Exercise 2: Explore Client-Side Document Generation

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."

Customize the sample client-side OmniScript. Add a button to the quote record page that launches the OmniScript.

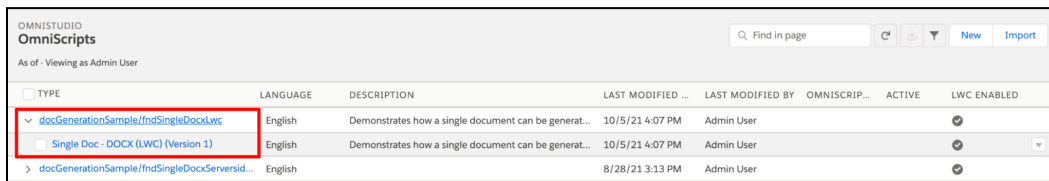## Prerequisites

- Create Document Templates

Tasks

1. Review the sample Client-side OmniScript.
2. Version and edit the sample client-side OmniScript.
3. Edit the Generate Document button on the quote record page to launch the OmniScript.
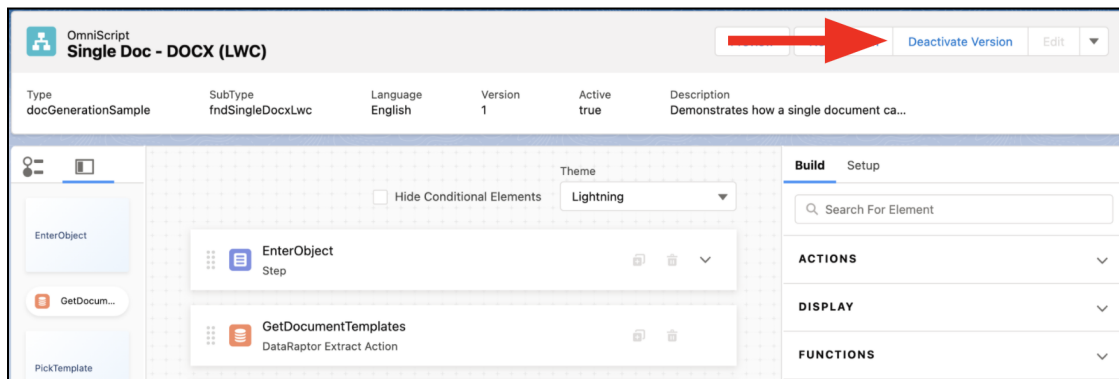
Time

- 30 minutes

Task 1: Investigate the Sample Client-Side OmniScript

1. Using the Lightning App Launcher, ⣿ type `OmniStudio Document Generation` in the search box. Click **OmniStudio Document Generation**.
2. In the Lightning Navigation Bar, click the **OmniScript** tab.
3. Click **docGenerationSample/fndSingleDocxLwc**, then click **Single Doc - DOCX (LWC) (Version 1)** to open the client-side sample OmniScript.

4. Click **Deactivate Version** to deactivate the OmniScript.

5. Click **Done**.
6. Click on **EnterObject** step element. Notice the fields.

7. Click the **Template Type** select field and notice the select options in the right panel under the **Properties** tab. The user has the option to select between Microsoft Word and Powerpoint templates.

Build	**Properties**	Setup

SELECT PROPERTIES   Active ☑

*Name ⓘ

TemplateType

Field Label ⓘ

Template Type

☑ Required ⓘ   ☐ Read-only ⓘ

Option Source ⓘ

Manual   ▼

Options ⓘ

Microsoft Word .DOCX Template   🗑

Default:	false
Value:	MicrosoftWord
Label:	Microsoft Word .DOCX Template
Auto Advance:	

Microsoft Powerpoint .PPTX Template   🗑

Default:	false
Value:	MicrosoftPowerpoint
Label:	Microsoft Powerpoint .PPTX Template
Auto Advance:	

8. Click the **GetDocumentTemplates** DataRaptor Extract Action element. In the right panel under Properties, click the 🔗 icon to open the DataRaptor Extract in a new browser tab.

9. In the **EXTRACT** tab of the DataRaptor, notice the filter options.

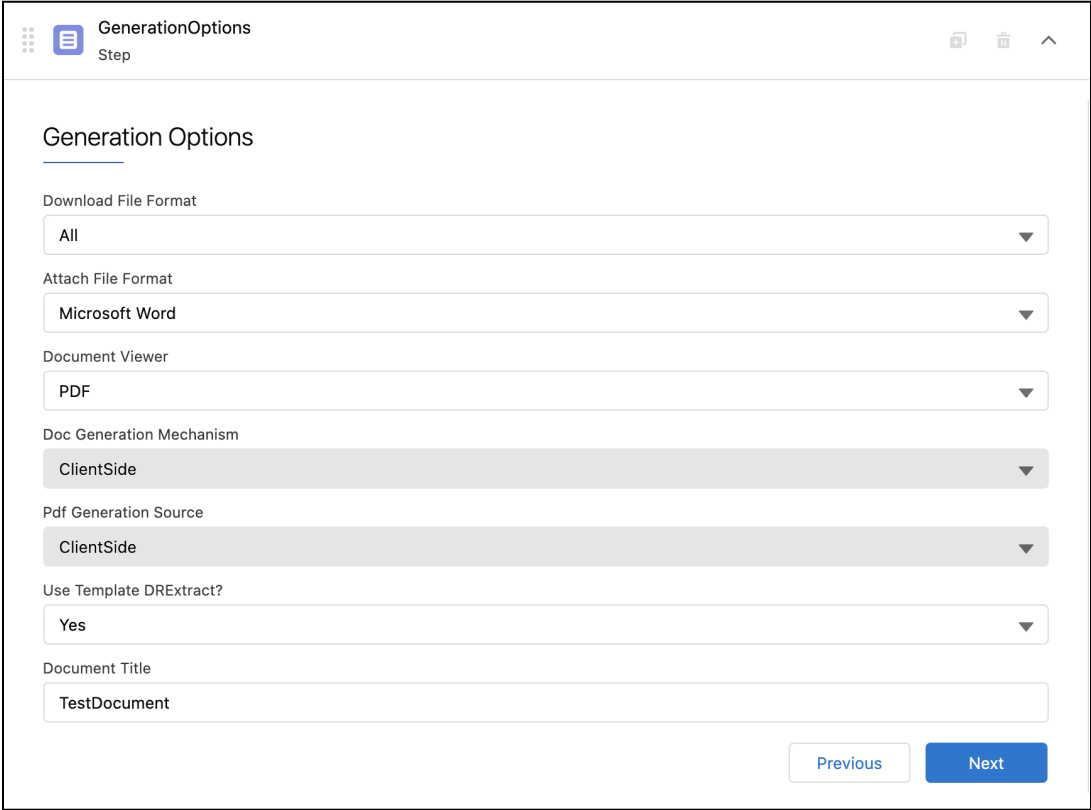10. In the **OUTPUT** tab, notice the Extract and Output JSON paths.

11. Close the DataRaptor browser tab.

12. Back in the OmniScript, click the **PickTemplate** step element. Click the **SelectTemplate** element inside the step. Notice the custom Lightning Web Component. It displays the template types in a list so we can select one.
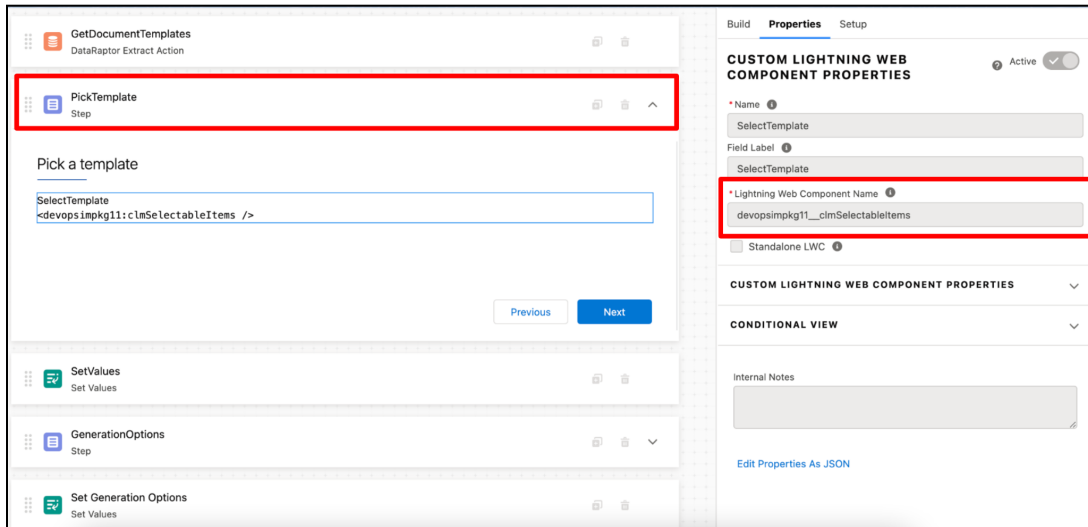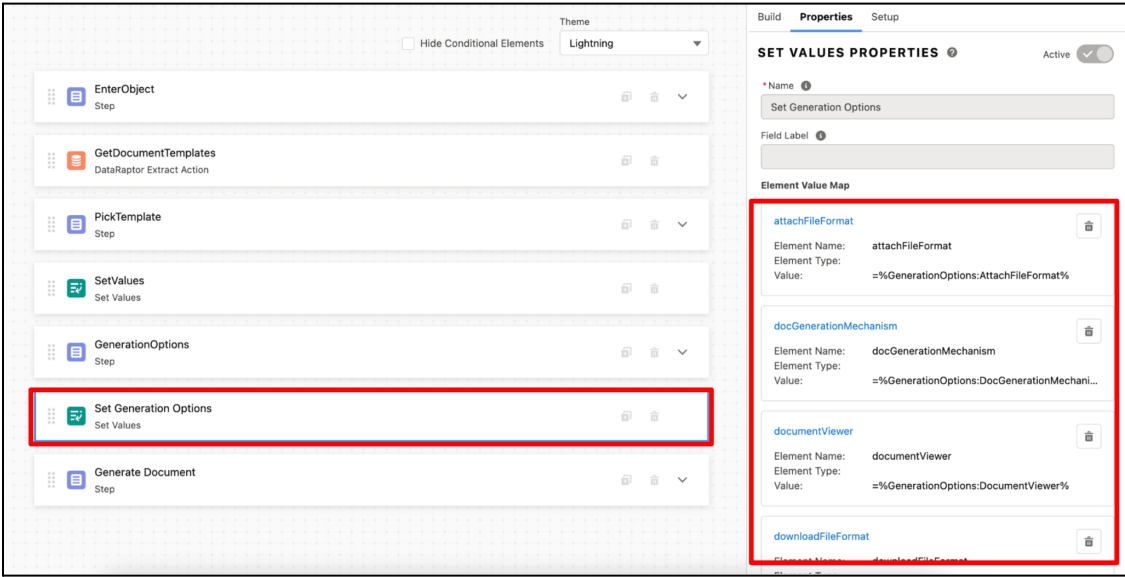

13. Click the **SetValues** element. Notice the **selectedTemplate** and **templateType** values. These values are passed to the **GenerationOptions** step.
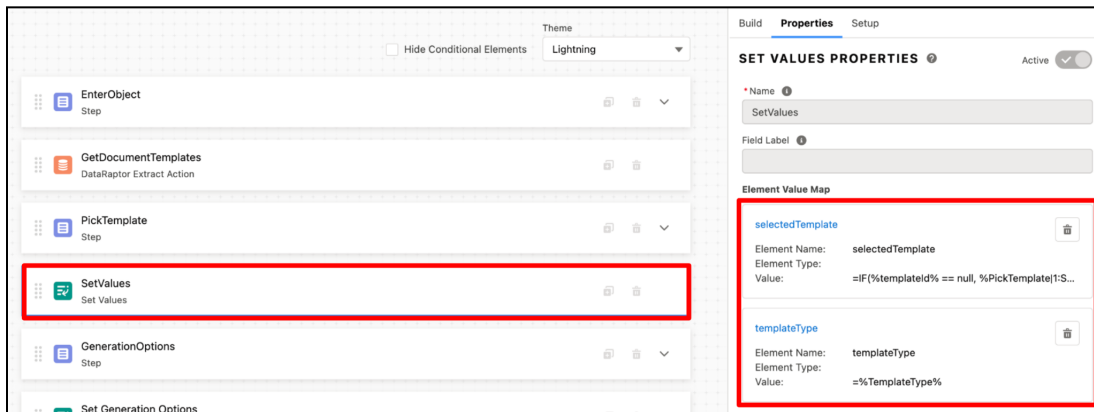

14. Click the **GenerationOptions** step element. Examine the fields.

15. Click the **Set Generation Option** Set Values element. Notice the values in the **Properties** panel on the right. The element sets these values and passes them to the **Generate Document** step.
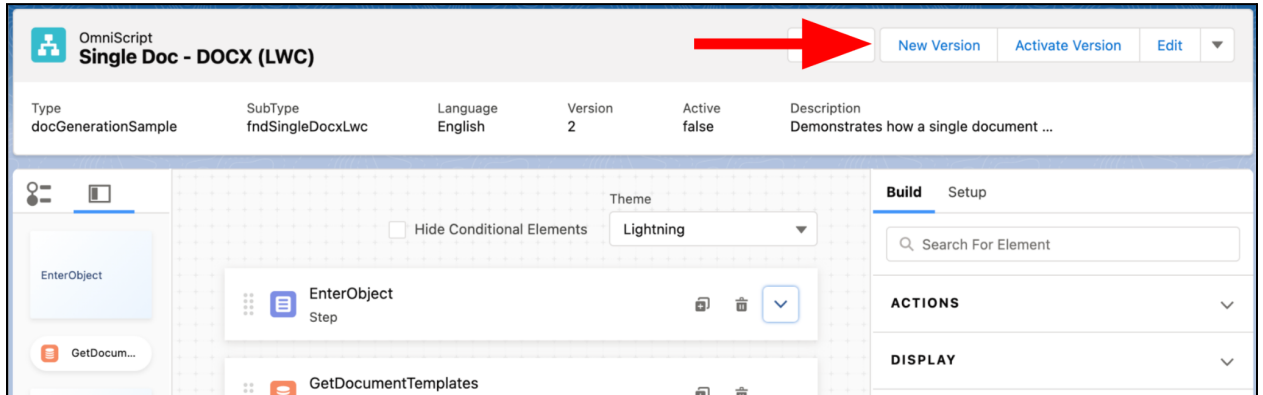
16. Click the **Generate Document** step element. Notice the custom Lightning Web Component and Email Action elements.
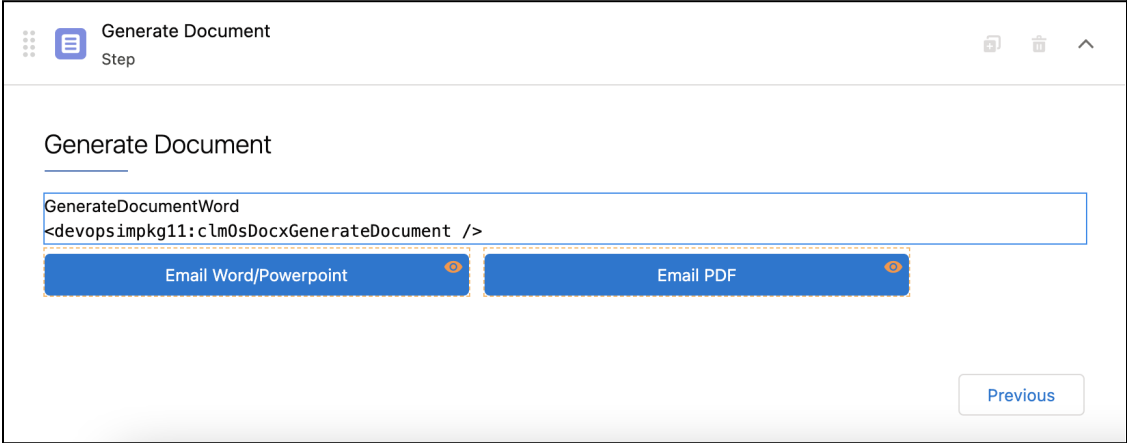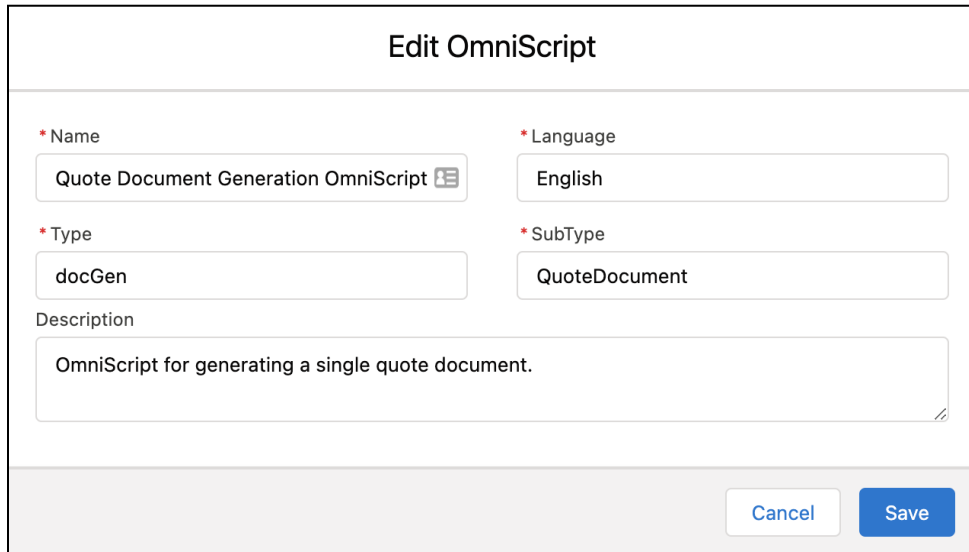
Task 2: Version and Edit the Sample Client-Side OmniScript

1. Click **New Version** to create a new version of the OmniScript. It is recommended that you create a new version before making any changes to the sample OmniScript.


2. Click **Edit**.
3. Edit the fields as following:

Field	Value
Name	Quote Document Generation OmniScript
Language	English
Type	docGen
Subtype	QuoteDocument
Description	OmniScript for generating a single quote document.

4. Click **Save**.
5. Edit **EnterObject** step fields to read only.
   a. Click the **EnterObject** step to expand it.
   b. Click the **ObjectId** field.
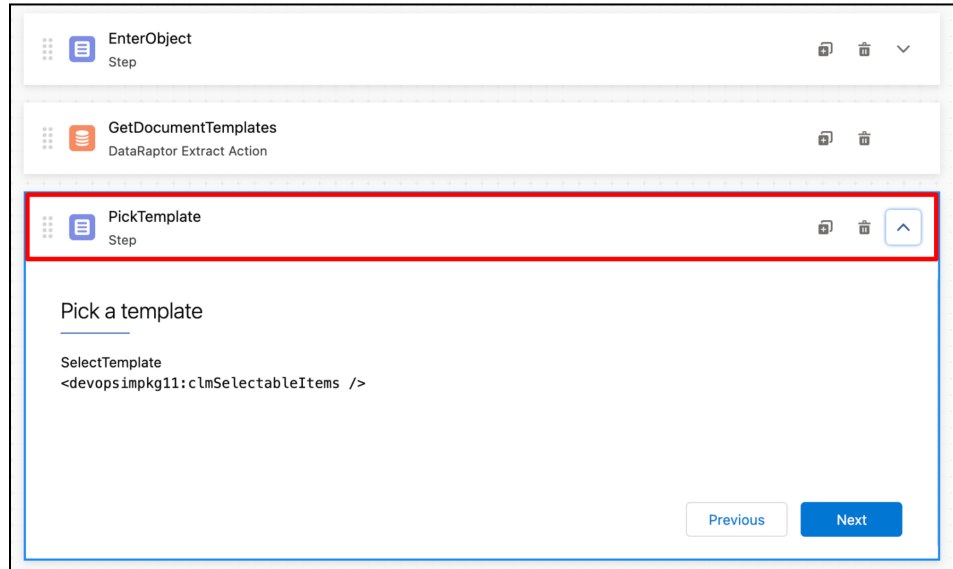   c. In the **Properties** panel on the right, select **Read-only**.
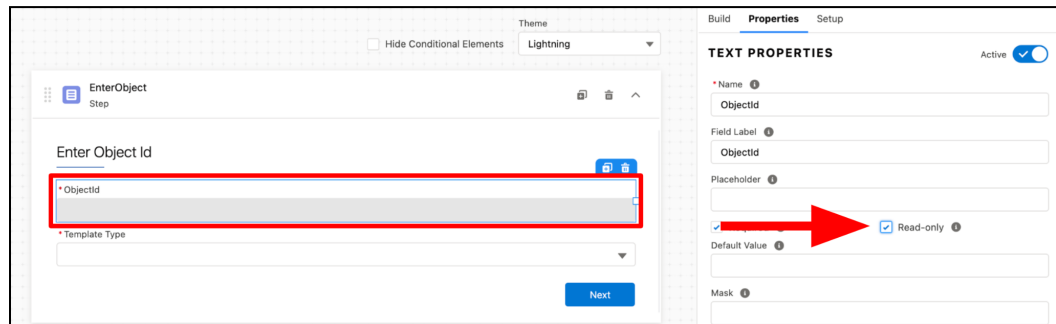
   d. Click the **Template Type** field.
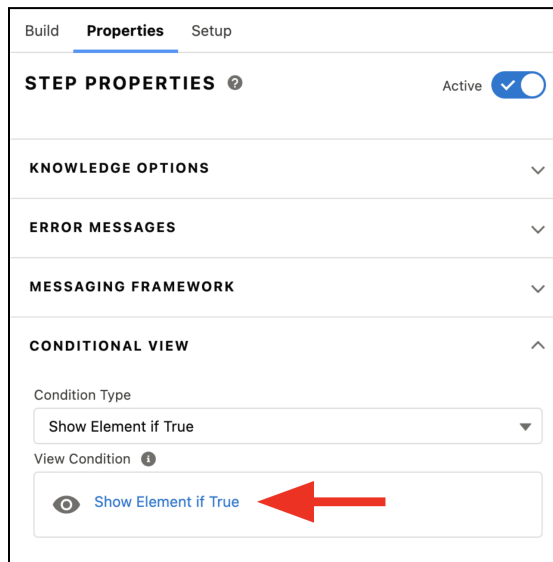   e. In the **Properties** panel on the right, select **Read-only**.
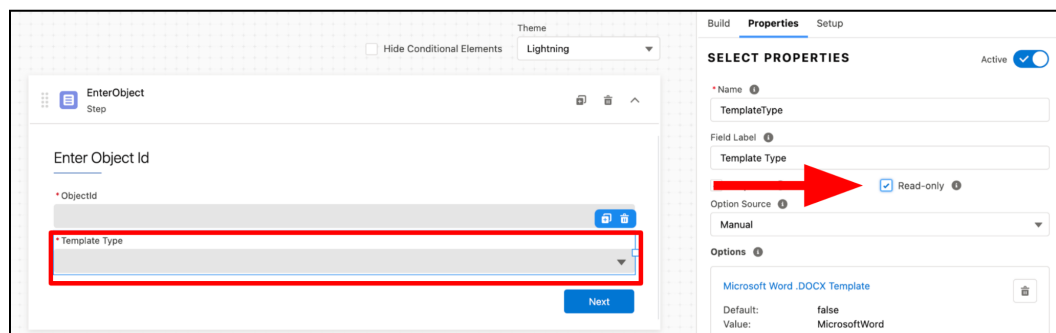
6. Edit the OmniScript to pre-select the template.

a. Add a conditional view to hide the **PickTemplate** step if templateId is provided.

    i.   Click the **PickTemplate** step.
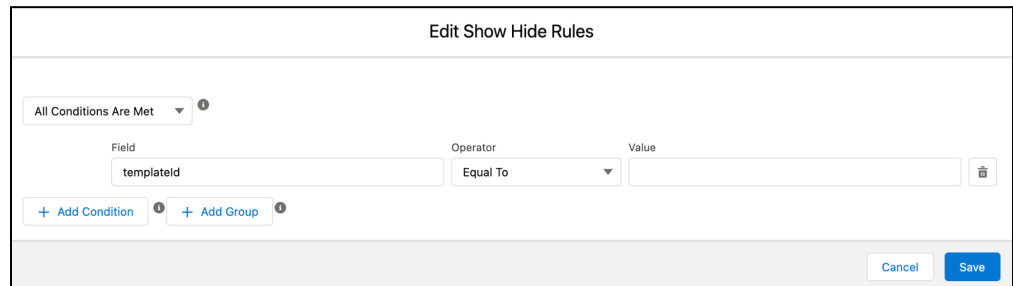
    ii.   In the **Properties** panel on the right, expand **CONDITIONAL VIEW**.

    iii.   Click **Show Element if True**.

    iv.   Edit the following fields:

Field	Value
Field	`templateId`

Operator	Equal To
Value	[leave blank]

v.   Click **Save**.
b. Edit SetValues element to add the pre-selected template.
i.   Click the **SetValues** element. Make sure to click the element with the name SetValues, not the Set Generation Options element.

ii.   Click **Edit Properties As JSON** on the bottom of the Properties panel.

iii.   Replace the elementValueMap node with the value below.

```
"elementValueMap": {
"preSelectedTemplate": {
"Id": "=%templateId%",
"TemplateType": "=%TemplateType%"
},
"selectedTemplate": "=IF(%templateId% == null,
%PickTemplate|1:SelectTemplate|1%,
%preSelectedTemplate%)",
"templateType": "=%TemplateType%"
},
```

```
Build    Properties    Setup

SET VALUES PROPERTIES ?                    Active  ✓○

1    {
2        "controlWidth": 12,
3        "label": "",
4        "elementValueMap": {
5            "preSelectedTemplate": {
6                "Id": "=%templateId%",
7                "TemplateType": "=%TemplateType%"
8            },
9            "selectedTemplate": "=IF(%templateId% == null
10           "templateType": "=%TemplateType%"
11       },
12       "showPersistentComponent": [
13           true,
14           false
15       ],
16       "show": null,
17       "HTMLTemplateId": "",
18       "wpm": false,
19       "ssm": false,
20       "message": {},
21       "pubsub": false
22   }
```
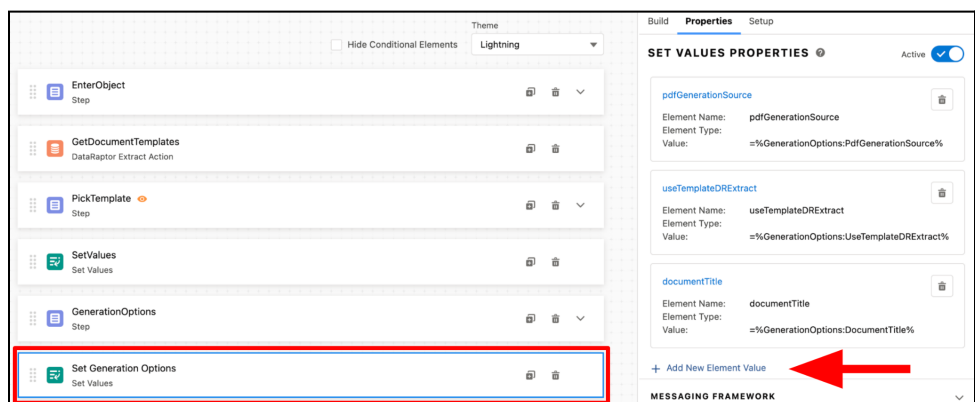
iv.   Click **Close JSON Editor**.

c. Edit **Set Generation Options** element.
   i. Click the **Set Generation Options** element.
   ii. In the Properties panel on the right, click **+Add New Element Value**.

   iii. Edit the following fields:

Element Name	`selectedTemplate`
Value	`IF(%templateId%!=NULL, %preSelectedTemplate%, %selectedTemplate%)`
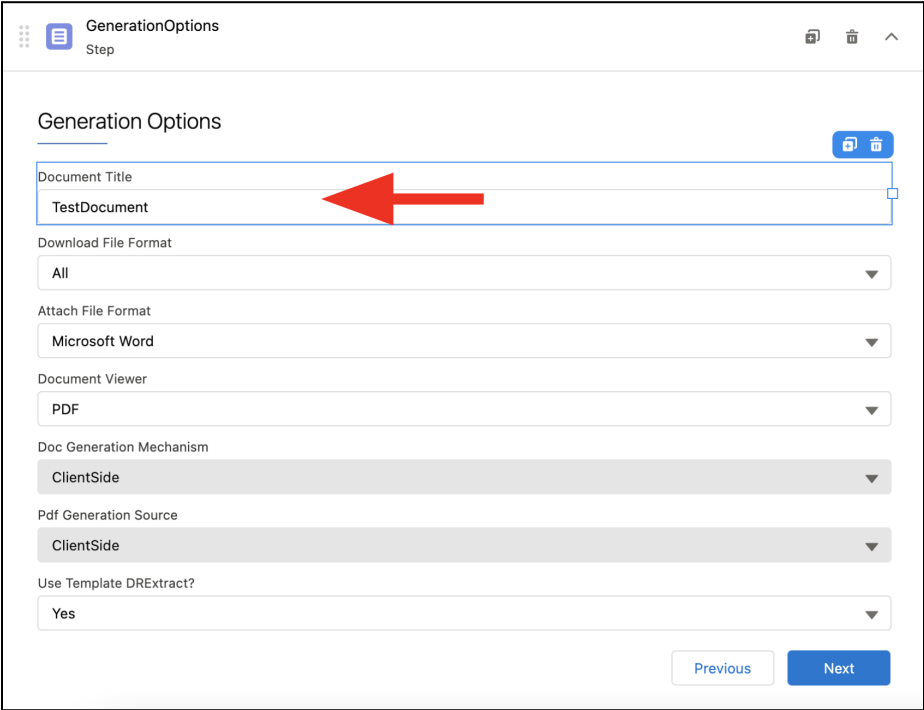
iv.   Select the **Use Expression For Value** checkbox.

v.   Click **Save**.
7. Edit **Generation Options** step.
    a. Click the **GenerationOptions** step.

b. Click the **Document Title** field and move it right above the **Download File Format** field.

c. In the Properties panel, change the default value of the **Document Title** field
    to **Quote Document**.
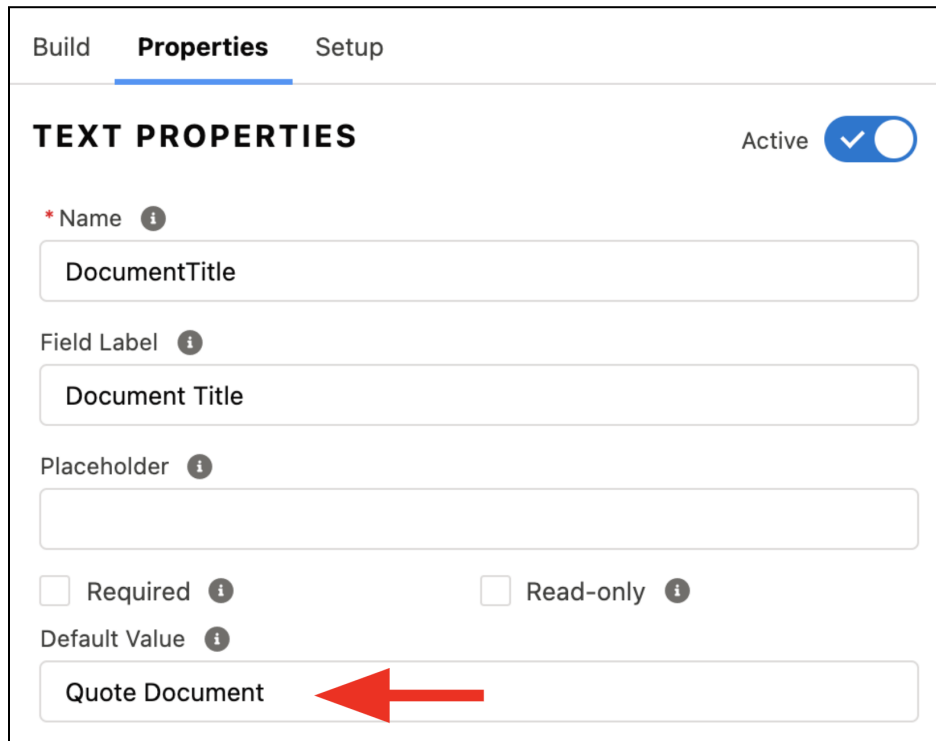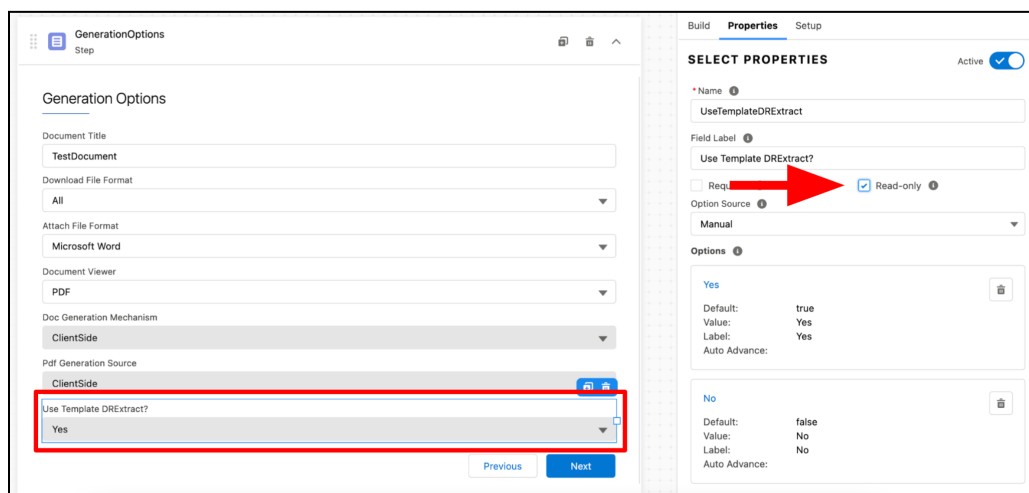
d. Click the **Use Template DRExtract?** field and in the **Properties** panel, check
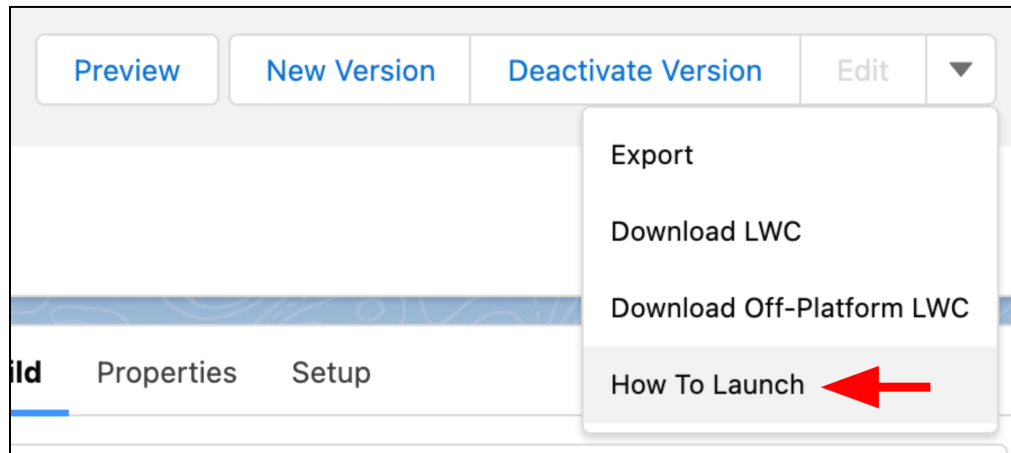   **Read-Only**.

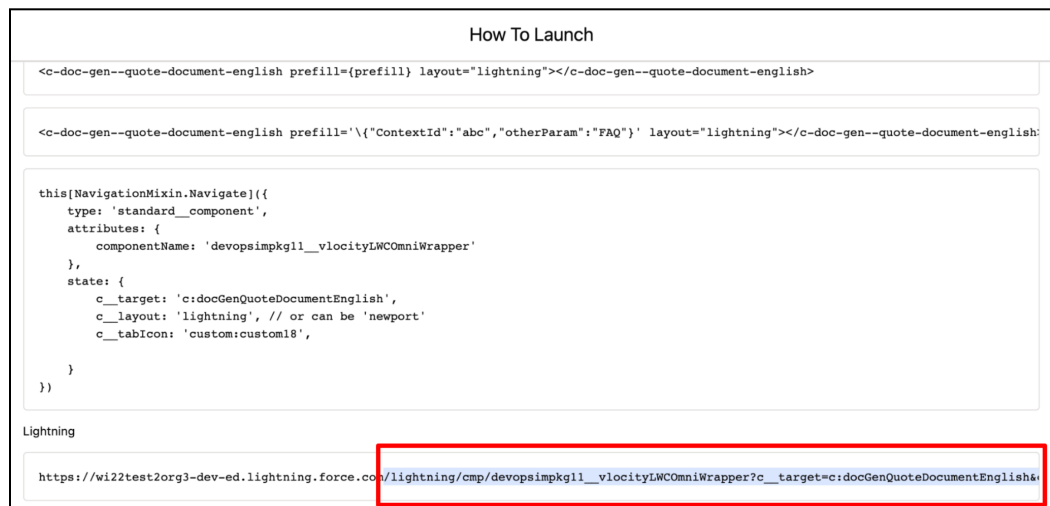8. Click **Activate Version** to activate the OmniScript.

Task 3: Edit the Generate Document Button on the Quote Record Page to Launch the OmniScript

1. Retrieve Lightning Launch URL.

   a. Click ⬇️ and then click **How To Launch**.

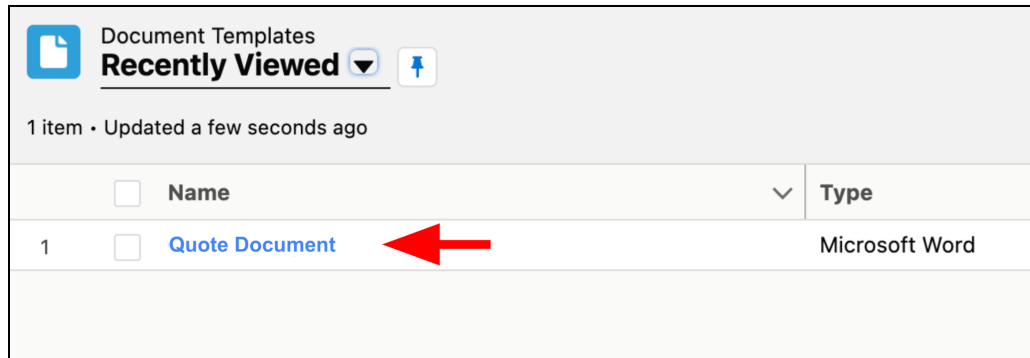   b. Copy the **Lightning** Launch URL after **.com** till the end. Save it for later.
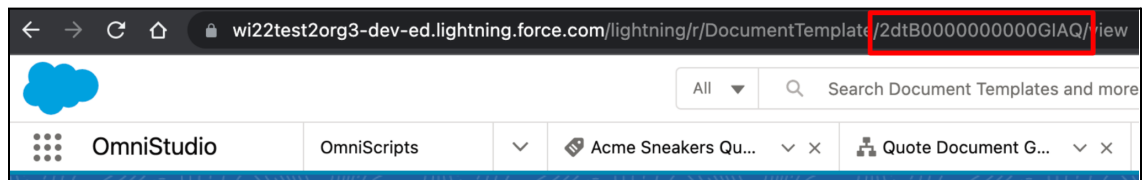

   c. Click **Done**.

2. Retrieve the Template Id

   a. In the Lightning Navigation Bar, click **Document Templates** tab.

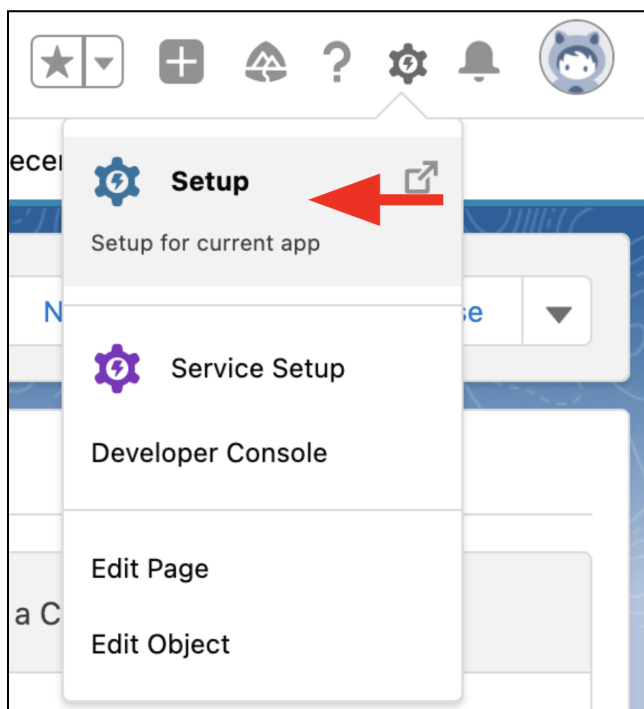b. Click **Quote Document** to open the template information.

c. Copy the alpha-numeric combination from the URL between **DocumentTemplate/** and **/view**. This is the Template Id. Save it for later.
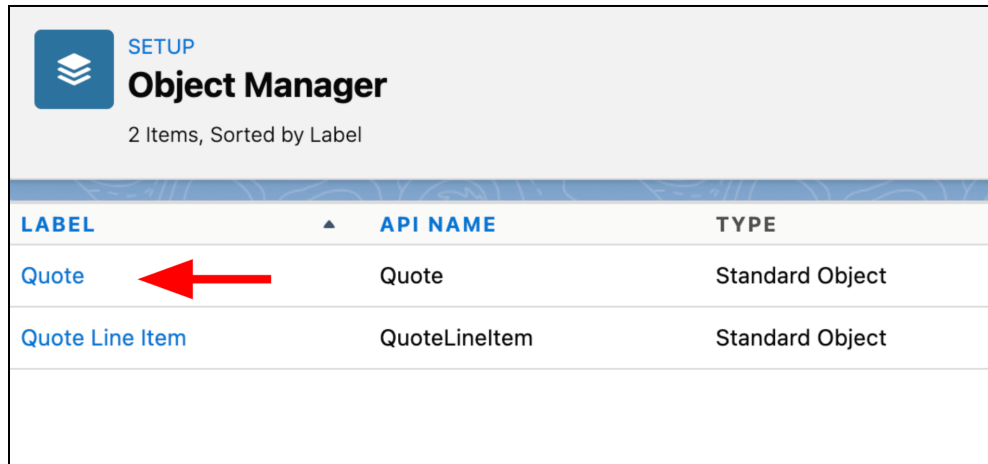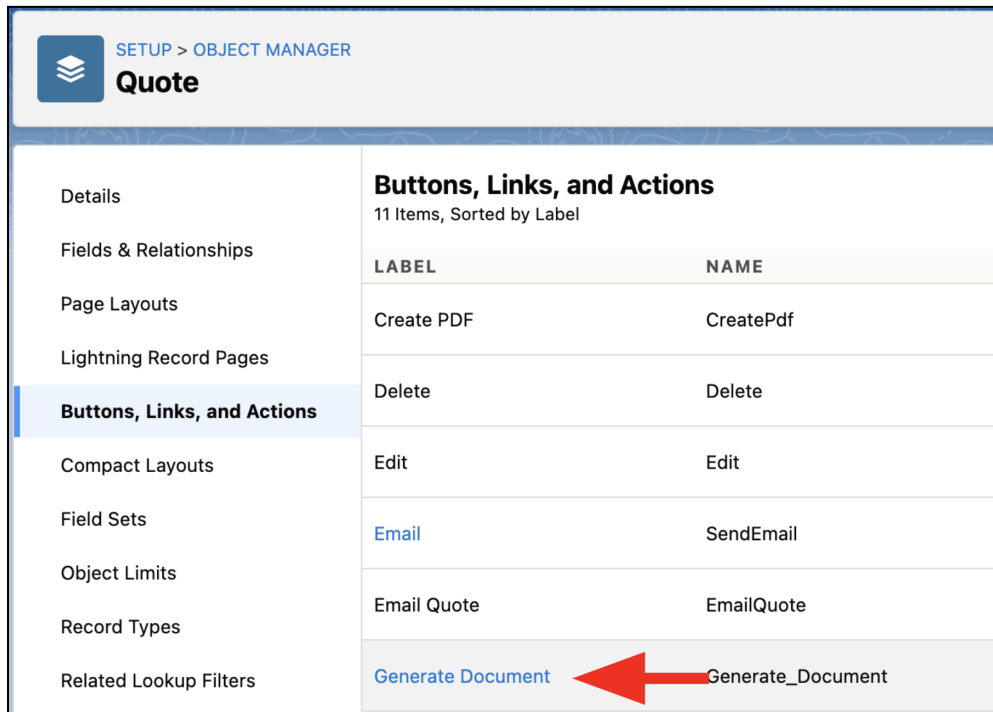

3. Edit Generate Document button.

a. Click **Setup**.

b. Click **Object Manager** and open the **Quote** object.

c. Click **Buttons, Links, and Actions**.

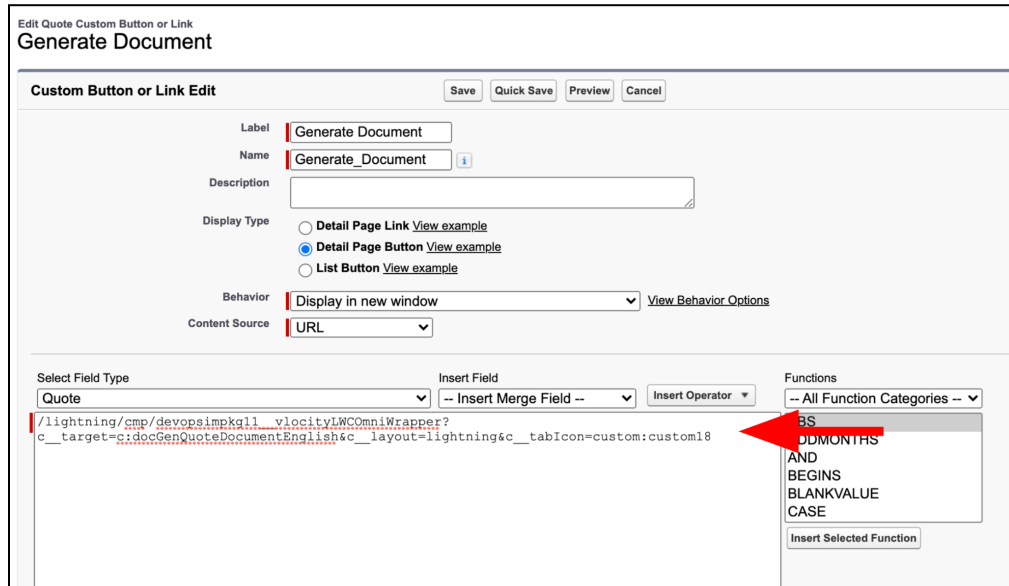d. Click **Generate Document**. We pre-built this custom button for training purposes.

e. Click **Edit**.

f.   Delete whatever text may be here and paste the **Lightning Launch URL** from an earlier step into the formula field.

g.   Append

&c__ObjectId={!Quote.Id}&c__TemplateType=MicrosoftWord at the end of the URL. This passes QuoteId from the record into the OmniScript and pre-selects the template type.

h.   Append &c__templateId=.

i.   Append template Id you saved in an earlier step at the end of the URL. This passes template Id to the OmniScript and pre-selects the template the OmniScript is going to use.

j.   Make sure there are no spaces in the URL.
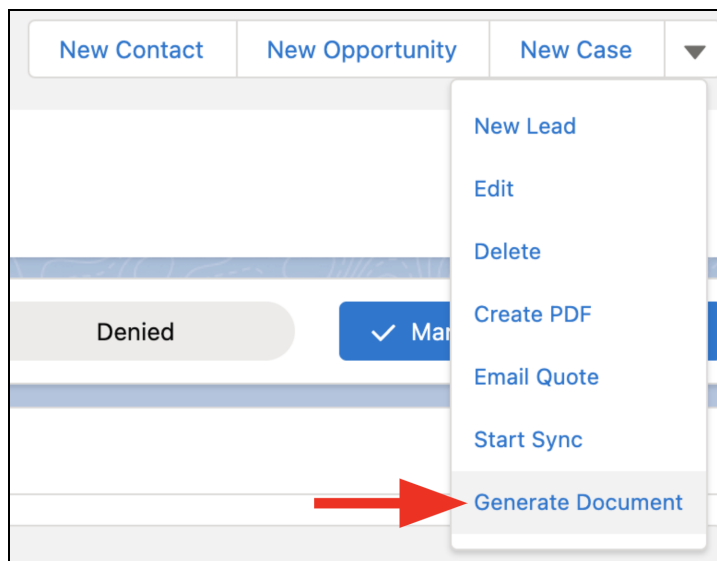
       k.   Click **Save**.

4. Test the Document Generation process.

      a.   In the Lightning Navigation Bar, click **Quotes** tab.

      b.   Click **Acme Sneakers Quote** to open the quote page.
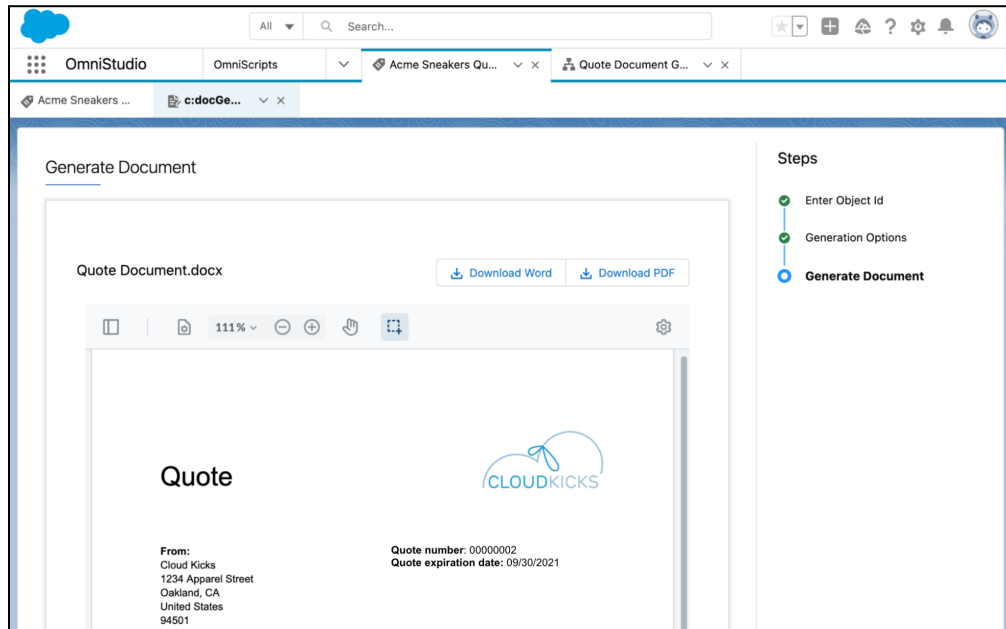

      c. Click [▾] and click **Generate Document**.

d. The OmniScript opens in a separate tab. Go through the OmniScript Steps to generate the quote document.

e. Close the Generate Document tab and go back to the **Acme Sneakers Quote** page.

f. Go to the **Notes and Attachment** related list and notice the quote document attached.