

Release Preview

Fall 2026



Experlogix Smart Flows 4.29

Experlogix Documents 26.9

Foreword

The Fall 2026 release is a milestone release for Experlogix Document Automation. After an extensive preview period and real-world customer validation, Experlogix Documents reaches General Availability, and with it comes a formal commitment to backward compatibility that lets organizations build and scale document automation with confidence. Alongside it, Experlogix Smart Flows 4.29 continues to close the distance between the two platforms, so that what your users experience is one document automation solution rather than two products that happen to be connected.

Governance is the second theme of this release. Experlogix Documents now lets organizations classify every project explicitly as Production or Non-Production, giving teams a safe, watermarked environment for development, testing, training, and user acceptance testing that does not consume licensed DPUs, and giving administrators a clear view of their entitlements.

Integration between Smart Flows and Experlogix Documents takes a significant step forward. Users created in a Smart Flows project can be invited automatically to the connected Experlogix Documents project, and existing users can be invited in bulk from the Control Panel. On the runtime side, eligible web forms can now be completed inside an active Flow execution without a separate authentication prompt, removing one of the most visible points of friction in guided processes.

Smart Flows also extends its eInvoicing coverage to Microsoft Dynamics 365 Business Central, applying the same UBL-based, schema-reduction approach already available for Finance and Operations. On the Experlogix Documents side, Project-Level Field Formatting introduces centrally managed, language-aware formatting standards that are applied automatically as designers map fields. On the overlap between the products, dynamic web form theming allows a single web form to adapt its appearance to the customer, the process, or the user in the context of a flow execution.

Rounding out the release is a broad set of quality-of-life improvements across reporting, import and export, connectors, and the flow designer. Together, these changes make the platform more unified and more pleasant to work in every day.

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General Availability of Experlogix Documents

Experlogix Documents enters General Availability with the maturity needed for production document automation. The preview phase helped shape the platform through customer feedback, performance tuning, usability refinements, and operational hardening. With this release, organizations can move from controlled adoption to business-critical deployment, supported by long-term product commitments and a formal backward compatibility guarantee.

Benefits

General Availability marks the transition of Experlogix Documents from an early-adoption platform to a fully supported production solution. You can now deploy the platform for mission-critical document processes knowing that future releases will prioritize platform

stability and predictable upgrades. The preview period provided valuable insights that helped optimize performance, reliability, and overall user experience, so you can benefit from a platform that has been validated across a broad range of deployment scenarios.

This release also introduces a formal commitment to backward compatibility. Going forward, configurations, templates, integrations, and automated processes built on Experlogix Documents are protected by compatibility guarantees that reduce upgrade risk and simplify long-term adoption.

Production and Non-Production Projects

Not every project within your organization serves the same purpose. Some projects support live, customer-facing document generation, while others are used to design, test, validate, train, or prepare future solutions. This release introduces explicit Production and Non-Production project classifications in Experlogix Documents, giving you clearer licensing governance, lifecycle support and more predictable consumption of Document Processing Units (DPU).

Benefits

Project types help you separate business operations from development and testing activities. Production projects generate final business documents without watermarks and contribute to licensed DPU consumption counts. Non-Production projects provide a safe environment for experimentation, configuration, validation, training, and user acceptance testing, generating watermarked output that does not consume DPUs.

Administrators gain greater visibility into their licensing entitlements through the Organization Settings page, where the number of Production and Non-Production projects included in the subscription is shown directly. By differentiating clearly between production and non-production usage, you can control costs while encouraging teams to validate data sets, templates and content before moving solutions into live operation.

Typical Use Cases

- Create a dedicated non-production project for template development and testing
- Conduct user acceptance testing without consuming licensed DPUs
- Train business users with realistic but clearly watermarked document output
- Operate customer-facing document generation in a Production project with full-quality output
- Track Production project entitlements from a centralized licensing view

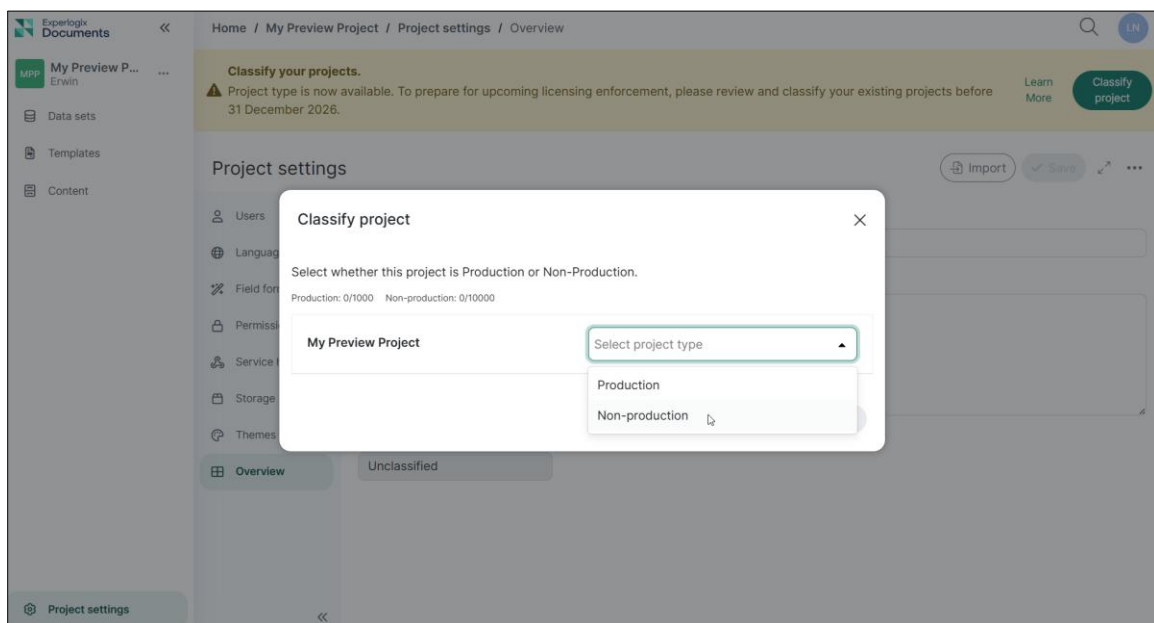


Feature Takeaways

- Explicit project classification: Each project is designated as either Production or Non-Production, providing clear governance over how the project is intended to be used, with the project type visible and filterable in the project lists.
- Production projects: Generate non-watermarked output suitable for business operations. Activity in these projects contributes to the organization's DPU consumption.
- Non-Production projects: Generate watermarked output and contribute less to DPU consumption counts, making them ideal for development, testing, training, and validation.
- License visibility: Organization administrators can view the number of Production and Non-Production projects included in their license directly from the Organization Settings licensing page.

Important Action Point: One-time Project Classification

Organization administrators are invited to classify their existing Experlogix Documents projects. Because the classification has licensing implications, the selection is permanent and cannot be changed after it has been saved.



A More Unified Document Automation Experience

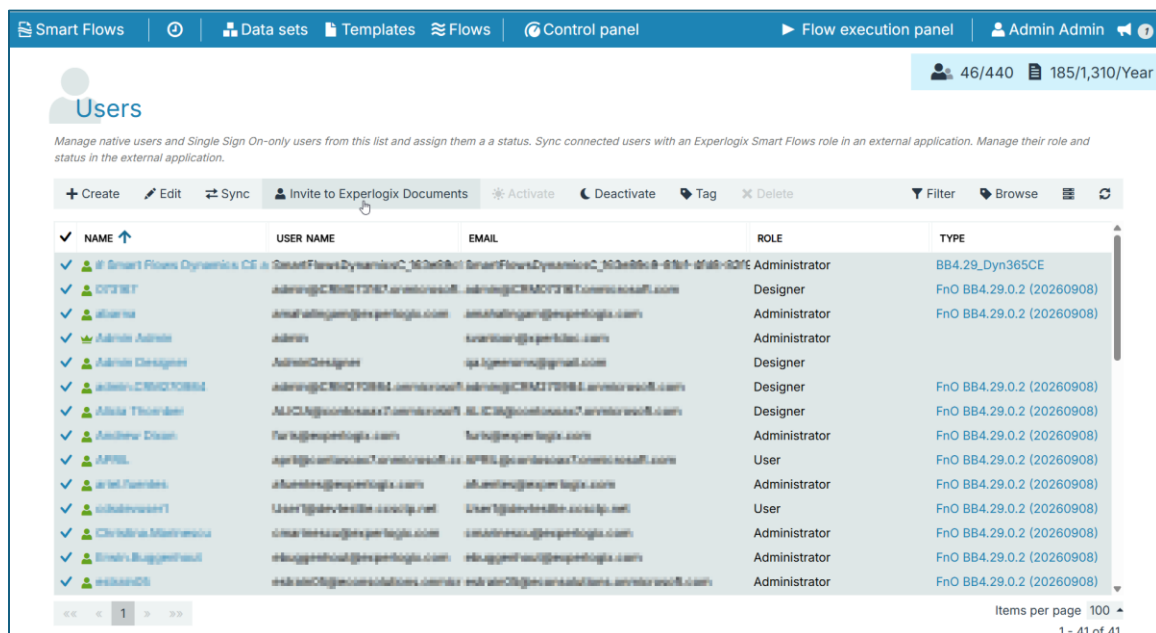
The Fall 2026 release continues to reduce the practical distance between Experlogix Smart Flows and Experlogix Documents. Instead of asking administrators and users to manage

separate experiences, this release focuses on those moments where connected products should feel seamless: provisioning users, completing forms, and carrying a process forward without unnecessary interruptions.

Streamlined User Provisioning in Connected Projects

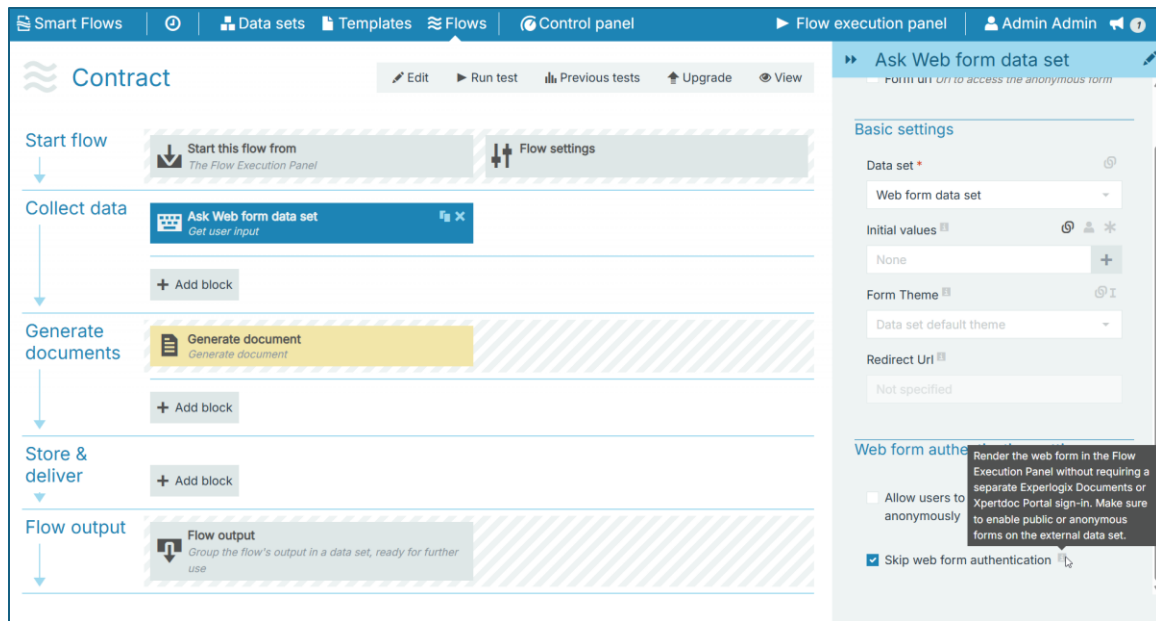
When a new user is created in a Smart Flows project that has a configured Experlogix Documents connector, Smart Flows can automatically invite that user to the connected Experlogix Documents project. Administrators can also perform bulk invitations for existing Smart Flows users directly from the User Management view in the Smart Flows Control Panel.

Managing users across multiple products creates unnecessary administrative overhead. Initiating user creation in Experlogix Documents from Smart Flows removes the need to invite users one by one through separate administration interfaces, and bulk invitation makes it practical to provision large groups at once.



Seamless Web Form Access in the Flow Execution Panel

Web forms are most effective when they fit naturally into the process around them. With Smart Flows 4.29, public web forms from Experlogix Documents and Xpertdoc Portal can skip user authentication in the Flow Execution Panel. Logged-in Smart Flows users can complete and submit their forms without a separate authentication prompt for Experlogix Documents or Xpertdoc Portal.



End-to-End eInvoicing for Microsoft Dynamics 365 Business Central

Electronic invoicing requirements continue to expand across regions, trading networks, and industries. Smart Flows 4.29 brings end-to-end eInvoicing support to Microsoft Dynamics 365 Business Central, allowing you to retrieve invoice data, shape it through reduced eInvoicing data sets (UBL), and produce compliant electronic invoice formats from a single standards-based flow design.

Benefits

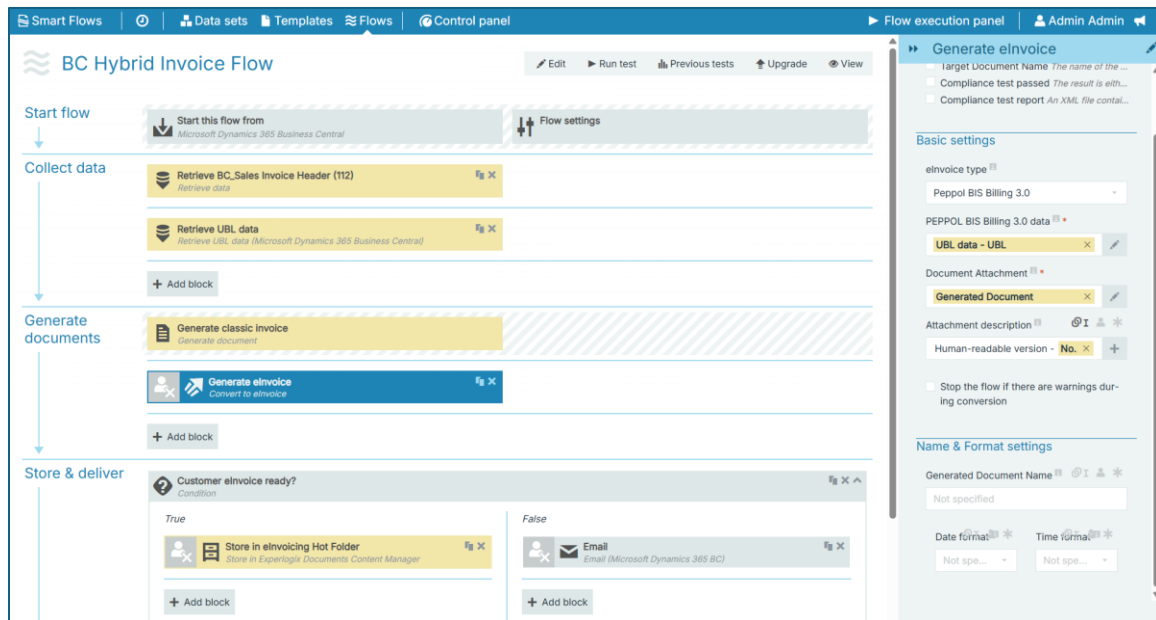
As governments and trading partners increasingly require structured electronic invoices, organizations need a reliable way to generate compliant eInvoices without building and maintaining custom integrations. Smart Flows provides a standards-based approach that creates electronic invoices directly from Business Central data.

The solution provides a no-code approach to eInvoice schema-compliant data collection from Microsoft Business Central and a single foundation to produce both PEPPOL BIS 3.0 and ZUGFeRD eInvoices. This means that you can now support customers with varying invoice format requirements within a single flow that starts with the same invoice data source or upgrade your traditional invoicing flows to support eInvoicing.

If you require embedded human-readable presentations of electronic invoices or you need to support hybrid scenarios where some customers still receive traditional invoices, Smart



Flows has the blocks to automate these scenarios without coding, ready to be called from where your data lives, either Microsoft Dynamics 365 Business Central or Finance and Operations.



Typical Use Cases

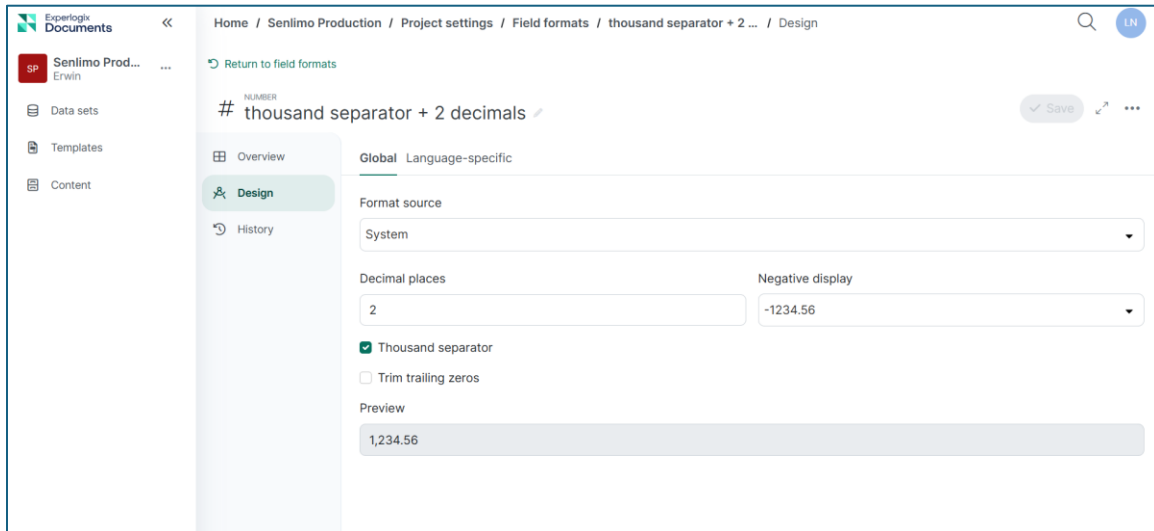
- Generate eInvoices directly from Business Central posted sales invoices
- Generate multiple eInvoice formats, such as PEPPOL BIS 3.0 and ZUGFeRD, from a single source of invoice data
- Generate and embed a human-readable version of your eInvoices

Project-Level Field Formatting for Fillable PDF Templates

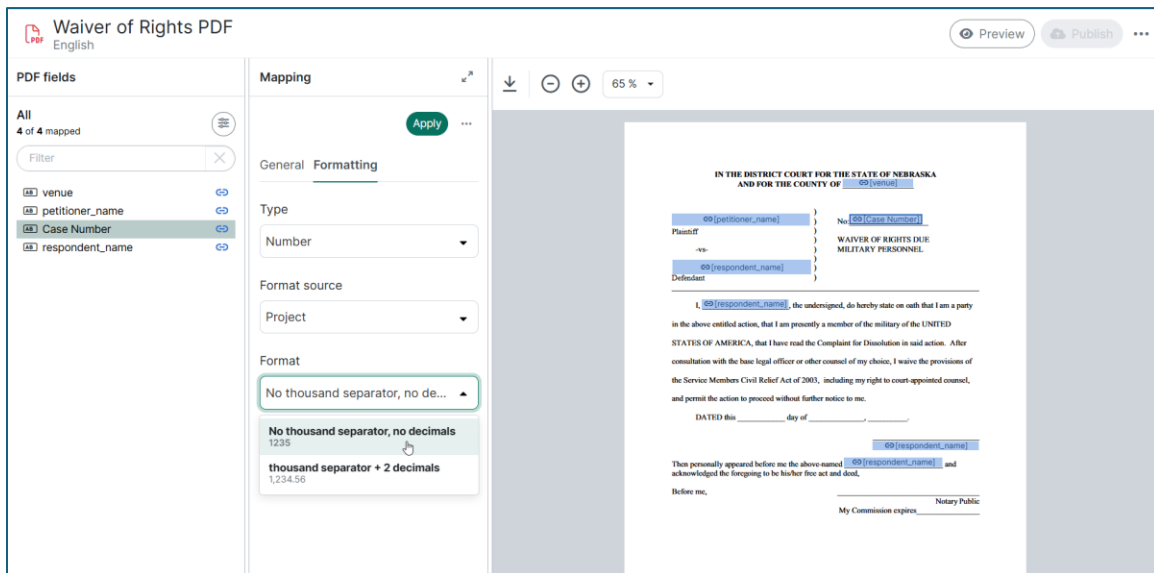
For template designers, repeatedly configuring date, number, currency, and other formatting on every individual field mapping can be one of the most time-consuming parts of template setup. Project-Level Field Formatting centralizes formatting presets at project level, so designers can apply shared standards while mapping fields and rely on defaults where the data type is recognized. The result is less repetitive setup work and more consistent generated documents across the full template library.

In Experlogix Documents, designers can now create formatting presets for template mappings in the Project Settings section. Each format has a type, such as date/time or

number, and a configuration that is easy to define. Formats can also include variants for the languages supported by the project. These variants can either follow the main format configuration or use language-specific settings. For each field type, one format can be set as the default.



When template contributors design fillable PDF templates, mappings are preformatted without any configuration required at the mapping level. The system detects the field types it discovers in the PDF template and automatically applies the project default formatting for those field types to the corresponding mappings. If a mapping needs non-default formatting, the designer can customize the formatting configuration for that specific mapping. This reduces manual formatting work to only the mappings that deviate from the default.



An additional benefit of this feature is that formatting can be managed centrally. If a formatting requirement changes or a language is added to a project, field mappings in templates across the project can be updated at once by updating the project-level formats.

Important Note: Export-Import and Experlogix Documents Project-Level Formatting

In this release, Smart Flows export-import patterns do not yet resolve project-level field formats. To ensure imported template formats work correctly in the destination project, [import the template separately in Experlogix Documents](#).

Dynamic Web Form Theming

A single web form often needs to serve more than one audience, brand, or business context. Dynamic web form theming lets flow designers select a theme directly or resolve it from the output of an earlier flow step. This allows one form definition to adapt its appearance at runtime, reducing duplication while delivering a more relevant visual experience for each process.

Flow Builder's Get User Input block now includes a theme selection control for Experlogix Documents web form data sets. Designers can choose a fixed theme from the available options or determine the theme dynamically from collected data values or the output of an earlier flow block.

The screenshot shows the 'Web Form' configuration panel in Flow Builder. The panel has a blue header with a double arrow icon and a pencil icon. Below the header, there is a 'Flow output' section with a dropdown arrow and a checkbox labeled 'Form url' with the text 'Url to access the anonymous form'. The 'Basic settings' section includes a 'Data set' dropdown menu with 'Web form data set' selected, an 'Initial values' field with 'None' and a plus icon, and a 'Form Theme' dropdown menu. The 'Form Theme' dropdown is open, showing three options: 'Data set default theme', 'Premier Brand', and 'Standard Brand'. The 'Premier Brand' option is highlighted. Below the 'Form Theme' section, there is a section for 'Web form authentication settings'.



Typical Use Cases

- Apply customer-specific branding based on account or customer profile information
- Display different color schemes for various business units, products, or departments
- Use distinct visual identities for different process types or workflow stages
- Automatically apply high-contrast themes for users with accessibility preferences

Minor Improvements

As always, the release brings a long list of smaller enhancements and quality-of-life upgrades. The selection below is representative rather than exhaustive; the full set is described in the release notes.

Experlogix Smart Flows

- Tag-based flow visibility: Access to flows can be restricted based on a user's regular and system tags, and tag browsing has been improved throughout the application.
- User experience optimizations for the Flow Execution Panel: Users can now pin flows as favorites. Pinned flows appear at the top of the list on the flow selection page of the Flow Execution Panel. Also, categorization tags that have no associated flows no longer show in the browsing navigation of the flow selection page.
- Data ID output for Retrieve Data blocks: The Retrieve block now exposes the Data ID as an output, so it can be referenced later in the flow.
- Support for array resolution in email flow blocks: The To, CC and BCC fields of email flow blocks now accept comma-separated lists which will be resolved to multiple recipients at runtime.
- Import and export improvements: The archive import preview shows the structured contents of the ZIP before importing, and the Overwrite option now defaults to "on".
- Flow Builder experience enhancements: Search, sort and filter in data sets in Flow Builder, inline editing for flow names and editor titles and descriptions, and warning-icon tooltips that list the invalid properties blocking a save.

Experlogix Documents

- Login provider management: Login providers can be managed via the Organization Settings, supported by a redesigned login screen and authentication flow.
- Content Manager folder creation on the fly: A new folder can be created while moving or copying items, without leaving the dialog.
- Expression editor syntax highlighting: PowerFx expression syntax in fillable PDF expression mappings is now color-coded, making longer expressions easier to read and to debug.

- Template design convenience: Field and expression selections are preserved when navigating between tabs, and the data set tree view in the PDF designer can be refreshed without reloading.
- User Interface refresh: Menus, submenus, and horizontal separators have been reworked as part of the ongoing UI optimization.

Important Updates

If you are an Experlogix Documents Organization Admin, you are invited to classify them as either Production or Non-Production. After the upgrade from version 1.0.0-Preview.34 to version 26.9, there will be a guided process in the user interface to classify your projects.

Release Notes and Release Artefacts

- [Experlogix Documents Release 26.9 Notes](#)
- [Experlogix Smart Flows 4.29 Release Notes](#)
- [Experlogix Smart Flows 4.29 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

