have? Now imagine how much time it would take to update every single template in your organization.

SMARTDOCUMENTS CONNECTOR FOR PLATINA

Let us introduce a more efficient and faster way to manage content, your corporate identity and standard text.

Choose to automate the process of populating a document with content. Instantly create ready-to-go documents based on interactive templates in SmartDocuments. The benefits are endless.

- **Create and manage interactive templates in one easy-to-use environment.** No coding, just drag & drop.

- **Efficiently create personalized documents.** Automated document creation is a huge time saver, it reduces errors and increases quality. Using question & answer screens with help texts, users are guided to create a complete, flawless and personalized document. No more copy & paste errors.

- **Always send your documents in the correct corporate identity.** The layout of all your templates is managed in one central place, meaning that changes to the corporate identity only have to be implemented once and will automatically and instantly be updated in all templates.

- **Keep recurrent and standard text correct and up-to-date.** All standardized text is legally secure and always up-to-date. Changes to standard text are automatically and instantly updated in all your templates.

- **Case data from Platina is automatically inserted into your documents.** Our integration of SmartDocuments in Platina is seamless. For the Platina end-user, the document creation process is the same; no need to change behaviour or introduce new processes. SmartDocuments only brings added value, no functionality is lost.

Keep it clean and simple. The SmartDocuments Connector for Platina stands for simplicity and efficiency. It's no rocket science and no extensive IT knowledge is required. Decrease the number of templates within your organisation with more than 50% and increase your control of document quality. Thanks to minimal user intervention, you're minimising the risk for errors.

Additional benefits

Your organisation can reach new heights of savings by also using SmartDocuments for other purposes than Platina only, such as stand-alone Word templates and templates for other case management or business support systems. This is when you unleash the full power of SmartDocuments.

"SmartDocuments' ability to handle complex xml structures and, based on that, automatically create complete and accurate content has helped us enormously."

Elisabeth, Template designer

Automatically create ready-to-go documents containing all the correct case data and content elements. Want to learn more about how the SmartDocuments Connector for Platina can forever change the way you conduct your business? Let us know!

SmartDocuments stands for more than 25 years of experience in the field of automated document creation and template management. We deliver an easy-to-use system for managing your templates and convenient software for creating flawless documents.

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Formpipe is a value driven software company - we put people first and at the centre of digital transformation. Our mission is to build valuable relationships between data and people. Passionate about creating value for our customers, we contribute to an inclusive, trustworthy and sustainable digital society.

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