

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

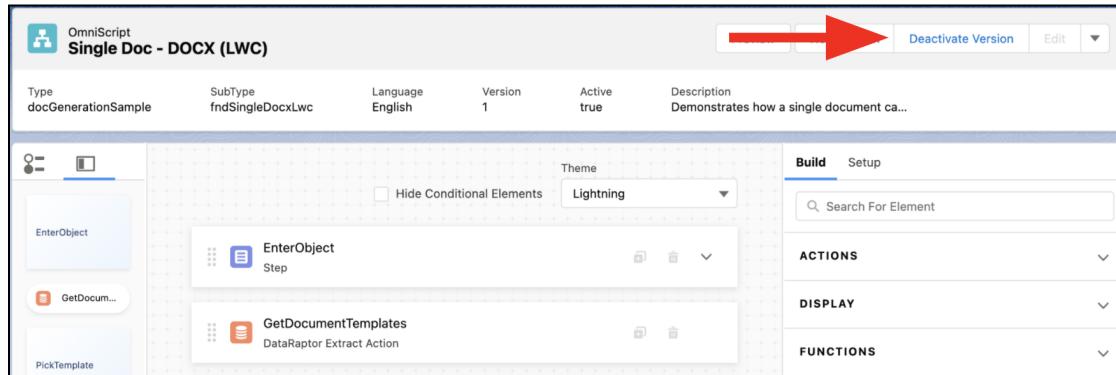
- 30 minutes

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.

OMNISTUDIO OmniScripts							Find in page	C	D	T	New	Import
Type	Language	Description	Last Modified ...	Last Modified By	OmniScript...	Active	LWC Enabled					
docGenerationSample/fndSingleDocxLwc	English	Demonstrates how a single document can be generat...	10/5/21 4:07 PM	Admin User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
Single Doc - DOCX (Version 1)	English	Demonstrates how a single document can be generat...	10/5/21 4:07 PM	Admin User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
docGenerationSample/fndSingleDocxServerSide...	English		8/28/21 3:13 PM	Admin User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					

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



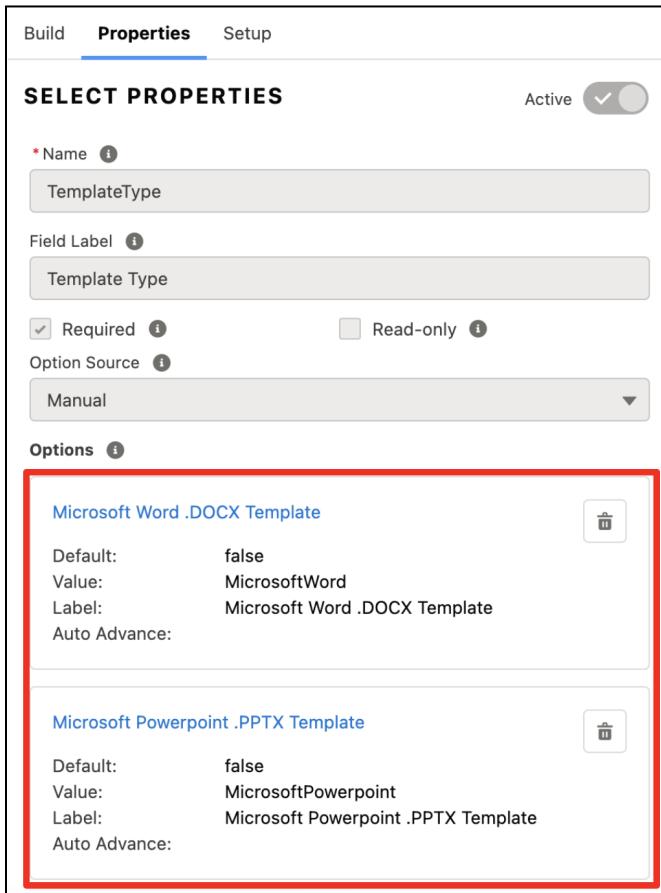
The screenshot shows the OmniScript builder interface for a Single Doc - DOCX (LWC) version. The top navigation bar includes 'OmniScript' and 'Single Doc - DOCX (LWC)'. The main area displays details like Type: docGenerationSample, SubType: fndSingleDocxLwc, Language: English, Version: 1, Active: true, and Description: 'Demonstrates how a single document ca...'. On the right, there are tabs for 'Build' (selected), 'Setup', and sections for 'ACTIONS', 'DISPLAY', and 'FUNCTIONS'. A red arrow points to the 'Deactivate Version' button in the top right corner of the main content area.

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



The screenshot shows the configuration screen for the 'EnterObject' step. It has a title 'Enter Object Id' and two required fields: 'ObjectId' and 'Template Type'. Both fields have dropdown menus. A blue 'Next' button is located at the bottom right.

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.



The screenshot shows the 'Properties' tab in the Salesforce interface. Under the 'SELECT PROPERTIES' section, there is a 'Name' field labeled 'TemplateType', a 'Field Label' field labeled 'Template Type', and checkboxes for 'Required' and 'Read-only'. Below these are dropdown menus for 'Option Source' (set to 'Manual') and 'Options'. The 'Options' section contains two items, each with a delete icon. The first item is 'Microsoft Word .DOCX Template' with details: Default: false, Value: MicrosoftWord, Label: Microsoft Word .DOCX Template, and Auto Advance: (empty). The second item is 'Microsoft Powerpoint .PPTX Template' with similar details. A red box highlights the 'Options' section.

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.

Explore Client-Side Document Generation

Exercise Guide



Screenshot of the DataRaptor Extract Action Properties screen. The "Properties" tab is selected. The "Name" field contains "GetDocumentTemplates". The "Field Label" field also contains "GetDocumentTemplates". The "DataRaptor Interface" dropdown is set to "DocGenSample-ExtractDocumentTemplatesLWC", which is highlighted with a red box. Other options include "+ Create New Dataraptor" and "Ignore Cache".

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

Screenshot of the DataRaptor Extract tab. It shows a step named "1 - DocumentTemplate". The "Extract Output Path" is "DocumentTemplate". The "Filter" conditions are: IsActive = 'true' AND TokenMappingType = 'JSON' AND Type = templateType. A button "+ Add Extract Step" is visible at the bottom.

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

Screenshot of the DataRaptor Output tab. It lists extract and output JSON paths. Extract paths include "DocumentTemplate:DocumentGenerationMechanism", "DocumentTemplate:id", "DocumentTemplate:name", "DocumentTemplate:type", and "DocumentTemplate:versionNumber". Output paths are identical to the extract paths. Each path has edit and delete icons.

Explore Client-Side Document Generation

Exercise Guide



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.

The screenshot shows the OmniScript builder interface. On the left, a list of steps includes 'GetDocumentTemplates', 'PickTemplate', 'SetValues', 'GenerationOptions', and 'Set Generation Options'. The 'PickTemplate' step is selected and highlighted with a red box. On the right, the 'Properties' tab is open for the 'SelectTemplate' component within the 'PickTemplate' step. The 'CUSTOM LIGHTNING WEB COMPONENT PROPERTIES' section shows the 'Name' field set to 'SelectTemplate' and the 'Lightning Web Component Name' field set to 'devopsimpkg11_cimSelectableItems'. A second 'CUSTOM LIGHTNING WEB COMPONENT PROPERTIES' section is partially visible below it. The 'Edit Properties As JSON' button is at the bottom right.

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

The screenshot shows the OmniScript builder interface. The 'SetValues' step is selected and highlighted with a red box. On the right, the 'Properties' tab is open for the 'SetValues' step. Under the 'SET VALUES PROPERTIES' section, two fields are defined: 'selectedTemplate' with a value of '=IF(%templateId% == null, %PickTemplate|1:\$...)' and 'templateType' with a value of '=">%TemplateType%"'. Both fields have their respective 'Element Name' and 'Element Type' fields filled in.

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

Explore Client-Side Document Generation

Exercise Guide



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

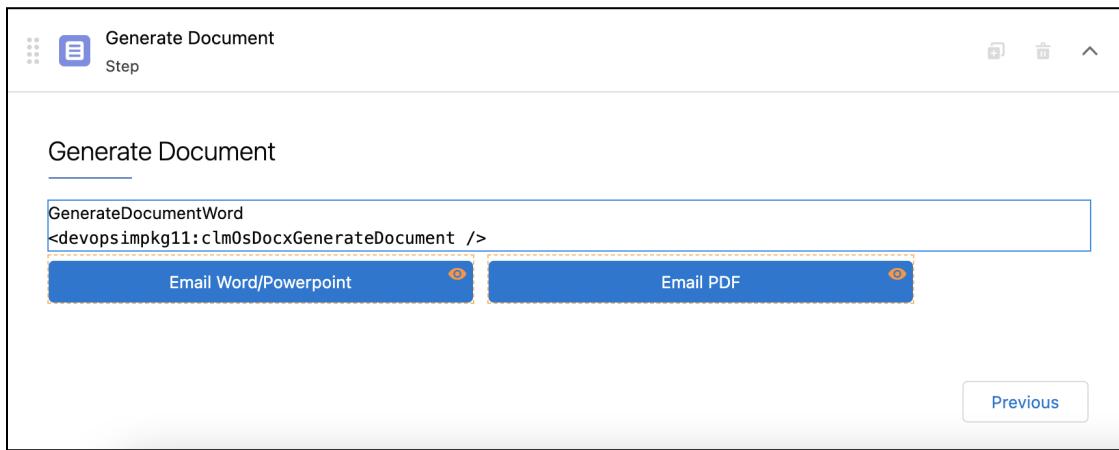
Previous Next

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.

The screenshot shows the Salesforce Flow builder interface. On the left, a list of steps is visible: EnterObject, GetDocumentTemplates, PickTemplate, SetValues, GenerationOptions, and Set Generation Options. The 'Set Generation Options' step is highlighted with a red box. On the right, the 'Properties' panel is open for this step, showing four 'Set VALUES PROPERTIES' entries:

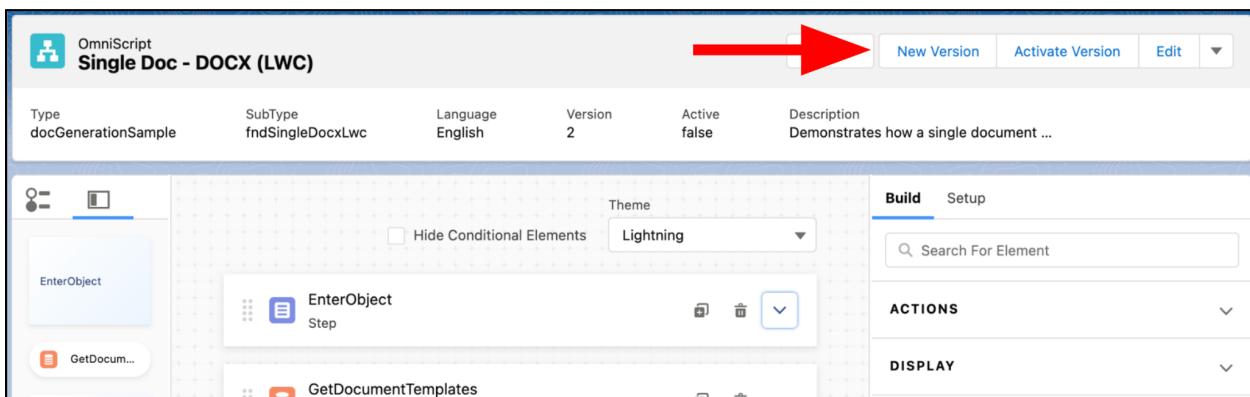
- attachFileFormat: Element Name: attachFileFormat, Element Type: Set Values, Value: =%GenerationOptions:AttachFileFormat%
- docGenerationMechanism: Element Name: docGenerationMechanism, Element Type: Set Values, Value: =%GenerationOptions:DocGenerationMechani...
- documentViewer: Element Name: documentViewer, Element Type: Set Values, Value: =%GenerationOptions:DocumentViewer%
- downloadFileFormat: Element Name: downloadFileFormat, Element Type: Set Values, Value: =%GenerationOptions:DownloadFileFormat%

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.

Explore Client-Side Document Generation

Exercise Guide



Edit OmniScript

* Name	* Language
Quote Document Generation OmniScript	English
* Type	* SubType
docGen	QuoteDocument
Description	
OmniScript for generating a single quote document.	
<button>Cancel</button> <button>Save</button>	

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**.

The screenshot shows the Salesforce OmniScript builder interface. An 'nEnterObject Step' is selected. On the left, there's a form with fields 'Enter Object Id' and 'Template Type'. On the right, the 'Properties' panel is open for the 'ObjectId' field under the 'TEXT PROPERTIES' tab. A red box highlights the 'ObjectId' input field. A red arrow points to the 'Read-only' checkbox, which is checked.

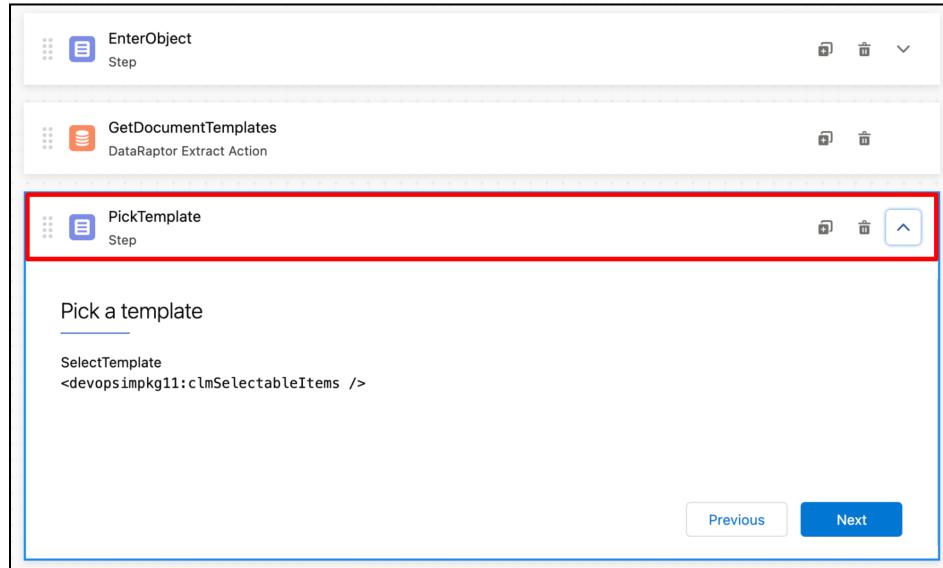
- d. Click the **Template Type** field.
- e. In the **Properties** panel on the right, select **Read-only**.

The screenshot shows the Salesforce OmniScript builder interface. An 'nEnterObject Step' is selected. On the left, there's a form with fields 'Enter Object Id' and 'Template Type'. On the right, the 'Properties' panel is open for the 'Template Type' field under the 'SELECT PROPERTIES' tab. A red box highlights the 'Template Type' input field. A red arrow points to the 'Read-only' checkbox, which is checked.

6. Edit the OmniScript to pre-select the template.

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

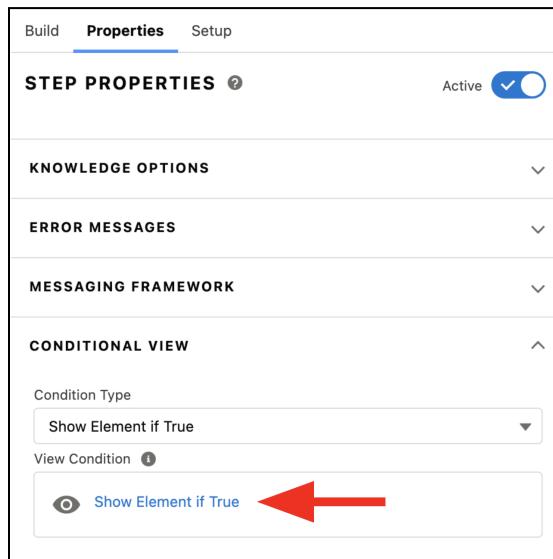
- i. Click the **PickTemplate** step.



The screenshot shows the Salesforce Flow builder interface. At the top, there are three steps listed: 'EnterObject Step', 'GetDocumentTemplates DataRaptor Extract Action', and 'PickTemplate Step'. The 'PickTemplate Step' is highlighted with a red border. Below the steps is a preview area titled 'Pick a template' containing the XML code: 'SelectTemplate <devopsimpk11:c1mSelectableItems />'. At the bottom right of the preview area are 'Previous' and 'Next' buttons.

- ii. In the **Properties** panel on the right, expand **CONDITIONAL VIEW**.

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



The screenshot shows the 'Properties' tab of the 'STEP PROPERTIES' panel for the 'PickTemplate' step. The 'Conditional View' section is expanded, showing the 'Condition Type' dropdown set to 'Show Element if True' and the 'View Condition' input field containing the expression 'Show Element if True'. A red arrow points to this input field.

- iv. Edit the following fields:

Field	Value
Field	templateId

Operator	Equal To
Value	[leave blank]

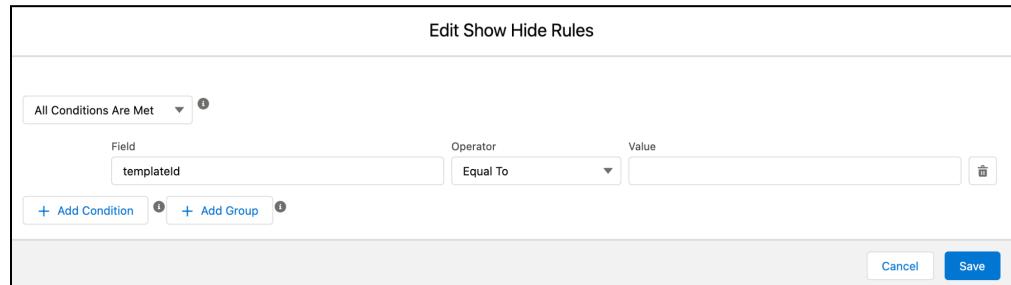
Edit Show Hide Rules

All Conditions Are Met

Field	Operator	Value
templateId	Equal To	

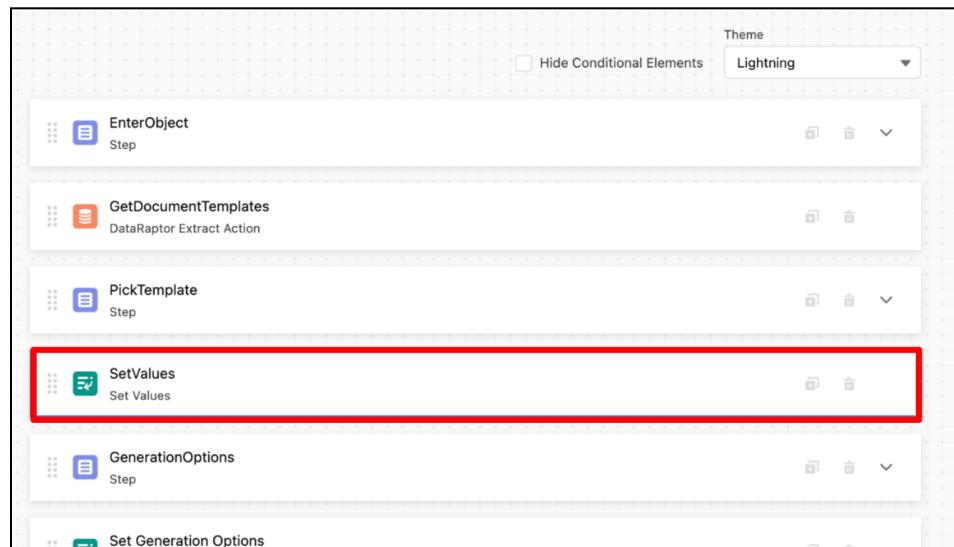
+ Add Condition + Add Group

Cancel Save



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.



The screenshot shows the Salesforce Flow builder interface. A list of steps is displayed in a grid:

- EnterObject
- GetDocumentTemplates
- PickTemplate
- SetValues** (highlighted with a red box)
- GenerationOptions
- Set Generation Options

At the top right, there are theme settings: "Theme" (Lightning) and "Hide Conditional Elements".

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

Explore Client-Side Document Generation

Exercise Guide



The screenshot shows the 'Properties' tab of the 'Set Values Properties' screen. It displays two element definitions:

- selectedTemplate**:
 - Element Name: selectedTemplate
 - Element Type:
 - Value: =IF(%templateId% == null, %PickTemplate|1:S...)
- templateType**:
 - Element Name: templateType
 - Element Type:
 - Value: =%TemplateType%

Below these definitions are sections for 'MESSAGING FRAMEWORK' and 'CONDITIONAL VIEW'. At the bottom left, there is a link 'Edit Properties As JSON' with a red arrow pointing towards it.

- 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**.

Explore Client-Side Document Generation

Exercise Guide



Screenshot of the Set Values Properties panel in the Trailhead exercise interface. The panel shows a JSON configuration for a component. A red arrow points to the "Close JSON Editor" button at the bottom left.

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

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**.

Screenshot of the Trailhead exercise interface showing the Step list and Properties panel for the Set Generation Options element. A red box highlights the "Set Generation Options" step in the list, and a red arrow points to the "+ Add New Element Value" button in the Properties panel.

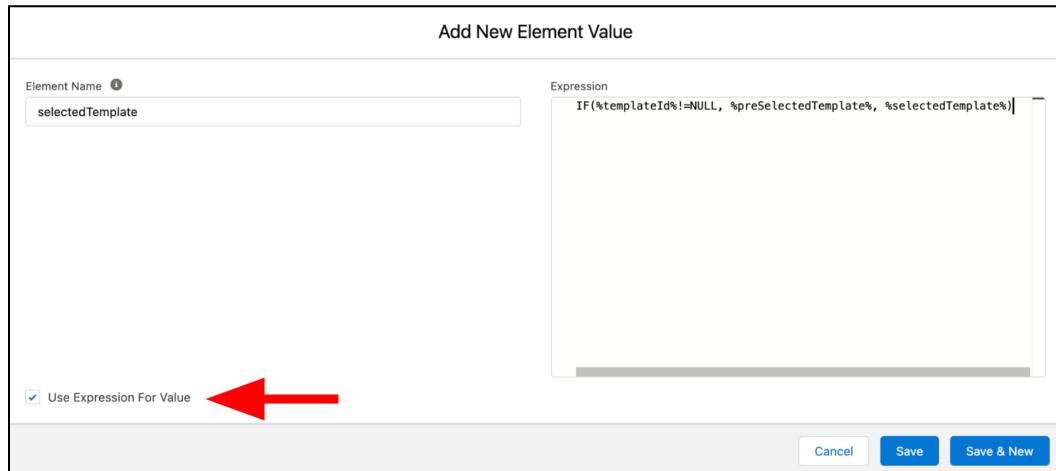
The Properties panel displays the following configuration:

- pdfGenerationSource**:
 - Element Name: pdfGenerationSource
 - Element Type: =%GenerationOptions:PdfGenerationSource%
 - Value: (empty)
- useTemplateDRExtract**:
 - Element Name: useTemplateDRExtract
 - Element Type: =%GenerationOptions:UseTemplateDRExtract%
 - Value: (empty)
- documentTitle**:
 - Element Name: documentTitle
 - Element Type: =%GenerationOptions:DocumentTitle%
 - Value: (empty)

- iii. Edit the following fields:

Element Name	selectedTemplate
Value	IF(%templateId%!=NULL, %preSelectedTemplate%, %selectedTemplate%)

iv. Select the **Use Expression For Value** checkbox.



Add New Element Value

Element Name ⓘ
selectedTemplate

Expression
IF(%templateId%!=NULL, %preSelectedTemplate%, %selectedTemplate%)

Use Expression For Value

Cancel Save Save & New

v. Click **Save**.

7. Edit **Generation Options** step.

a. Click the **GenerationOptions** step.

Explore Client-Side Document Generation

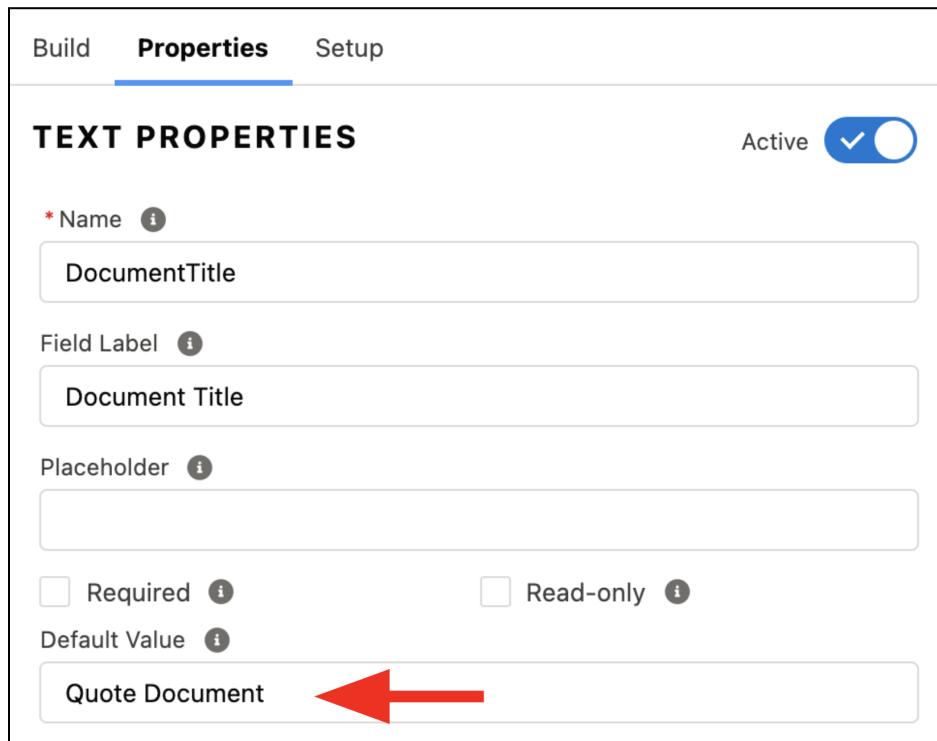
Exercise Guide



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

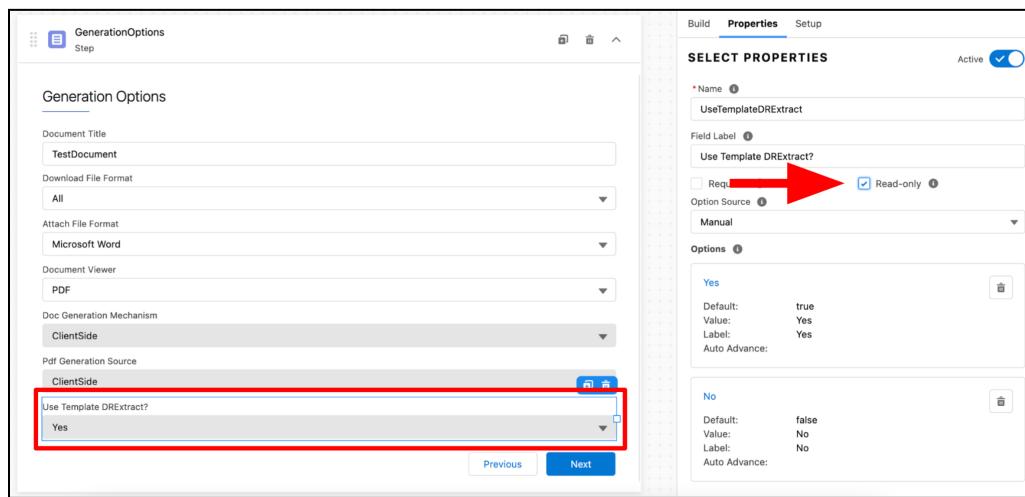
The screenshot shows the "Generation Options" step of a "GenerationOptions" wizard. The "Step" icon is at the top left. The "Document Title" field contains "TestDocument" and has a red arrow pointing to it from the left. Below it are fields for "Download File Format" (set to "All"), "Attach File Format" (set to "Microsoft Word"), "Document Viewer" (set to "PDF"), "Doc Generation Mechanism" (set to "ClientSide"), "Pdf Generation Source" (set to "ClientSide"), and "Use Template DRExtract?" (set to "Yes"). At the bottom are "Previous" and "Next" buttons.

- c. In the Properties panel, change the default value of the **Document Title** field to **Quote Document**.



The screenshot shows the Salesforce Properties panel for a custom object. The tab 'Properties' is selected. Under the 'TEXT PROPERTIES' section, there is a field labeled 'Name' with the value 'DocumentTitle'. Below it is a 'Field Label' field with the value 'Document Title'. A 'Placeholder' field is present but empty. Under 'Required' and 'Read-only' checkboxes, the 'Default Value' field contains the text 'Quote Document', which is highlighted with a large red arrow.

- d. Click the **Use Template DRExtract?** field and in the **Properties** panel, check **Read-Only**.



The screenshot shows the Salesforce Properties panel for a custom object. The tab 'Properties' is selected. Under the 'SELECT PROPERTIES' section, there is a field labeled 'Name' with the value 'UseTemplateDRExtract'. Below it is a 'Field Label' field with the value 'Use Template DRExtract?'. A 'Required' checkbox is unchecked, while a 'Read-only' checkbox is checked, indicated by a red arrow. The 'Default' value is set to 'true'. The 'Yes' and 'No' options are listed below, each with its own set of properties. A red box highlights the dropdown menu for 'Use Template DRExtract?'.

Explore Client-Side Document Generation

Exercise Guide



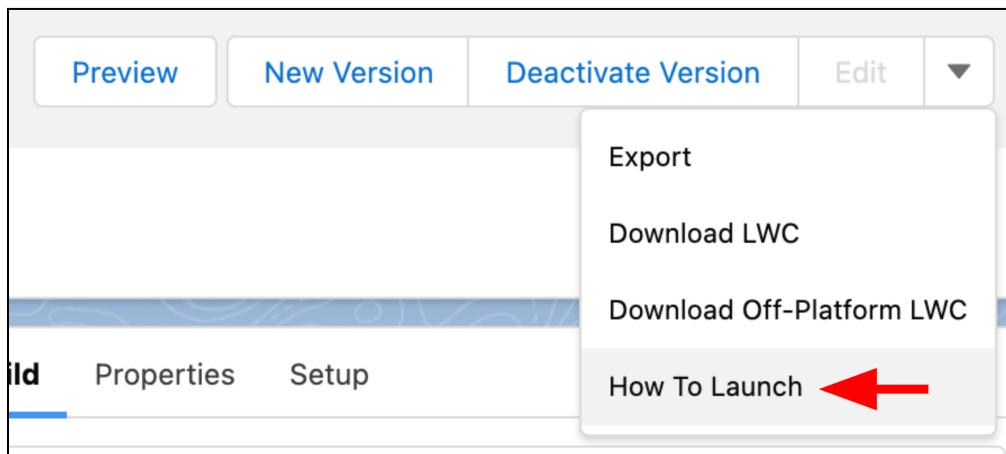
8. Click **Activate Version** to activate the OmniScript.

The screenshot shows the Salesforce OmniScript builder interface. At the top, there's a header with the title "OmniScript Quote Document Generation OmniScript", a timestamp "Saved 2 minutes ago", and a "Preview" button highlighted with a red arrow. Below the header, there are fields for Type (docGen), SubType (QuoteDocument), Language (English), Version (1), Active (false), and Description (OmniScript for generating a single quote do...). On the left, a sidebar lists available actions: EnterObject, GetDocumentTemplates, PickTemplate, and SetValues. The main workspace displays four steps in a vertical stack: "EnterObject Step", "GetDocumentTemplates DataRaptor Extract Action", "PickTemplate Step", and "SetValues". To the right of the workspace is a panel with tabs for Build, Properties, and Setup, and sections for ACTIONS, DISPLAY, FUNCTIONS, and GROUPS. A search bar at the top of this panel contains the placeholder "Search For Element".

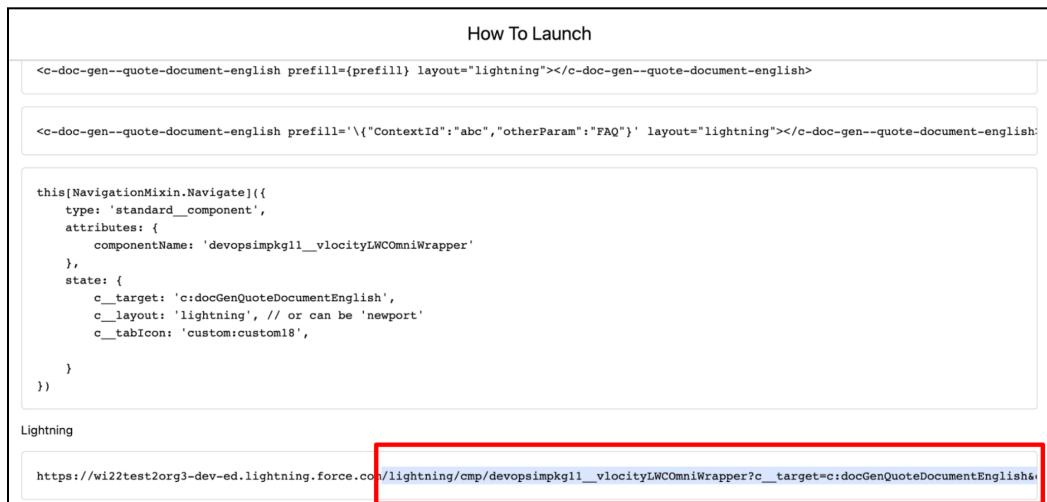
Task 3: Edit the Generate Document Button on the Quote Record Page to Launch the OmniScript

1. Retrieve Lightning Launch URL.

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

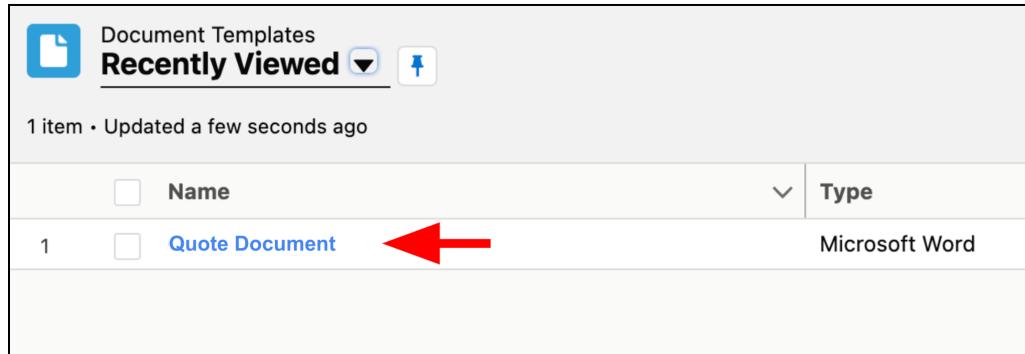


- b. Copy the **Lightning Launch URL** after .com till the end. Save it for later.



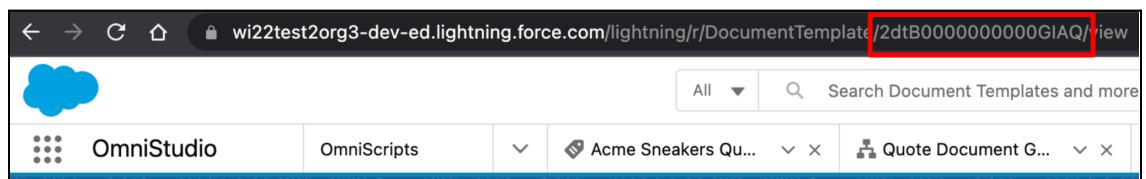
- c. Click **Done**.
2. Retrieve the Template Id
 - a. In the Lightning Navigation Bar, click **Document Templates** tab.

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



The screenshot shows a list titled "Document Templates Recently Viewed". It contains one item: "1 item • Updated a few seconds ago". The item is a table with two columns: "Name" and "Type". The "Name" column shows "Quote Document" with a blue link-like icon to its right, which has a red arrow pointing to it. The "Type" column shows "Microsoft Word".

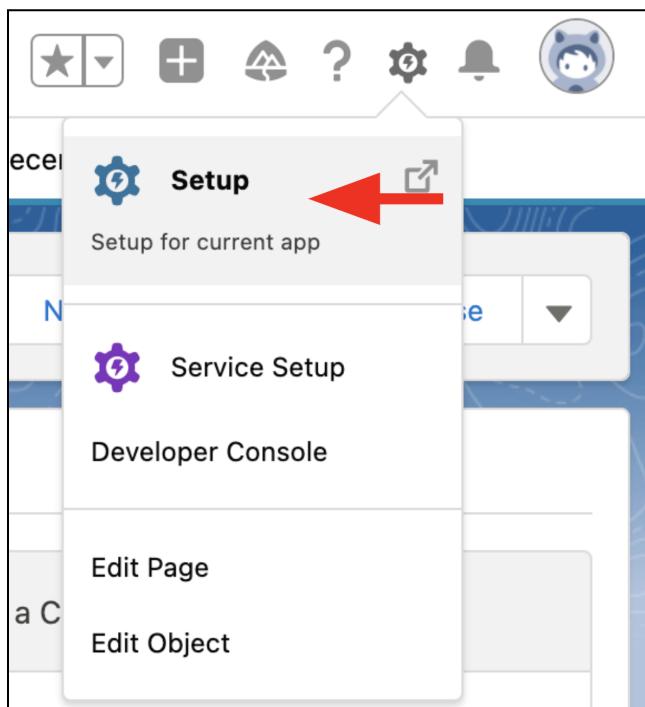
- c. Copy the alpha-numeric combination from the URL between **DocumentTemplate/** and **/view**. This is the Template Id. Save it for later.



The screenshot shows a browser window with the URL "wi22test2org3-dev-ed.lightning.force.com/lightning/r/DocumentTemplate/2dtB00000000000GIAQ/view". A red box highlights the template ID "2dtB00000000000GIAQ". The browser interface includes a search bar, tabs for "OmniStudio", "OmniScripts", "Acme Sneakers Qu...", and "Quote Document G...", and a top navigation bar with icons.

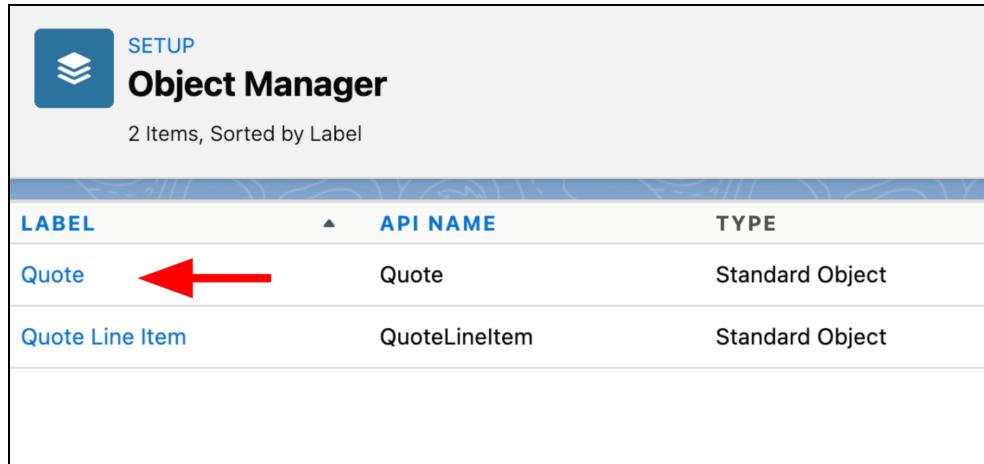
3. Edit Generate Document button.

- a. Click **Setup**.



The screenshot shows the Salesforce Setup menu. The "Setup" option is highlighted with a red arrow pointing to its icon. Other options visible include "Service Setup", "Developer Console", "Edit Page", and "Edit Object". The background shows a blurred view of the Salesforce interface.

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

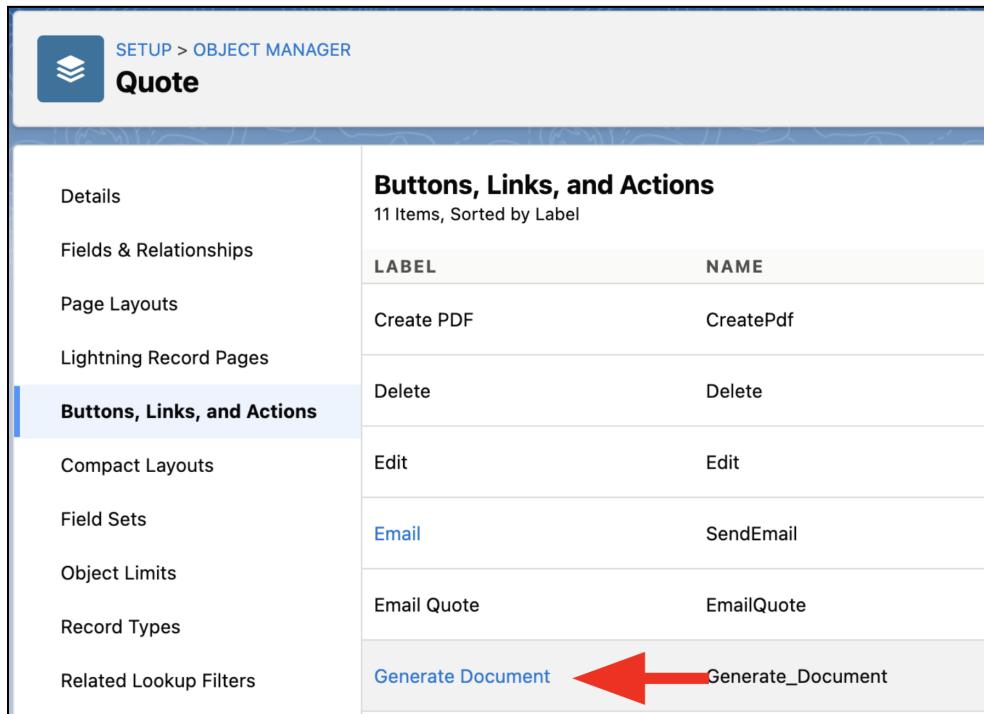


The screenshot shows the Salesforce Setup > Object Manager interface. The title bar says "SETUP" and "Object Manager". Below it, it says "2 Items, Sorted by Label". A table lists two objects:

LABEL	API NAME	TYPE
Quote	Quote	Standard Object
Quote Line Item	QuoteLineItem	Standard Object

A red arrow points to the "Quote" label in the first row.

- c. Click **Buttons, Links, and Actions**.
d. Click **Generate Document**. We pre-built this custom button for training purposes.



The screenshot shows the "Quote" object's "Buttons, Links, and Actions" section. The title bar says "SETUP > OBJECT MANAGER" and "Quote". On the left, there's a sidebar with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, and Buttons, Links, and Actions (which is currently selected). The main area shows a table of actions:

LABEL	NAME
Create PDF	CreatePdf
Delete	Delete
Edit	Edit
Email	SendEmail
Email Quote	EmailQuote
Generate Document	Generate_Document

A red arrow points to the "Generate Document" label in the last row.

- e. Click **Edit**.

Explore Client-Side Document Generation

Exercise Guide



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

The screenshot shows the 'Edit Quote Custom Button or Link' page under the 'Generate Document' tab. In the 'Content Source' section, the 'URL' field contains the following lightning launch URL:

```
/lightning/cmp/devopsimpkgl1_vvelocityLWOMniWrapper?  
c__target=c:docGenQuoteDocumentEnglish&c__layout=lightning&c__tabIcon=custom:custom18
```

A red box highlights the URL in the 'Content Source' field. A red arrow points from this highlighted area to a dropdown menu labeled 'Functions' on the right side of the screen. The 'Functions' menu is open, showing various mathematical and logical functions like ABS, ADD_MONTHS, AND, BEGINS, BLANKVALUE, and CASE. The 'ABS' function is currently selected.

- 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.

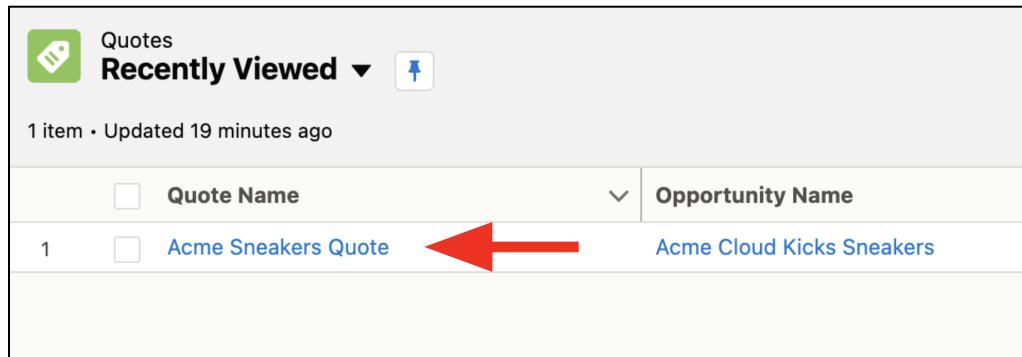
The screenshot shows the 'Edit Quote Custom Button or Link' page under the 'Generate Document' tab. The 'Content Source' section now contains the following lightning launch URL with additional parameters appended:

```
/lightning/cmp/devopsimpkgl1_vvelocityLWOMniWrapper?  
c__target=c:docGenQuoteDocumentEnglish&c__layout=lightning&c__tabIcon=custom:custom18&c__obj  
ctId={!Quote.Id}&c__TemplateType=MicrosoftWord&c__templateId=2dtB000000000GIAQ
```

A red box highlights the URL in the 'Content Source' field. A red arrow points from this highlighted area to the 'Functions' dropdown menu on the right, which is identical to the one shown in the previous screenshot, with 'ABS' selected.

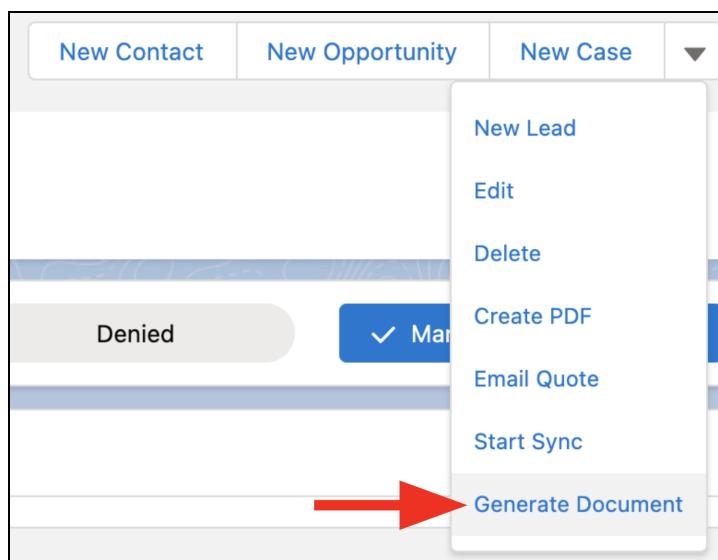
- j. Make sure there are no spaces in the URL.

- 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.



A screenshot of the Salesforce Quotes tab. The title bar says "Quotes" and "Recently Viewed". Below it, a message says "1 item • Updated 19 minutes ago". A table shows one item: "Acme Sneakers Quote" with a checkbox next to it, and "Opportunity Name" "Acme Cloud Kicks Sneakers". A red arrow points to the checkbox in the "Acme Sneakers Quote" row.

- c. Click  and click **Generate Document**.

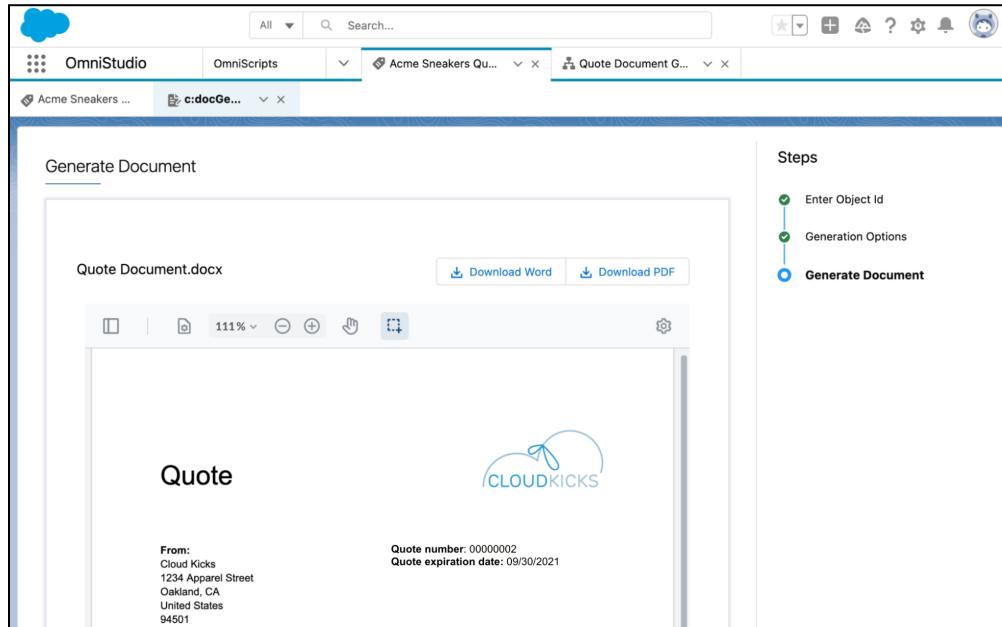


A screenshot of a quote page. At the top, there are buttons for "New Contact", "New Opportunity", and "New Case". A dropdown menu is open, showing options: "New Lead", "Edit", "Delete", "Create PDF", "Email Quote", "Start Sync", and "Generate Document". A red arrow points to the "Generate Document" option in the menu.

Explore Client-Side Document Generation

Exercise Guide

- 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.

