

## Exercise 1: Create Document Templates

### Requirements

*“As a Sales Rep, I’d like to generate quote documents with a click of a button from a quote record page and have a Word Document and PDF version attached in the Notes section of the quote record page.”*

Create a quote document template in Microsoft Word with appropriate tokens and upload the .DOCX template into the Document Template Designer in Salesforce.

### Prerequisites

- None


### Tasks

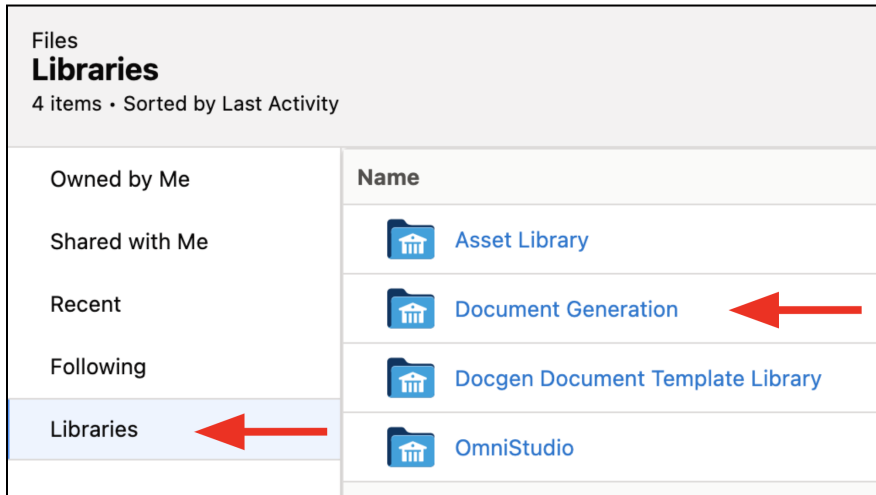
1. Insert tokens into Microsoft Word DOCX template.
2. Create a Microsoft Word DOCX template.
3. Test the Microsoft Word DOCX template.

### Time

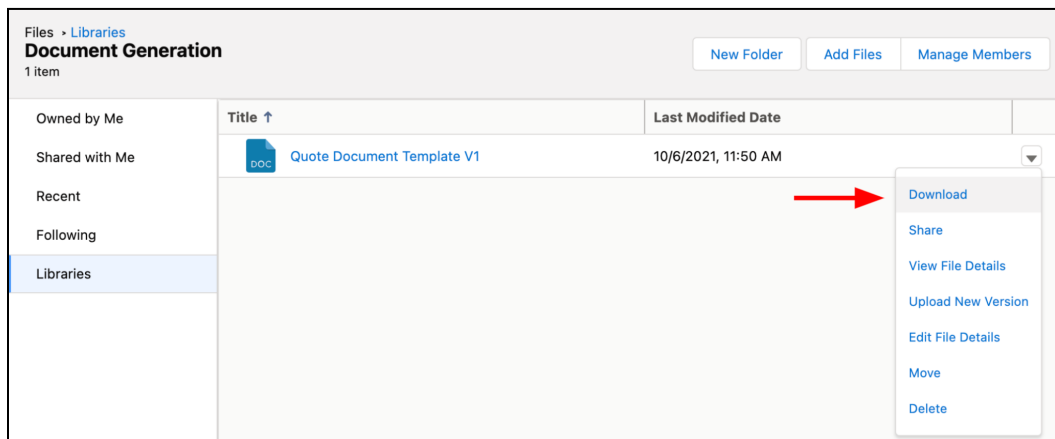
- 15 minutes
-

## Task 1: Insert tokens into Microsoft Word DOCX template

- Using the Lightning App Launcher,  type `files` in the search box. Under Items, click **Files**.
- Click **Libraries**.
- Click the **Document Generation** folder.



- Click **Download** to download the file **Quote Document Template V1**.




- Open the **Quote Document Template V1** in Microsoft Word to edit the file.
- Replace the fields with the variable token in the document as shown below:

| Field        | Variable Token    |
|--------------|-------------------|
| ACCOUNT NAME | { {AccountName} } |

---

|              |                       |
|--------------|-----------------------|
| STREET1      | {{Street}}            |
| CITY         | {{City}}              |
| STATE        | {{State}}             |
| COUNTRY      | {{Country}}           |
| POSTAL CODE  | {{PostalCode}}        |
| QUOTE NUMBER | {{QuoteNumber}}       |
| DATE         | {{ExpirationDate}}    |
| PRODUCT      | {{Product}}           |
| QUANTITY     | {{Quantity}}          |
| UNIT PRICE   | {{UnitPrice}}         |
| AMOUNT       | {{Amount}}            |
| TOTAL        | <b>{{TotalPrice}}</b> |

**Quote**



**From:**  
Cloud Kicks  
1234 Apparel Street  
Oakland, CA  
United States  
94501

**Quote number:** `{{QuoteNumber}}`  
**Quote expiration date:** `{{ExpirationDate}}`

**Bill to:**  
`{{AccountName}}`  
`{{Street}}`  
`{{City}}, {{State}}`  
`{{Country}}`  
`{{PostalCode}}`

**Items Quoted**

| Product                  | Quantity                  | Unit price                 | Amount                      |
|--------------------------|---------------------------|----------------------------|-----------------------------|
| <code>{{Product}}</code> | <code>{{Quantity}}</code> | <code>{{UnitPrice}}</code> | <code>{{Amount}}</code>     |
|                          |                           |                            | <code>{{TotalPrice}}</code> |



**NOTE:**

Variable tokens display the value of a variable that is passed into the document template as a JSON element. The displayed value uses the formatting of the first curly brace. For example, if the first curly brace in the token is italicized, the text in the token is italicized as well.

- In the Items Quoted table, use a repeating content token `{{#products}}` to display product line items. The line items will be repeated. For each line, it will display the product name, quantity, unit price and subtotal. Use `{{/products}}` to close the tag.

### Items Quoted

| Product                                | Quantity                  | Unit price                 | Amount                                |
|--|---------------------------|----------------------------|---------------------------------------|
| <code>{{#products}} {{Product}}</code> | <code>{{Quantity}}</code> | <code>{{UnitPrice}}</code> | <code>{{Amount}} {{/products}}</code> |
|  |                           |                            | <code>{{TotalPrice}}</code>           |

- Use a conditional token `{{#IF_Customer_in_HI_AK}}` to display the delivery time disclaimer for customers who live in Hawaii or Alaska. Use `{{/IF_Customer_in_HI_AK}}` to close the tag.

### Shipping Options

| Service  | Shipping charge | Order delivered    |
|----------|-----------------|--------------------|
| Standard | Free            | 5-10 business days |
| Express  | \$10            | 2-5 business days  |
| Priority | \$25            | Next business day  |


`{{#IF_Customer_in_HI_AK}}`

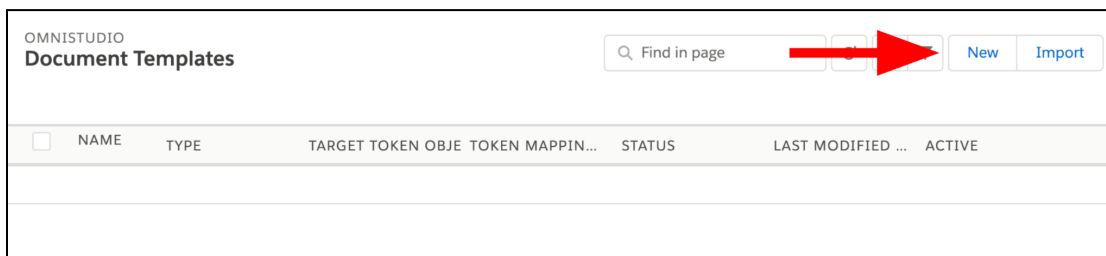
For customers in Hawaii and Alaska, please allow 5 additional days for delivery.

`{{/IF_Customer_in_HI_AK}}`

- Save the updated Microsoft Word DOCX file to your desktop.

## Task 2: Create a Microsoft Word DOCX template

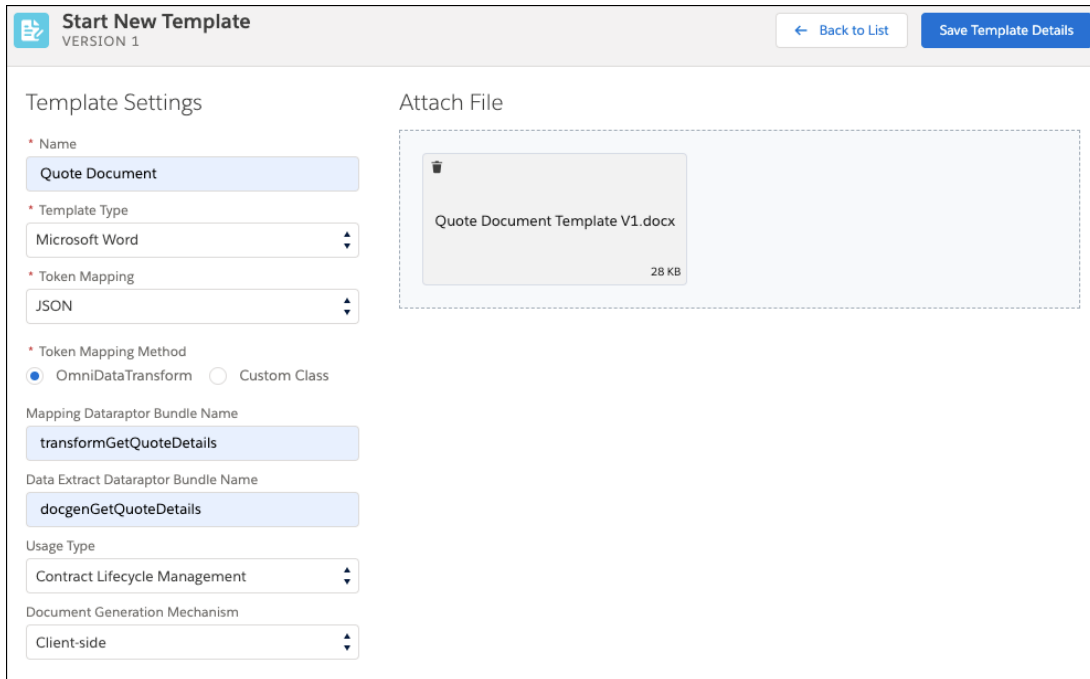
- Using the Lightning App Launcher,  type `OmniStudio Document Generation` in the search box. Click **OmniStudio Document Generation**.
- In the Lightning Navigation Bar, click **Document Template Designer** tab.
- Click **New** on the top right section to create a new document template. The **Start New Template** page opens.




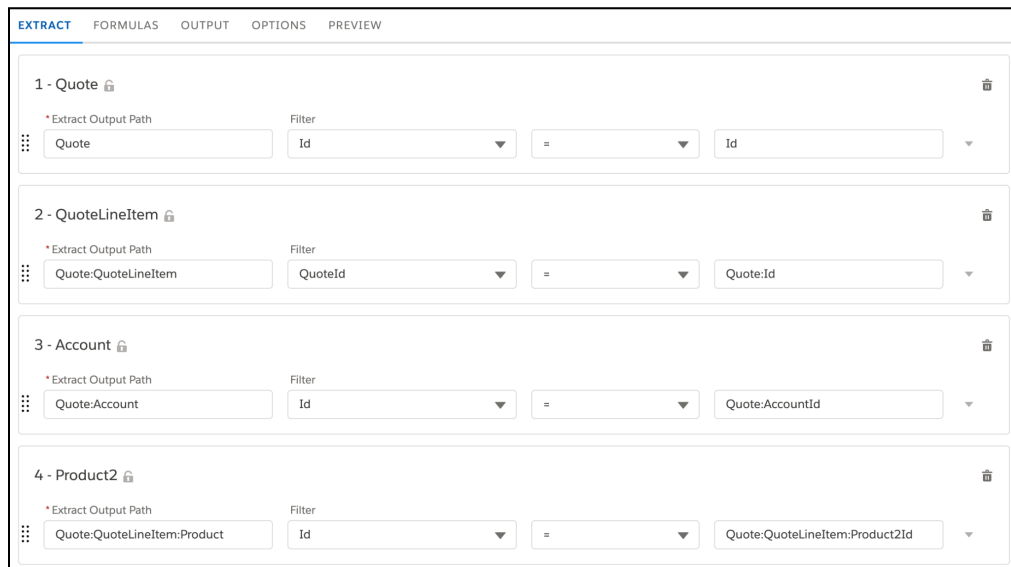
- In the Template Settings section, enter the following information:

| Field                               | Information                           |
|-------------------------------------|---------------------------------------|
| Name                                | <code>Quote Document</code>           |
| Template Type                       | Microsoft Word                        |
| Token Mapping                       | JSON                                  |
| Token Mapping Method                | OmniDataTransform                     |
| Mapping Dataraptor Bundle Name      | <code>transformGetQuoteDetails</code> |
| Data Extract Dataraptor Bundle Name | <code>docgenGetQuoteDetails</code>    |
| Usage Type                          | Contract Lifecycle Management         |
| Document Generation Mechanism       | Client-side                           |

- Drag the updated `.docx` file (Quote Document Template V1) from your desktop into the Document Template Designer or click **Browse** to upload the `.docx` file.



6. Click **Save Template Details**.
7. Examine the docgenGetQuoteDetails DataRaptor Extract
  - a. Click the  icon next to the Data Extract DataRaptor Bundle Name field to open the DataRaptor Extract in a new browser tab.
  - b. Click the **EXTRACT** tab of the DataRaptor. Notice the filter options. This DataRaptor is extracting data from multiple objects.



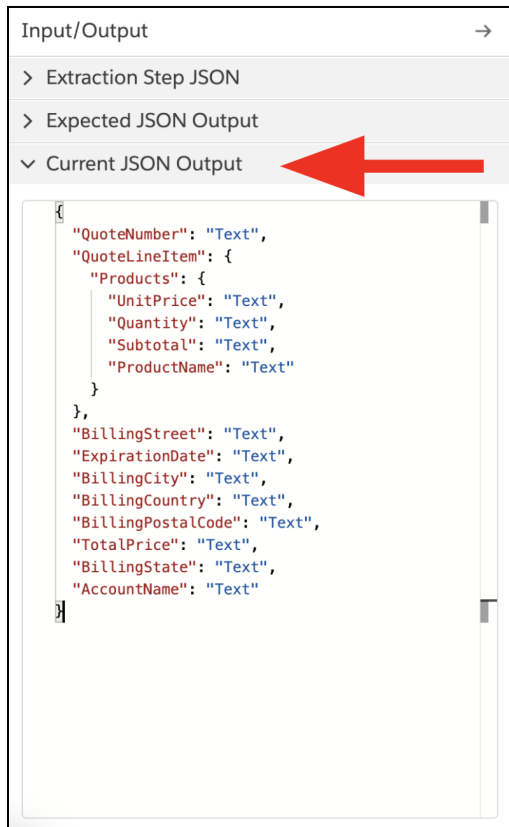
- c. Click the **OUTPUT** tab. Notice the Extract and Output JSON paths. These are fields you are extracting from Salesforce and using in the document.

| EXTRACT                          | FORMULAS | OUTPUT                             | OPTIONS | PREVIEW |
|----------------------------------|----------|------------------------------------|---------|---------|
| EXTRACT JSON PATH 🔍              |          | OUTPUT JSON PATH 🔍                 |         | ⊕       |
| Quote:AccountName                |          | AccountName                        |         | ✎ 🗑     |
| Quote:BillingCity                |          | BillingCity                        |         | ✎ 🗑     |
| Quote:BillingCountry             |          | BillingCountry                     |         | ✎ 🗑     |
| Quote:BillingPostalCode          |          | BillingPostalCode                  |         | ✎ 🗑     |
| Quote:BillingState               |          | BillingState                       |         | ✎ 🗑     |
| Quote:BillingStreet              |          | BillingStreet                      |         | ✎ 🗑     |
| Quote:ExpirationDate             |          | ExpirationDate                     |         | ✎ 🗑     |
| Quote:QuoteLineItem:Product:Name |          | QuoteLineItem:Products:ProductName |         | ✎ 🗑     |
| Quote:QuoteLineItem:Quantity     |          | QuoteLineItem:Products:Quantity    |         | ✎ 🗑     |
| Quote:QuoteLineItem:Subtotal     |          | QuoteLineItem:Products:Subtotal    |         | ✎ 🗑     |
| Quote:QuoteLineItem:UnitPrice    |          | QuoteLineItem:Products:UnitPrice   |         | ✎ 🗑     |
| Quote:QuoteNumber                |          | QuoteNumber                        |         | ✎ 🗑     |
| Quote:TotalPrice                 |          | TotalPrice                         |         | ✎ 🗑     |

8. Copy Current JSON Output from the docgenGetQuoteDetails DataRaptor Extract
- a. Click the **Output** tab in the docgenGetQuoteDetails DataRaptor Extract if you aren't there yet.




b. Expand the Current JSON Output panel.



- c. Copy the JSON Output and save it for later.
- d. Close the DataRaptor Extract browser tab.

9. Create the transformGetQuoteDetails DataRaptor Transform

- a. On the Document Template Designer page, click the  icon next to the Mapping DataRaptor Bundle Name field to open the DataRaptor Transform in a new tab. This opens a new DataRaptor Transform.
- b. Click the **FORMULAS** tab.
- c. Click **+Add Formula** button.
- d. Fill in the fields. This formula is used for the conditional token. Make sure you don't have any spaces in the formula result path field.

| Formula  | Formula Result Path   |
|--|-----------------------|
| <pre>IF ( var:"BillingState" == "HI", true, false)    IF (</pre> | customer_not_in_HI_AK |

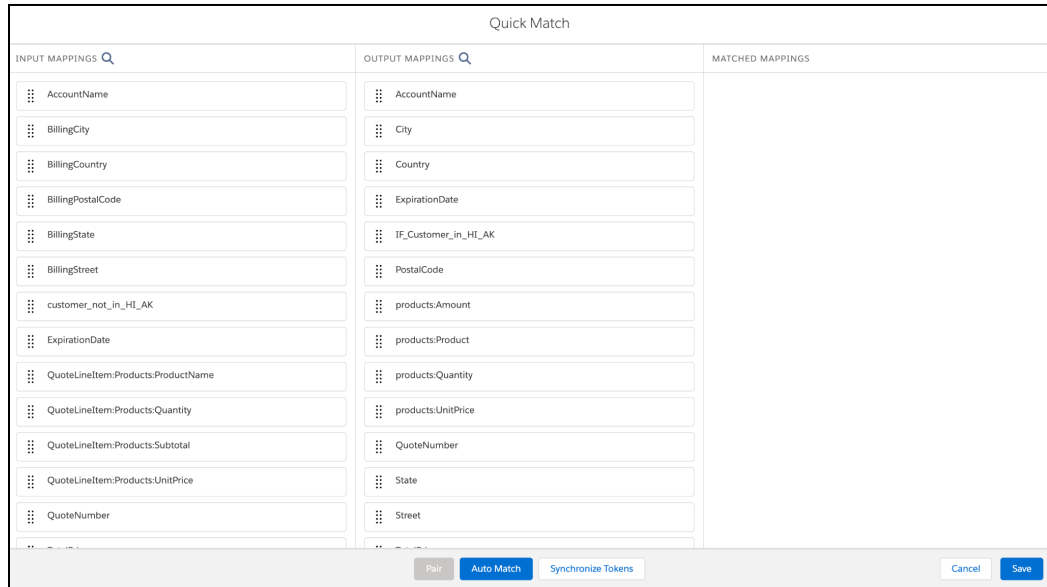
```
var:"BillingState" == "AK", true,  
false)
```

- e. Click the **TRANSFORMS** tab.
- f. Expand the Input JSON panel.
- g. Paste the JSON code you copied from the DataRaptor Extract.



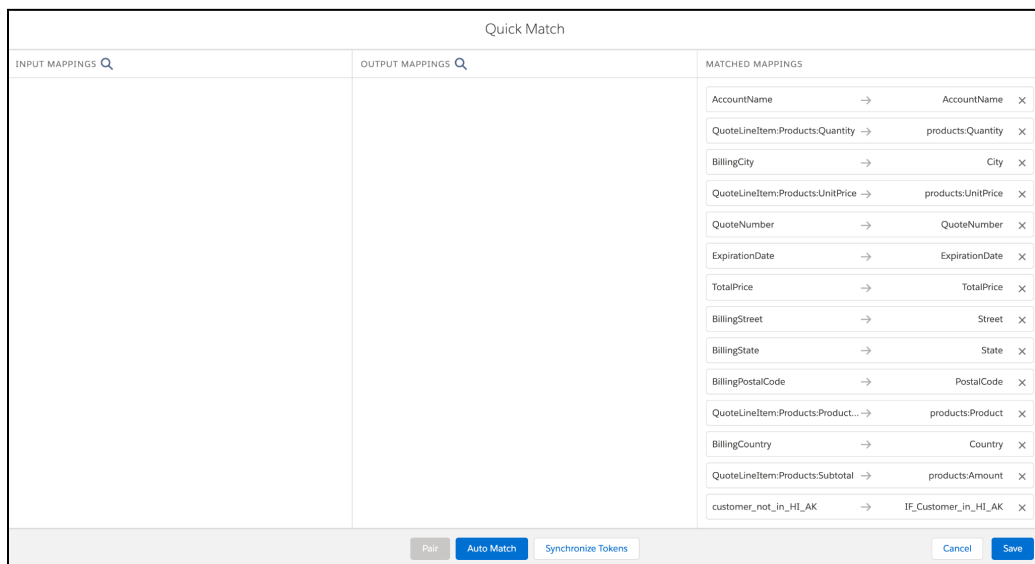
- h. Click **Quick Match** button.
- i. Notice the fields in the Input and Output Mappings columns. The fields in the Input Mappings column come from the JSON code you pasted into the Input JSON panel. The fields in the Output Mappings column come from the

document template.



The screenshot shows the 'Quick Match' interface with three columns: INPUT MAPPINGS, OUTPUT MAPPINGS, and MATCHED MAPPINGS. The INPUT MAPPINGS column contains a list of fields: AccountName, BillingCity, BillingCountry, BillingPostalCode, BillingState, BillingStreet, customer\_not\_in\_HI\_AK, ExpirationDate, QuoteLineItem:Products:ProductName, QuoteLineItem:Products:Quantity, QuoteLineItem:Products:Subtotal, QuoteLineItem:Products:UnitPrice, and QuoteNumber. The OUTPUT MAPPINGS column contains a list of fields: AccountName, City, Country, ExpirationDate, IF\_Customer\_in\_HI\_AK, PostalCode, products:Amount, products:Product, products:Quantity, products:UnitPrice, QuoteNumber, State, and Street. The MATCHED MAPPINGS column is currently empty. At the bottom of the interface are buttons for 'Pair', 'Auto Match', 'Synchronize Tokens', 'Cancel', and 'Save'.

- j. Click **Auto Match** to match the input and output fields. Make sure to drag and drop fields from the Input column into the Output column if they don't get matched automatically.



The screenshot shows the 'Quick Match' interface after the 'Auto Match' button has been clicked. The MATCHED MAPPINGS column now contains a list of 14 pairs of fields, each with a right-pointing arrow and a close button (X). The pairs are: AccountName → AccountName, QuoteLineItem:Products:Quantity → products:Quantity, BillingCity → City, QuoteLineItem:Products:UnitPrice → products:UnitPrice, QuoteNumber → QuoteNumber, ExpirationDate → ExpirationDate, TotalPrice → TotalPrice, BillingStreet → Street, BillingState → State, BillingPostalCode → PostalCode, QuoteLineItem:Products:Product... → products:Product, BillingCountry → Country, QuoteLineItem:Products:Subtotal → products:Amount, and customer\_not\_in\_HI\_AK → IF\_Customer\_in\_HI\_AK. The INPUT and OUTPUT MAPPINGS columns are now empty. At the bottom of the interface are buttons for 'Pair', 'Auto Match', 'Synchronize Tokens', 'Cancel', and 'Save'.

- k. Click **Save**.
- l. In **TRANSFORMS** tab, notice the Input and Output JSON paths. The Input JSON path matches the output from the DataRaptor Extract. The Output JSON path matches the tokens in the document template.

| FORMULAS                           | TRANSFORMS | OPTIONS              | PREVIEW |
|------------------------------------|------------|----------------------|---------|
| INPUT JSON PATH 🔍                  |            | OUTPUT JSON PATH 🔍   | +       |
| AccountName                        |            | AccountName          | ✎ 🗑     |
| BillingCity                        |            | City                 | ✎ 🗑     |
| BillingCountry                     |            | Country              | ✎ 🗑     |
| BillingPostalCode                  |            | PostalCode           | ✎ 🗑     |
| BillingState                       |            | State                | ✎ 🗑     |
| BillingStreet                      |            | Street               | ✎ 🗑     |
| customer_not_in_HI_AK              |            | IF_Customer_in_HI_AK | ✎ 🗑     |
| ExpirationDate                     |            | ExpirationDate       | ✎ 🗑     |
| QuoteLineItem:Products:ProductName |            | products:Product     | ✎ 🗑     |
| QuoteLineItem:Products:Quantity    |            | products:Quantity    | ✎ 🗑     |
| QuoteLineItem:Products:Subtotal    |            | Products:Amount      | ✎ 🗑     |
| QuoteLineItem:Products:UnitPrice   |            | products:UnitPrice   | ✎ 🗑     |
| QuoteNumber                        |            | QuoteNumber          | ✎ 🗑     |
| TotalPrice                         |            | TotalPrice           | ✎ 🗑     |

- m. Click **Edit**.
- n. Change the Output type to **JSON**.

### Edit transformGetQuoteDetails

\* DataRaptor Interface Name

\* Interface Type

\* Input Type

\* Output Type

Required Permission (Optional)

Description

- o. Click **Save**.

- p. Close the DataRaptor Transform browser tab.



**NOTE:**


The Data Extract DataRaptors have been provided to you in the training playground. To learn more about OmniStudio DataRaptors, please see [Build Guided Experiences with OmniStudio](#).

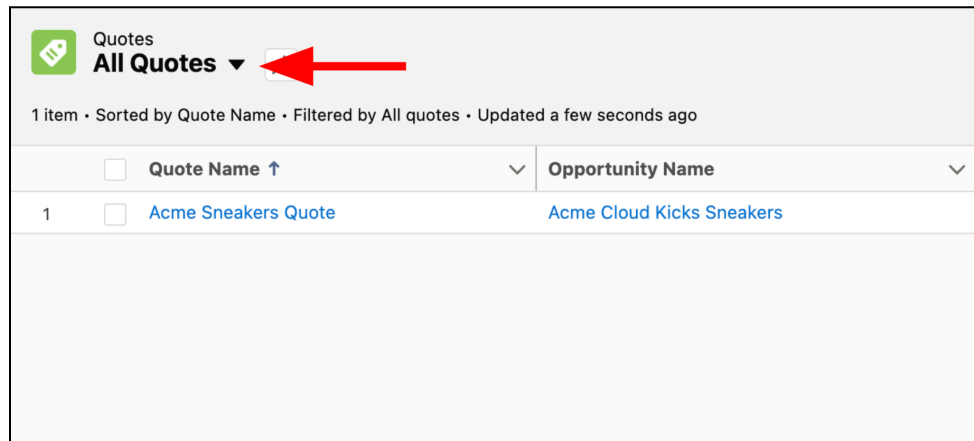
10. Click **Activate** on the Quote Document Template page to activate the document template.



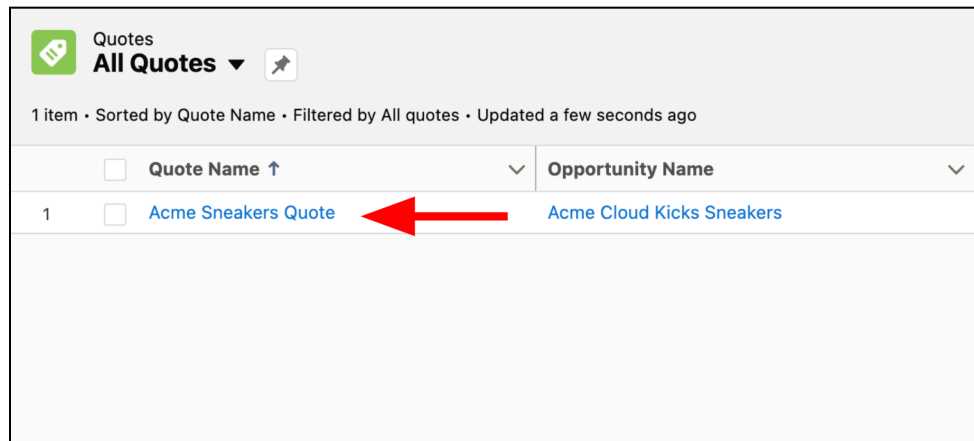
11. Click **Yes, Save Template** when you see the prompt: Are you sure you want to save this template version as Active?

## Task 3: Test the Microsoft Word DOCX template

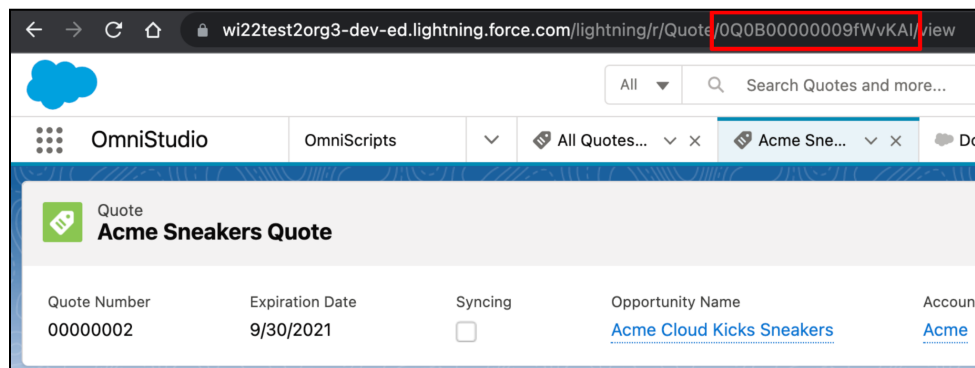
1. Get the Acme Sneakers Quote object Id.
  - a. In the Lightning Navigation Bar, click **Quotes** tab.
  - b. Click  next to Recently Viewed and change the list view to **All Quotes**.



- c. Click **Acme Sneakers Quote**.



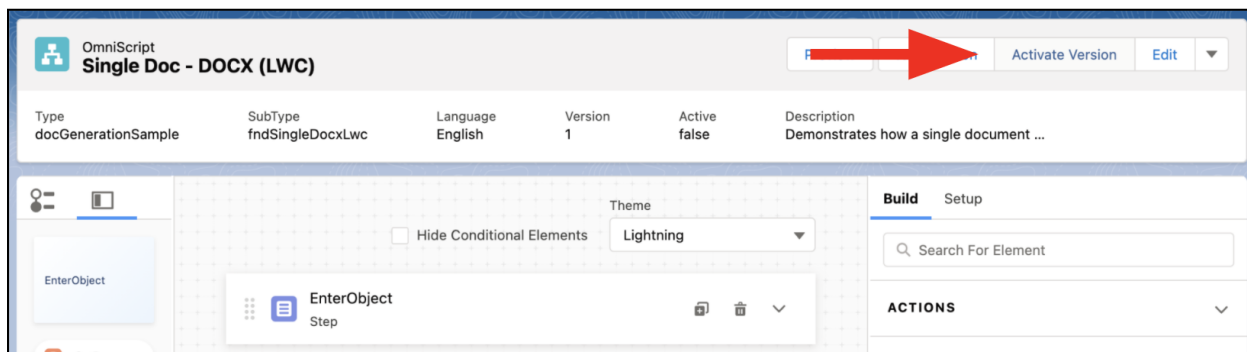
- d. Copy the alpha-numeric combination from the URL between **Quote/** and **/view**. This is the Acme Sneakers Quote object Id. Save it for later.



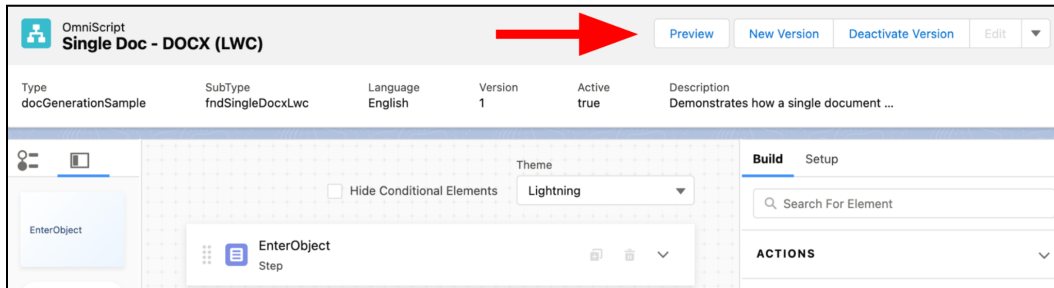
2. In the Lightning Navigation Bar, click the **OmniScripts** tab.
3. Click `docGenerationSample/fndSingleDocxLwc`, then click **Single Doc - DOCX (LWC) (Version 1)** to open the client-side sample OmniScript. This may take a few minutes.



4. Click **Activate Version** to activate the OmniScript. The OmniScript must be active to properly display the Lightning Web Components that are embedded in it, and to test the document template.



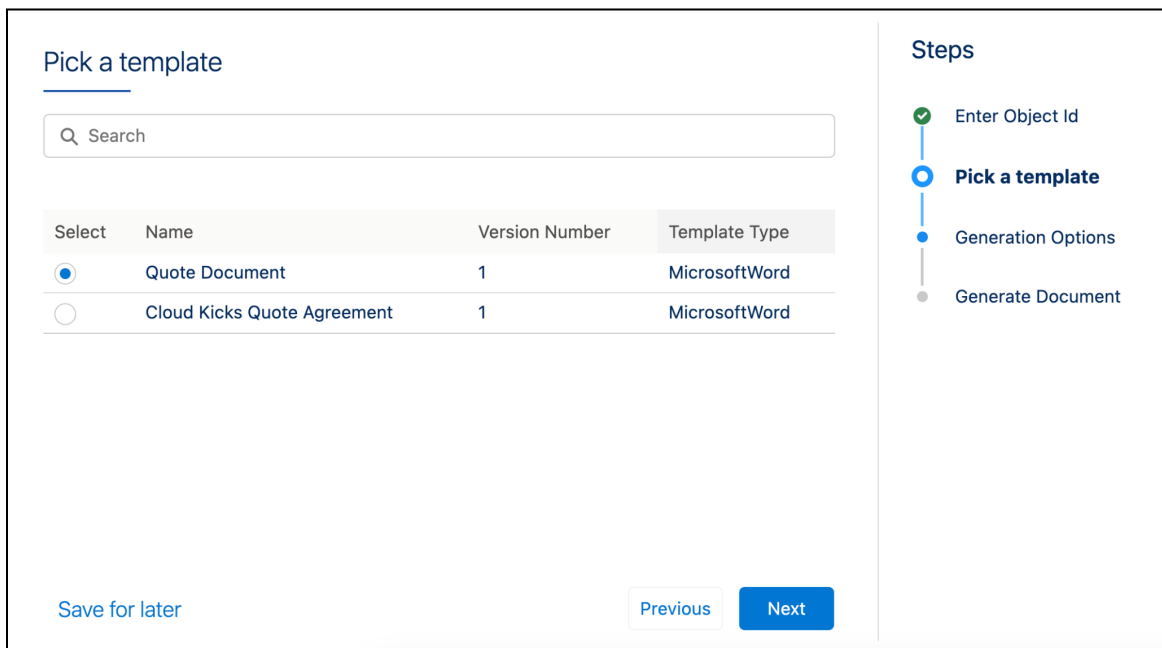
5. Click **Done** when the OmniScript activates.
6. Click **Preview** to preview the OmniScript.



7. In the Enter Object Id step, in the Objectid field, enter Acme Sneakers Quote object Id. You retrieve it in an earlier step. For Template Type, select **Microsoft Word .DOCX Template**.
8. Click **Next**.

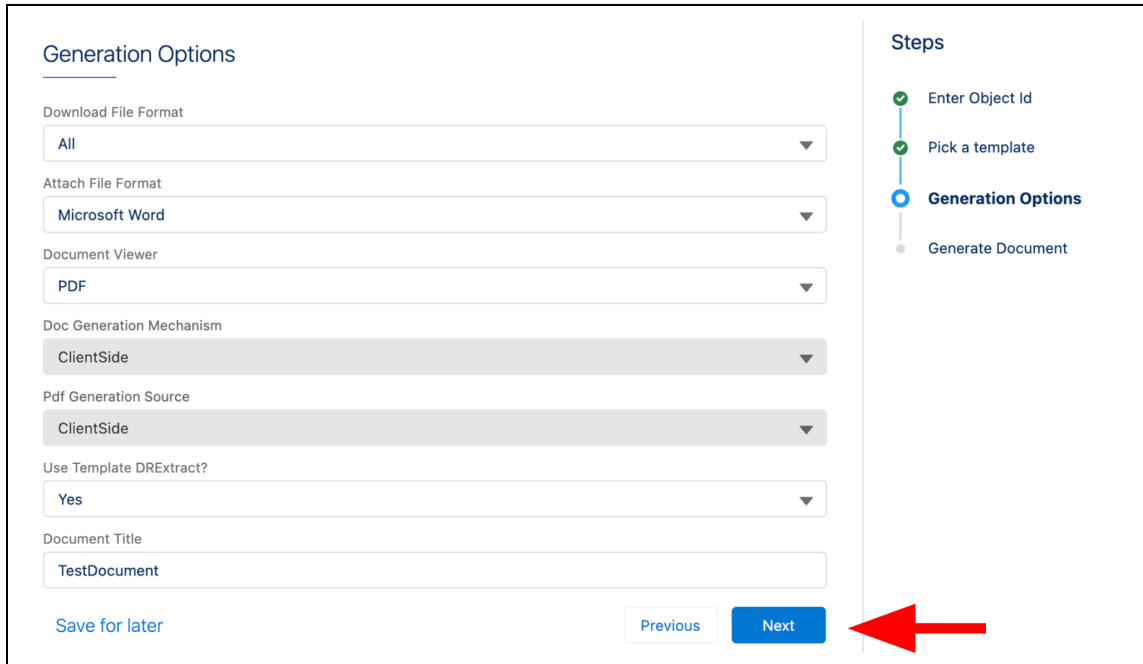


9. In the Pick a template step, select **Quote Document** as your template.
10. Click **Next**.





11. In the Generation Options step, keep all generation options as is, then click **Next**.



**Generation Options**

Download File Format: All

Attach File Format: Microsoft Word

Document Viewer: PDF

Doc Generation Mechanism: ClientSide

Pdf Generation Source: ClientSide

Use Template DRExtract?: Yes

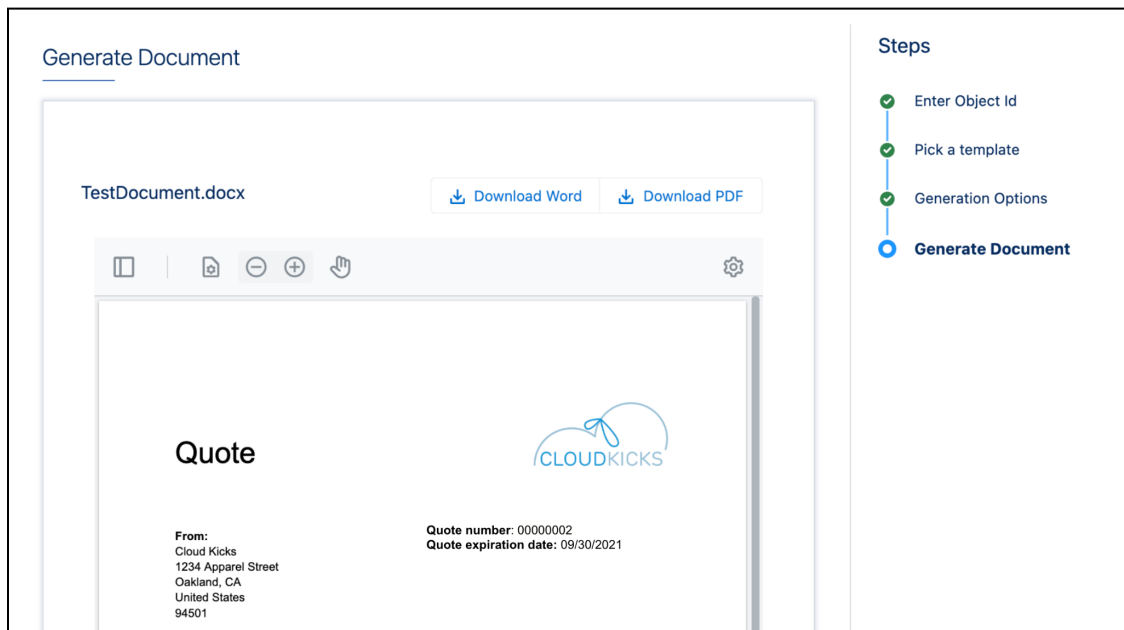
Document Title: TestDocument

Buttons: Save for later, Previous, Next

**Steps**

- Enter Object Id
- Pick a template
- Generation Options**
- Generate Document

12. In the Generate Document step, wait for the Quote Document to generate. The Document Viewer displays the template populated with Acme data.



**Generate Document**

TestDocument.docx

Download Word | Download PDF

Quote

CLOUDKICKS

From:  
Cloud Kicks  
1234 Apparel Street  
Oakland, CA  
United States  
94501

Quote number: 00000002  
Quote expiration date: 09/30/2021

**Steps**

- Enter Object Id
- Pick a template
- Generation Options
- Generate Document**