

Xpertdoc Smart Flows 4.13

Release Preview Guide

March 2022

Introduction

The Xpertdoc Product Team is excited to announce the general availability of Xpertdoc Smart Flows 4.13 in March 2022. This Release Preview Guide walks you through the hero features this latest update adds to Xpertdoc's low-code document generation and document automation software.

The 4.13 release of Xpertdoc Smart Flows deepens the integration of your document flow automation platform with the industry-leading electronic signature software of DocuSign. You can add DocuSign form fields in Xpertdoc Template Builder and capture the input from DocuSign envelope recipients for further processing in your document or data flows.

The DocuSign form field support addresses scenarios where there is a need for the recipient(s) of the envelope to provide additional information. For instance, think of an application form where the recipient verifies, completes, and signs off information. Or, in a sales context, imagine a quotation where your potential customer ticks boxes to add extras to your base offer before confirming a purchase on the dotted line. You could also generate a sales quote with alternative proposals and let your potential customer select which one to sign.

Another highlight in the 4.13 release of Xpertdoc Smart Flows is the capability to combine multiple log-in connectors on the same project. You can now connect your project to an instance of Microsoft Dynamics 365 CE and an instance of Salesforce.com simultaneously. This dual connection lets you sync users, build data sets and templates and start flows from both systems. With new integrations coming soon, this feature will help you leverage Xpertdoc Smart Flows to engage with stakeholders via a uniform process across all your record systems.

The Xpertdoc product and engineering teams' continuous investment in security has prevented exposure to log4j 2 related threats. We are also continuing our efforts to guarantee compatibility with the latest two releases of Microsoft Dynamics 365 CE and Sugar and the latest version of Salesforce.com.

Should you need support, please [reach out](#) to our team!

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Support for DocuSign Form Fields

A much-anticipated feature is the capability to include DocuSign form fields in Xpertdoc templates. In version 4.13 of Xpertdoc Smart Flows, you can extend your templates with all form fields DocuSign supports. You can create an interactive DocuSign form that one or more recipients can fill out during the e-signing ceremony.

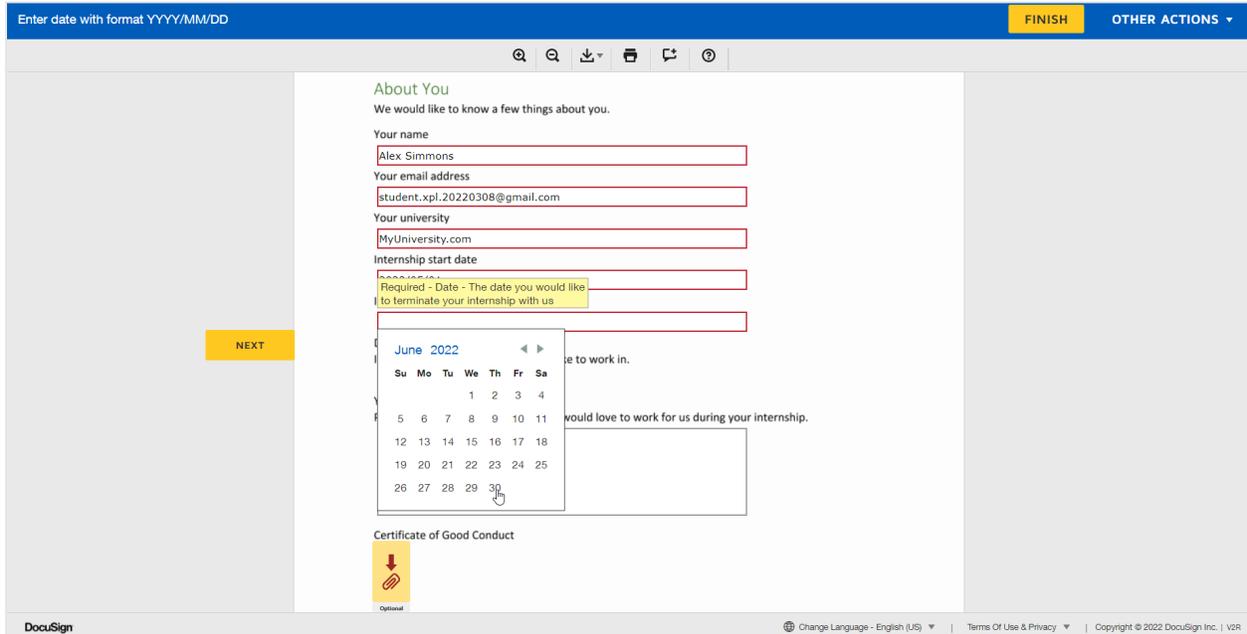


Figure 1 Example form created using DocuSign fields

DocuSign Data Sets

To insert DocuSign form fields in your Xpertdoc Template Builder templates, you first need a DocuSign connector in your Xpertdoc Smart Flows project. Once you have that in place, you will be able to create data sets of the type DocuSign. This new data set allows you to make DocuSign form fields available in your Xpertdoc Template Builder templates. Only one DocuSign data set can be associated with a template in the initial implementation of the feature.

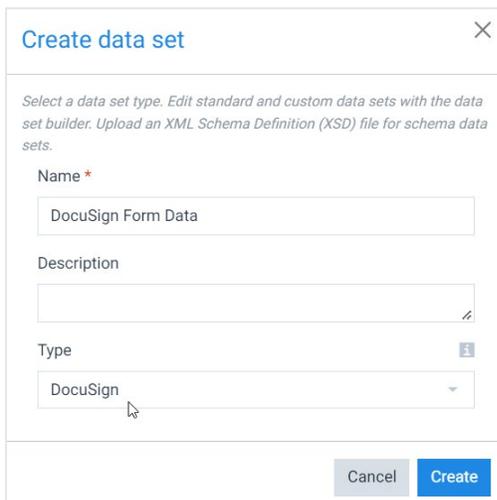


Figure 2 Creating a DocuSign data set

DocuSign Field Types

The experience of building a DocuSign data set is similar to creating custom data sets. You can create a variety of field types which give you more flexibility and freedom in gathering important and precise information about recipients.

Approve	Inserts a button in the form to explicitly approve a section of the document. When clicked, the system places a checkmark on the button. You can control the label of the Approve button via the Data set builder.
Attachment	Allows recipients to upload attachments. The system includes attachments in the DocuSign envelope and supports a wide variety of file formats . Uploaded documents can also be retrieved separately by a Fetch document block in an advanced flow.
Checkbox	Inserts a checkbox in the template that can be checked or unchecked by the associated recipient(s). Checkboxes can be associated with a checkbox group, allowing you to validate whether recipient(s) checks one or more checkboxes.
Date Signed	Adds a field that automatically populates the date and time the associated recipient signs the envelope.
Decline	Like the Approve field, the Decline field adds a button to the document in the envelope. When clicked, the system places a checkmark in the button and voids the DocuSign for the associated recipient. You can control the label on the button via the Data set builder.
Drawing	Inserts a drawing canvas into the document in the envelope, so the associated recipient can draw something.
Dropdown	Adds a customizable list of items from which the associated recipient can only select one option. Designers can edit Dropdown fields via the Data set builder.
Initial	Allows the associated recipient to place their initials in the placeholder.
Note	Inserts a textual note into the document. A note is a static text field that the associated recipient(s) can expand or collapse.
Radio	This field type allows you to insert a radio button. Radios can be associated with a radio group, allowing you to validate that no more than one radio button in the group has been checked.
Recipient company	Inserts a placeholder for the company name of the associated recipient.
Recipient email	Inserts a placeholder for the email of the associated recipient.
Recipient name	Inserts a placeholder for the name of the associated recipient. You can mark a name field as first name, last name and full name.

Signature	Inserts a placeholder for the signature of the associated recipient.
Text	This field inserts a text input control. There are several pre-set validation patterns for text controls: date, email, letters, numbers, social security number, ZIP, ZIP 5-4. You can also create a custom validation pattern based on a regular expression.
Title	Inserts a placeholder for the title of the associated recipient.

Showing or hiding fields based on the value of another field, is something we do not support at this time. Please follow our [release overviews](#) on the Xpertdoc knowledge base for updates on this and more improvements.

Recipients in Xpertdoc Template Builder

The 4.13 version of Xpertdoc Template Builder comes with a new DocuSign ribbon group. It is loaded if your associated Xpertdoc Smart Flows project runs a 4.13 version of the server component and is licensed to connect with DocuSign. The DocuSign ribbon group has two controls, one to insert form fields into your templates and one to manage recipients.

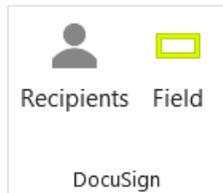


Figure 3 Xpertdoc Template Builder- DocuSign ribbon group

Managing recipients on the template level saves you the hassle of including the recipient’s name, e-mail, and language on every DocuSign placeholder in your template. Instead, you define recipients once in your template. Then you can associate a recipient with each of the mappings with a simple lookup. You can mark one of the recipients as default. Designers can also assign the recipients’ signing order and access codes at the template level.

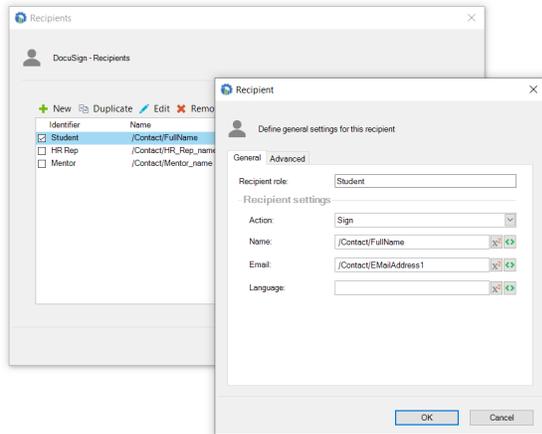


Figure 4 Assigning a Recipient profile

DocuSign Form Field Mappings

The Field control in the DocuSign ribbon group in Xpertdoc Template Builder 4.13 brings up the new mapping dialog for DocuSign form field insertions. The system renders mappings as form fields in the DocuSign envelope when mapping via the Fields button.

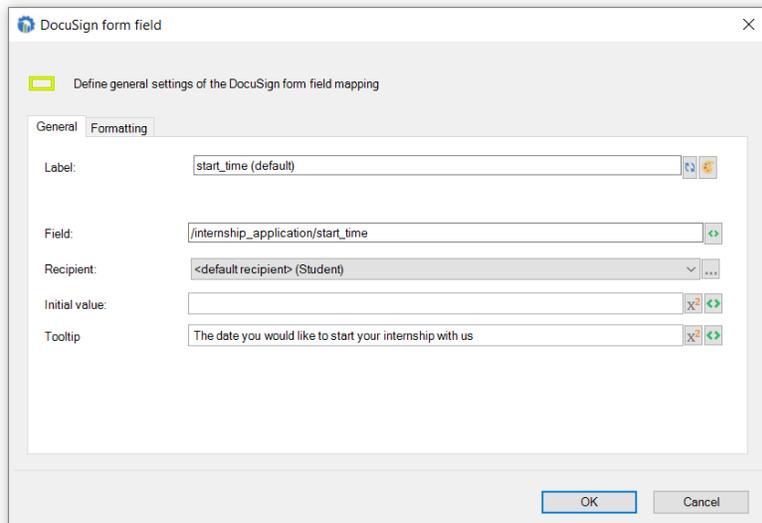


Figure 5 Mapping via the Fields button

A DocuSign form field mapping must be associated with a field from a DocuSign data set and must be assigned to a recipient. Optionally you can define the initial value of the field and a tooltip. All of those parameters can be either statistic values or field references. For example, you can present contacts with addresses or other information about them in your systems of record and ask them to validate, update and confirm this data.

In the formatting tab of the form field dialog, you can set the dimensions and the alignment of the placeholder. Please remember that DocuSign renders interactive elements in a layer on top of the generated document. That means that the document content will not reflow around the DocuSign elements, so you'll have to consider that while designing.

DocuSign form fields can be part of a conditional block in a template. However, the condition cannot use variables from a DocuSign data set used for form field mapping in the active template. Smart Flows cannot use DocuSign form fields in loops in the current iteration.

Retrieval of Submitted Values in a Flow

We have extended the Send to DocuSign flow block with an option to retrieve the data submitted by the recipient(s). After the signing ceremony, the submitted values are available as a data set output of the Send to DocuSign flow block. Subsequent flow blocks can then use these values as an input.

In a Microsoft Dynamics CE context, a use case for the data retrieval could be that after a flow completes a DocuSign envelope, it triggers a Power Automate flow. The Power Automate flow passes the submitted values back to Microsoft Dynamics 365 CE. It creates or updates one or more records with the information provided by the envelope's recipient(s). In general, any subsequent flow step can process these provided values, for instance, to generate a new document or send an email that reports provided values. A Fetch flow block could retrieve a recipient's attachment from the DocuSign envelope and store it in Xpertdoc Content Manager, Microsoft SharePoint, on a file server or any other storage location

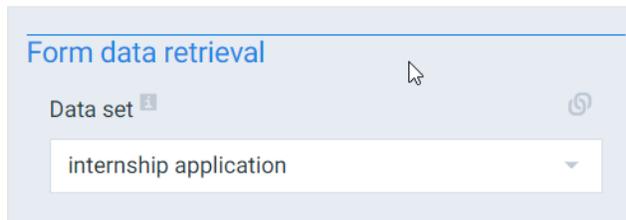


Figure 6 Example Fetch flow block

Backward Compatibility

To ensure your existing templates with DocuSign signature placeholders continue to work, Xpertdoc Template Builder still supports the classic e-signature process. Using the classic process, designers add signature placeholders that can be created from any field mapping if there is no DocuSign data set associated with the template. You can also still use this mechanism when building new templates. Still, we recommend using DocuSign data sets to use predefined recipients and get access to the broad range of supported form fields.

Multiple Log-in Connectors

One of the main advantages of Xpertdoc Smart Flows is its tight integration with your record systems, like Microsoft Dynamics 365 for Customer Engagement, Salesforce.com, or Sugar. Admins can sync users of those host systems into the Xpertdoc Smart Flows user table if they have an Xpertdoc Smart Flows role in the host system. After that, they can log into the flow execution panel and the project console with their host system credentials.

As from version 4.13, an Xpertdoc Smart Flows project can sync users from more than one host system. Although few companies in the Xpertdoc ecosystem have more than one CRM system, we expect this feature will gain importance as new integrations with other record systems will be shipped soon.

Microsoft AppSource Listing

As from version 4.13 Xpertdoc Smart Flows plugin app for Microsoft Dynamics 365 CE is available for download via Microsoft AppSource, Microsoft's online store for business apps. The Xpertdoc Smart Flows AppSource package lets you load the plugin application directly into your Microsoft Dynamics 365 for Customer Engagement instance. You will need an Xpertdoc Smart Flows project with a full or trial subscription to use it.

Before being posted on the AppSource, third-party apps are scanned thoroughly for defects, vulnerabilities, and imperfections. Xpertdoc Smart Flows 4.13 has passed that scan with no significant issue reported.

Minor Improvements

Mitigation of Log4j Vulnerability

Following changes introduced in 4.12.x patch releases, Xpertdoc Smart Flows 4.13 is not vulnerable to any potential issues with the log4j logging library. In the first half of December 2021, Chen Zhoajun identified the vulnerability of the popular log4j (version 2) library. Log4j is a component that many Java applications use for logging functionality. Bad actors could exploit the vulnerability for Remote Code Execution (RCE). Needless to say, a severe risk like this on a prevalent library caused quite a shockwave in the Java world.

Xpertdoc Smart Flows does not use log4j 2 directly but uses another component called Spring Boot that has a dependency on log4j 2. The current version of log4j used in Smart Flows' Spring Boot component is 2.17. This version no longer contains the vulnerability.

Older versions of Xpertdoc Smart Flows may contain a version of the log4j 2 library that has the vulnerability. However, Smart Flows does not use Log4j2 as the default logging system in Spring Boot. According to our [information](#), that prevents the vulnerability to be exploited for RCE. Our hosted environments run on Java 11, which seems to be less impacted than earlier Java versions. Our recommended software prerequisites also advise using Java versions that are in the safe zone for on-premises deployments of the Xpertdoc Smart Flows software.

Based on our information, there has never been any risk that Xpertdoc Smart Flows environments could fall victim to the exploitation of any log4j 2 related vulnerability. Nevertheless, we recommend updating to a version of Xpertdoc Smart Flows 4.12.4 or higher.

All other Xpertdoc products are not using log4j version 2.

About Xpertdoc Smart Flows

The Xpertdoc document generation and document automation software empowers companies to simplify, optimize and automate consistent document processes.

- Businesses can leverage a single platform with robust and user-friendly features that increase the speed of adoption.
- Teams can create simple or complex document templates, capture customer data, and store and manage enterprise content.
- Users can increase productivity and drive the business forward by generating documents in batches or automated flows and sending them for electronic signatures.