experlogix
Document Automation

Release Preview
Spring 2026

Experlogix Smart Flows 4.27
Experlogix Documents 1.0.0-preview

Foreword

We're excited to share what's new in the Spring 2026 release of **Experlogix Smart Flows 4.27** and **Experlogix Documents 1.0.0-preview**, two tightly connected platforms advancing enterprise document automation.

This release introduces powerful new capabilities that deepen automation coverage across regulated, data-driven, and insight-oriented scenarios. Smart Flows expands its eInvoicing support with native Peppol BIS 3.0 capabilities and end-to-end eInvoicing for Microsoft Dynamics 365 Finance and Operations, enabling organizations to meet evolving regulatory requirements while maintaining a single, automated source of truth for invoice generation and delivery.

We're also introducing a new reporting foundation in Smart Flows, built on a dedicated, API-first reporting data model. This enables long-term insight into usage, adoption, and document volume consumption across users, flows, templates, and licenses. The new reporting API supports better operational visibility, optimization, and capacity planning.

On the Experlogix Documents side, support for fillable PDF templates enables automated completion of regulated and standardized PDF forms, while automatic metadata population from Smart Flows ensures that stored content is immediately contextualized, structured, and ready for downstream automation and reporting.

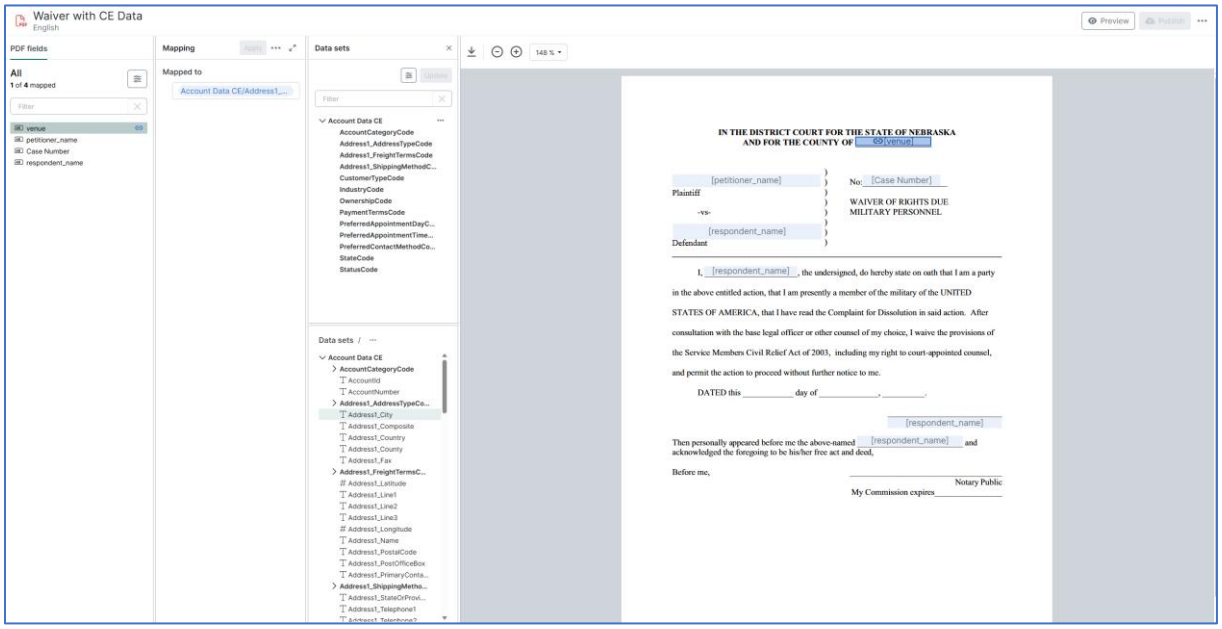
Rounding out the release is a Preview of the Smart Flows MCP server for Microsoft Copilot Studio, opening the door to agent-driven and conversational document automation, along with a series of targeted improvements across connectors, authentication, and flow lifecycle management.

Together, these enhancements strengthen the Experlogix Document Automation platform, helping organizations automate with confidence, maintain compliance, and gain deeper insight across the entire document lifecycle.

Contents

Fillable PDF Templates (Requires Experlogix Documents Connector)

Experlogix Documents now supports Fillable PDF templates, enabling organizations to upload existing form-based PDF documents and use them as templates for automated document generation. This capability streamlines processes where organizations must complete regulated forms, government documents, or standardized PDF submissions - allowing these documents to be automatically prefilled with data sourced from systems of record or user inputs.



Benefits

Many industries rely on PDF forms, particularly AcroForm and static XFA documents, to comply with regulatory, governmental, or industry-specific requirements. Manually filling these PDFs is time-consuming, error-prone, and inefficient.

With Fillable PDF templates, Experlogix Documents automates this process. When a PDF form is uploaded, the system automatically discovers form fields and exposes them for mapping. Designers can then bind these fields to values from datasets (webforms, XML or JSON).

At runtime, the templates are used to generate fully prefilled, ready-to-submit PDF forms. This not only reduces manual labor but ensures consistency, accuracy, and operational efficiency across every form submission process.

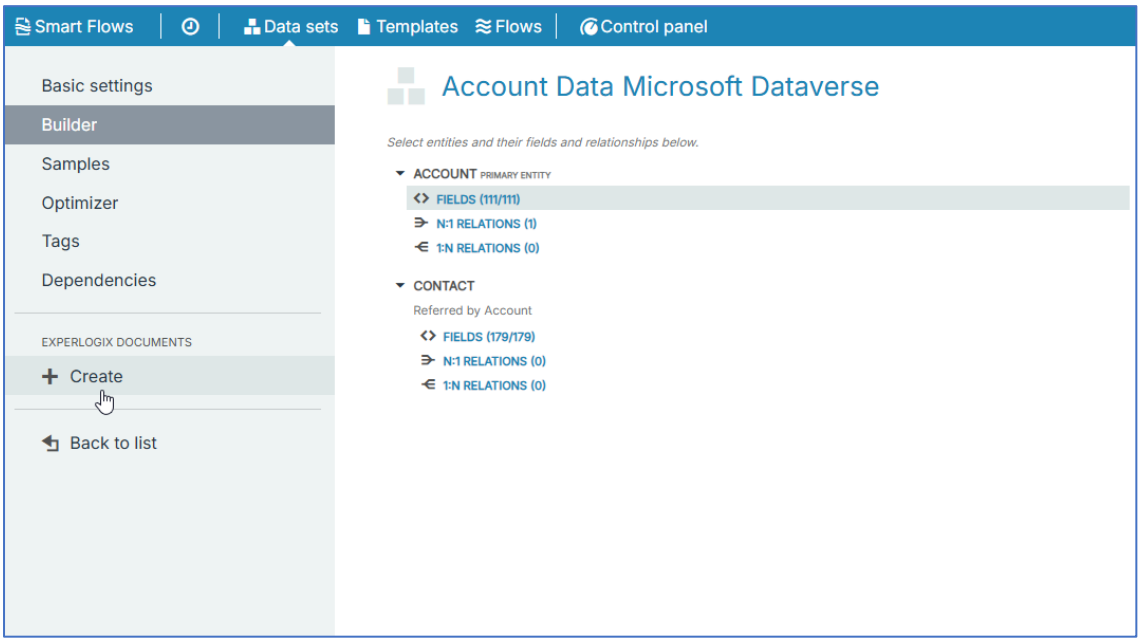
Typical Use Cases

- Prefill regulatory or compliance forms automatically using system-of-record data
- Populate government-issued PDF forms that must be submitted in their original format
- Automate insurance, finance, or healthcare workflows that rely heavily on PDF form interactions
- Use data collected from a webform to generate filled PDF documents for customer signatures or submission

- Reduce manual entry bottlenecks and improve accuracy in departments processing large volumes of standardized forms

Feature Takeaways

- **Support for AcroForm and Static XFA Forms -** Users can upload existing PDF forms (AcroForm-based documents and static XFA forms) as the base template for automated document generation.
- **Automatic Field Discovery -** Experlogix Documents detects all fillable fields within the uploaded PDF, making them available for mapping without manual field extraction.
- **Flexible Data Mapping Options -** Fields can be mapped to values from form data sets, XML data sets and JSON data sets.
- **Data Mapping with Smart Flows Data Sets** - Designers can associate a fillable PDF template with a standard Experlogix Smart Flows data set - based on a CRM or ERP connector - and generate a shadow Experlogix Documents XML data set. Designers can map fields from the XML data set. Smart Flows will collect data from connected systems and take care of the conversion to the corresponding XML data set.



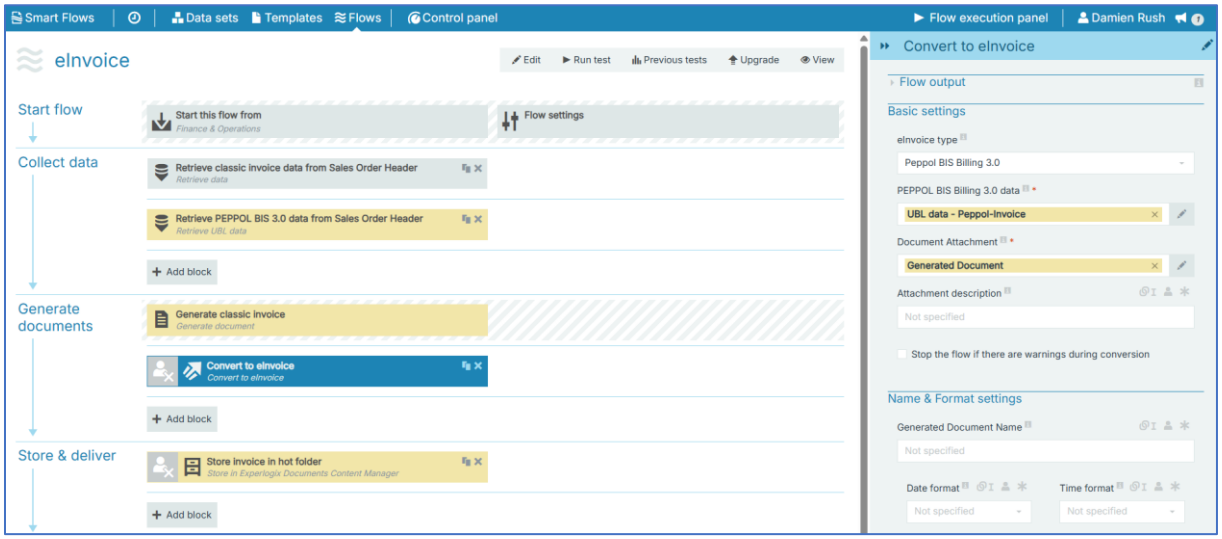
- **Template Versioning Without Remapping -** Fillable PDF templates can be updated by replacing the underlying AcroForm or XFA form with a newer version without having to redo existing field mappings or business logic. This is ideal for scenarios where official PDF forms are updated regularly, allowing organizations to stay compliant while preserving their automation setup.
- **Prefilled Fillable PDFs at Runtime** - During execution, data and template are merged to generate a fully completed fillable PDF using the mapped data. This ensures forms are delivered with accurate, consistent values every time.
- **Ideal for High-Compliance, High-Volume Scenarios** - Fillable PDF templates are particularly beneficial for organizations that must complete official forms exactly as issued, such as regulatory declarations, permit applications, claims, government reporting or industry-standard disclosures.

Advanced eInvoicing Capabilities

eInvoicing is becoming a regulatory and operational standard across many markets. With this release, Experlogix Smart Flows expands its eInvoicing capabilities to support compliant, machine-readable invoice formats while preserving human-readable documents. These enhancements help organizations meet regulatory requirements, reduce manual effort, and automate invoice delivery end to end.

Support for PEPPOL BIS 3.0

Experlogix Smart Flows 4.27 extends its eInvoicing capabilities with native support for Peppol BIS 3.0 in the Convert to eInvoice flow block. This enhancement allows organizations to generate fully compliant Peppol invoices. Next to Peppol, ZUGFeRD PDF is also supported, ensuring broad interoperability across European and international eInvoicing networks.



Benefits

Peppol BIS 3.0 is a widely adopted eInvoicing standard used for B2G and B2B transactions across Europe and beyond. By adding native Peppol support, Smart Flows enables organizations to meet regulatory requirements and trading partner expectations without introducing additional tooling or manual conversion steps.

Experlogix Smart Flows 4.27 also bridges the gap between machine-readable invoices and human-readable documents. By embedding a visual representation of the invoice as an attachment within the Peppol XML, Smart Flows ensures that invoices can be easily reviewed by finance teams, auditors, and recipients using eInvoice viewers, without sacrificing compliance.

Typical Use Cases

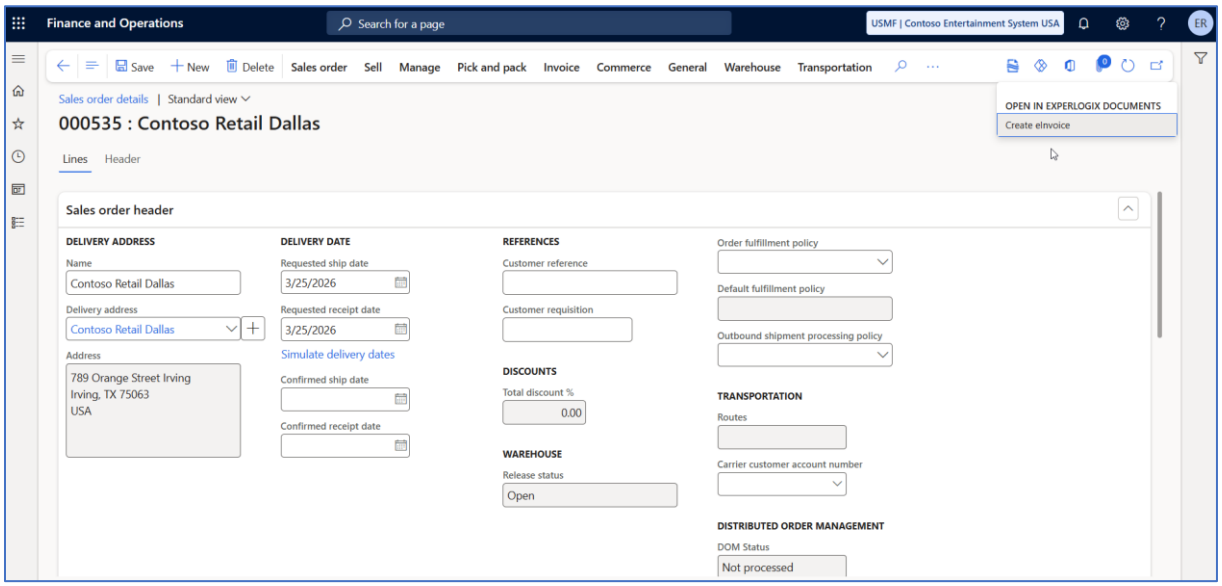
- Generate Peppol BIS 3.0-compliant invoices for B2G or B2B scenarios
- Attach a human-readable invoice PDF to a Peppol eInvoice for visualization purposes
- Reuse documents generated earlier in the flow as attachments in the eInvoice payload
- Support multiple eInvoicing standards (Peppol and ZUGFeRD) from a single flow
- Automate compliant invoice delivery across different countries and networks

Feature Takeaways

- **Peppol BIS 3.0 Support -** The **Convert to eInvoice** flow step now supports Peppol BIS 3.0 alongside ZUGFeRD, allowing organizations to select the appropriate standard based on regulatory or partner requirements.
- **Binary Document Attachments in Peppol XML -** You can now reference a document, typically generated earlier in the flow, and include it as a binary attachment within the Peppol XML. This attachment can be rendered by Peppol-compatible eInvoice viewers, providing a clear visual representation of the invoice.
- **Seamless Integration with Existing Flows -** The attachment mechanism integrates naturally with existing Smart Flows. Documents generated using Word templates, compositions, or other output steps can be reused without duplication or reprocessing.
- **Supports Compliance and Usability -** By combining structured Peppol data with a visual document attachment, Smart Flows ensures both regulatory compliance and practical usability for downstream users and systems.

End-to-end eInvoicing for Microsoft Dynamics 365 Finance and Operations

Experlogix Smart Flows 4.27 introduces native support for end-to-end eInvoicing scenarios for Microsoft Dynamics 365 Finance and Operations (F&O). This enhancement enables organizations to generate compliant electronic invoices directly from F&O using UBL-based data sets, reduced to the exact structure required for their eInvoicing use cases, and seamlessly convert that data into standardized eInvoice formats.



Benefits

With increasing regulatory pressure to adopt structured eInvoicing formats, organizations running Microsoft Dynamics 365 Finance and Operations need a reliable, scalable way to extract invoice data and transform it into compliant electronic invoices.

Smart Flows now bridges the gap between F&O's Electronic Reporting (ER) framework and eInvoicing requirements. By leveraging UBL schemas and allowing schema reduction, Smart Flows

ensures that only relevant invoice data is collected, thus reducing complexity, improving performance, and simplifying maintenance.

Typical Use Cases

- Generate UBL-based eInvoices directly from F&O sales invoice records
- Reuse existing F&O invoice flows as input for electronic invoice generation
- Reduce complex UBL schemas to match specific regulatory or partner requirements
- Support multiple eInvoicing formats (e.g. Peppol, ZUGFeRD) from a single source of truth
- Automate compliant invoice delivery without custom ER development

Feature Takeaways

- **UBL Connector and Reduced UBL Data Sets -** Smart Flows allows you to configure a UBL connector within your project and define UBL XML data sets based on official UBL XML schema definitions. These schemas can be reduced to include only the elements required for your specific eInvoicing scenario, making data extraction more efficient and easier to manage.
- **Integration with Finance and Operations Electronic Reporting -** A new flow step called "Retrieve UBL data" allows you to reference:
    - A reduced UBL data set
    - A specific F&O record (for example, a sales invoice header record used as input for an existing classic invoice flow)
    - An Electronic Reporting (ER) configuration.

  Based on this configuration, Smart Flows automatically:
    - Creates an ER record in Finance and Operations
    - Fetches invoice data according to the reduced UBL structure defined in the data set

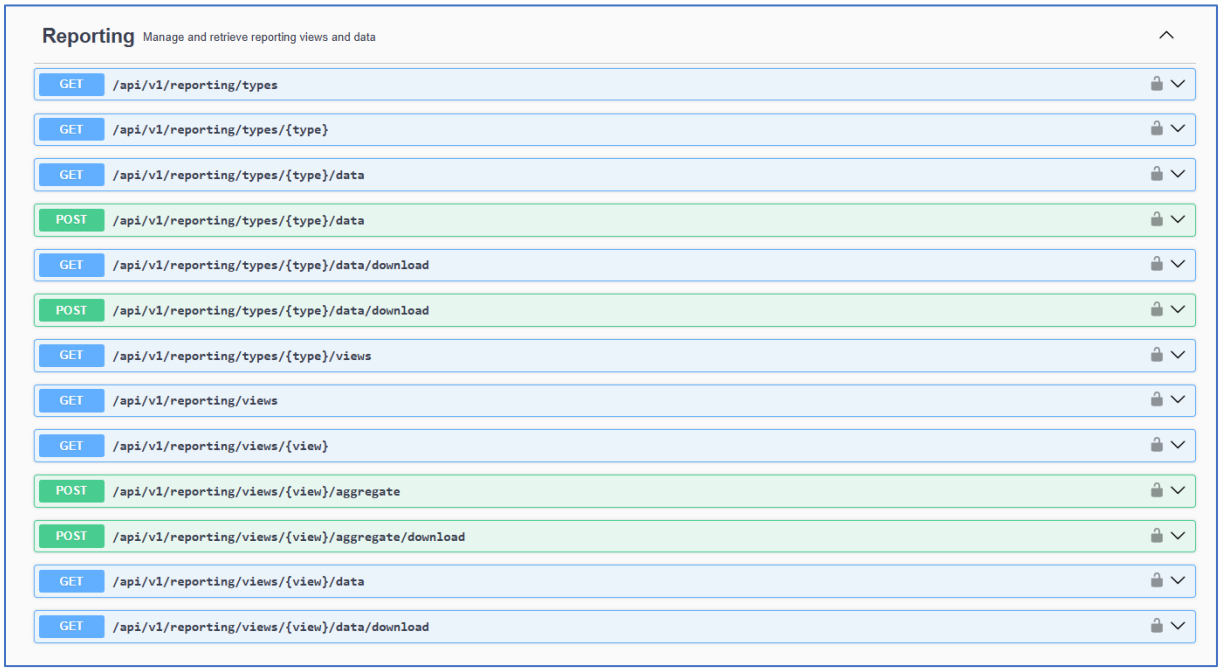
  This ensures alignment with F&O's native ER framework while keeping Smart Flows in control of the data pipeline.
- **Flexible eInvoice Output Options -** The collected UBL data can be transformed into an electronic invoice using:
    - A *Convert data to document* flow block, for generating structured outputs or intermediary formats
    - A *Convert to eInvoice* flow block, for producing fully compliant eInvoice formats such as Peppol BIS or ZUGFeRD

This flexibility allows organizations to support multiple eInvoicing standards and delivery channels from a single Smart Flow.

Tip: Check out the tutorial on Common Scenarios for eInvoicing on the Experlogix Smart Flows knowledge base.

Advanced Reporting Capabilities for Enhanced Analytics and Insights

Experlogix Smart Flows 4.27 introduces a major foundational upgrade to reporting and analytics. This release adds a new, dedicated reporting data model that delivers deeper insight into adoption, usage, and document volume consumption across users, flows and templates. The new reporting capabilities are API-first, with a native reporting user interface and export to Excel from the UI planned for a future release.



Benefits

The new reporting architecture introduces a clear separation between operational execution data and analytical reporting data. Reporting information is now stored in dedicated reporting tables that are no longer subject to the automated cleanup service used for flow execution data. This allows organizations to retain reporting data for longer periods and analyze trends over time without impacting operational performance.

By organizing reporting data around meaningful business dimensions, such as users, flows, templates and license consumption, Smart Flows enables organizations to better understand adoption patterns, identify optimization opportunities and track document processing volume with greater accuracy and confidence.

Typical Use Cases

Organizations can leverage the new reporting capabilities to:

- Analyze Smart Flows adoption and usage across departments or business units
- Track document volume (DPU) consumption per user, role, or user tag
- Measure flow execution frequency and document output per flow or flow tag
- Compare test versus production usage across flows and templates

Dedicated Reporting Data Model

Reporting data is now stored in separate reporting tables that are fully isolated from operational execution data. These tables are not affected by the periodic cleanup service, ensuring longer data retention and a clean separation between runtime operations and analytics.

Expanded Reporting Dimensions

The new reporting model provides structured insights across four main event categories:

- **User Events** - User-level reporting enables detailed analysis of login history of individual users in the application.
- **Flow Execution Events** - Flow-level reporting provides insight into automation usage, including:
  - Execution counts per flow or flow tag
  - Usage segmented by execution stage (test or production)
- **Template Utilization Events** - Template- and document-level reporting enables:
  - Analysis per template or template tag
  - Visibility into document generation volume by execution stage
- **DPU Consumption Events** - DPU consumption reporting enables:
  - Analysis of license consumption per user or user tag
  - Insight into license usage per flow or template, including ID, type, tag, and execution stage
  - Visibility into overall license consumption trends over time

Standard Views with Formatting and Aggregation

Out of the box, Smart Flows provides a set of predefined reporting views that can be queried to generate filtered reports. These views expose common reporting dimensions and metrics:

- **All Logins** - Provides an overview of all user login events, including frequency and timing, to help analyze user adoption and activity patterns.
- **All Logouts** - Shows all user logout events, offering insight into session behavior and overall platform usage.
- **All Templates** - Displays an overview of all document generation actions that use a template in the environment, helping assess template usage, adoption, and opportunities for cleanup or consolidation.
- **All Executions** - Provides a complete overview of all flow executions, enabling analysis of automation adoption, execution volumes, and trends over time.
- **All DPU Consumption** - Shows detailed Document Processing Unit (DPU) consumption, allowing monitoring of license usage, optimization of consumption patterns, and capacity planning.

To extract actionable insights from the reporting data generated by the view, Experlogix Smart Flows offers capabilities to define the format of the output (include/exclude and order columns) and group and aggregate results.

These formatted and aggregated results are ideal as source data for reporting tools or dashboards.

Custom Filtered Reports

In addition, organizations can create custom reports to filter reporting data for specific entities or scenarios.

Report Output

Reporting endpoints can return results in multiple formats, including JSON responses, CSV-files (Comma Separated Values), or spreadsheet-compatible outputs, making it easy to consume reporting data in downstream systems.

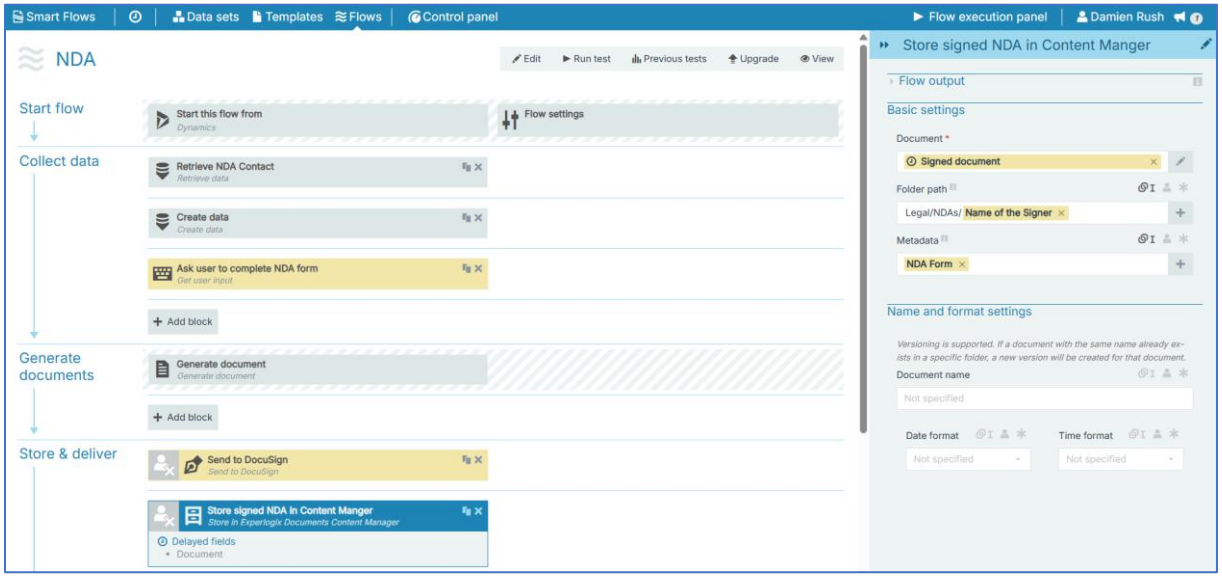
API-First Availability

All reporting capabilities in Smart Flows 4.27 are available through APIs, enabling seamless integration with external analytics platforms and reporting tools. A dedicated reporting user interface will be introduced in a future release, building on this same reporting foundation.

Tip: Check out the tutorial on Gaining Insights in Adoption Rate and License Consumption on the Experlogix Smart Flows knowledge base.

Automatic Metadata Population in Experlogix Documents Content Manager with Smart Flows

Experlogix Smart Flows now allows you to populate metadata automatically when storing documents in Experlogix Documents Content Manager. As part of the Store in Content Manager flow block, metadata can be derived directly from data collected earlier in the flow. This capability eliminates manual enrichment and ensures that stored content is immediately contextualized and ready for downstream use.



Benefits

This enhancement streamlines metadata application for stored documents by embedding it directly within the flow logic. Instead of enriching content after the fact, Smart Flows now enables metadata to be assigned at the moment content is persisted.

By reusing data already collected during flow execution, organizations can ensure consistency, reduce duplication, and improve traceability. Whether metadata originates from user input, system data, or integrations, it becomes part of the document lifecycle automatically.

Typical Use Cases

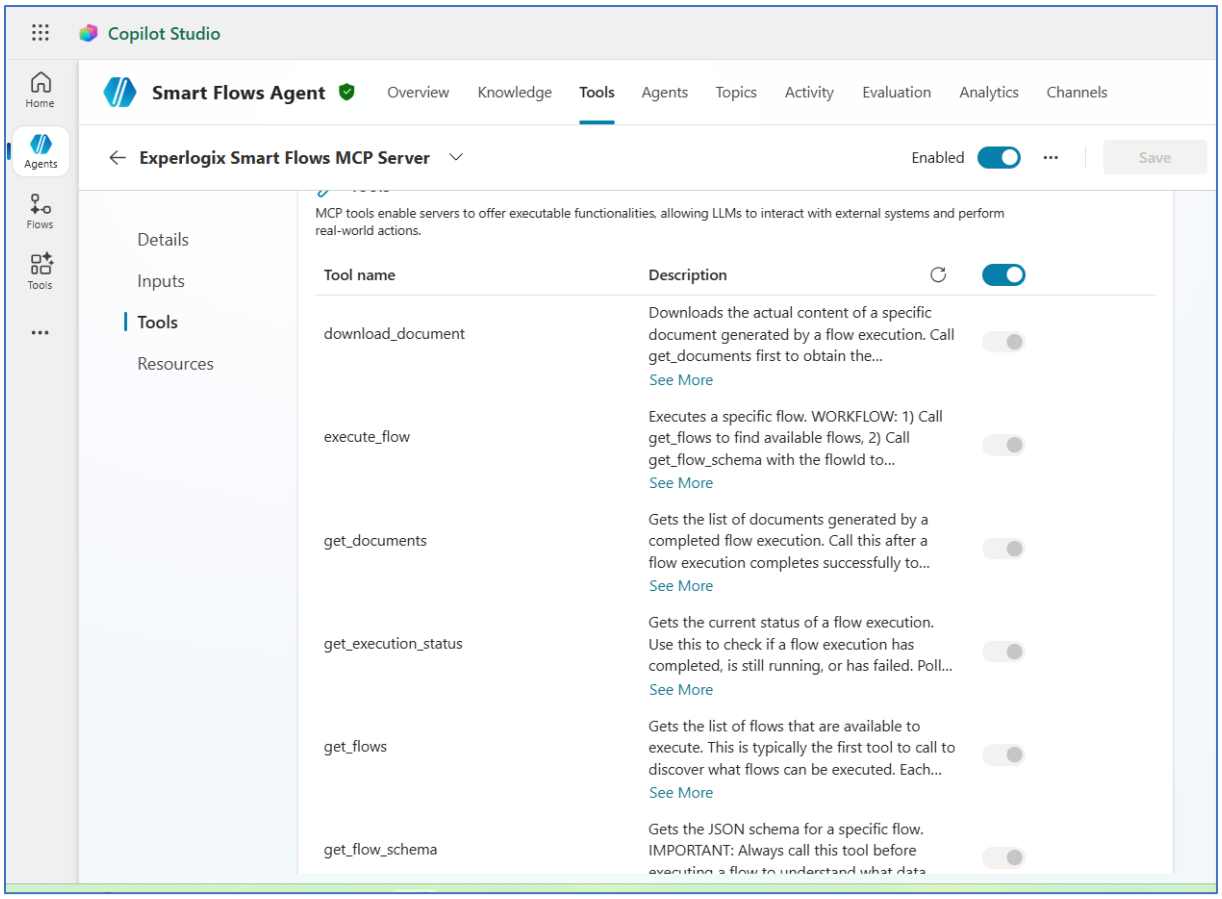
- Automatically attach business context (e.g. customer, document type, process stage) when storing generated documents
- Reuse form input collected earlier in a flow as structured metadata
- Store system-generated values (IDs, statuses, timestamps) as metadata without additional configuration
- Ensure documents are enriched consistently before being archived or reused
- Prepare stored content for metadata-driven automation and reporting scenarios

Feature Takeaways

- **Metadata Population as Part of Storage -** The *Store in Experlogix Documents Content Manager* flow block now supports metadata population. In the step configuration, you can reference data that was collected earlier in the flow and attach it directly to the stored document.
- **Form-Based Metadata Association -** If the referenced data is associated with a form data set, that form data set is automatically linked to the stored content and persisted as a **metadata form**. This preserves structure, field definitions, and versioning.
- **Free-Text Metadata Support -** If the referenced data is not linked to a form data set, the information is stored as free-text metadata. This provides flexibility for scenarios where metadata is system-generated or does not require a predefined schema.
- **Seamless Integration with Existing Metadata Capabilities -** This feature builds on existing metadata support in Experlogix Documents Content Manager, ensuring that metadata created during storage is versioned, recoverable, and available for future automation and reporting enhancements.

Experlogix Smart Flows MCP server for Microsoft Copilot Studio (Preview)

Experlogix Smart Flows now includes a Model Context Protocol (MCP) server, published and available for Preview in Microsoft Copilot Studio. This enables Copilot agents to discover, execute, and interact with Smart Flows in a fully supported and structured way, opening up powerful new scenarios for conversational and agent-driven document automation.

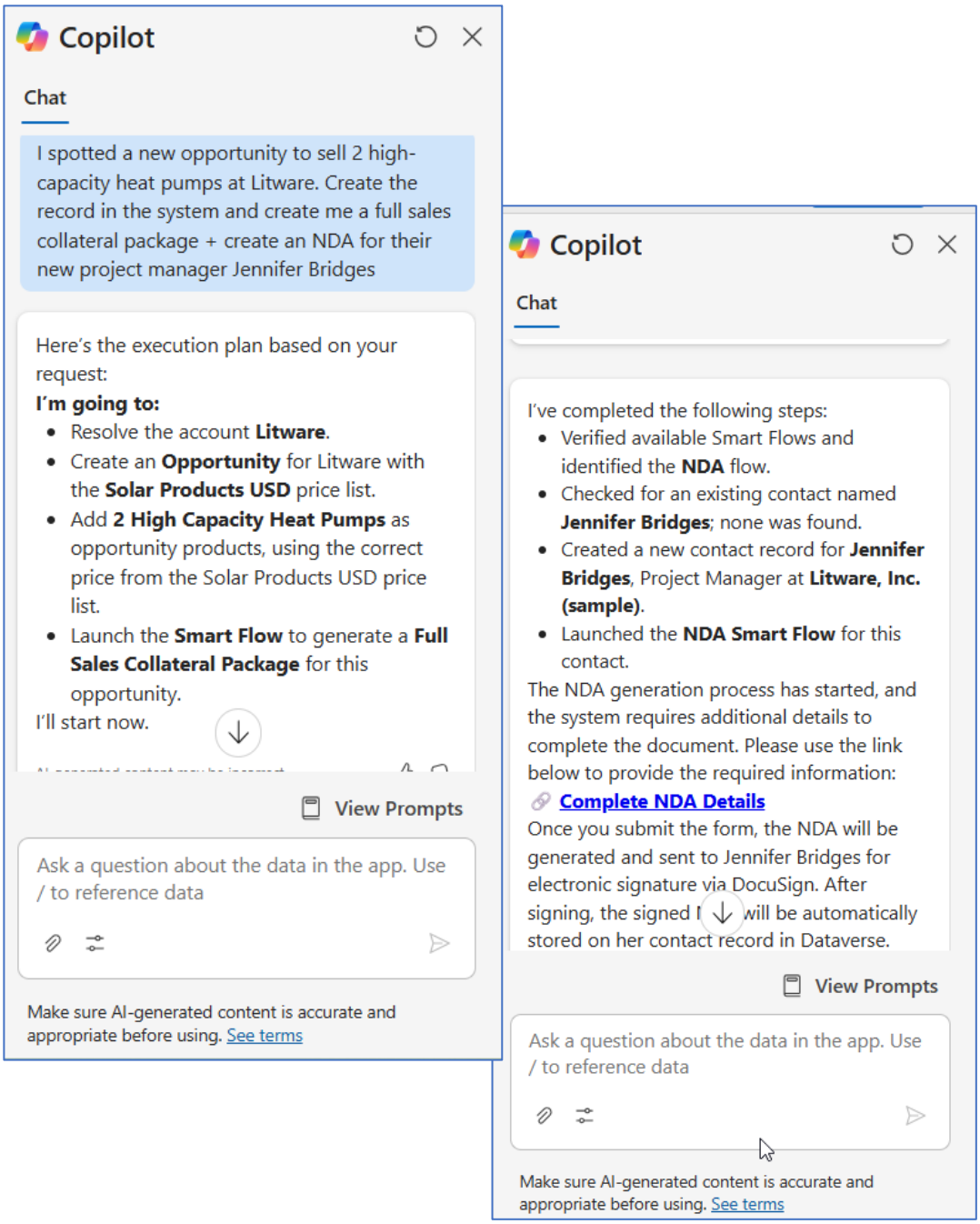


Benefits

With the Smart Flows MCP server, organizations can expose their document automation capabilities directly to AI-powered agents built in Microsoft Copilot Studio. Agents can discover available flows, understand what input is required to run them, trigger executions, and retrieve results.

This creates a natural bridge between conversational AI and enterprise-grade automation. Users can initiate document processes through chat or agent interactions, while Smart Flows continues to enforce structure, governance, and traceability behind the scenes.

For administrators, this approach ensures controlled access to automation logic while maintaining visibility into execution status, results, and generated artifacts.



Typical Use Cases

- Allow Copilot agents to trigger document generation flows on behalf of users
- Enable conversational interfaces for running flows that require structured input
- Retrieve generated documents through an AI agent and provide direct download links
- Monitor flow execution progress and outcomes from within Copilot Studio
- Combine AI-driven interaction with governed, reusable automation logic

Feature Takeaways

- **MCP Server Published in Microsoft Copilot Studio -** The Smart Flows MCP server is published and discoverable in Microsoft Copilot Studio, allowing agents to connect to Smart Flows using the standardized Model Context Protocol.
- **Flow Discovery and Input Introspection -** Agents can discover available flows and query the MCP server to understand:
    - What inputs are required to run a flow
    - Whether the flow expects a data payload, a CRM or ERP record, or other structured input

  This allows agents to guide users through data collection or validate inputs before execution.
- **Flow Execution and Status Tracking -** Agents can trigger flow executions and receive execution status updates. The MCP server returns:
    - Execution state information
    - Links to the Smart Flows Flow Execution Panel, where users can interact with the running flow or inspect execution details
- **Access to Generated Documents -** The MCP server retrieves documents generated by a flow and exposes download links for documents and assets produced during execution. This makes it easy for agents to surface results back to users in a conversational experience.
- **Secure and Governed Automation** - All executions initiated through the MCP server run within the existing Smart Flows security, permission, and auditing framework, ensuring consistency with other execution channels.

Minor Improvements

As always, a new Smart Flows release brings minor improvements and quality-of-life upgrades. Below is a list of some of those.

- **SMTP connectors support OAuth authentication**: Mail server connectors now support both basic and modern OAuth-based authentication. OAuth is the recommended pattern for mail servers that support it. Please be advised that Microsoft has announced phase out of basic authentication for Microsoft Exchange Online SNTP Auth later this year (Deprecation of Basic authentication in Exchange Online).

- **Self-service connector set-up for Microsoft Dynamics 365 Business Central connectors**: Business Central connectors are now available for self-service configuration in Smart Flows. Previously, setting up a Microsoft Dynamics 365 Business Central connector required an asynchronous process with manual provisioning steps handled outside the product. With this release, the entire setup is fully automated and can be completed directly within Smart Flows, enabling teams to connect to their Business Central environment quickly and independently.

- **Persist ongoing executions when deleting a flow**: When deleting a flow from the Project Console with flow snapshotting enabled, Smart Flows now prompts you to decide how to handle ongoing executions. You can choose whether active executions should be allowed to continue using their saved snapshot or be ended immediately,

giving administrators clearer control over runtime behavior while safely managing flow lifecycle changes.

Important Updates

- Experlogix Smart Flows 4.27 requires Microsoft SQL Server 2017+, whereas earlier versions of Smart Flows were compatible with Microsoft SQL Server 2016+
- The Experlogix Documents 1.0.0-preview.28 contains a breaking refactor of the schema for form data sets that contain nested forms. The nested form data will no longer have <data> as its root node. Changes in your implementation may be required to accommodate this change. Check the knowledge base for more information.
- Experlogix Smart Flows 4.27 will be the last Smart Flows version that supports automated user synchronization. Check the knowledge base for more information.

Release Notes and Release Artefacts

- Experlogix Documents 1.0.0-preview Release Notes
- Experlogix Smart Flows 4.27 Release Notes
- Experlogix Smart Flows 4.27 Release Artefacts
- Experlogix Smart Flows Version Compatibility Matrix

About Experlogix

The Experlogix product suite offers purpose-built business applications that accomplish a shared goal – making it easier for your clients to engage with and buy from you. No matter how complex your business or products are, our seamless integrations and low-code/no-code configurability create outstanding digital experiences for your buyers, clients, distributors, and dealers. Headquartered in the United States and the Netherlands, Experlogix enables clients worldwide to achieve unprecedented efficiency while doing more to engage and impress their customers. Learn more about our Configure, Price, Quote (CPQ), Document Automation and Digital Commerce solutions at experlogix.com

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