


Release Preview

Summer-Fall 2025



Experlogix Smart Flows 4.25
Experlogix Documents 1.0.0-preview

Foreword

We're excited to share what's new in the Summer-Fall 2025 release of **Experlogix Smart Flows 4.25** and **Experlogix Documents 1.0.0-preview**, two tightly connected platforms advancing enterprise document automation.

This release marks a significant leap forward in flexibility, governance, and user-driven control. Smart Flows now supports direct output to **Microsoft Excel and PowerPoint**, giving teams new ways to deliver data-driven reports, visual updates, and meeting-ready content without extra formatting effort. For regulated markets, newly introduced eInvoicing capabilities enable structured output formats such as UBL and ZUGFeRD, helping organizations stay compliant with upcoming EU mandates.

We've also introduced **Persistent Flow Definitions**. Every flow execution now uses the exact version captured at design time, ensuring consistent results, even if the flow is later modified or deleted. This unlocks greater reliability in approval flows, signing processes, and any long-running automation. In that same spirit, our DocuSign integration now supports SMS invitations and advanced envelope control through modular flow steps, expanding what's possible in your e-signature journeys.

Connectivity and integration also take major steps forward. Smart Flows now includes a native **Microsoft Dynamics 365 Business Central** connector. By using Experlogix Cloud Connect to connect to BC, users can run flows in context, personalize communication, and write documents back to BC. **SharePoint integration** has also been modernized with Entra ID authentication, ensuring long-term compatibility with Microsoft 365.

On the Experlogix Documents side, we're introducing foundational support for **metadata**. Content stored in Content Manager can now be enriched with structured context, making it easier to classify, route, and prepare for future search and governance features. We're also adding support for **custom themes**, giving organizations more control over branding and accessibility across all user-facing forms.

Rounding out the release is a preview of our **Experlogix CPQ connector**, enabling quote-driven document automation directly within the CPQ environment, as well as a set of quality-of-life improvements across the platform.

Taken together, these innovations empower teams to work more efficiently, automate confidently, and deliver tailored experiences across the full document lifecycle.

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Document Conversion to Microsoft Excel and PowerPoint Formats

Smart Flows 4.25 supports the conversion of generated documents to Microsoft Excel (.xlsx) and PowerPoint (.pptx) formats. This enhancement enables broader output flexibility while continuing to leverage the full power of Word-based templates.

This feature introduces a no-code alternative to the Excel and PowerPoint conversion capabilities previously available only through the Xpertdoc Portal Document Services. By enabling direct export to Excel and PowerPoint within Smart Flows, users can significantly improve the usability of generated content by delivering it in the format most appropriate for the intended audience. It also eliminates the need for time-consuming manual conversions, streamlining workflows across teams. Importantly, all output formats continue to reflect the same consistent design and branding defined in the original Word templates.

Organizations can now export reports or summaries to Excel for further analysis or collaborative editing. Similarly, content originally designed in Word can be delivered as ready-to-use PowerPoint slides, making it easy to share insights and updates in meetings or stakeholder presentations without reformatting.

Source Templates

All documents remain based on compositions or Microsoft Word templates created using either the Template Builder or the Template Designer add-in for Word.

Use Flow Builder to Produce Excel and PowerPoint Files

Flow designers can produce Microsoft Excel and PowerPoint files via two flow blocks in Flow Builder:



- **Generate Document Flow Block:** Direct conversion to Excel or PowerPoint can occur with document generation.
- **Convert Document Flow Block:** Offers enhanced control with format-specific settings.

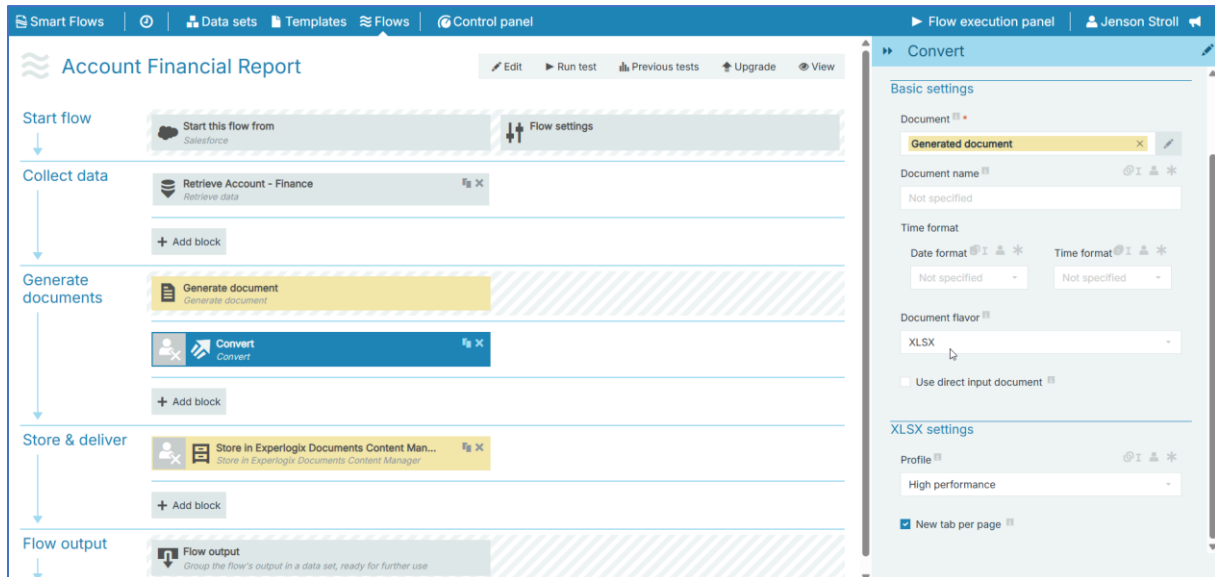


Figure 1 – Conversion to Microsoft Excel format in the Convert Document Block of Flow Builder

Format-Specific Options

In the Convert Document flow block, designers can configure format-specific settings, including:

- **Excel:** Configure how Word document pages or sections are split across Excel sheets within the generated workbook.
- **PowerPoint:** Manage the output file size by controlling image resolution and slide splitting behavior.

Support for eInvoicing Scenarios

With the European Union's eInvoicing mandate (Directive 2014/55/EU) now expanding to require all B2B and B2G invoices to be electronic across member states by 2025–2027 ([European Commission eInvoicing Hub](#)), Smart Flows introduces powerful new flow steps to help organizations stay compliant and efficient. The new flow steps enable **output of compliant invoice data as a file** and seamless delivery of **both human-readable and machine-readable versions** of invoices and credit notes.

EU regulations now mandate that electronic invoices use structured, machine-readable data formats like UBL, XRechnung, or hybrid PDFs such as ZUGFeRD (PDF/A3 containing- embedded XML). Smart Flows now includes native steps to create compliant eInvoice content, reducing manual effort and risk. These capabilities simplify compliance, support cross-border standard adoption, and streamline invoice generation and distribution through automated workflows.

Typical eInvoicing Scenarios in Flows

Organizations are required to comply with EU B2G/B2B regulations, including mandates gradually deployed in EU member states like Germany (beginning 2025), Belgium, Croatia, Poland, Latvia, and Denmark (beginning 2026). In document flows, this translates into scenarios like:

- Converting UBL-format invoice data into a structured eInvoice file.
- Generating a hybrid PDF/A-3 (ZUGFeRD) that includes both human-readable invoice presentation and embedded XML for machine processing.
- Sharing the invoice file via email, platform, or ERP integration alongside a visual invoice copy.

Smart Flows introduces two new flow blocks to optimize your automated document flows for eInvoicing scenarios: a "convert data to file" block and a "Convert Document to ZUGFeRD" block.

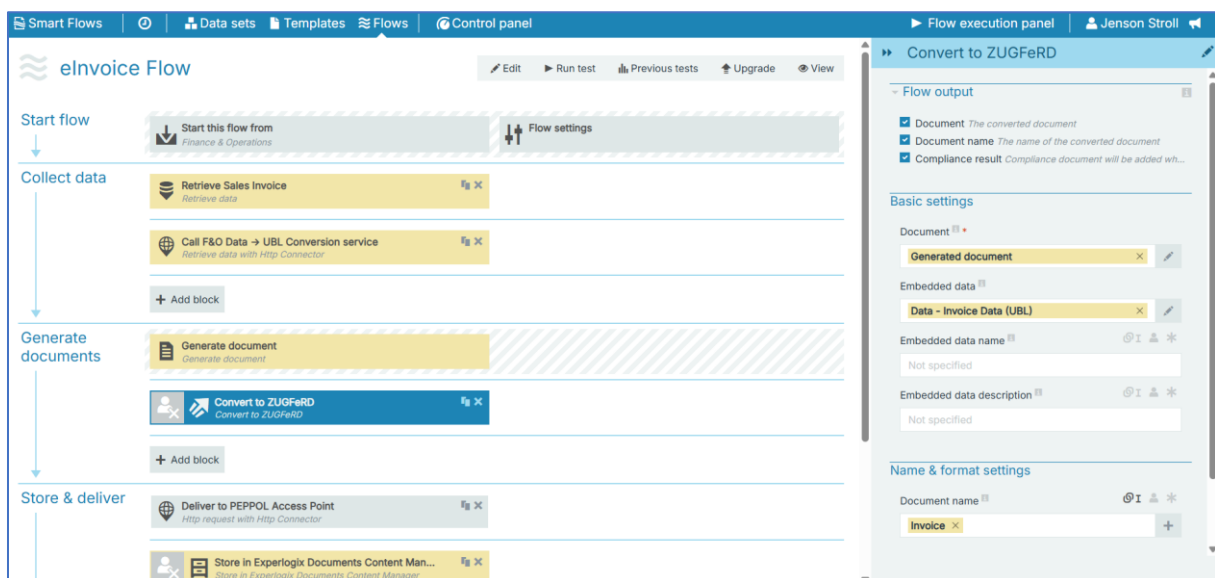


Figure 2 – Example of an eInvoice Flow in Flow Builder

Convert Data to File (UBL to File) Flow Block

This new flow block transforms UBL invoice data (from a connected source or transformation service) into a structured file, which can be output with or without additional formats downstream.

Convert to eInvoice Flow Block

This block takes an existing invoice or credit note document and the corresponding UBL data, then generates a **ZUGFeRD-compliant PDF/A3**, a hybrid document fully conformant with EU eInvoicing standards that combines a human-readable invoice with embedded XML.

These new flow steps provide a robust foundation for eInvoicing compliance. Combined with Smart Flows' existing integration capabilities – such as data merges, approval flows, email, and ERP attachments, they deliver a complete invoice automation solution for regulated markets. In

upcoming releases we intend to further optimize convenience with plug & play scenarios for our ERP connectors such as Microsoft Dynamics 365 Finance and Supply Chain Management.

Persistent Flow Definitions

Smart Flows now persists the flow definition used during a flow execution. A snapshot of the flow is automatically captured every time a designer saves changes in Flow Builder. When a user starts a flow, that snapshot is used throughout the execution, even if the flow is later modified or deleted.

This enhancement ensures that executions are stable and predictable, even in long-running scenarios like document signing or form submissions. It prevents executions from failing due to definition changes and supports governance requirements by making execution logic auditable and traceable.

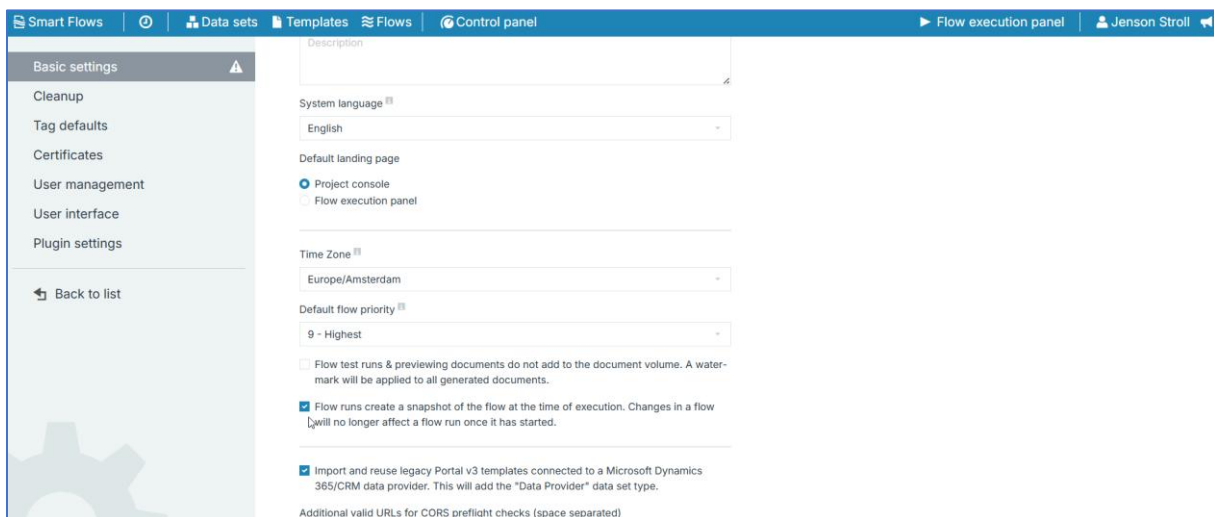


Figure 3 – Switching on Flow Definition Persistence in the Settings section of the Control Panel

Persisting the flow definition throughout execution provides for more control for the Smart Flows Administrator:

- **Maintain flow integrity** when flows are paused for approvals, signings, or user input
- **Archive or delete** outdated flows without breaking ongoing executions
- **Reduce errors** caused by design changes made during execution

Flow Snapshots on Save

Each time a flow designer saves a flow in Flow Builder, Smart Flows creates a snapshot of the definition. This snapshot is what the system will use during future executions until a new version is saved.

Execution Consistency

Once a flow execution begins, it is bound to the version of the flow at the time of execution start. Any changes made to the flow afterward will not affect executions already in progress.

Support for Deleted Flows

Executions based on a saved flow version can still continue even if the flow has been deleted from the project, reducing dependency on cleanup timing or archival processes.

The screenshot displays a flow execution report for 'Standard Invoice Flow' (ID: BRMF21-10000000). The 'Execution log' section shows a successful run with 0 documents, taking 0.9 seconds. The 'General info' section lists details such as 'Created By: Jenson Stroll', 'Status: Success', and 'Duration: 918'. A 'Flow Snapshot' is included, showing a JSON object with the following structure:

```

Flow Snapshot
Id 00c3c68c-6c3d-4756-b9a3-f3e76fe0c7c3
Snapshot Json {"outputs":[],"primaryDataset":{"id":"5e7c9e11-e889-42fd-a0d5-28e366229e2c","displayName":"Sales Invoice","type":"dataset"},"settings":{"flavour":"FLOW.FLAVOUR.FNO","displayName":"Standard
    
```

Figure 4 – Flow Snapshot information embedded in a Flow Execution Log Report

Advanced Envelope Handling for DocuSign

Smart Flows now offers enhanced integration with DocuSign, expanding support for both communication channels and advanced envelope workflows. These improvements provide users with greater flexibility when automating e-signature processes in complex document flows.

This release introduces support for sending DocuSign signing invitations via **SMS**, a capability available through select advanced DocuSign pricing plans. Smart Flows now fully leverages this feature, enabling organizations to reach signers faster and more conveniently, particularly in mobile-first scenarios.

In addition, Smart Flows introduces three new DocuSign-specific flow steps that unlock more **granular control over envelope handling within Advanced Flows**. By splitting the traditional “Send to DocuSign” step into modular components, users can now insert intermediate logic or

external review cycles between envelope creation, document addition, and envelope submission. This level of flexibility supports a wider variety of real-world e-signature use cases.

SMS Invitation Support

Signing invitations can now be delivered via text message (SMS), in addition to email. This requires an advanced DocuSign plan that includes SMS delivery support.

Support for Signature and Initial Placeholders in Headers and Footers

Smart Flows now supports handling placeholders for signature and initial fields in repeating document zones, headers and footers. Previously, DocuSign mappings were only resolved if placed in the body section of a document template.

The typical use case for DocuSign placeholders in headers and footers is placing an initial on every page of a document inside an envelope. If you have such a requirement, you can update existing templates with extra placeholders.

The feature supports both headers and footers of a standard template and headers and footers inserted via a composition.

New Flow Steps for Advanced Flows

Smart Flows introduces three dedicated steps for detailed envelope manipulation:

- **Create DocuSign envelope:** Start a new envelope without immediately adding documents or recipients.
- **Add documents and recipients to DocuSign envelope:** Attach content and define signers or reviewers.
- **Submit DocuSign envelope:** Finalize and send the envelope for signature.

Compatibility and Flow Design

The original **Send to DocuSign** step remains available for use in **Basic Flows** and Advanced Flows, combining all envelope actions into a single step. Advanced Flows now allow greater control and custom exit points, enabling scenarios that were not possible with a single-step design.

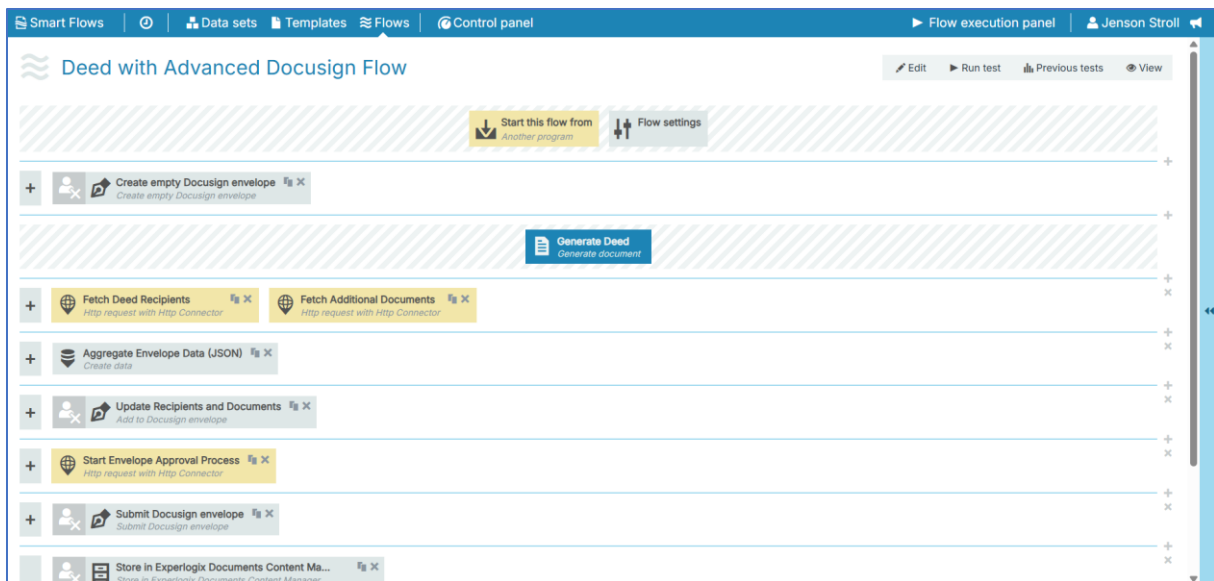


Figure 5 – Example of an advanced flow with complex DocuSign envelope preprocessing

Microsoft Dynamics 365 Business Central Connector (General Availability)

Smart Flows now includes native support for Microsoft Dynamics 365 Business Central (BC), enabling users to seamlessly connect to their BC instance and trigger document flows directly from within the application. This integration uses Experlogix Cloud Connect technology and unlocks new levels of flexibility for automating documents across your ERP processes.

This connector enables organizations to streamline document generation and delivery from within Business Central, using data from BC and other integrated systems. Whether you're creating quotes, invoices, reports, or service documents, Smart Flows allows you to combine data, generate polished outputs, and automate delivery, all while maintaining tight alignment with your business records in BC.

The connector also integrates with BC's email engine, letting you personalize email bodies, include dynamic content, and attach generated documents or assets to outbound messages. This reduces manual effort and improves consistency in communication.

Run Flows from Business Central

Users can initiate Smart Flows directly from their Business Central interface. Whether it's from a sales order, invoice, or another record, flows can be triggered in context to generate documents or launch a broader document delivery process.

Data Access Across All Entities

The connector allows access to all standard and custom BC entities. This ensures you can generate documents that reflect the full spectrum of your business data. Smart Flows supports combining BC data with content from other systems to produce accurate and complete documents.

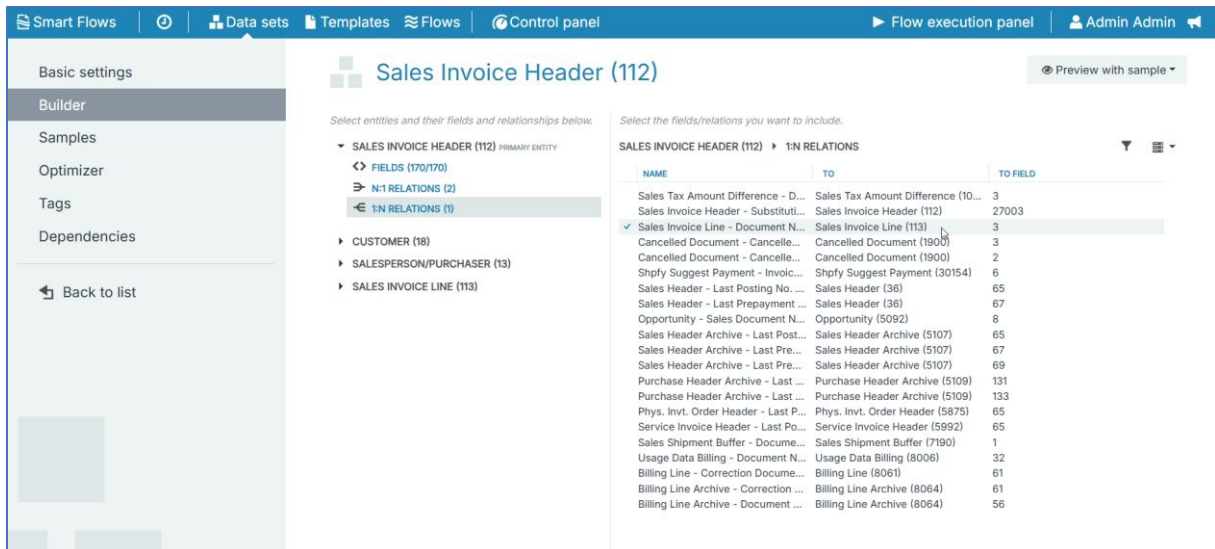


Figure 6 – Example of a data set based on Microsoft Dynamics 365 Business Central Data

Experlogix Cloud Connect Integration

The integration is powered by Experlogix Cloud Connect, ensuring uniform and flexible connectivity across your systems. If you already use Cloud Connect in combination with BC, you can re-use your connection for document automation.

Write Documents Back to Business Central

Generated documents can be written back and stored as attachments to corresponding BC records. This ensures traceability and easy access for downstream users or processes.

Leverage Business Central Email Capabilities

You can personalize the email body using templates and placeholders and include generated documents or assets as attachments. Emails are sent through Business Central’s email system, ensuring traceability of all client communication across your ERP processes.

Modernized Microsoft SharePoint Connector

Smart Flows now supports a **modernized authentication model for connecting to SharePoint**, in line with Microsoft’s deprecation of the legacy SharePoint add-in (ACS) model. Connector setup has been updated to rely on an Entra ID (Azure AD) app registration, ensuring long-term compatibility with Microsoft 365 and SharePoint Online.

Previously, Smart Flows established SharePoint connectivity through an app registration in the SharePoint add-in registry (ACS). Microsoft is retiring this model, with full support ending on April 2, 2026. To stay ahead of this change, Smart Flows now uses OAuth authentication via **Entra ID (Azure AD) app registrations**, following Microsoft’s recommended approach ([Retirement announcement for Azure ACS](#)).

While the initial setup process is more hands-on, this ensures long-term stability, improved security, and compliance with Microsoft's modern cloud authentication standards.

Modern Authentication with Entra ID

Smart Flows now uses OAuth 2.0 via Entra ID app registrations to authorize SharePoint access. This replaces the deprecated ACS model and supports site-specific permission control aligned with Microsoft security guidelines.

Updated Connector Setup Process

Connector setup now requires:

1. Initiating the process using a SharePoint user with admin access to all sites in your Microsoft 365 environment.
2. Creating an **Entra ID app registration** that defines the permissions for a specific SharePoint site.
3. Completing the OAuth handshake so Smart Flows can securely read from and write to that site.

Configuration Flow Optimization

The initial setup of a SharePoint connector involves some scripting to finalize permissions and app configuration. To reduce the complexity for the administrator, Experlogix intends to provide clear documentation now, and out-of-the-box app registrations in follow-up releases.

Future-Proof Configuration

Once configured using the modern approach, your SharePoint connector will remain functional after Microsoft retires the SharePoint add-in registry in 2026, reducing risk of service disruption and avoiding costly rework later on.

Metadata Support in Experlogix Documents

Experlogix Documents now supports the addition of metadata to content stored in Content Manager. This capability enables organizations to describe and structure stored content more effectively, laying the groundwork for enhanced automation, governance, and future search capabilities.

Metadata allows users to enrich stored content with structured information such as document type, region, language, or lifecycle stage. This improves how content can be processed, filtered, and used in business workflows.

By attaching metadata, organizations can enable smarter flows, conditional logic, and integrations that rely on descriptive attributes. Whether tagging content for classification, driving routing decisions, or synchronizing with external systems, metadata enhances the value and traceability of stored content.

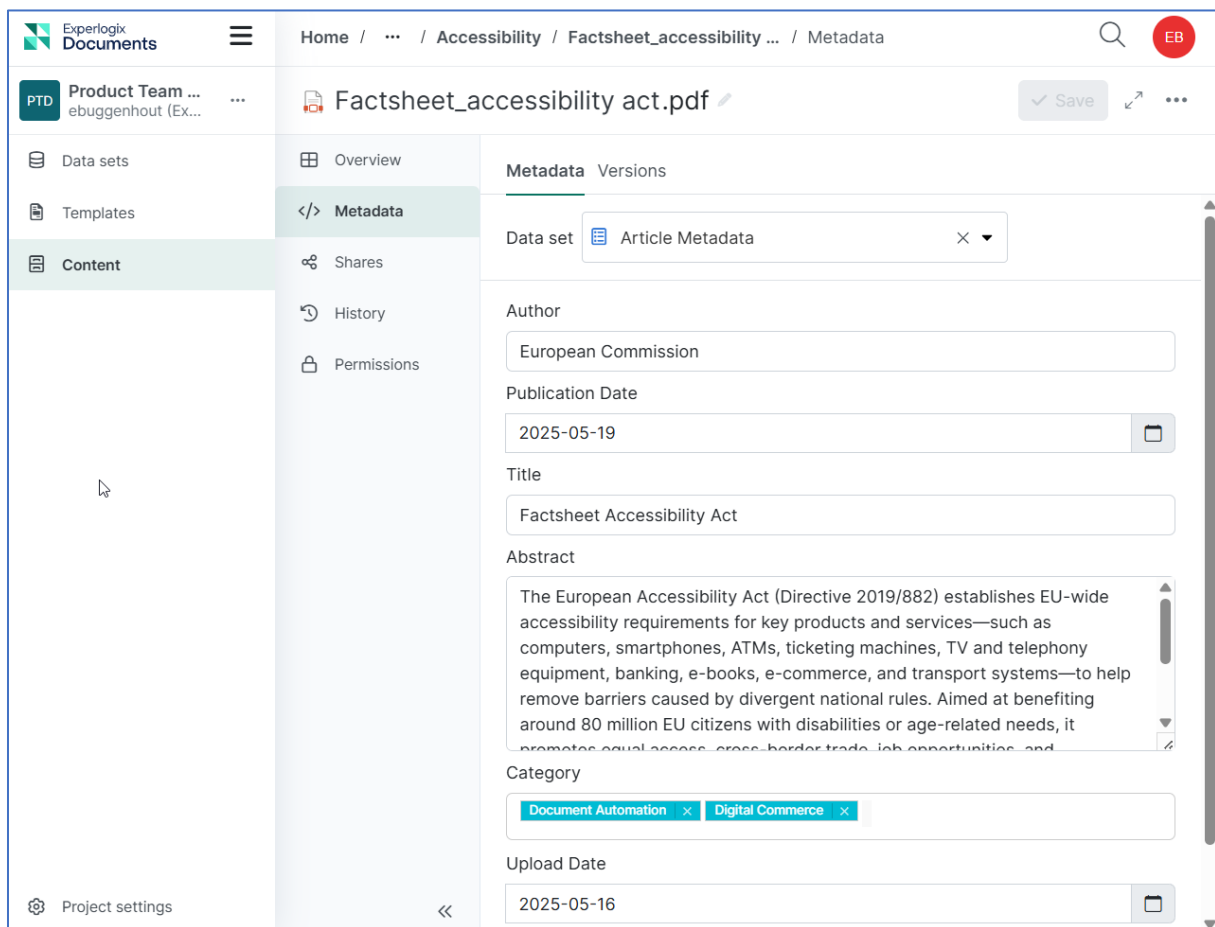
Typical Use Cases

- Tag documents with metadata such as contract type, customer segment, or expiry date.
- Attach structured context generated by external systems to documents stored in Experlogix Documents.
- Prepare for future capabilities such as metadata-based content filtering or reporting.

Flexible Metadata Input Options

Experlogix Documents supports two ways to define metadata in Content Manager:

- **Form-Based Input:** Associate a form data set and fill out metadata fields through the UI. This input method is ideal for human-driven tagging or classification.
- **Code Editor Input:** Use the built-in editor to input metadata in any structured format. While JSON and XML are most common, other formats are also supported, making this option ideal for programmatic or integration scenarios.



The screenshot displays the Experlogix Documents Content Manager interface. The top navigation bar shows the breadcrumb path: Home / ... / Accessibility / Factsheet_accessibility ... / Metadata. The main document title is 'Factsheet_accessibility act.pdf'. The left sidebar contains a menu with 'Data sets', 'Templates', and 'Content' (selected). The central pane shows the 'Metadata' tab for the document. The 'Data set' is 'Article Metadata'. The 'Author' field is 'European Commission'. The 'Publication Date' is '2025-05-19'. The 'Title' is 'Factsheet Accessibility Act'. The 'Abstract' field contains the text: 'The European Accessibility Act (Directive 2019/882) establishes EU-wide accessibility requirements for key products and services—such as computers, smartphones, ATMs, ticketing machines, TV and telephony equipment, banking, e-books, e-commerce, and transport systems—to help remove barriers caused by divergent national rules. Aimed at benefiting around 80 million EU citizens with disabilities or age-related needs, it promotes equal access, cross-border trade, job opportunities, and...'. The 'Category' field has two tags: 'Document Automation' and 'Digital Commerce'. The 'Upload Date' is '2025-05-16'. The bottom left corner shows 'Project settings'.

Figure 7 – Example of metadata in Experlogix Documents Content Manager

Versioned and Recoverable Metadata

Metadata is fully versioned, allowing users to review history, compare changes over time, and restore earlier versions if necessary. This ensures auditability and control throughout the metadata lifecycle.

Search Coming Soon

While metadata is already persisted and available for use in flows or integrations, searching or filtering content based on metadata is not yet available within Content Manager. This functionality is planned for a future release of Experlogix Documents.

Foundation for Scalable Automation

This feature establishes a structured metadata layer that supports smarter automation, content governance, and long-term extensibility across the Experlogix Documents platform.

Custom Themes in Experlogix Documents

Experlogix Documents now supports custom themes, allowing organizations to tailor the look and feel of the project and any associated forms.

Custom themes allow teams to reflect corporate branding in user-facing forms or improve accessibility by applying color schemes that meet organizational standards. They also provide a scalable way to align the user experience across projects and departments.

Typical Use Cases

- Apply brand colors and logos to sales or legal forms.
- Improve readability with high-contrast themes.
- Support multi-brand environments with different visual identities.

Custom Theme Definitions

Administrators can create and store multiple themes, each with its own color palette. These themes are centrally managed and configurable via the Project settings of the Experlogix Documents UI.

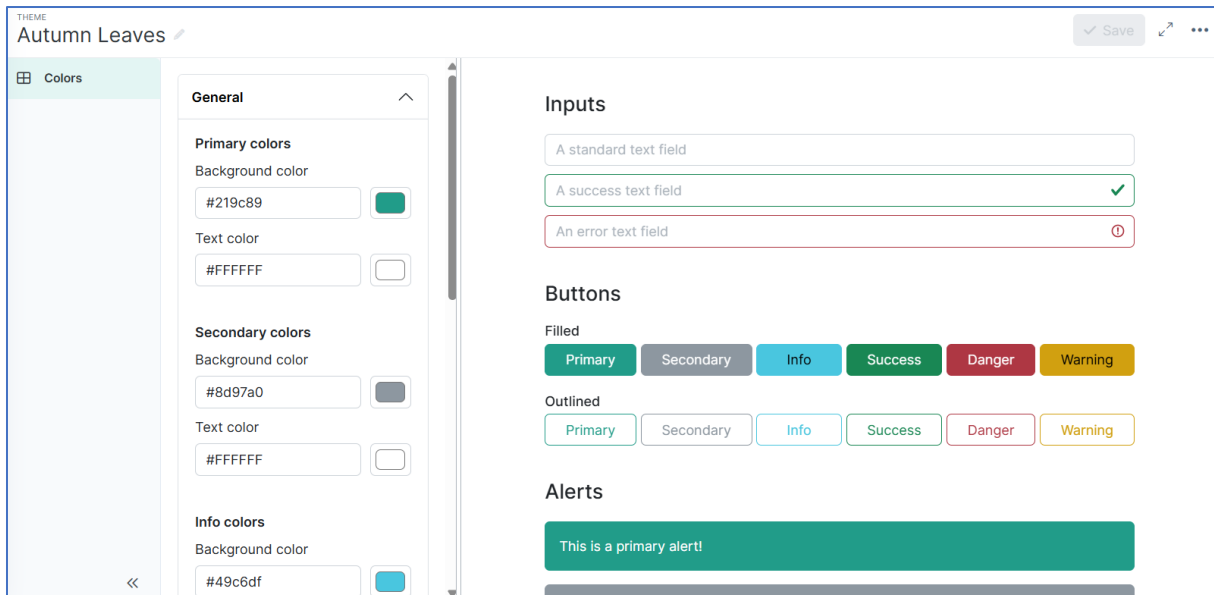


Figure 8 – Example of a custom UI theme in Experlogix Documents

Project-Wide Theming

Currently, a selected theme is applied across the full project, ensuring a uniform look and feel for all users and forms.

Planned Enhancements

Future releases will introduce:

- **Form-level theme assignment**, allowing specific forms to use different themes.
- **Runtime theme overrides**, enabling business rules to dynamically determine which theme to apply when rendering a form based on contextual logic (e.g., region, user group, brand).

These upcoming capabilities will support organizations managing multiple brand identities, enabling automated theme switching without manual intervention.

Experlogix CPQ Connector (Preview)

Experlogix Document Automation now includes a Preview version of a tailored offering for Experlogix CPQ (Configure, Price, Quote) users, streamlining the creation, management, and distribution of sales documents such as quotes, proposals, and contracts. This tightly integrated solution eliminates manual work by automating document flows directly within the CPQ interface, increasing accuracy, speed, and overall process efficiency.

Typical Use Cases

Typical usage of the connector for Experlogix CPQ include combined CPQ-Document Automation scenarios like:

- Generating a single document summarizing one or more product configurations.
- Comparing multiple configurations side by side in a single output document.
- Routing generated documents to e-signature services like DocuSign or Adobe Acrobat Sign.
- Reusing company-standard components such as legal disclaimers, branding, and terms across multiple templates.

Document Flow Triggering From Within Experlogix CPQ

At the core of this offering is the ability to trigger document flows from within Experlogix CPQ. Users can start a flow from the detail view of a configuration or from a list view that supports batch execution. Flows can process each configuration individually or consolidate them into a single output for comparison or aggregation.

Data Collection

Document flows use Experlogix CPQ data sets, which represent the full configuration model in a format optimized for document generation (powered by Experlogix Cloud Connect). Data payloads can be filtered at design time or reduced dynamically at runtime to improve performance. All collected data is stored securely and automatically cleaned up post-execution.

With Document Automation for Experlogix CPQ, users can generate professional, personalized documents using flexible templates and embedded business logic, without leaving the CPQ environment. This improves customer satisfaction by ensuring faster turnaround and consistently branded documentation. Automation reduces the risk of manual errors, ensures compliance with internal policies, and enables scalable sales operations by handling multiple configurations and approval scenarios seamlessly.

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.

- **Child forms are now recognized as dependencies of form data sets:** Experlogix Documents form data sets that have child forms now have those children as dependencies in Experlogix Smart Flows. This allows for a smoother experience when exporting and importing such forms between projects.
- **Review and Approve Document flow block now waits for an unlocked state of Microsoft 365 documents:** When executing a flow with a Review and Approve Document flow block that requires a Word, Excel or PowerPoint file to be edited in the browser, the execution will pause until the state of the edited file is unlocked before proceeding to the

next step of the flow execution. This built-in mechanism provides more certainty that the flow execution will pick up the latest version of the edited document.

- **Updated knowledge base links throughout Experlogix Smart Flows:** All hyperlinks to the Experlogix documentation website have been updated to use the help.experlogix.com domain. This guarantees a fluent experience when navigating to knowledge base pages from within the application, not requiring any page redirects.

Release Notes and Release Artefacts

- [Experlogix Documents 1.0.0-preview Release Notes](#)
- [Experlogix Smart Flows 4.25 Release Notes](#)
- [Experlogix Smart Flows 4.25 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

