Xpertdoc Smart Flows 4.14

Release Preview Guide

July 2022

Introduction

The Xpertdoc Product Team is excited to announce the release of Xpertdoc Smart Flows 4.14 in July 2022. In this new release, we are happy to introduce the Xpertdoc Smart Flows plug-and-play integration with Microsoft Dynamics 365 for Finance and Operations.

Our integration with one of Microsoft's most popular Enterprise Resource Management (ERP) systems opens a world of new capabilities. Experlogix customers who are already using Xpertdoc Smart Flows or Xpertdoc Portal standalone or with CRM applications like Microsoft Dynamics 365 for Customer Engagement, Salesforce.com, or Sugar can take advantage of both systems. Also, if you are an Experlogix CPQ customer using F&O, Xpertdoc Smart Flows 4.14 provides excellent capabilities to automate and execute document-centric process flows from within your familiar ERP environment.

Xpertdoc Smart Flows improves collaboration between IT staff and business team members by automating document generation and delivery throughout your ERP processes. Sales and purchase order documents are obvious candidates to be automated through Xpertdoc Smart Flows, just like invoices. However, freight documents such as inspection, compliance, inventory reports, or picking and packaging paperwork are also ripe for automated generation, and delivery via Xpertdoc Smart Flows.

Instead of tinkering with complex SSRS report layouts, you can design templates for any need via the Xpertdoc Template Builder add-on for Microsoft Word. For Designers, building the process flow to generate and deliver the documents becomes a matter of dropping flow steps onto a canvas with the visual Flow Builder. For the User, starting a document flow comes down to a simple click in the Microsoft Dynamics 365 F&O UI.

Even more, than empowering business users, this new Xpertdoc Smart Flows release allows companies to leverage and combine their data from even more sources. By connecting the dots between ERP and CRM, Xpertdoc Smart Flows lets you engage better and faster with customers and other stakeholders across all your applications. We provide value-added features like integrations with e-signature providers and a broad range of connectors to systems for printing and storing generated documents.

Should you need support, please reach out to our team!

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Xpertdoc Smart Flows for Microsoft Dynamics 365 for Finance and Operations

The Xpertdoc Smart Flows 4.14 release marks the introduction of the plug-and-play integration between Smart Flows and Microsoft Dynamics 365 for Finance and Operations.

Xpertdoc Smart Flows ISV Package for Microsoft Dynamics 365 F&O

The integration between Xpertdoc Smart Flows and Microsoft Dynamics 365 F&O includes an ISV package for Microsoft Dynamics 365 F&O that extends the ERP system with the following:

- buttons within Microsoft Dynamics 365 F&O to start flows on all relevant OData entities
- capability assign an Xpertdoc Smart Flows role to F&O users to grant access to flow executions
- a custom entity that contains configuration details of the Xpertdoc Smart Flows project associated with the F&O instance

The Microsoft Dynamics 365 F&O ISV package is available on the Release downloads page on the knowledge base. When deploying to your Microsoft Dynamics 365 F&O instance, the Xpertdoc Smart Flows package should be combined with other ISV packages to create an all-in-one deployable package.
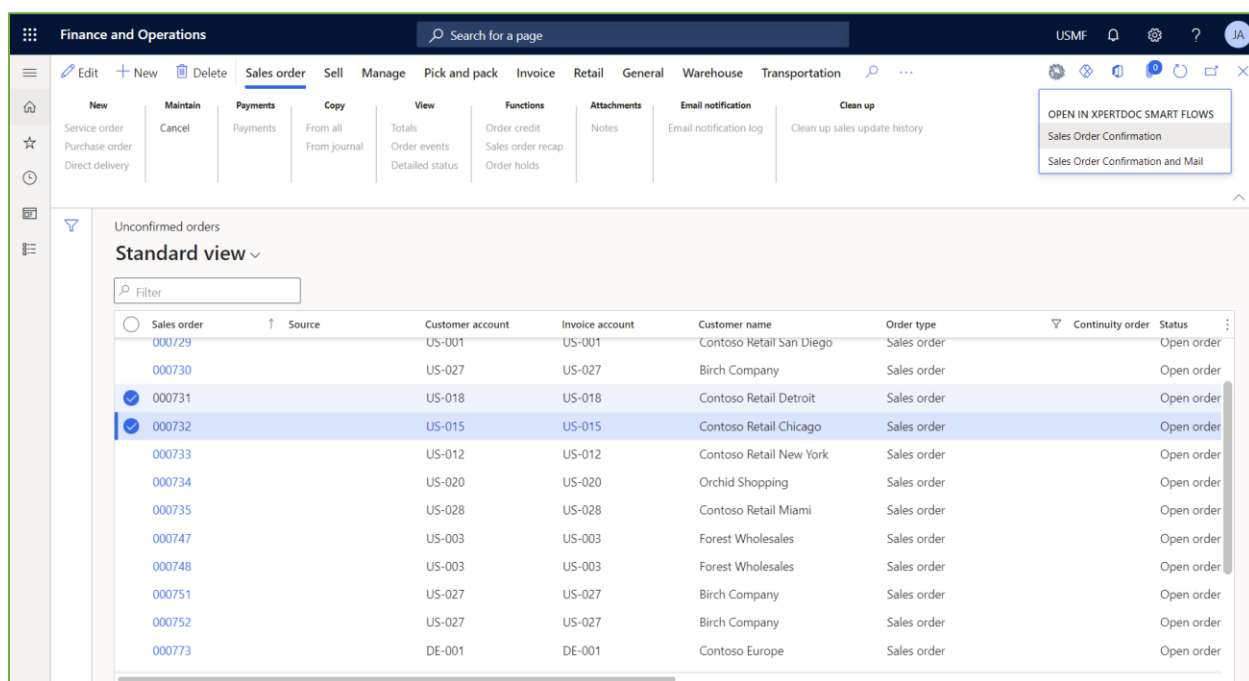

Figure 1 - Xpertdoc Smart Flows integration in Microsoft Dynamics 365 F&O

Connector Configuration and User Syncing

If you have an Xpertdoc Smart Flows project with a subscription that includes Xpertdoc Smart Flows for Microsoft Dynamics 365 F&O, you can create a Microsoft Dynamics 365 F&O type connector. The connector setup is a guided process that will allow you to connect your Smart Flows project either to an F&O instance or to a company (a legal entity) within that instance. In this latter case, users will only be able to run flows against records associated with the legal entity for which the connector has been set up.
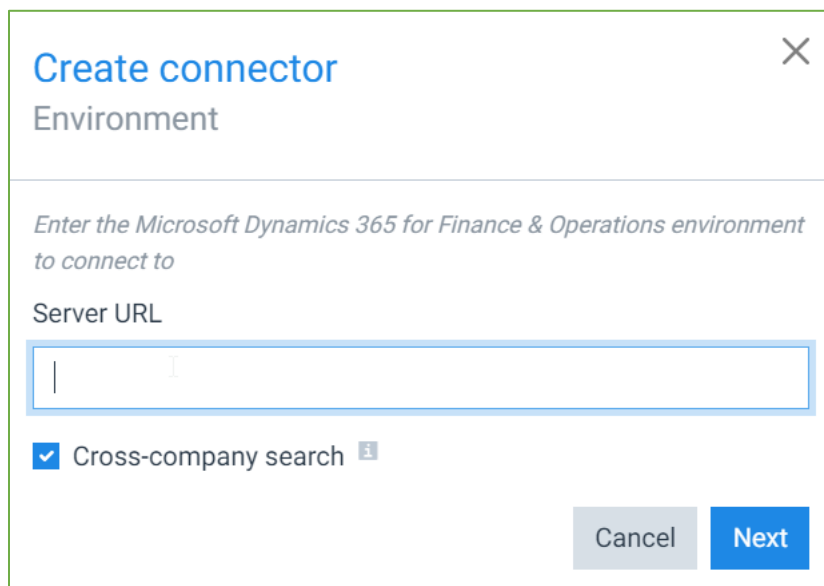

Figure 2 – Microsoft Dynamics 365 for F&O Connector setup

When creating a new connector, a connection is a setup using the OAuth pattern, where a service user typically grants Xpertdoc Smart Flows access to the target F&O instance. The Create, a Connector wizard, automatically creates an API key and generates a configuration record to store in the Xpertdoc Smart Flows table associated with the F&O instance. The system automatically assigns the Xpertdoc Smart Flows Administrator role to the user who granted Smart Flows access.

The Xpertdoc Smart Flows ISV package for F&O adds three cascading security roles to the system:

- Xpertdoc Smart Flows Administrator
- Xpertdoc Smart Flows Designer
- Xpertdoc Smart Flows User

When you sync connected users through the Project Console's User panel, all users with at least one of these roles will be able to log into the Smart Flows Flow Execution Panel to execute flows with their Microsoft Dynamics 365 F&O credentials.

In Smart Flows 4.14 and beyond, Administrators can sync users via more than one login connector. For example, a user that exists in two instances could access and execute flows in both Microsoft Dynamics 365 CE and Microsoft Dynamics 365 F&O.

Relationship Manager and Microsoft Dynamics 365 F&O Data Sets

With a connector to a Microsoft Dynamics 365 F&O instance, Xpertdoc Smart Flows can extract metadata about all externally available data entities through F&O's OData endpoint. The connection allows users to build data definitions in the visual Data Set Builder. This connection also allows users to indicate the primary entity fields and which related entity fields should be available to map in a document template. There is no limit on the number of degrees of relationship.

For relationships not automatically uncovered by the Odata query, Admins and Designers can manually add relationships in the Relationship Builder at the connector level. You can select two data entities and relate them as one-to-many or many-to-many by field. To boost your success, we've already added a list of expected OData relationships for you to import during the initial creation of your Microsoft Dynamics F&O connector. Once relationships are discovered through any of the methods above, they are available in Data Set Builder.

Figure 3 – The Relationship Manager on the Connector page

When a data set is associated with a template, Designers can map fields from the data as placeholders for data insertion. Associating templates with multiple data sets maximizes reuse and speed to adoption. Additionally, templates fetching data from the associated connector can be associated with a template or data sets fetching data from another connector. A typical scenario for combining multiple connectors is a sales order confirmation template. In this example, the system collects the order fulfillment from Microsoft Dynamics 365 F&O. At the same time; the system also collects the associated customer details from Microsoft Dynamics 365 CE.

Flow Blocks

The Xpertdoc Smart Flows integration with Microsoft Dynamics 365 for Finance and Operations comes with new two F&O-specific flow block:

- Email (Microsoft Dynamics 365 F&O) flow block
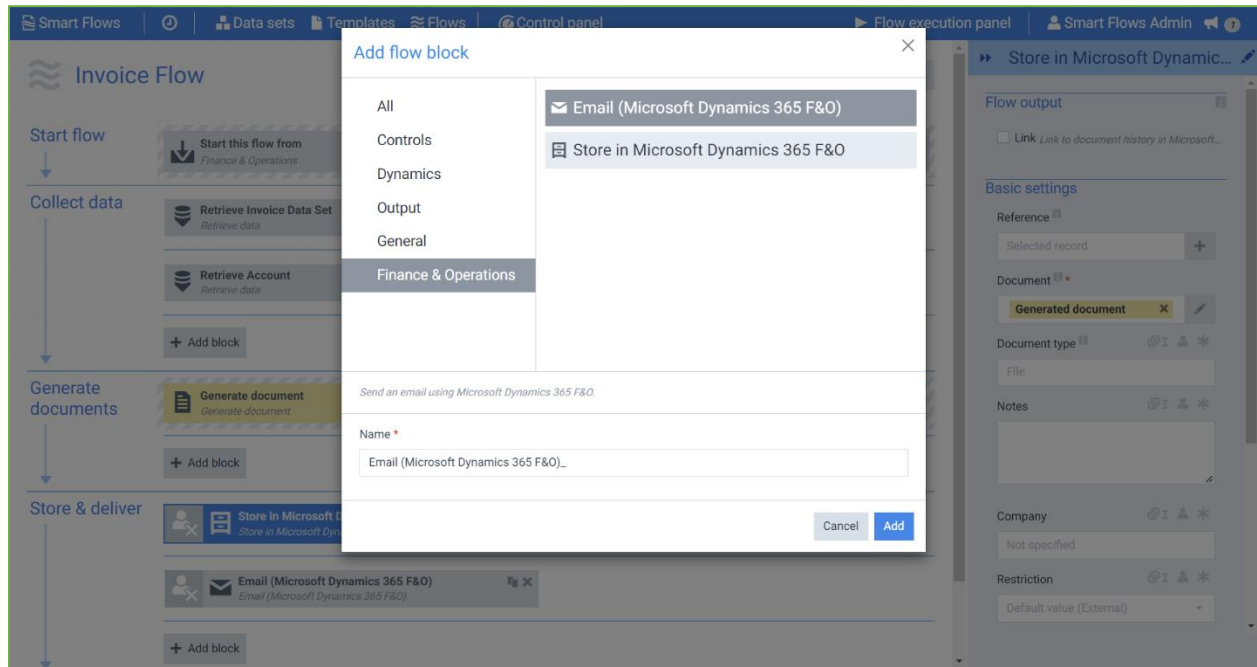- Store in Microsoft Dynamics 365 F&O flow block

Figure 4 Microsoft Dynamics 365 for Finance and Operations specific flow blocks

Email (Microsoft Dynamics 365 F&O) flow block

The Email (Microsoft Dynamics 365 F&O) flow block allows Designers to define a personalized subject line, email body, and one or more attachments. You can generate an email body via a template, existing document, or an HTML editor that allows personalization via field mappings. Attachments can be generated documents, other files available during flow execution, or assets stored in the Smart Flows Asset Manager. When the Email (Microsoft Dynamics 365 F&O) flow block generates emails, the system lists them in the email table in F&O.

Features

- ❖ Generate email bodies via the following options
  - o Template
  - o Existing Documents
  - o HTML editor that allows personalization via field mappings
- ❖ Include attachments with generated emails
  - o Generated documents
  - o Files referenced during the flow execution
  - o Assets stored in Smart Flows asset manager

Store in Microsoft Dynamics 365 F&O flow block

The Store in Microsoft Dynamics 365 F&O flow block adds the capability to store a document as a record attachment in F&O with the following features.

- ❖ Reference any document utilized in the flow(typically the document created via the Generate Document flow block)
- ❖ Storage parameters
  - o Default attachment flag
  - o Association with a specific legal entity(company)
  - o Restriction to internal or external users

These two F&O-specific flow blocks can be combined with all flow blocks that your project is licensed for. Flows can also trigger flows in other systems, such as a Microsoft Power Automate flow or a Microsoft Dynamics 365 CE workflow.

Flow Execution

Flow execution can be executed in Microsoft Dynamics 365 for Finance and Operation from any data entity's List view or any data record's Detail view. The Xpertdoc Smart Flows icon enables a drop-down menu with all flows related to the active record(s) that are tagged to be shown in the fly-out menu. Selecting a flow will launch the Xpertdoc Smart Flows Flow Execution Panel in a new browser tab, where the user follows the flow execution progress and collects any outputs.

During flow execution, the system prompts users to indicate preferences, fill out forms, preview and approve generated documents, and more. The user can also review the status of their previous flow executions and receive alerts about flow executions that require attention.
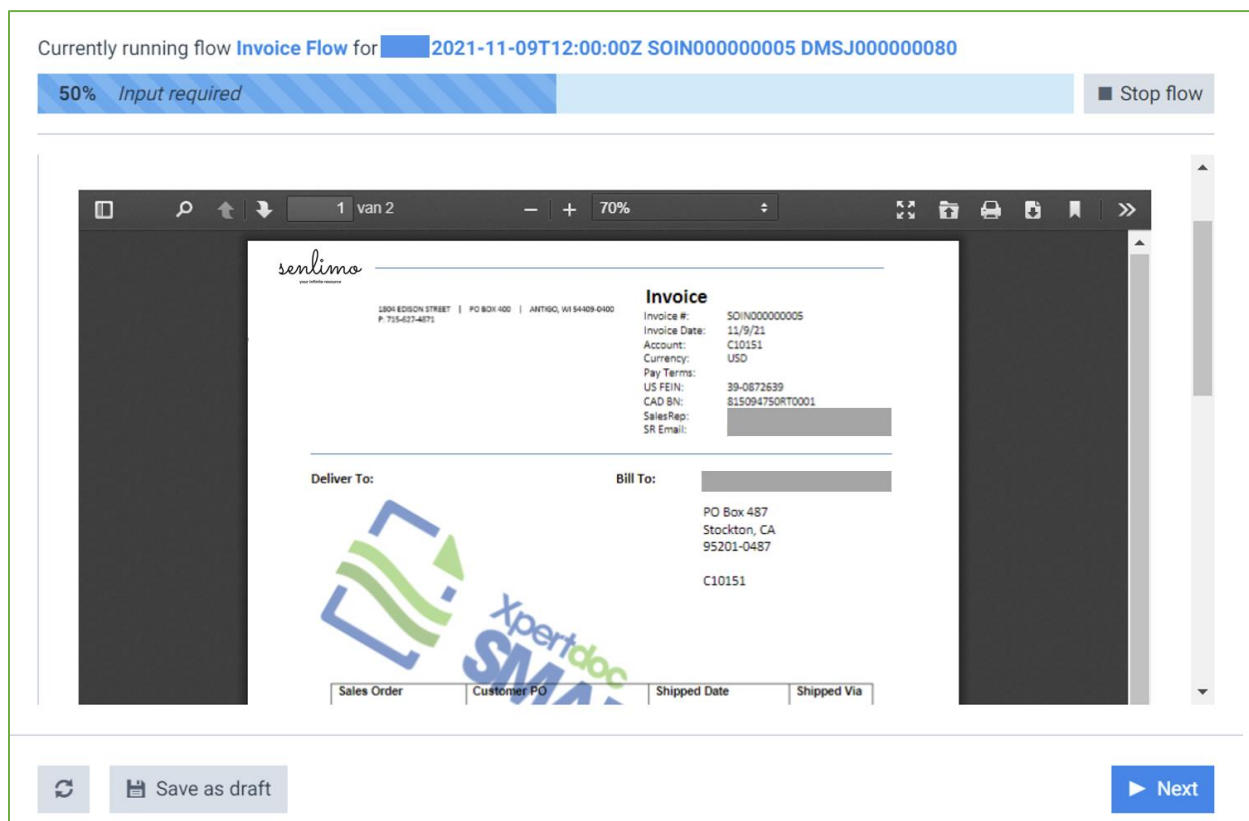

Figure 5 – Flow execution in the Flow Execution Panel

Minor Improvements

As always, the new Xpertdoc Smart Flows release contains multiple improvements and fixes. Our minor improvements can be found on the 4.14.0 Release Notes page. Subsequent 4.14 releases will focus on more of these minor improvements and bug fixes. Areas of improvement include,

❖ Dual login capabilities
❖ Data set builder
❖ Custom data sets
❖ Import and export functions
❖ Support for retrieving text and embedded images from notes in Microsoft Dynamics 365 CE

About Xpertdoc Smart Flows

The Xpertdoc document generation and document automation software empowers companies to simplify, optimize and automate consistent document processes.

- Businesses can leverage a single platform with robust and user-friendly features that increase the speed of adoption.
- Teams can create simple or complex document templates, capture customer data, and store and manage enterprise content.
- Users can increase productivity and drive the business forward by generating documents in batches or automated flows and sending them for electronic signatures.