

Xpertdoc Smart Flows 4.12

Release Preview Guide

October 2021

Introduction

The Xpertdoc Product Team is excited to announce the general availability of Xpertdoc Smart Flows 4.12 on October 26, 2021. This Release Preview Guide walks you through the hero features this latest update adds to Xpertdoc's low-code document generation and document automation software.

Release 4.12 of Xpertdoc Smart Flows contains several long-anticipated, "quality-of-life" features for administrators, template designers and end-users alike. For admins, this release includes a series of new features that enhance the way collected data is pre-processed before it merges with a template. Filtered relations help you to optimize relations between tables for use in templates. The improved "Data collection" flow step for HTTP connectors lets you enrich data sets. The new Sample Previewer in the Data Set Builder allows you to immediately check the impact of changes to your data sets from the Builder page.

Template designers will enjoy a new version of the Xpertdoc Template Builder add-in for Microsoft Word. The latest version loads templates faster, and the new online installer automatically installs the next version of Template Builder when it is available. No more uninstalling and reinstalling required – ever again.

For end-users, the 4.12 release brings the ability to preview a generated document during a flow execution and review it right from the Flow Execution panel. After review, you can approve it and resume the flow execution, or reject it and stop the flow execution, in which case a warning or error message can be sent to Xpertdoc Smart Flows admins.

Should you need support, [reach out](#) to our team!

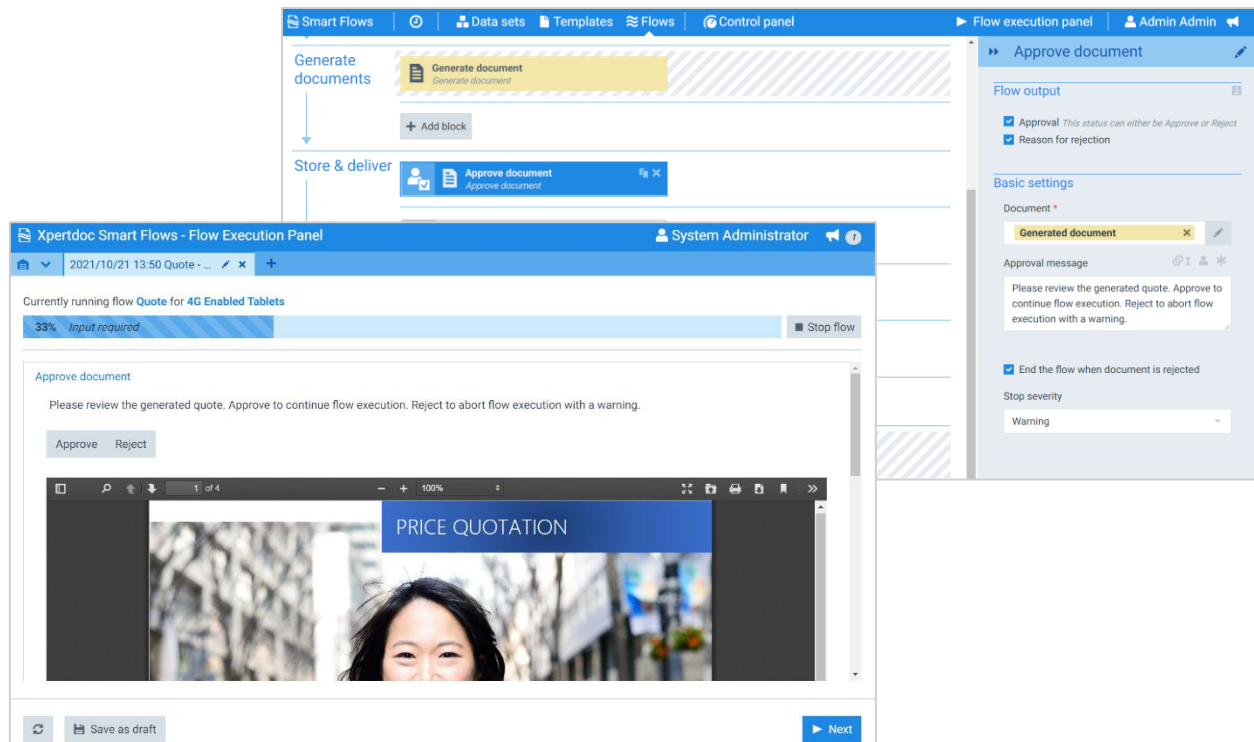
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Project Console Enhancements

Document Preview During Flow Execution

One of the much-anticipated new features is the capability to preview a generated document during a flow execution. In version 4.12, you can pause the execution of a flow immediately after the “Generate document” step to show a preview of the document in the Flow Execution panel. As an end-user, this lets you verify that the generated document looks exactly like you expected before resuming the flow with any subsequent storage or delivery steps. If the document does not pass the preview test, you can stop the flow execution at that step and cancel all remaining steps.

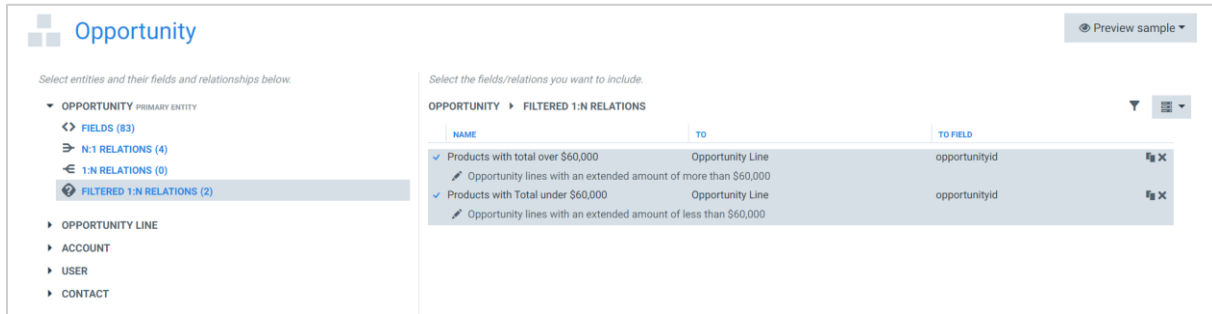


Filtered Relations at Data Set Level

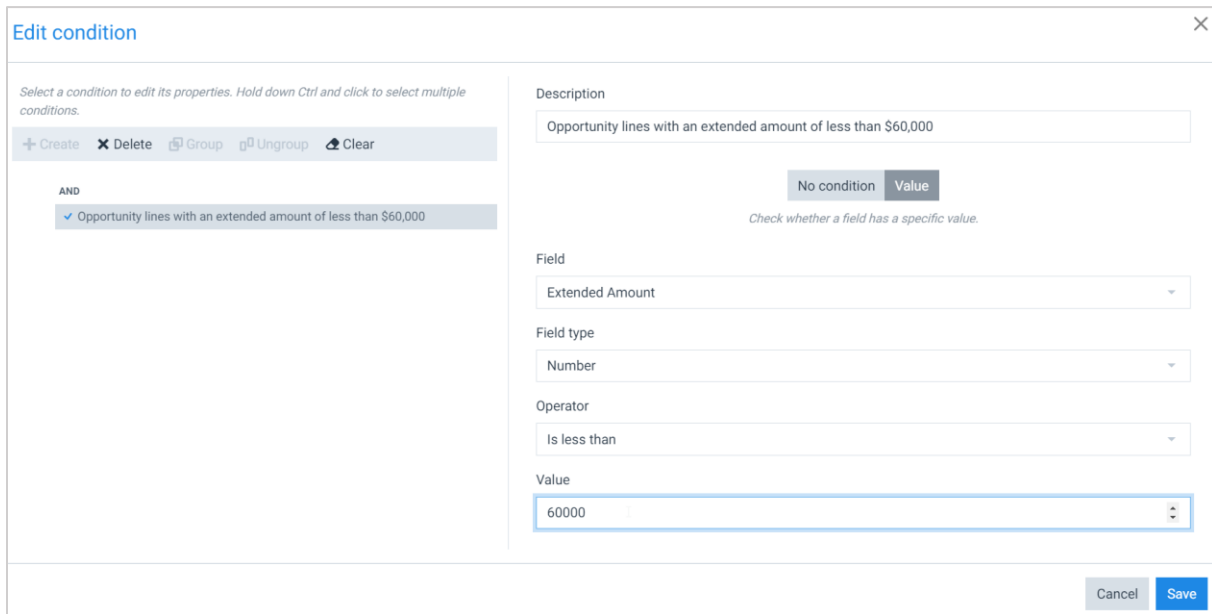
Many template designers make intensive use of the result set feature. A result set is a filtered one-to-many relation (1:N) in the data set associated with a template. This filter is based on a condition you define through the Condition wizard in Xpertdoc Template Builder. Until version 4.11, result sets could only be defined in the template, which meant that they could not easily be shared between templates.

In version 4.12, you can create filtered relations at the data set level. These conditions allow filtering of a one-to-many relation (1:N) in the data set. Users can reuse these filtered relations across all templates associated with that data set.

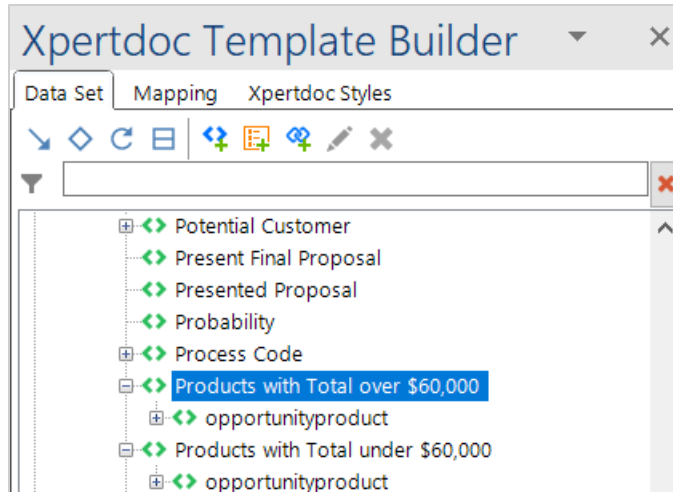
In the example below, two filtered relations are built on the one-to-many relation (1:N) between the Opportunities and the Opportunity Line entities, to only fetch items with an extended amount of more and less than \$60,000.



The process of defining a filtered condition in a data set is similar to creating a result set in a template. However, the condition that defines a filtered relation can only use fields from the filtered entity as parameters, whereas the filtered condition of a result set may include fields of other entities as well.



At the template level, filtered relations can be used in the same way as standard one-to-many relations (1:N) or result sets to build loops.

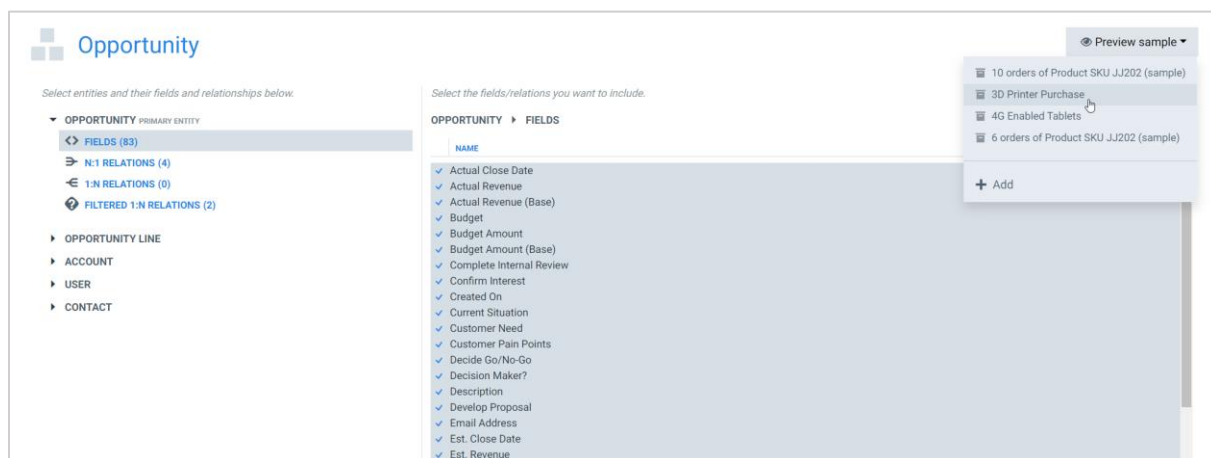


The main difference between a filtered relation in the data set and a result set in the template is that a filtered relation uses the filter before collecting data from a connector (e.g., Microsoft Dynamics 365, Salesforce or SugarCRM). In contrast, a result set filters the data after collecting data to only show the relevant portion in a generated document. Therefore, using filtered relations instead of result sets may improve performance, because only the data that makes it through the filter is collected.

The capability to filter relations is the first of a series of roadmap features that will enable users to execute data operations at the data set level rather than the template level. These planned features focus on optimizing data collection and promoting re-usability of data operations across templates and flows.

Preview Data Sets with Samples

A handy feature in the 4.12 release is previewing a data set with a sample right from the Data Set Builder, in the Project Console. With a single click, you can view the data your active data set would return for any of its samples. You can also create a new sample directly from this new function.



Connector Enhancements

HTTP Connector Support of all Types of Data Sets for Data Collection

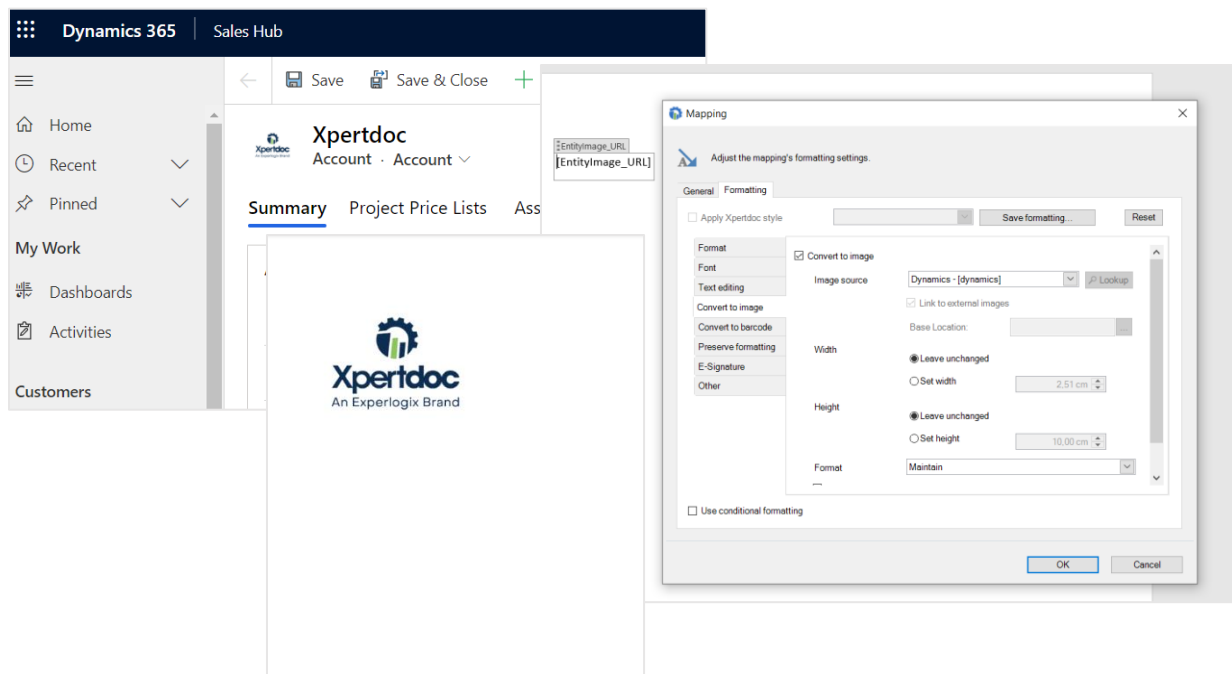
The HTTP connector serves as an open endpoint to call external REST services, either for document post-processing or data pre-processing. Many Xpertdoc Smart Flows projects have HTTP connectors in place. For example, to collect data from a legacy system or another data source that cannot be reached from an out-of-the-box connector. Other projects use it to launch a Microsoft Power Automate flow from a document flow in Xpertdoc Smart Flows.

When used for data collection, until version 4.11 the “Fetch data with HTTP connector” flow step would only collect data against a schema data set. In other words, it would fetch an XML that structurally corresponds to a schema definition uploaded as a data set.

However, in version 4.12, HTTP connector-based “Data collection” steps can now fill any data set type, including Microsoft Dynamics 365 Customer Engagement, Salesforce or SugarCRM data sets. This change allows you to enrich CRM data by calling a web service to authenticate against an HTTP connector.

Support for Image Fields in Microsoft Dynamics 365 CE

The new version of Xpertdoc Smart Flows supports “Image” type fields in Microsoft Dynamics 365 Customer Engagement. This change allows you to map the full-sized version of images in your Xpertdoc Template Builder templates. To take advantage of this change, the Smart Flows connector for Dynamics 365 CE must use version 9.1 of the Dynamics 365 web API and enable full image support in the Power Apps option for each image column in your Dataverse tables.



Automatic Role Assignment to Connection Users

When you configure a standard connector in Xpertdoc Smart Flows, a Smart Flows app is usually installed into the host system that adds the following:

- action buttons
- configuration settings
- security roles
- permission sets

You can then assign Xpertdoc Smart Flows Administrator, Designer and User roles to users of the host system and synch them up with the Users table in the Project Console.

In the 4.12 release of Xpertdoc Smart Flows, the user who authenticates a connector to a host system – Microsoft Dynamics 365, Salesforce or SugarCRM – is automatically assigned the Xpertdoc Smart Flows Administrator security role or permission set in the host system. If you sync users during the connector setup, you can immediately start flow executions as the “connection user” after the connector configuration, without first assigning any additional security roles.

Xpertdoc Template Builder for Microsoft Word Enhancements

Performance Improvements

Several customers experienced application latency when opening templates in Xpertdoc Template Builder. Thanks to an optimized caching mechanism for project-related data, templates load faster in version 4.12.

Automated Updates

Smart Flows 4.12 comes with an additional online installer for the Xpertdoc Template Builder add-in for Microsoft Word. The new installer automatically pulls new updates of Template Builder as they become available in the Xpertdoc web repository. It will always prompt the user to install the latest version, regardless of the version that is in use.

With the addition of this new installer, three installers are now available:

- The **new online installer** always pulls the latest release of Xpertdoc Template Builder. For example, if your current version is 4.12.1. when 4.12.2 launches, the installer prompts users to install the new version. When 4.13.0 launches, this installer also prompts users to update to the latest version.
- The **previous online installer** is tied to a minor release when your current version is 4.12.1. When 4.12.2 releases, the installer prompts users to install the new version. When 4.13.0 launches, however, this installer does not prompt users to update. To update to 4.13.0, users must uninstall the 4.12 add-in and replace it with the 4.13 add-in.
- The **offline installer** will never prompt updating to a new version as it has no link to an online repository.

Licensing Changes

Blank Documents No Longer Deducted from Subscription Volume Allowance

Every document flow you create with Xpertdoc Smart Flows has a “Generate document” flow step by default. It is a hard requirement that every flow have at least one such document generation step; yet this also prevents you from deleting them. Therefore, you may end up creating a blank document in your flow to meet the requirement – not because you need the document.

Although most of your flows will generate documents, there are scenarios where that is not necessary. Imagine you are using an Xpertdoc Smart Form to collect data and then pass that data through an HTTP connector to an external service that processes it without a real need to create a document. In previous versions of Xpertdoc Smart Flows, the blank document created to meet the requirement would have consumed a credit of your subscription’s document volume allowance. Although the requirement to have a document generation step in every flow still exists, in version 4.12, blank documents no longer count towards your subscription.

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 through automated flows, and send them for electronic signatures.