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Getting Started with xdge
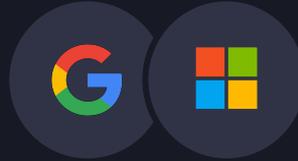
From Connection to Automation in Minutes

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Onboarding

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Sign Up in Seconds

1 Use your existing **Google** or **Microsoft** account to log in.

2 No manual account setup or new passwords required.

3 You'll be in the platform and ready for the next step immediately.

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Connect Your Core Tools

4 After signing up, you'll be prompted to connect the apps your team already uses.

5 Start with 4-5 core apps like Slack, Gmail, Google Drive, Jira, or Salesforce.

6 Connections always respect your existing user-level permissions.

A Quick Note on Approvals

- Some custom tools may require IT or admin approval, which can take 1-2 days

- You can continue exploring xge and building workflows while any approvals are pending

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Launch Your First Workflow

Start from Scratch

Action: Open the Workflow Builder.

Description: Create a workflow step by step with guided prompts and maximum flexibility.

Start with a Template

Action: Launch an Ideal Workflow.

Description: Use a pre-built template designed to work out of the box with minor edits, helping you see value quickly.

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Workflows, Simplified

Bring information together from all your disparate tools.

Turn it into something useful like updates, reports, or actions.

Keep things moving without manual follow-ups or intervention.

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You don't need to 'program' anything to use them

The Lifecycle of a Workflow

1

Create

Build a new workflow from scratch or adapt a template.

2

Test

Run your workflow in a safe environment to confirm the outputs are correct.

3

Publish

Make your workflow live once you're happy with the results.

4

Run

Once published, your workflow can be activated in multiple ways.

Reuse: Run it on-demand anytime.

Share: Let teammates use it.

Schedule: Set it to run automatically.

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A Quick Tour of Your New Superpowers

Search
Find answers, context, and past decisions across all your connected tools instantly.

Assist
Ask questions and get grounded answers based on your team's actual work.

Collections
Save important documents, conversations, and outputs in one place for easy reference.

Meetings & Clips
Automatically capture transcripts and extract key takeaways, decisions, and next steps.

Workflows
Turn recurring work into simple automations that create reports, update systems, or take action.

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Reliability & Speed

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Stable & Fast, Out of the Box

Saved AI Plans

Once a workflow is published, its AI plan is saved and reused for faster, more predictable execution every time.

Pre-Built Tools

Access a library of ~100 pre-built, certified tools for common actions (e.g., posting to Slack, updating records).

Reliable Execution

These tools eliminate the need to generate actions on the fly, making workflows highly reliable.

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Our Commitment to Constant Improvement

What we're improving

Automatic Custom Tool Saving

Current status: Custom tools generated during workflows are not yet saved automatically.

The future: This is in progress, and soon these tools will be baked into workflows for consistent reuse.

Certified Data Transformations

Current status: Some intermediate data steps currently rely on custom code.

The future: We are actively adding certified tools to handle these steps seamlessly.

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xdge is the future that works for you