

Experlogix Smart Flows

4.23

Preview Guide



November 2024

Foreword

The Experlogix Product Team is excited to announce the general availability of Experlogix Smart Flows 4.23. This release brings powerful enhancements to our document automation platform, improving how you generate, manage, and deliver documents.

This new Smart Flows release is all about engagement. Its innovative features will revolutionize your interactions with clients and other stakeholders.

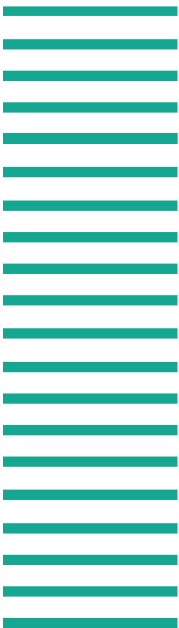
- Communicate with more impact by taking the right action at the right time.
- Share documents and maintain control over how long they will be available.
- Receive alerts when recipients interact with shared documents and take the next appropriate action to streamline the flow of engagement.
- Harness AI to translate your documents into your recipient's language.
- Be detail-oriented by reviewing and editing generated documents in your browser before you deliver them.

As always, this release contains more minor improvements, optimizations, and fixes that reduce the complexity of automating your document processes so you can generate better documents faster.

From all of us here at Experlogix, happy templating!

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Editing Documents in the Browser

(Requires Experlogix Documents Connector)

When you automatically generate documents, you may want to preview and tweak them before you deliver and store them. Maybe it's just a matter of verifying that your document looks exactly like you imagined it, or maybe you want to give the generated document a personal touch. There are many reasons to check your documents before you deliver them.

With Experlogix Smart Flows 4.23 you can pause a flow execution to open a generated document, review and edit it, and then continue your flow execution. The flow will pick up the edited document and complete the rest of the flow.

There is no requirement to install anything on your local device to edit generated Word documents. You can simply open a generated Word document from within the flow execution and make changes using Microsoft Word for the web in your browser. While editing, your documents are safely kept in Experlogix Documents Content Manager. Editing is privileged to users holding write permissions for the generated file.

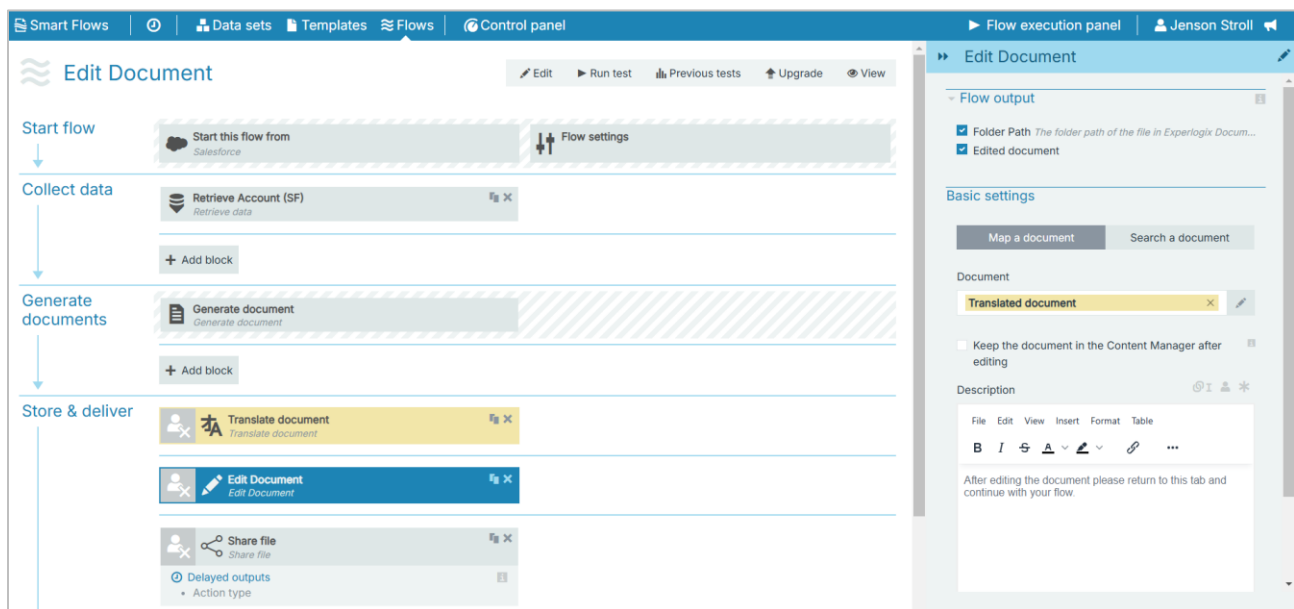


Figure 1 – Edit document flow block in Flow Builder

Translating Documents with AI

(Requires Experlogix Documents Connector)

When you communicate in an international context, you can approach translation and localization of your documents in two ways. You can use translated versions of templates or select the appropriate

language variant of your templates at runtime. Alternatively, you first generate documents in a base language and translate the generated documents into the appropriate language post-production. Experlogix Smart Flows 4.23 supports both approaches. To translate generated documents, Experlogix Documents connects to a cloud-based neural machine translation service that supports more than 130 source and target languages.

You can integrate the selection of a translated template variant or the translation of a generated document into your document flows. After translation, you can either deliver the translated document directly or combine the translation with an Edit document step to verify the AI-generated translation before you continue the delivery process.

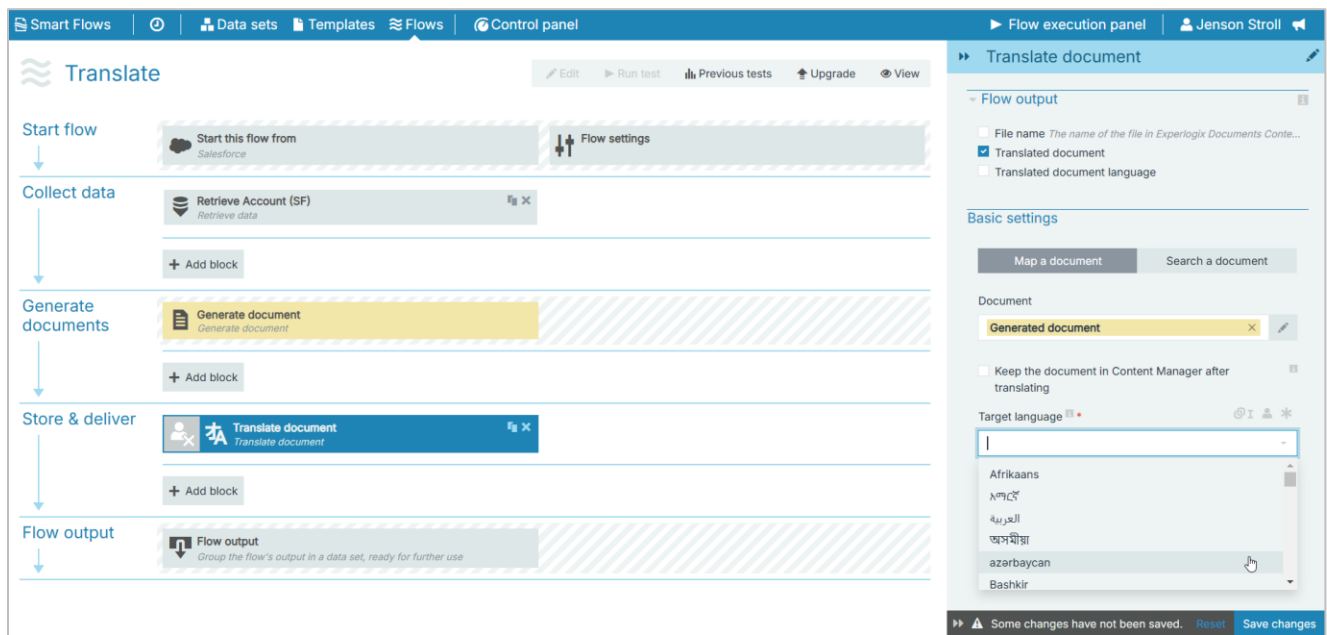


Figure 2 – Translate document flow block in Flow Builder

File Sharing and Interaction Tracking

(Requires Experlogix Documents Connector)

The goal of most outbound document scenarios is to engage with your recipients and let them interact with your content. Most of the documents we create are intended for recipients to view, read, or at least scan. In many cases, it is valuable for the document's sender to receive a notification when the recipient has done so.

File Sharing

You can now include functionality in your document flows to create trackable share links for your generated documents. When clicked, these links trigger an event that can trigger paused flows to resume with a relevant next step. For example, if you generate quotations, your document flows can notify the salesperson that the potential client has downloaded or opened the generated quote document and create a follow-up task. In a contracting scenario, your flow can trigger based on the contracting party downloading the contract.

Share links do not require authentication. They have a scope – which can be either to view or to download the file, and they expire if not set to permanent. You can also use the expiration of a link as a trigger to resume a document flow with an appropriate follow-up action.

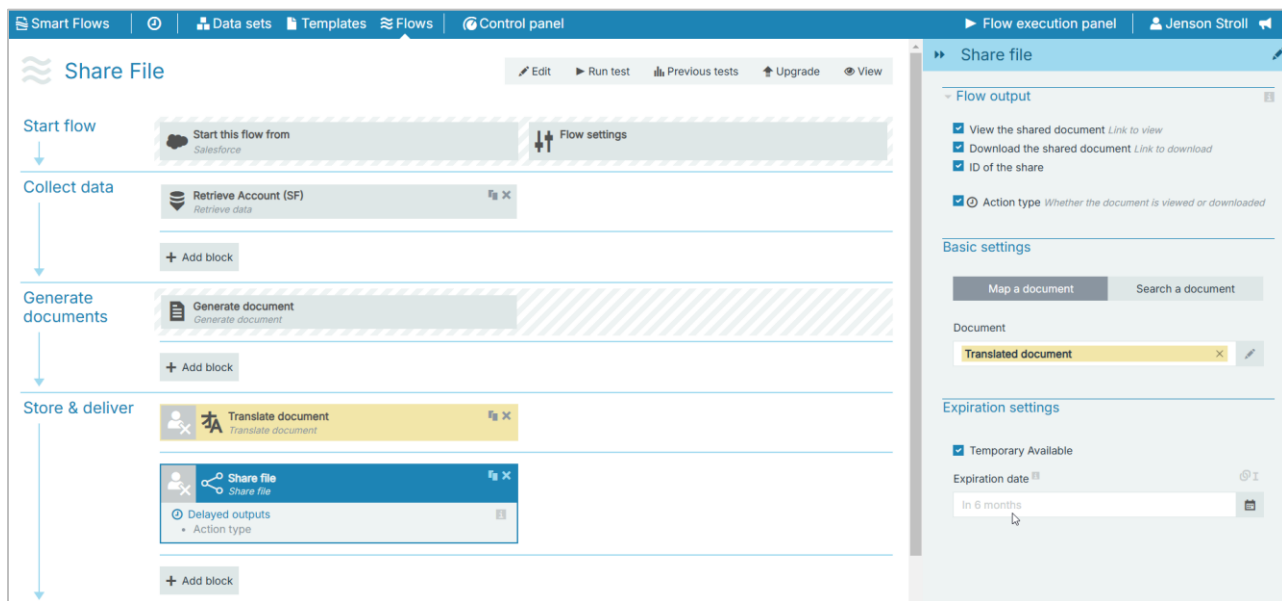


Figure 3 – Share file flow block in Flow Builder

Share Analytics

Content Manager aggregates all of the share interactions on a “Share Analytics” page. This page provides actionable insights into the interactions with the active content.

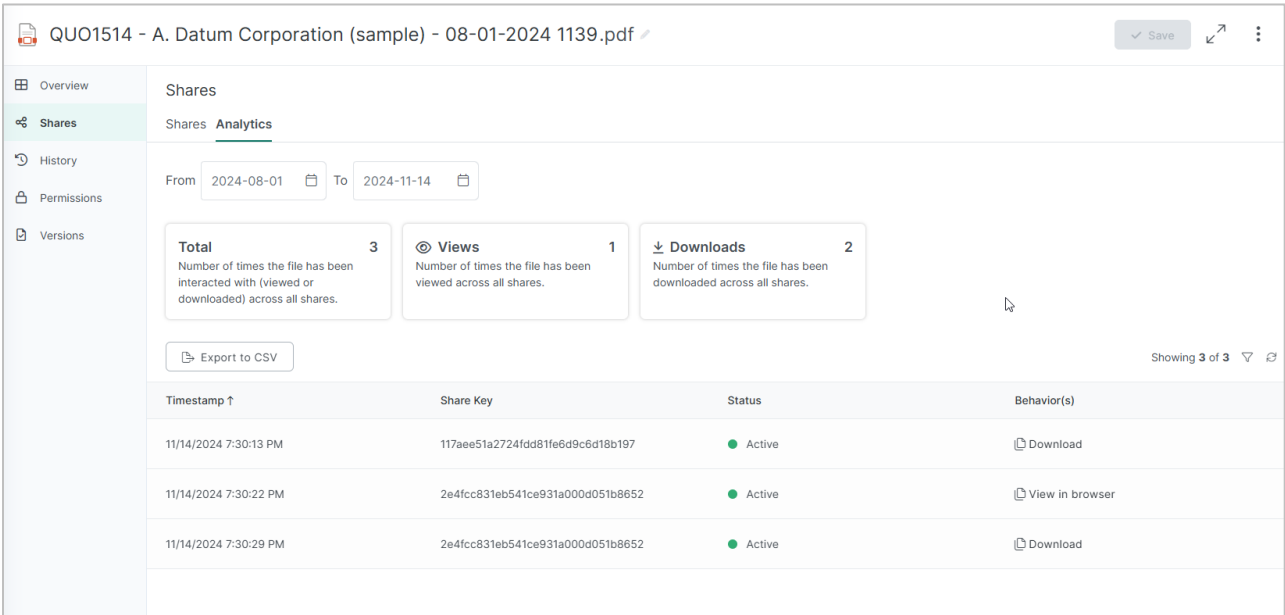


Figure 4 – Shares Analytics in Content Manager

Pausing Flow Executions

Interacting with clients or other stakeholders can be a waiting game. Taking the appropriate action at the appropriate time is critical for a smooth experience. The 4.23 release of Smart Flows helps you set up your flows to wait for internal and external triggers and then make the next move.

The Flow Builder now has a “pause until” flow block that freezes the flow in a waiting state until a delayed output of an earlier flow block is populated. Here are some examples of delayed outputs:

- The edited document from an Edit Document flow block.
- A recipient's interaction or the expiration of a share following a Share File flow block.
- Recipient actions during an e-signature ceremony.

The Pause Until flow block can wait for either one delayed output to be populated or multiple outputs.

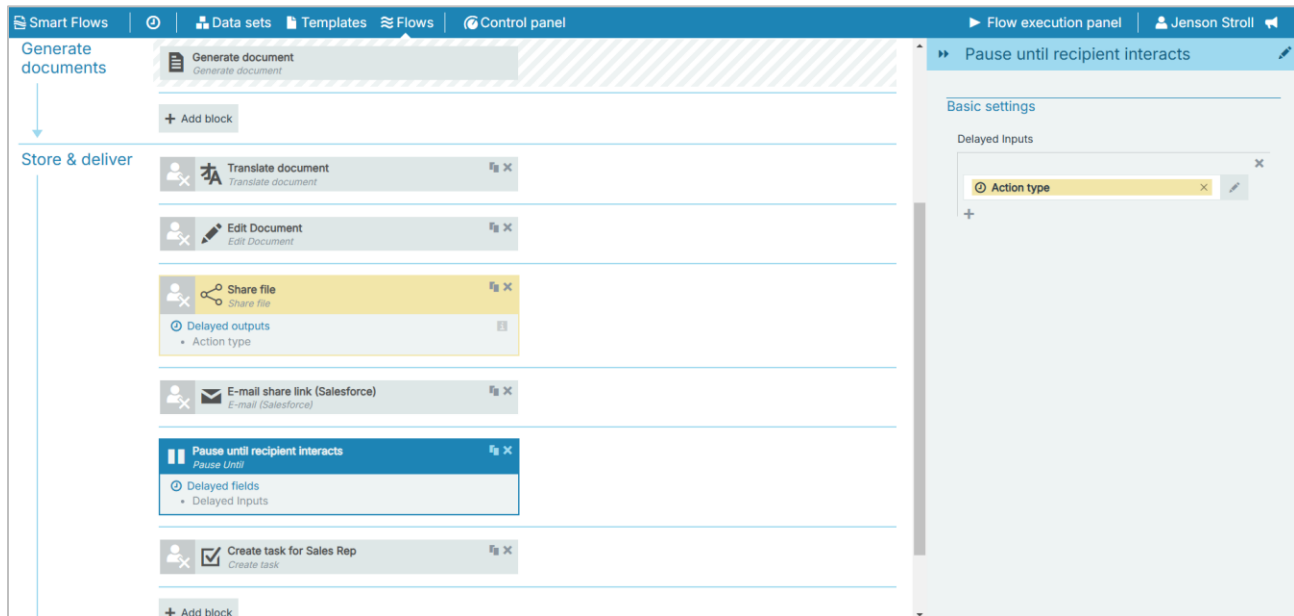


Figure 5 – Pause until flow block in Flow Builder

User Lifecycle Management Enhancements

Experlogix Smart Flows 4.23 contains multiple enhancements for user lifecycle management. The most significant changes are the deprecation of the automated user sync and the name retention pattern for end-of-life users.

Automated User Creation via Primary Connectors

In previous versions of Experlogix Smart Flows, administrators could already configure a Single Sign-On connector to automatically create users upon their first login. The 4.23 release expands this pattern to all primary connectors, replacing automated user synchronization.

Comparison between Automated User Sync (deprecated) and Automated User Creation (new default)

- **Automated User Sync (deprecated):** Users who have an Experlogix Smart Flows security role or permission set in the connected application of a primary connector (Microsoft Dynamics CE/F&O, Salesforce.com or Sugar):
 - See the Experlogix Documents controls in the connected application.
 - Are automatically created as users in Smart Flows by a synchronization service
 - Consume a license after the sync process.

- **Automated User Creation (new default):** Users who have an Experlogix Smart Flows security role or permission set in the connected application of a primary connector (Microsoft Dynamics CE/F&O, Salesforce.com or Sugar):
 - See the Experlogix Documents controls in the connected application.
 - Are automatically created as users in Smart Flows when they first log into Flow Execution Panel
 - Consume a license after their first login.

The new default approach has two benefits. First, switching off the automated user sync results in better resource allocation. Especially in larger implementations with thousands of users, services that continuously run in the back consume a considerable portion of the system’s memory and processing capacity. When the sync service is switched off, those resources are available to optimize the performance of your flow executions.

The other benefit user creation has over synchronization is optimized user license allocation. The new default pattern creates a new Smart Flows user whenever someone logs into Flow Execution Panel for the first time. Therefore, only users who have logged in at least once will consume an Experlogix Smart Flows license.

Depending on your project settings, the system can update a returning user's role in Smart Flows based on their security role or permission set in the connected system or keep their current role.

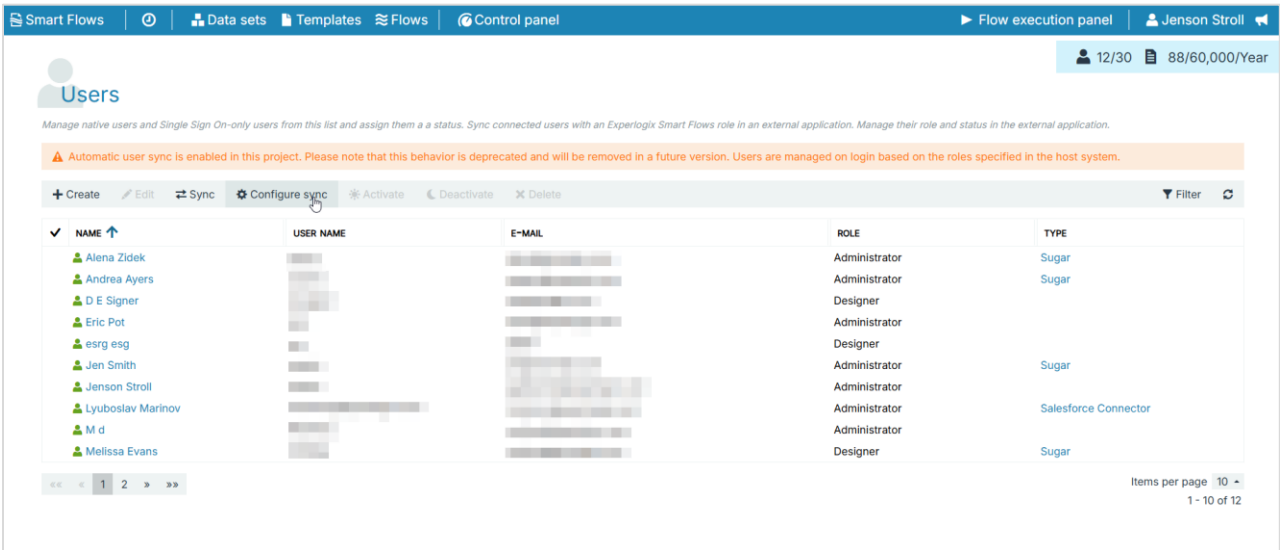


Figure 6 – Deprecation alert for automatic user sync in the User Management section of the Control Panel

End-of-Lifecycle Management

Users who are no longer active but have contributed earlier can still be displayed in the system and associated with creation or modification events. In Experlogix Smart Flows 4.23, administrators can configure a naming pattern for these deactivated users. Either they are displayed with their original name or referred to with a GUID. In either of these patterns, the system clearly indicates that the user is no longer active.

These user deletion settings are accessible in the Settings section of the Control Panel.

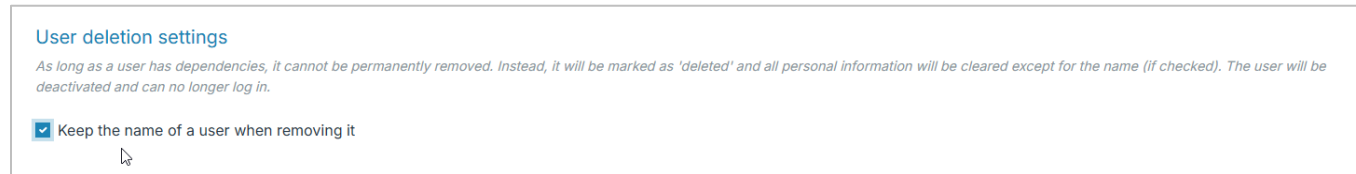


Figure 7 – Naming pattern settings for deleted users

Minor Improvements

As always, a new Smart Flows release brings minor improvements and quality-of-life upgrades. Listed below are some of those included in this Experlogix Smart Flows 4.23 release.

- **Capability to Edit Relationships in Relationship Manager for Microsoft Dynamics 365 F&O Plugin:** In the Connector menu of a Microsoft Dynamics 365 F&O connector, you can now edit custom relationships between tables you have built earlier with Relationship Manager. This can be useful, for instance, after a system upgrade that impacts the data model of your Microsoft Dynamics 365 F&O instance.
- **Experlogix Documents Branding in Flow Execution Panel:** Experlogix Documents branding has been extended across the entire end-user experience, which means that Flow Execution Panel is now also branded Experlogix Documents.
- **Default Data Retrieval Pattern for Microsoft Dynamics 365 CE in Plugin Settings:** In the Plugin Settings section of the Settings area within the Control Panel, you can now control the default data collection pattern (FetchXML or OData) for Microsoft Dynamics 365 CE data sets. This default pattern will be applied to all new data sets of this type and to data sets with no explicit configuration for the fetch pattern on the data set level.

Important Deprecation and End-of-Support Messages

As your document automation platform evolves, some features are being deprecated or end-of-life. Below, we list the features that are deprecated or put to rest in the upcoming release:

- **Experlogix Smart Flows – User Management - Automated user synchronization:** Deprecated. We recommend switching to the automated creation of users upon first login instead.

- **Experlogix Smart Flows – Microsoft Dynamics 365 CE Managed Solution – Smart Flows command bar buttons for Classic Web UI Apps: End-of-life.** Microsoft ended support for Web UI Apps in 2020 and replaced them with Unified Interface apps. The Smart Flows command bar buttons in the 4.23 Managed Solution only work in Unified Interface apps. Our recommendation is only to use Unified Interface apps, or if this is not an option, postpone upgrading the Experlogix Smart Flows Managed Solution to version 4.23.
- **Experlogix Documents – Form Data Sets – Simple Conditions: End-of-life.** Form data sets with conditional fields no longer support the simple condition definition. Our recommendation is to redefine conditions on form fields using complex condition definitions. You could use the AI assistant to help you migrate your conditions with a prompt like “Do not use simple condition logic in this form.”

Release Notes and Release Artefacts

- [Experlogix Smart Flows 4.23 Release Notes](#)
- [Experlogix Smart Flows 4.23 Release Artefacts](#)

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

