experlogix
Document Automation

Experlogix Smart Flows 4.16 Release Preview Guide

This Release Preview Guide contains highlights that are expected to be included in the next minor release of Experlogix Smart Flows. It is not meant to be complete, nor does it guarantee that all the listed items will be fully implemented.

Introduction

Experlogix is excited to announce the release of Experlogix Smart Flows 4.16 in winter 2023. Experlogix Smart Flows continues to simplify the most complex document automation challenges by empowering business users to generate and deliver better documents faster.

Experlogix Smart Flows 4.16 introduces an optimized flow execution experience for Microsoft Dynamics 365 CE app users and a new e-signature platform integration. Our continuous growth and product improvements are the results of your feedback and suggestions.

Also included in this release is the unification of the Experlogix brand reflected in the user interface. Version 4.16 of your favorite document automation application has been updated to display the new Experlogix branding. The updated font and color schemes, along with the other small adjustments, makes Smart Flows an Experlogix product with a user experience that both our CPQ and Document Automation customers recognize and love.

From all of us here at Experlogix, we wish you happy templating, and should you need support, please reach out to our team!

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Integrate with Notarius' ConsignO Cloud

Experlogix Smart Flows now contains an e-signature plug-in for ConsignO Cloud by Notarius. Notarius is a leading expert in electronic signatures, digital signatures, and long-term document reliability since 1998. Notarius is the only Canadian firm that issues trusted signatures recognized by Adobe (Adobe Approved Trust List – AATL) and eIDAS (Electronic Identifcation Authentication and Trust Services).

Configure a ConsignO Cloud connector in the Project Console to connect Smart Flows to your ConsignO Cloud account and easily manage the signing process of your electronic documents. When activated on your Experlogix Smart Flows license, your template designers can insert ConsignO Cloud e-signature placeholders in Template Builder to increase your productivity and allow customers to sign from anywhere.
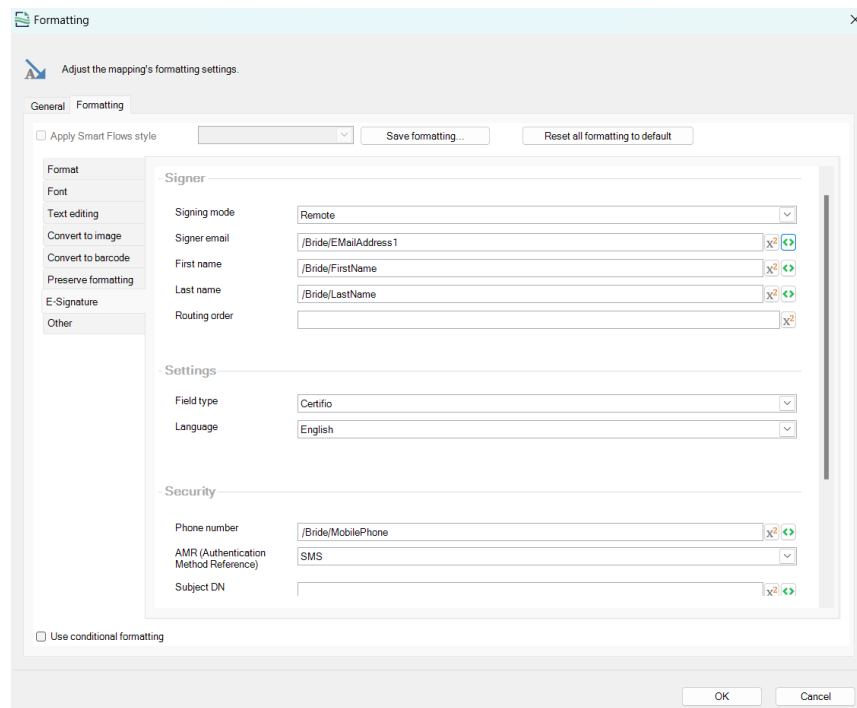

Figure 1 – ConsignO Cloud settings in Template Builder

As a flow designer, you can insert "Send to ConsignO Cloud" steps in your flows. This new step will execute a ConsignO Cloud workflow with a document generated or retrieved earlier in the flow. It can send e-mails to recipients of the workflow or generate signing URLs for in-person signing. The step contains deferred output options to collect the signed document after the completion of the ConsignO Cloud workflow. This means that Smart Flows can wait for the ConsignO Cloud workflow to complete and then process the signed document(s) in further steps.
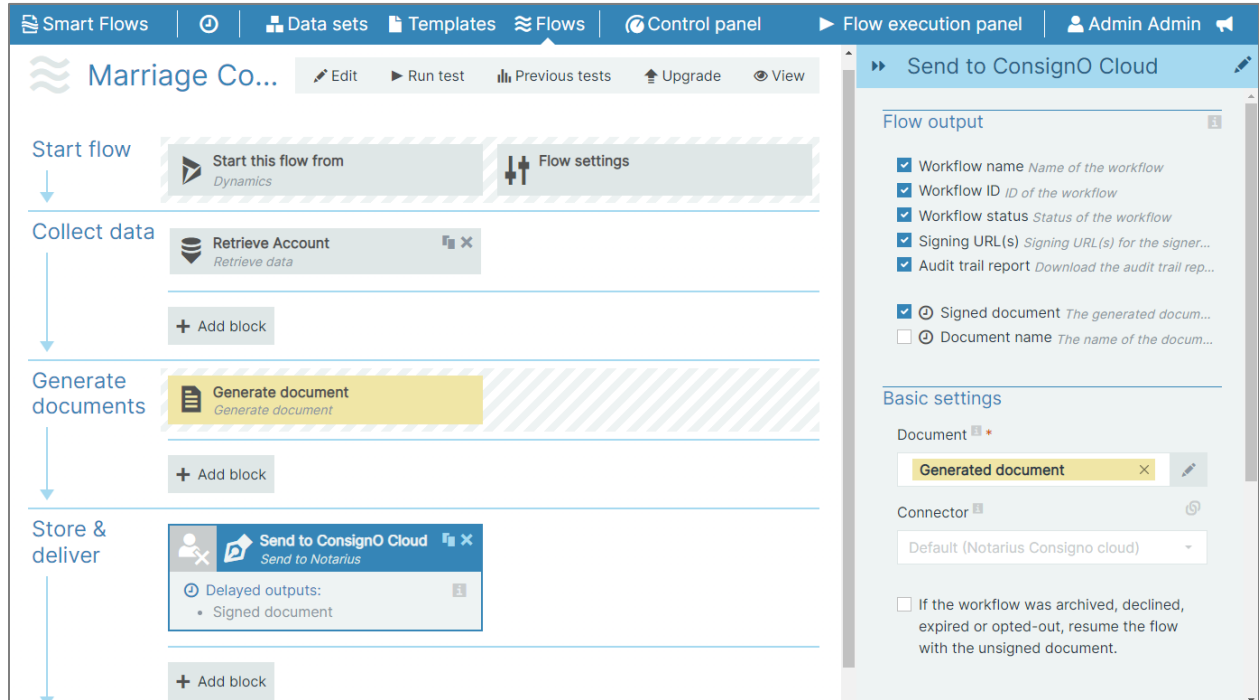

Figure 2 – Send to ConsignO Cloud flow block in the Experlogix Smart Flows Project Console

Execute Flows in Microsoft Dynamics 365 CE Without Execution Panel

With Experlogix Smart Flows 4.16, you can run flows from Microsoft Dynamics 365 CE for Customer Engagement without opening a flow execution panel. Instead, a small, native Dynamics notification displays for approximately 10 seconds. The notification contains a View link to the flow execution, which will still open an execution panel in a separate browser tab. For flows that do not require user interaction during execution, users can now stay inside the Microsoft Dynamics 365 CE user experience.
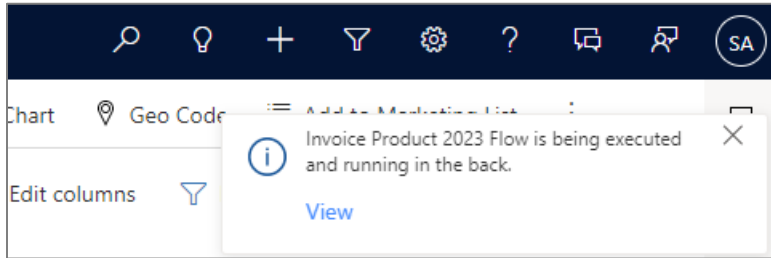

Figure 3 – Flow execution notification in Microsoft Dynamics 365 CE

The new option to not trigger a flow execution panel in a separate browser tab works for classic and unified interface apps on all supported browsers. Flow statuses are available to the triggering user via the Smart Flows Power app. To trigger the new behavior, tag your flows with the Flyout (run in the back) system tag underneath the Availability category.
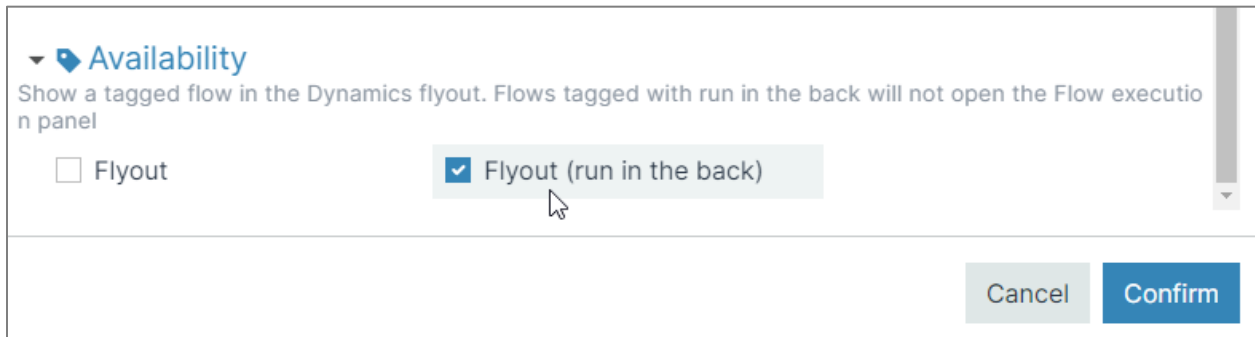

Figure 4 – Flyout (run in the back) tag to execute flows from Microsoft Dynamics 365 CE without triggering a flow execution panel

Rebranding and User Interface Update

To reflect the unified branding of all Experlogix products, Smart Flows has received a user interface update. The new look and feel is kept close to the original but use slightly different shades of the leading colors, a different font, and updated landing screens.
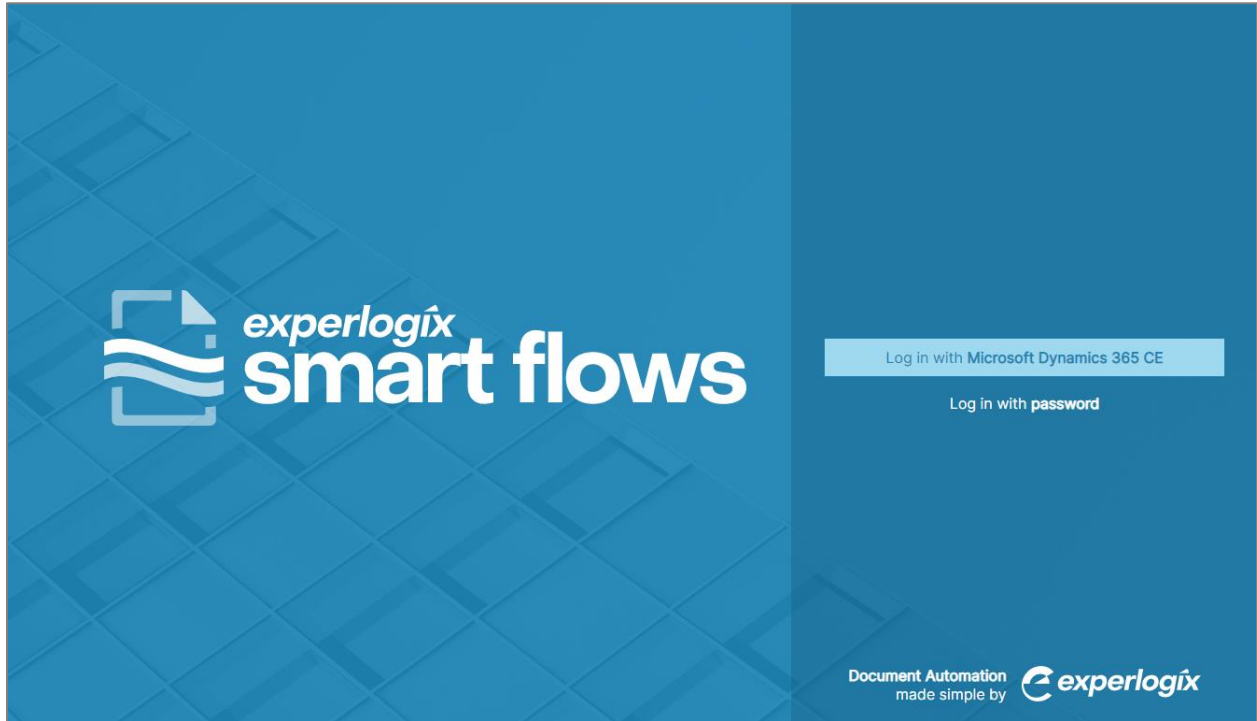

Figure 5 Updated login screen in Experlogix Smart Flows

Redesigned Apps

The Smart Flows packages for Microsoft Dynamics 365 CE for Finance and Operations and Microsoft Dynamics 365 CE for Customer Engagement are now Experlogix branded and contain new command bar buttons. Smart Flows related security roles or permission sets now have new names that start with Experlogix rather than Xpertdoc.
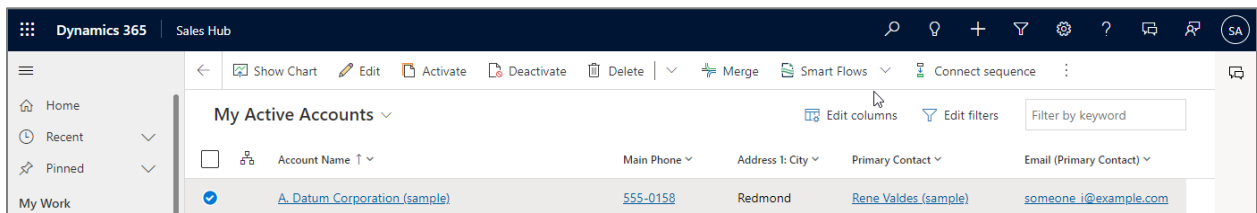

Figure 6 – Redesigned commands in the Experlogix Smart Flows App for Microsoft Dynamics 365 CE

Smart Flows' native template design add-in for Microsoft Word is now called Template Builder instead of Xpertdoc Template Builder. Its online installer will automatically push the update to your local template designers' devices upon the release of Experlogix Smart Flows 4.16.

New Connector for Microsoft Power Automate

There is a new Experlogix Smart Flows connector for Microsoft Power Automate. The connector is currently in the preview stage but is fully functional. At the time of publication of this Release Preview Guide, Microsoft is still in the process of publishing the new connector in all geographical regions. If you don't see it yet, please check back shortly.

The previous connector for Microsoft Power Automate, Xpertdoc, is now marked deprecated. That doesn't mean it will stop working, but we kindly ask you to update your Microsoft Power Automate flows with the corresponding actions from the new Experlogix Smart Flows connector.
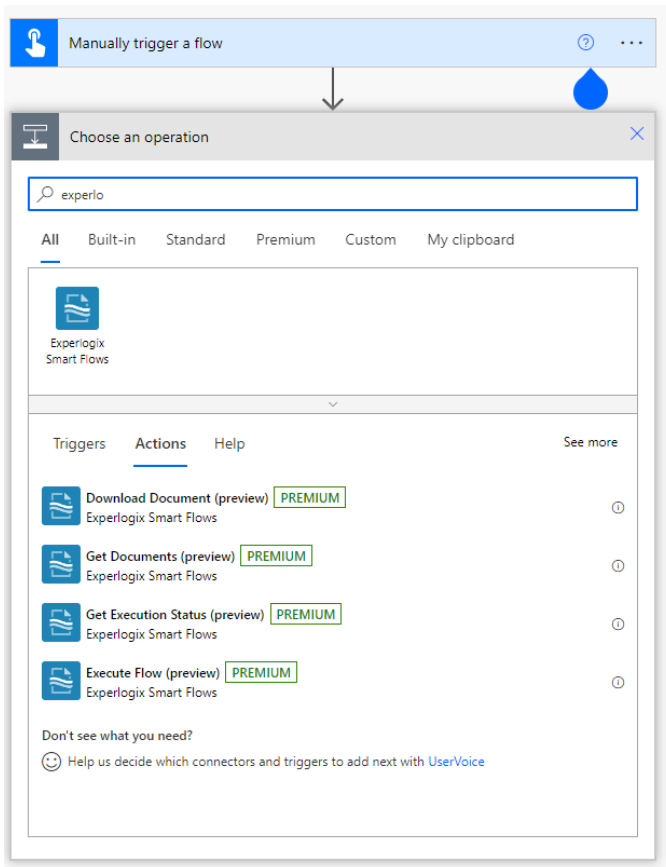

Figure 7 – New Experlogix Smart Flows connector for Microsoft Power Automate

Minor Improvements

- **DocuSign**
  - Flows can now collect output from a reject field in a DocuSign data set, including the rejection status and the reason for rejection;
  - Collaboration on DocuSign form fields by all recipients of an envelope is supported;
  - Issues with initial field values have been resolved;
  - The form data retrieval option has been repositioned on the Send to DocuSign flow step.

- **Adobe Acrobat Sign**
  - During connector creation, Experlogix Smart Flows 4.16 guides you better through the process of creating a webhook inside your Adobe Acrobat Sign environment;
  - All references to Adobe Sign have been updated to Adobe Acrobat Sign to reflect the recent name change of Adobe's e-signing platform.

- **Template Builder**
  - Support for EXIF (Exchangeable Image File) annotation for image orientation on JPEG images;
  - Support for pseudo relationships between all types of data sets. Prior to version 4.16, Template Builder supported only pseudo relationships between standard and schema data sets and pseudo relationships within a data set.

About Experlogix

Experlogix solutions simplify and humanize the most complex products and processes to unlock workflow velocity and create a better customer experience. Experlogix Design Center makes configuration and other processes faster than you ever thought possible and more straightforward than you dared to imagine. Experlogix Document Automation simplifies and optimizes even the most complex document processes for companies worldwide in any industry. Experlogix — simplifying the complex. Experlogix is a global company headquartered in Salt Lake City, with European headquarters in Veenendaal, Netherlands. We're online at www.experlogix.com.