Experlogix Smart Flows 4.24 Preview Guide

April 2025

Foreword

The Experlogix Product Team is excited to announce the general availability of Experlogix Smart Flows 4.24. This release brings powerful enhancements to our document automation platform, improving how you generate, manage, and deliver documents.

This release is all about deepening the integration of Experlogix Smart Flows into the other applications you use every day. Moreover, we have enhanced how Experlogix Document Automation solutions tie into your business processes, with additional capabilities for document review and approval processes. We have also introduced theming capabilities for the main user-facing components to let the document capabilities blend better into your overall user experience.

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

From all of us here at Experlogix, happy templating!

Content

Advanced Docusign Settings in Flows

Experlogix Smart Flows 4.24 integrates even more deeply into Docusign's leading e-signature platform. Not only can you insert multiple generated or fetched documents into a single envelope, but you can also manage the envelope recipients at the flow level and integrate advanced recipient identity verification patterns into your document assembly and delivery flows.

Multiple Documents per Docusign Envelope

Experlogix Smart Flows can now generate Docusign envelopes that contain more than one document. Any preceding flow block that generates or fetches a document can be referenced as a document source for the *Send to Docusign* block.
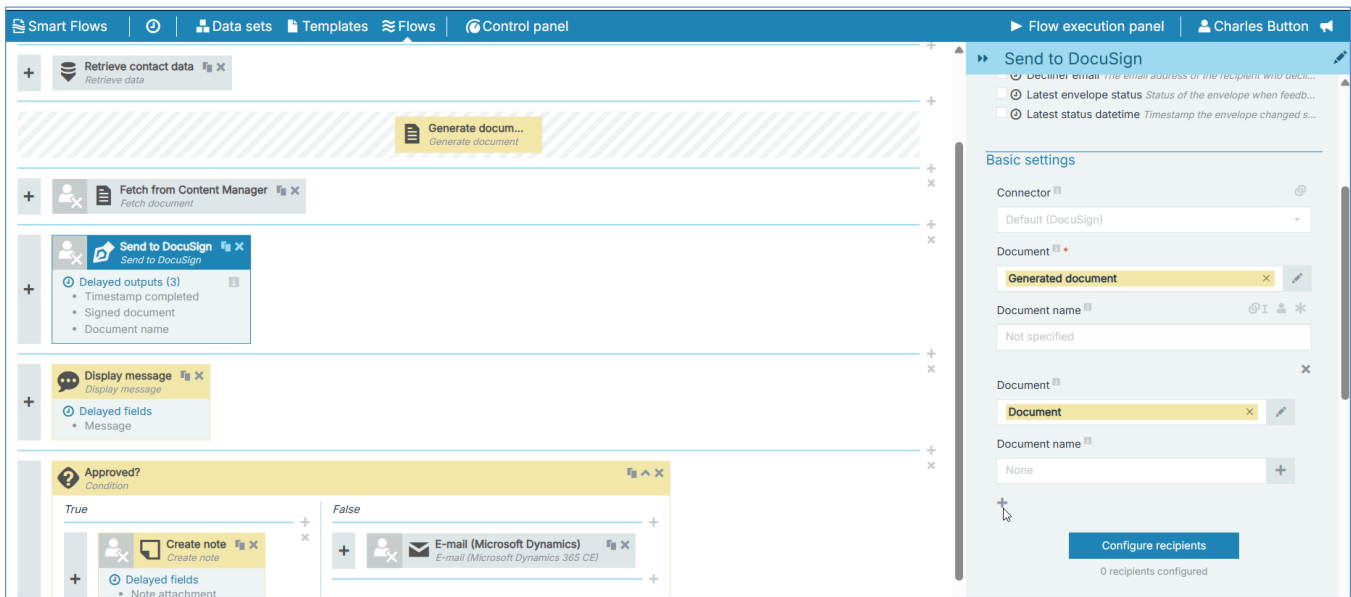

Figure 1 – Send to Docusign flow block with the capability to add multiple documents to a single envelope

This multi-document per envelope feature makes bundling documents in a single transaction easy. Not only does that increase efficiency, and can also optimize consumption for Docusign clients on a transaction-based subscription plan.

Docusign Envelope Recipient Configuration on Flow Level

The real catalyst for unlocking the new Docusign features is the capability to configure Docusign envelope recipients at the flow level instead of the template level. When you insert a Send to Docusign block in a flow, it will collect recipient information for all related templates, organized per recipient role. You can then configure details for each role on the flow level.

The details that you can configure per recipient role are:

- recipient ID verification and envelope access code settings,
- the e-mail message the recipients in this role will receive for this envelope.

Additionally, you can add recipients to the envelope who have a non-interactive role for the envelope. These recipients can receive an invitation to view the envelope or a copy of the completed envelope.

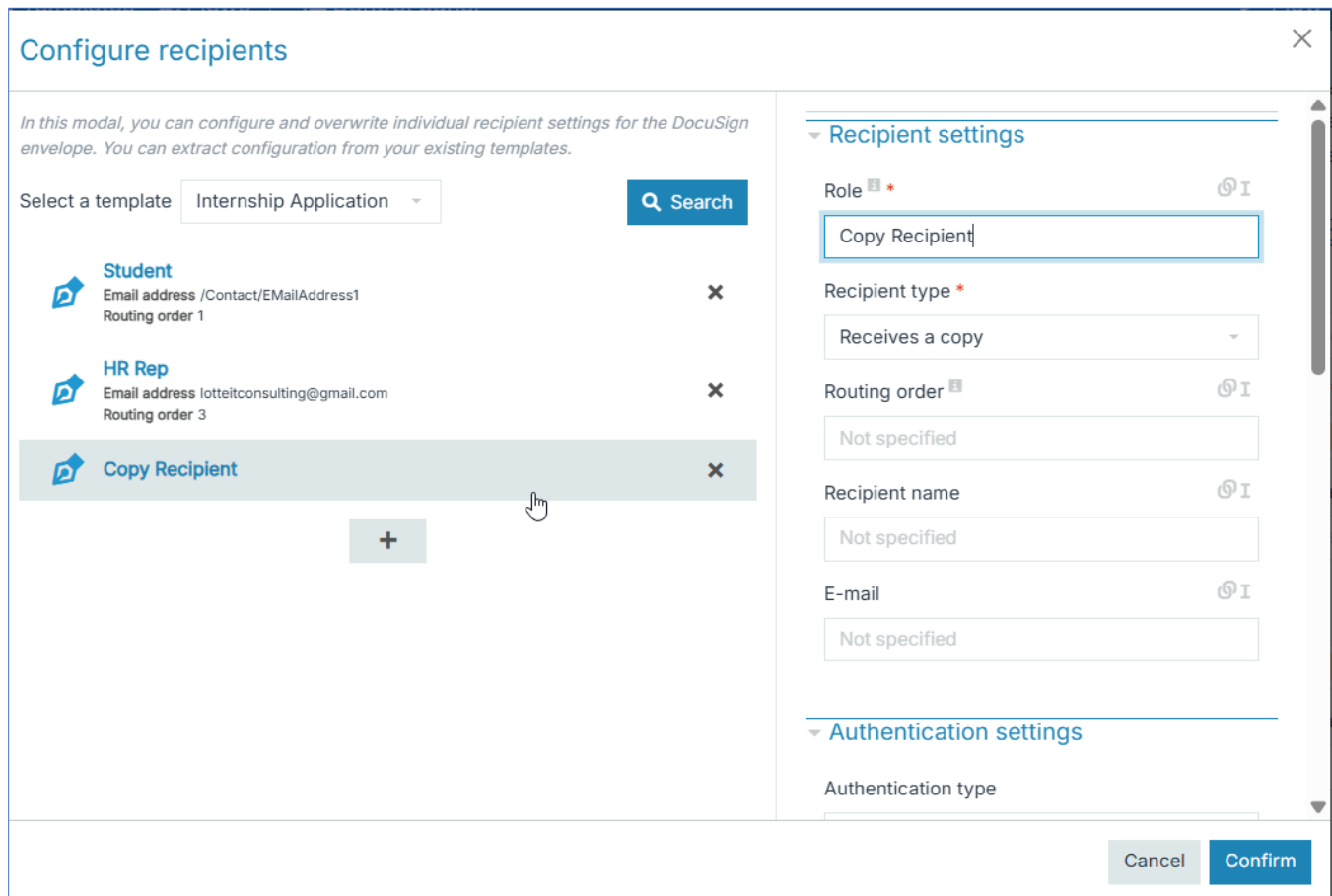
Figure 2 – Overwrite recipient settings and envelope viewers in the Send to Docusign flow block

Identity Verification for Docusign Envelope Recipients

When agreements require an elevated level of trust, senders can request signers to verify their identity before accessing them. Docusign offers a wide range of identity verification options, and Experlogix Smart Flows supports all of them.

- Basic ID check - This option, available on all Docusign plans, checks the user's identity based on a verification form that Docusign shows before opening the envelope.
- Phone check - This option, also available on all Docusign plans, verifies the user's identity with a two-factor authentication protocol. The recipient receives a text message with the access code for the agreement.
- Identity Verification - This option, available on higher Docusign plans, provides a broad range of identity verification options, including government eID verification services and facial recognition based on a video selfie.

Experlogix Smart Flows also supports access-code-based security for Docusign envelopes. In this more basic access control pattern, a recipient enters a passcode before opening the envelope. With the 4.24 release of Smart Flows, the requirement to enter an access passcode can apply to specific recipient roles, while recipients with other roles may access the envelope without first entering a code.

Personalized Email Messages from Docusign

Docusign sends email messages that invite envelope recipients to sign an agreement. With Experlogix Smart Flows, you can personalize these messages. The body of the Docusign email message can be distinct for each recipient role and the content can contain variables from the flow. To further improve the level of personalization for these email messages, you can now use a template or a document generated earlier in the flow as the source for the message.
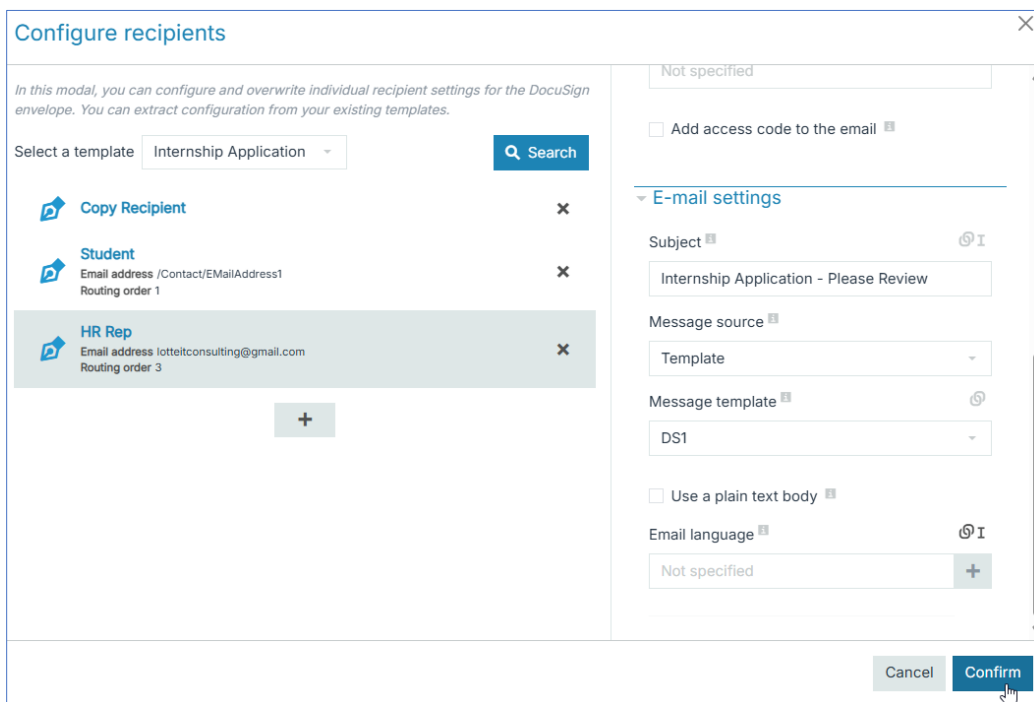

Figure 3 – Recipient role-specific email settings in the Send to Docusign flow block

The templated personalization options can help you tailor the email message for your recipients more accurately and also support multi-language scenarios.

Theming for the Flow Execution Panel

In Experlogix Smart Flows 4.24, you can apply a custom theme to Flow Execution Panel. This capability helps you create a uniform experience for your end users.

The theming settings for the Flow Execution Panel let you set the color of the header, the application name label in the header bar, and the logo image at the top left.

- Color - To set the color for the header bar, you can use the color picker or enter a HEX, RGBA, or HSLA color code
- Label - The application name label supports any hexadecimal character. Text color is automatically set to optimize contrast against the chosen background color of the header bar
- Logo image—You can upload logo images in SVG, JEPG, JPG, and PNG format. If you want to use a different image for mobile viewing, you can upload a separate logo file for the small screen estate.

Please note that the customized theming of Flow Execution Panel does not impact the UI of Project Console.
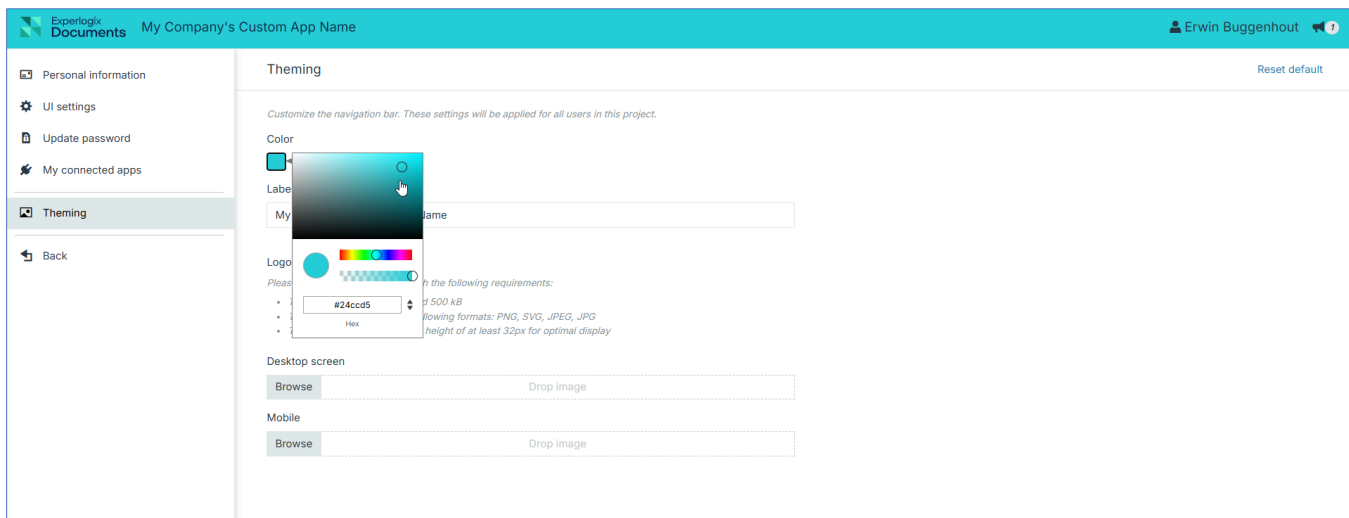

Figure 4 – Theming capabilities in the Flow Execution Panel

Reviewing, Editing and Approving Generated Documents
(Requires Experlogix Documents Connector)

The latest release of Experlogix Smart Flows contains a new flow block for delayed document review and approval. With this block, you can invite others to review, edit, and approve a document other than the user who started the flow.

Hierarchy Approvals

A common use case for letting others review, edit, and approve a document is hierarchy approvals, where somebody with the appropriate level of authority receives a request to approve a document before it is processed. For example, a sales director could require such approval from a quotation, and the HR leadership team could need a prior stamp of approval from employment proposals. There are plenty of examples of outbound document flows with hierarchy approval steps.

With the new delayed *Review and Approve* flow block, flow designers can provide approvers a link to an automatically generated form to start their review session.

Browser-based and Mobile-friendly Approvals

For the approver's convenience, you only need a browser to review, edit, and approve a document. Editable formats like Microsoft Word, PowerPoint and Excel files open in the web version of Microsoft 365 (aka Microsoft Office) and fully support mobile experiences in Microsoft 365 Copilot.
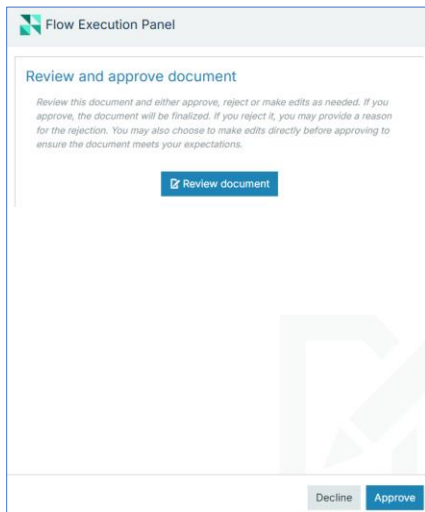

Figure 5 – Webform associated with a Review and approve document flow block

The actual approval leverages Experlogix's web form technology, offering a smooth process for approving, rejecting, and documenting a reason for rejection.

Approval Logic Baked into Flows

The visual Flow Builder has a new *Review and Approve Document* block. Process designers can insert this block into their flows and point to a document that requires approval. This document can be the output of a prior flow step or an external upload. The block will automatically create an approval form with a link to enter the document that needs approval.

In the following blocks, the flow can deliver a link to the form to a designated approver. After approval or rejection, a simple condition can drive the business logic.
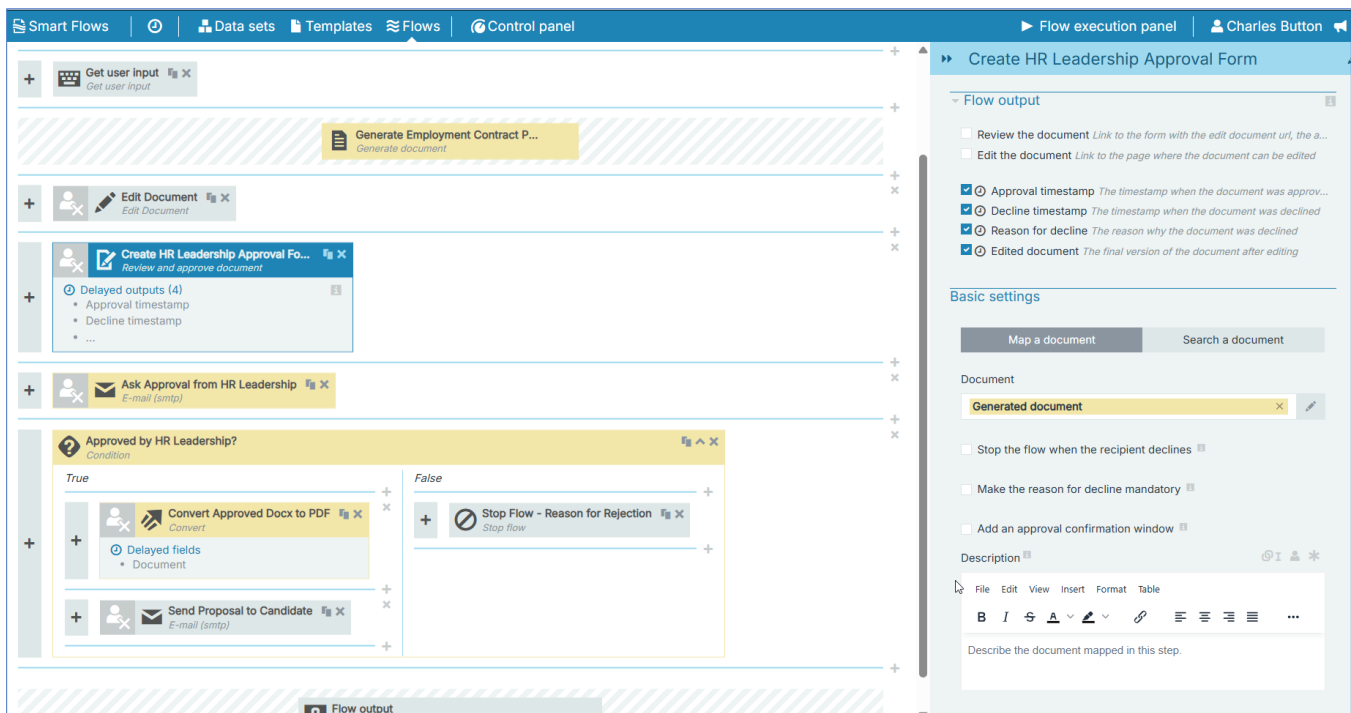
Figure 6 – Review and approve document flow block in Flow Builder

Individual User Authentication for Microsoft Dynamics 365 CE Connectors

Experlogix Smart Flows 4.24 allows you to configure Microsoft Dynamics 365 CE connectors for individual user authentication. This means that all inbound and outbound data processing steps related to this connector are using the identity of the active, authenticated user. From an auditability perspective, this may be preferable to the traditional pattern of executing those flow steps with a service user or a connector user impersonating the active application user.

End User Perspective

When you enable individual user authentications for the Microsoft Dynamics 365 CE connector, end users will be invited to log into Microsoft Dynamics 365 CE the first time they run a flow that has one of these steps:

- Retrieve Data (Microsoft Dynamics 365 CE)
- Create Note (Microsoft Dynamics 365 CE)
- Email (Microsoft Dynamics 365 CE)
- Create Letter (Microsoft Dynamics 365 CE)
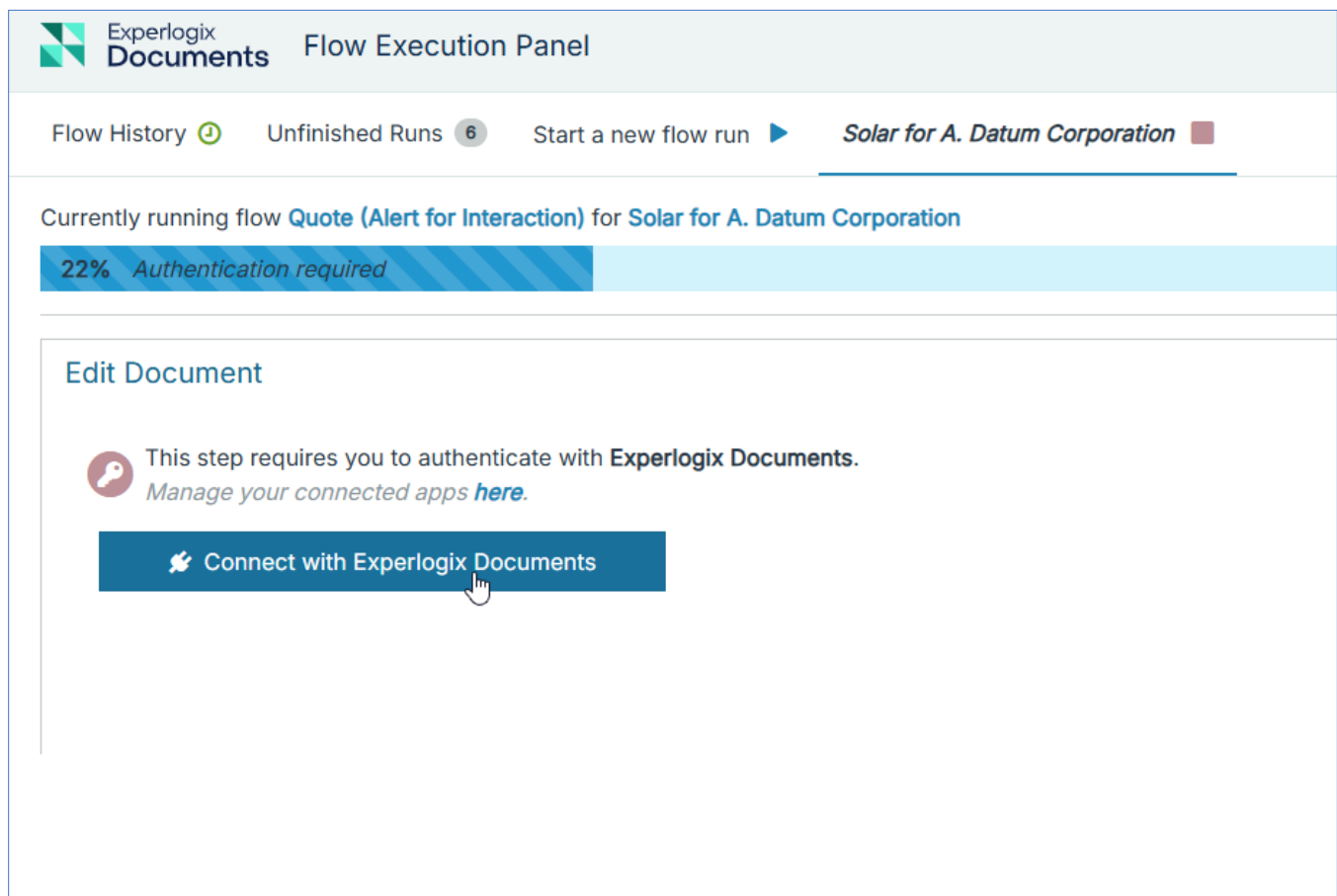- Create Task (Microsoft Dynamics 365 CE)
- Update record

Figure 7 – Invitation to authenticate an individual user during flow execution

When the user authenticates, the flow continues, executing the Microsoft Dynamics 365 CE steps with the authenticated user's identity. If the user does not authenticate, the flow is paused with the status "Authentication needed." At any time, the user can return to the flow execution via Flow Execution Panel or the Notifications panel and resume the flow. Once a user is authenticated to Microsoft Dynamics 365 CE, Smart Flows stores a token that remains valid for a preconfigured number of days.

The system renews the token upon each use, so frequent users will not be requested to log in again. Should the token expire, the user can reconnect during the next flow run that holds one of the steps that require authentication for this connector.

Experlogix Smart Flows Users can manage their personal app authentications in the user profile section of Flow Execution Panel. The *My connected apps* tab of the User settings area lists the connectors that support individual user authentications along with the user's current authentication status. Users can log into a connected app or revoke the current authentication token.
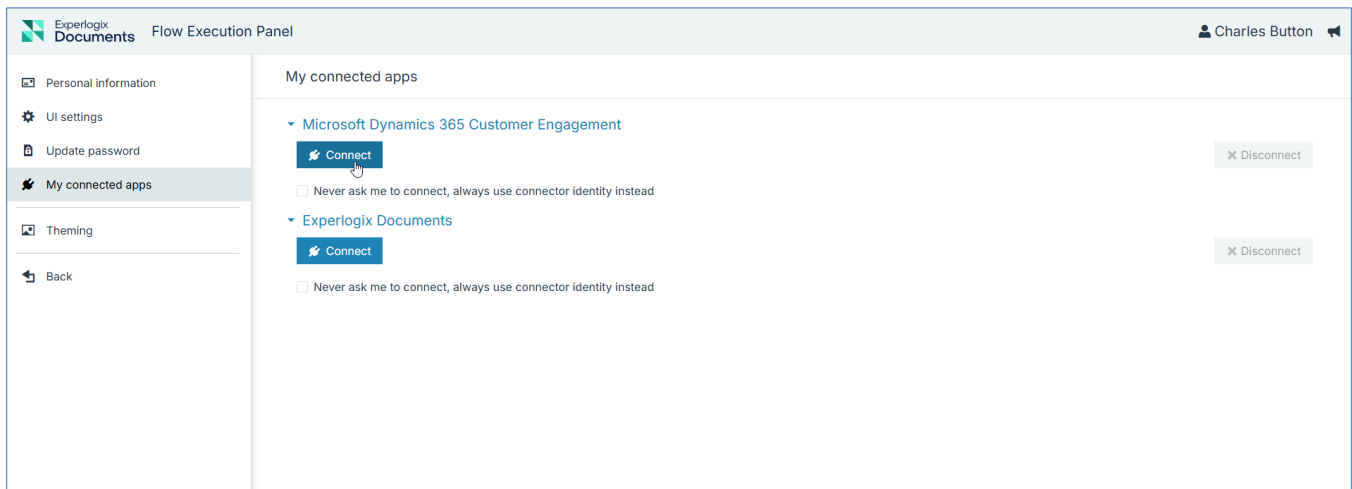

Figure 8 – Individual user settings in Flow Execution Panel where users can manage their app authentications

Administrator Perspective

Experlogix Smart Flows Administrators can enable individual user authentication for their Microsoft Dynamics 365 CE connector in Project Console or switch it off.

- If the option is switched off, the connector behaves like in previous Smart Flows versions, meaning that all data transactions will be carried out under the service user's identity authenticated during connector setup. This service user impersonates the active user, making sure it only accesses data that the active user is entitled to view.
- If the option is switched on, any Microsoft Dynamics 365 CE user can start flow execution (visibility of the Smart Flows menu option is based on the Experlogix Smart Flows security role). The user's individual authentication will be used to execute the steps related to the Microsoft Dynamics 365 CE connector.
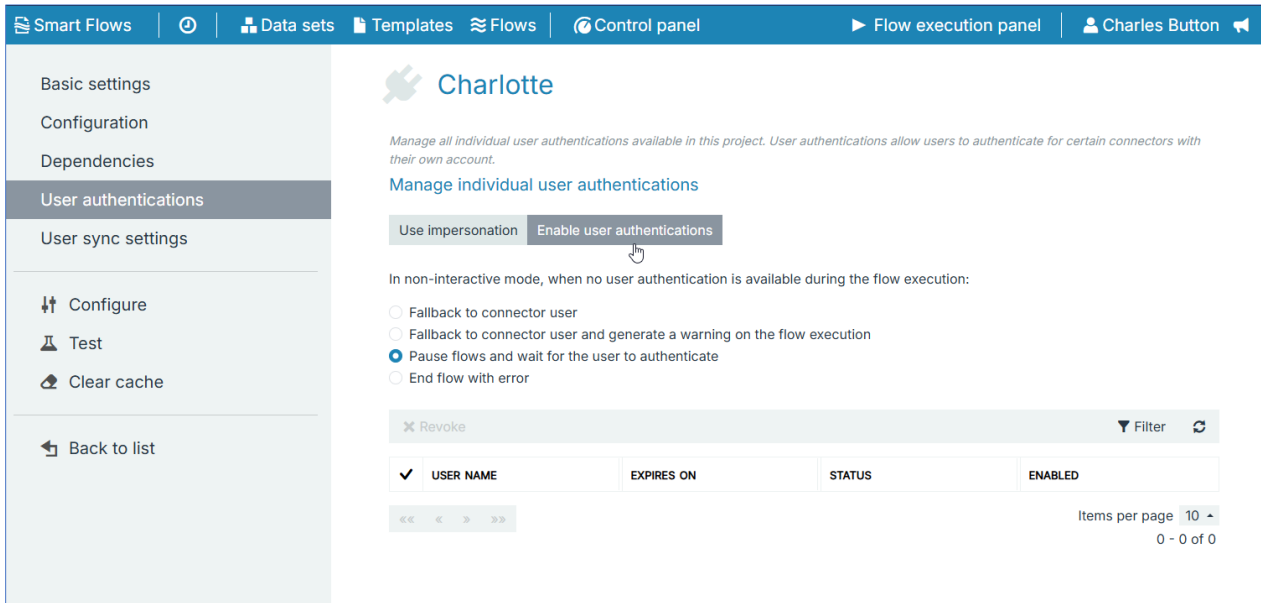
Figure 9 – User authentication settings for a Microsoft Dynamics 365 CE connector in Project Console

Non-interactive Flow Executions (Batch Mode)

At the connector level, admins can define behavior for flow executions in non-interactive mode. Non-interactive flow executions skip all user input and are triggered through the flows/executions/start endpoint of the Experlogix Smart Flows API. Flows that run in a non-interactive mode as a background process cannot ask a user to authenticate in the rare case that the user's authentication token has expired. Administrators can decide on the connector level what needs to happen in that case:

- Fall back to the service user (with or without warning)
- Pause the flow and wait for the user to authenticate via Flow Execution Panel
- End the flow with an error.

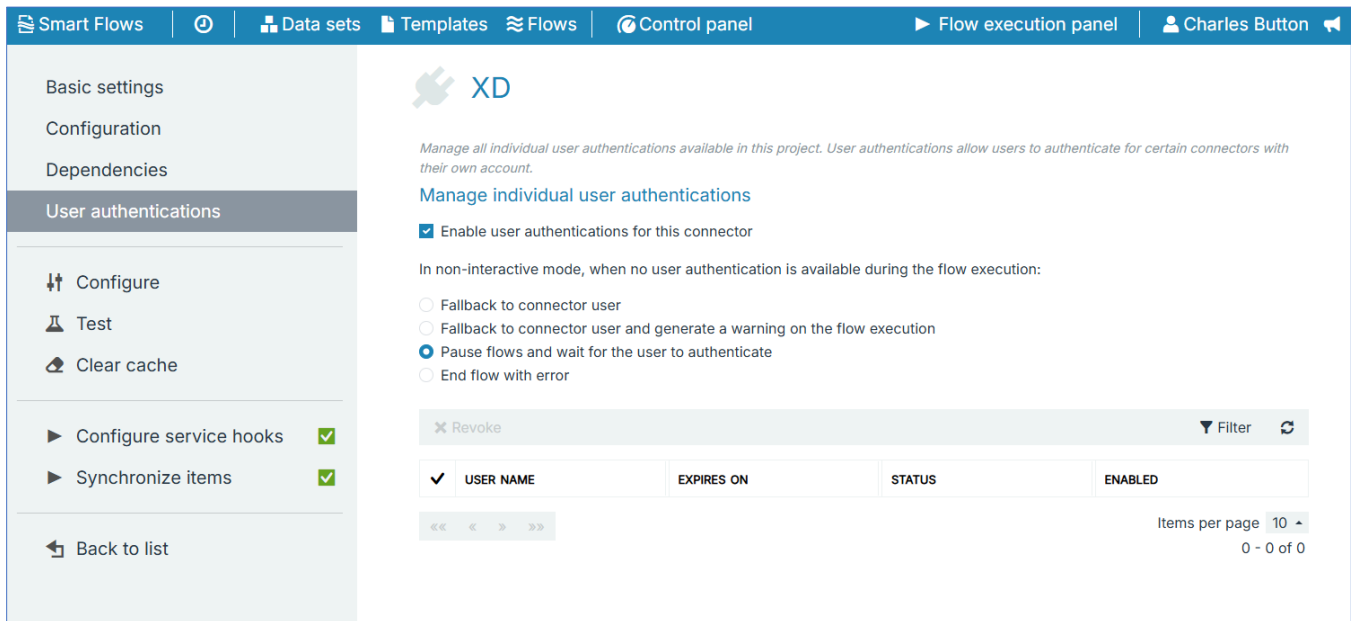# Individual User Authentication for Experlogix Documents Connectors

In the latest Smart Flows release, both Microsoft Dynamics 365 CE connectors and Experlogix Documents connectors support individual user authentication. This means that all flow blocks related to Content Manager use the identity of the active, authenticated Experlogix Document user, not the identity of the connector user.

The flow blocks that make implicit or explicit use of Content Manager are:

- Store in Content Manager
- Edit document
- Review and approve document
- Translate document
- Share document

Like other apps that support individual user authentication, Experlogix Documents will show up in the user settings of Flow Execution Panel. Here, users can see their authentication status for the different apps that interact with Smart Flows.

Administrators can configure settings for non-interactive (batch) processes, which require an admin configuration to run.

Figure 10 – User authentication settings for an Experlogix Documents connector in Project Console

Experlogix Document Automation for Microsoft Dynamics 365 Business Central (Preview)

Experlogix document automation capabilities are now integrated with Microsoft Dynamics 365 Business Central (BC). A new plug-and-play connector leverages Experlogix's Cloud Connect technology to link your Microsoft ERP environment with your Smart Flows project, start flow executions from BC, or use ERP data in flows your users trigger elsewhere.

Experlogix Cloud Connect

Integration has always been key to Experlogix. Across all product lines, Document Automation, Configure Price Quote, and Digital Commerce, Experlogix products are tightly interwoven with the mainstream Microsoft ERP and CRM applications, Salesforce, SAP, and other ecosystems. At the heart of these integrations, Experlogix Cloud Connect technology provides a secure, fast, and reliable connection hub connecting the dots.

For the Microsoft Dynamics 365 Business Central integration, the connector setup imports two solution packages into your BC instance: one Cloud Connect Omni package and a specific extension of that package for Smart Flows.
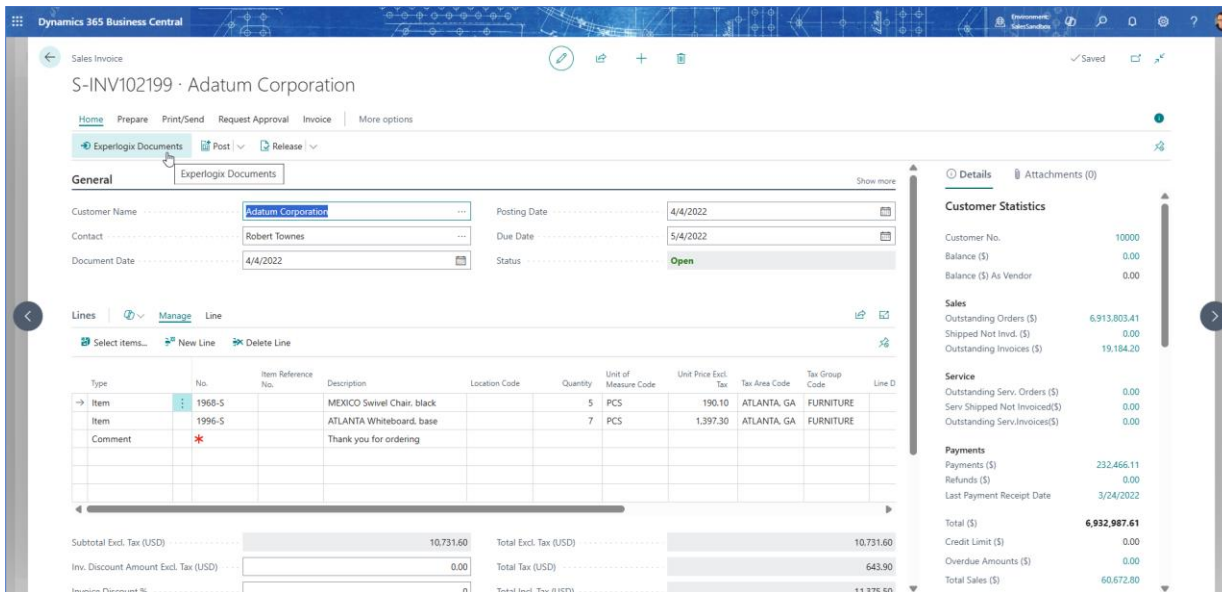

Figure 11 – Experlogix Documents button on a card view in Microsoft Dynamics 365 Business Central

Flow Triggers and Business Central Data Sets

In the preview stage of this new connector, you can trigger flow executions from more than thirty Business Central entities. The familiar Experlogix Documents button to start a flow execution appears on the command bar of the list and card views of these entities. The entities commonly associated with outbound documents, such as the different types of quotes, orders, credit memos, and invoices, have the button.

The full metadata model of Business Central - including but not limited to those thirty entities, is available for you to build Business Central data sets. When associated with templates and flows, designers can map Business Central fields to document templates and flow blocks.
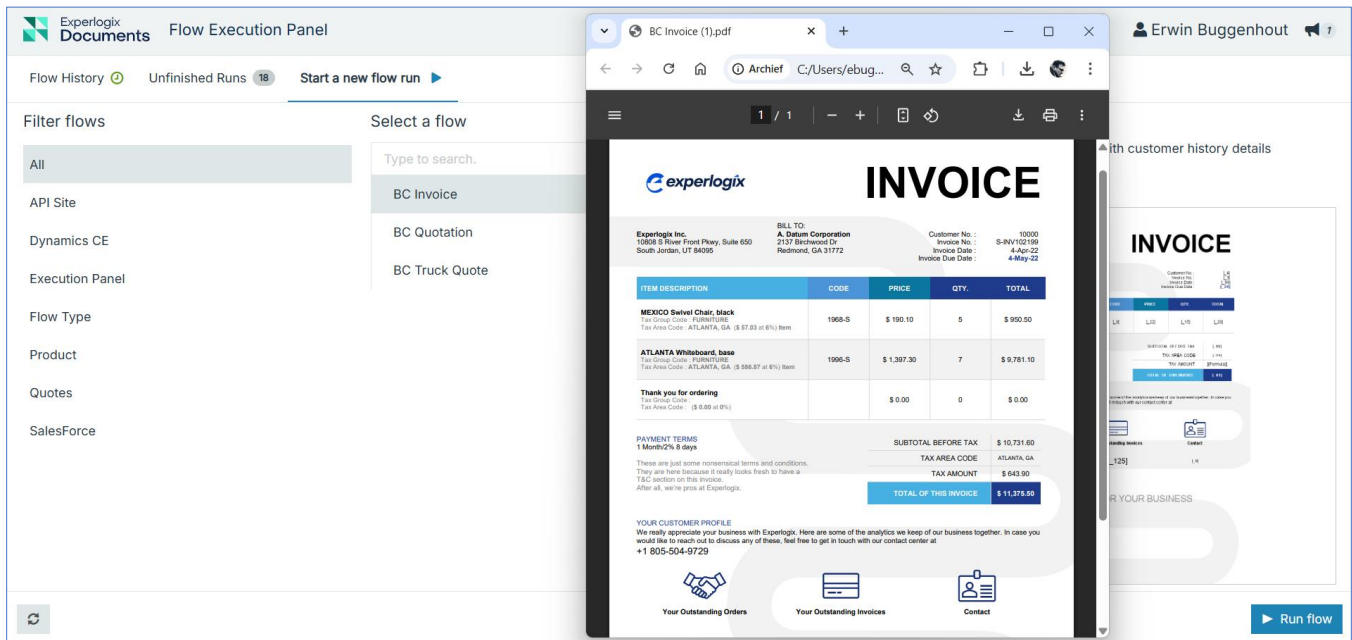

Figure 12 – Flow execution run from the context of a Microsoft Dynamics 365 Business Central record

Additional Capabilities Expected After Preview

After the preview stage, Experlogix Document Automation for Microsoft Dynamics 365 Business Central will be generally available. These features will include:

- Start a flow execution from any entity's list or card view.
- Flow block to attach a document to a Business Central record.
- Flow block to send an email with Microsoft Dynamics 365 Business Central.

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.

- **Identity count versus user count**: New Experlogix Smart Flows projects will take multiple identities into account when counting users. If a user has more than one identity, i.e., the user can log in with more than one login connector, then each of those identities will count as a user consuming a license. In current projects, there will be no change in the user count pattern.
- **Capability to unlock flows stuck in an unfinished state**: Administrators can now unlock flows stuck in an unfinished but not resumable state. Administrators can identify such flow runs in the reporting section and manually take them beyond the exception thrown.

Release Notes and Release Artefacts

- [Experlogix Smart Flows 4.24 Release Notes](#)
- [Experlogix Smart Flows 4.24 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