Experlogix Smart Flows Release Preview Guide

Version 4.20

February 2024

The Experlogix Product Team is excited to announce the general availability of Smart Flows 4.20 and the 0.0.1 preview release of Project "Great White Shark."

The future is now. We are so happy to launch the new version of Experlogix Smart Flows, our intuitive yet comprehensive platform to generate your business documents and automate your document flows.

This release is unique because it gives you a first peek into the future direction of Experlogix's document products. Product innovation and engineering teams have been working for several years to build the next-generation document platform, codenamed "Project Great White Shark."

In Smart Flows 4.20, you can set up a connector to a Great White Shark Preview project and then sync data sets from Great White Shark into your Smart Flows project. Project Great White Shark supports three types of data sets:

Form data sets This is the next-generation web form, combining the capabilities of Smart Flows' native custom data sets and Xpertdoc Portal Smart Flows, but with a more intuitive and comprehensive form building and managing experience.
JSON data sets Make Smart Flows support JSON data with JSON data sets on Project Great White Shark. With this new data set type, you paste JSON or a JSON schema to define the structure of your data, map fields from that structure in a template at design time, and feed a JSON payload as input to a flow at runtime.
XML data sets Comparable to Smart Flows' native schema data sets, but with a convenient code editor to paste and edit XML or XSD to define the structure of your data.

We are thrilled to finally reveal a small first part of Project Great White Shark, albeit just a tip of the fin. With upcoming seasonal releases of Smart Flows, more Great white Shark components will surface. As such, we will gradually and seamlessly switch from our current document automation platform to the next generation.

As always, the new Smart Flows release contains smaller improvements, optimizations, and fixes that reduce the complexity of automating your document flows so you can generate better documents faster.

From all of us here at Experlogix, happy templating!

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Plugin for Project "Great White Shark"

Project Great White Shark is the codename for Experlogix's next-generation document generation and automation product. New capabilities will become available in the upcoming quarters via the Great White Shark connector for Smart Flows. The final commercial name for Project Great White Shark will be announced at the 2024 **Experlogix Elevate** Conference, which takes place in Park City, Utah, United States, June 11-13.

In the first preview version of the connector for Great White Shark, you can register for a Great White Shark preview account with an organization and a project. You can connect your Smart Flows project to that Great White Shark project and unlock form data sets, JSON data sets, and XML data sets for your Smart Flows project.

Please note that we are launching Great White Shark in **Preview** mode. This means that it is intended to give a taste of what is coming soon, but for now, we discourage using Great White Shark data sets for production. We can't guarantee production-level data protection or backward compatibility between versions during the preview phase. The general availability release of the Great White Shark connector is projected for the Smart Flows version 4.22, slated for summer 2024.

The Great White Shark Preview is hosted on our North American Microsoft Azure Cloud.

Why Great White Shark?

As with so many other great stories, Experlogix's recent history is marked by several mergers and acquisitions, bringing so many invaluable business insights, combined decades of technological expertise, and a great hunger to innovate together in one single company. The fastest way to let customers benefit from all that is to build integrations between existing products and a future roadmap together.
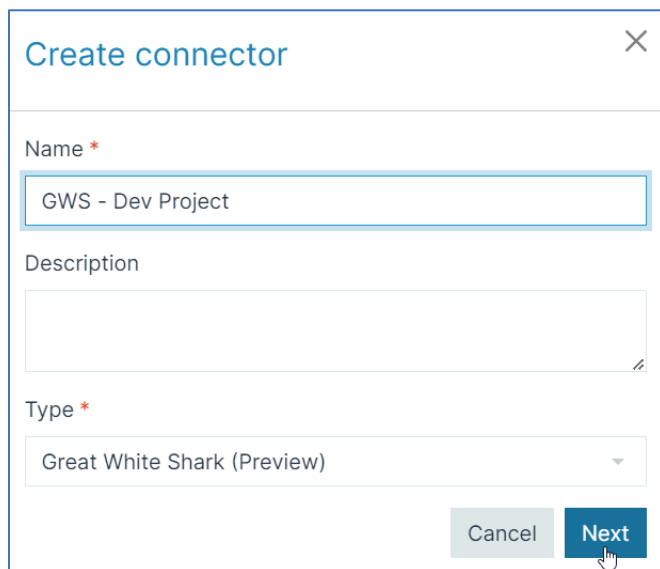
Experlogix has been very effective at creating integrations between its products. For many years, customers have been able to extend Smart Flows with Xpertdoc Portal features. Meanwhile, we have worked below the surface to rethink document generation and automation, and we have been building a unified product that combines the convenience of Smart Flows with the flexibility of Xpertdoc Portal. Project Great White Shark is the culmination of those efforts.

Register for Project Great White Shark

Enroll for a Great White Shark Preview

To enroll in the Preview program for Project Great White Shark, you can register by filling out the form on the Smart Flows connector setup page.

In Project console > Connectors, create a new Great White Shark (Preview) type connector
Submit the form to sign up for a Great White Shark account, providing your name, valid e-mail, and the desired name of your organization and project in Great White Shark.

Figure 1 - Set up of a connector for Project Great White Shark

After the necessary automated and human validation steps, Great White Shark automatically provisions an environment for you. You will receive an e-mail when your environment is ready. We expect this to be within two business days.

A link in the confirmation e-mail takes you to your Great White Shark environment, which consists of an organization and a project.

At the organization level, you can create, update, and remove projects and manage users who will have permissions to do so.
At the project level, you can manage users who can access the active project and manage your project's data sets, templates, and content. In preview mode, only the data sets module has been activated.

Connect your Smart Flows Project and your Great White Shark Project

In the Connector List view in Smart Flows, you can now create a connector to your Great White Shark project. To do so, have your Great White Shark login details handy. The handshake between the projects is based on the OAuth protocol, making it easy to set up, secure, and stable.
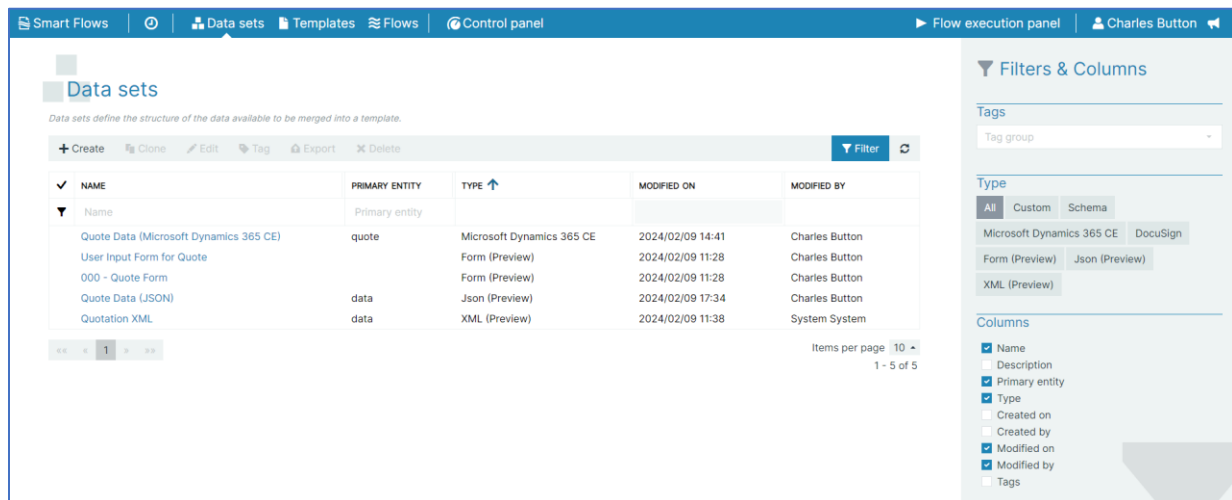

Figure 2 - List view with synced Great White Shark data sets in a Smart Flows project

After the projects are connected, Smart Flows produces the necessary event service hooks into your Great White Shark project to sync all data sets and pick up updates as they happen. After the connector setup is completed, your Smart Flows project is ready to work with the data sets of your connected Great White Shark project.

All data sets of your Great White Shark project are listed in the data sets table of your Smart Flows project. The Create data set dialog in Smart Flows contains three new data set types: Form (Preview), JSON (Preview) and XML (Preview). Flow Builder has updated flow blocks to work with Great White Shark data sets. Template Builder can consume data sets in the connected Great White Shark project. Make sure to upgrade Template Builder to version 4.20.0 or above first.

Form Data Sets

Project Great White Shark offers an effortless, drag-and-drop experience to build web forms. Flow and template designers can use the forms to collect user input during a flow execution and map from fields in templates to populate documents with user-provided data.

The form building experience is intuitive yet comprehensive. Great White Shark forms support any field and design element you would like to include in a form. On top of that, you can define and manage complex front and back-end validation rules and set business logic to show, hide, and fill fields or sections in your form. Forms can have nested and repeatable child forms. The form experience also supports a multi-lingual context, making it very easy to translate all form labels for the convenience of your users.
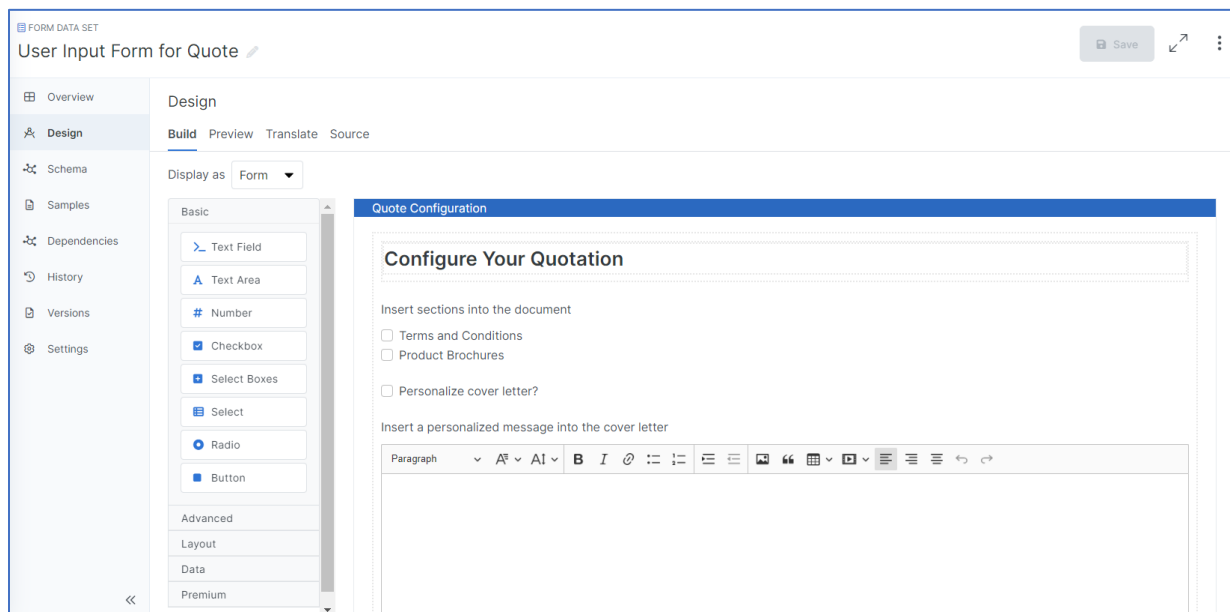

Figure 3 - Great White Shark Form design experience

During design, you can always preview the form you are building. At runtime, your form renders as an embedded form in Flow Execution Panel. Forms can be private, requiring authentication before the user can submit, or public, requiring no authentication to submit.

JSON and XML Data Sets

Project Great White Shark supports both JSON (JavaScript Object Notation) and XML (Extensible Markup Language) formats to describe data. You can start creating JSON and XML data sets in Smart Flows and either upload a file or use the code editor to edit the data set. You can provide a schema (XSD or JSON Schema) or a data sample (XML or JSON).

Template designers can associate templates with Great White Shark data sets. In Template Builder, Great White Shark data sets load in the side panel and behave like any other data set. In Flow Builder, the corresponding flow steps serve a web form to the user or collect a JSON or XML payload at runtime.
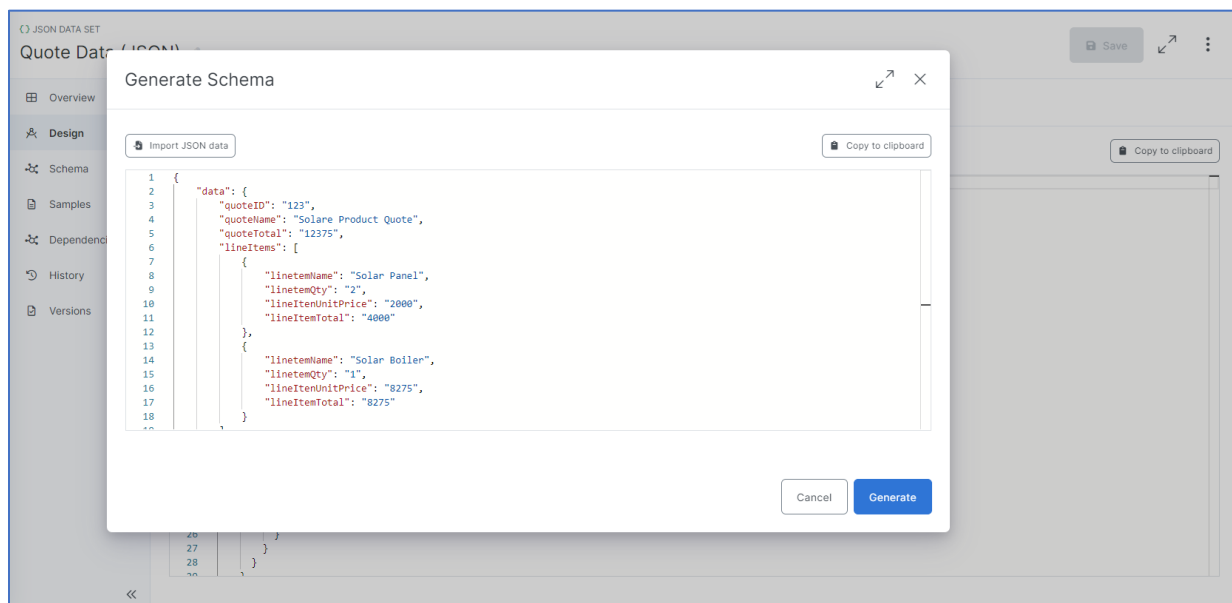

Figure 4 - Generate a JSON data set from JSON with the code editor in Great White Shark.

Limitations During the Preview Stage

During the Preview stage, we would like to discourage using Great White Shark data sets in production. There is no guaranteed protection for data loss when we update the service at this stage. We also reserve the right to update and maintain the service without prior notice. Although set up to be transparent, we don't guarantee service continuity during maintenance tasks. During the preview stage, the service will be hosted on Microsoft Azure in the United States of America. Access to the Great White Shark plugin capabilities is governed by your Smart Flows license and an application property. To maximize your potential to experiment with Great White Shark, this capability will be licensed and available to all Smart Flows public and private cloud tenants that Experlogix deploys as a managed service.

Samples

During the preview stage, samples you create in Great White Shark do not sync with the associated Smart Flows project. We recommend you create samples in Smart Flows, even for Great White Shark data sets.

XML Data Sets based on an XSD File with Multiple Potential Root Elements

Unlike Smart Flows, Project Great White Shark does not require selecting a root element when creating a data set. In one scenario, this could lead to a malfunction of the integration: when you create an XML data set based on a schema definition file with multiple potential root elements. In that case, Smart Flows will not be able to render the data set correctly in Template Builder or Project Console, as the rendering requires a single root element. For this scenario, we recommend creating a schema data set in Smart Flows instead of an XML data set in Great White Shark.

No Template, Flow, or Content Management Features

Project Great White Shark is actively expanding. In the months ahead, more features are planned and will gradually become available to your Smart Flows connected Great White Shark environment.

General availability of the Smart Flows connector to Project Great White Shark is slated for summer 2024, coinciding with the 4.22 release of Smart Flows.

Flow Block to Update a Microsoft Dynamics 365 Customer Engagement Record

The Microsoft Dynamics 365 for Customer Engagement (CE) connector has an extra flow block in Experlogix Smart Flows 4.20. The new Update record flow block empowers you as a flow designer to update a record in the connected Microsoft Dynamics 365 CE instance.

To update records with previous versions of Smart Flows, you could either make an HTTP request to start a Microsoft Power Automate flow or include a step in your flow to kick off a traditional Microsoft Dynamics 365 CE workflow. For straightforward operations like updating one or more

fields on a single record, this can now be achieved directly from the flow without starting an external service.

You can easily configure the new flow block to update a Microsoft Dynamics 365 CE record by associating a Microsoft Dynamics 365 CE data set with a record referenced in the flow and mapping constant or dynamic values to the fields in that data set. At runtime, the system will update those fields.
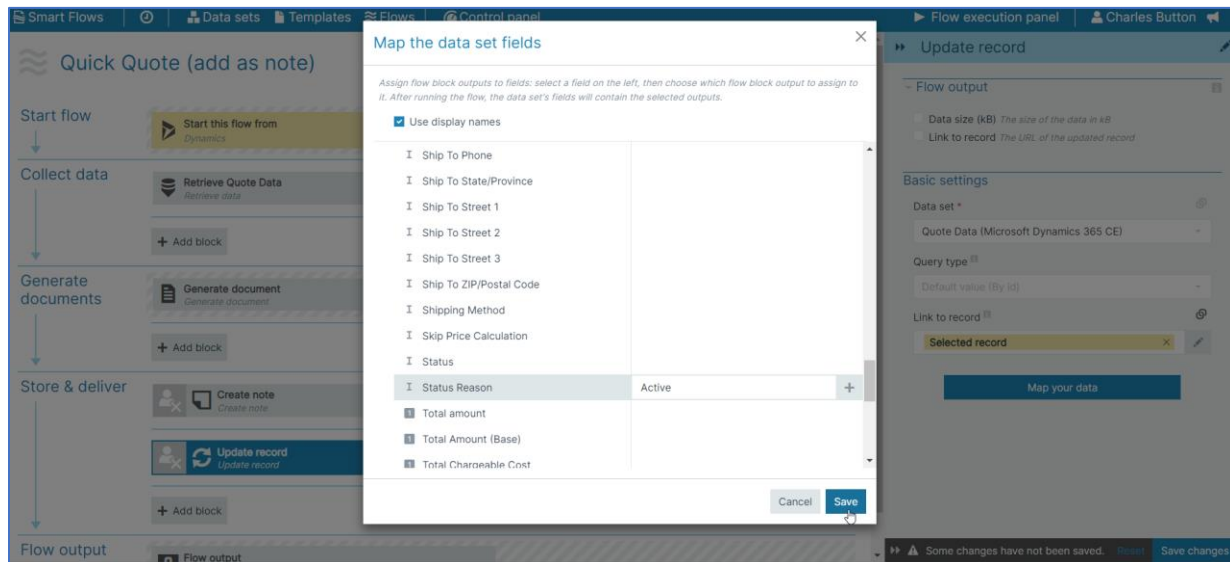

Figure 5 - Update record flow block in Flow Builder

The Update record flow block can update fields of the primary entity of a data set. To update fields from one-to-many related entities, we recommend sending an HTTP request from your flow to start a Microsoft Power Automate flow that updates the relevant Dataverse rows.

Minor Improvements

As always, a new Smart Flows release brings smaller improvements and quality-of-life upgrades. We are happy to list some of those included in the 4.20 release.

- **Edit Data Set Samples with Code Editor**. When editing or creating a sample for a schema data set, an XML data set, or a JSON data set, you can now use a text editor to paste and edit the sample content as an alternative to a file upload.
- **Field's Type Icons in Flow Builder**. When referencing data set fields in Flow Builder, icons indicate each field type, such as a text field, a date/time field, a numerical field, a currency, a pick list (option set), and a true/false field (Boolean). This visual aid helps flow designers select the correct field faster.

- **Collapse the Flow Step Outputs in Flow Builder.** Some of the flow steps have a long list of available outputs. The output section is now collapsable to optimize screen estate on the step configuration side panel.
- **Better support for Multiselect Option Set Fields (Microsoft Dynamics 365 CE) in Conditions.** The 4.20 release of Experlogix Smart Flows supports a "contains" operator for conditions in Flow Builder and Data Set Builder, which is particularly helpful for conditions based on multiselect option sets. The comparison value for conditions with options sets supports both the absolute numerical value of options, and their localized label in the standard language of the connector user.

Release Notes and Release Artefacts

Comprehensive release notes and an overview of downloadable release artefacts are available through the Experlogix knowledge base.

Experlogix Smart Flows 4.20 Release Notes
Experlogix Smart Flows 4.20 Release Artefacts

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 are online at www.experlogix.com.