

Before You Begin

Did you sign up for a Industries training playground already? You'll need one to do the steps in this guide. Here's how to request one if this is your first time doing the exercises:

1. Sign up for a Industries training playground.
2. Fill out the form.
 - a. For Email, enter an active email address.
 - b. For Username, enter a username that looks like an email address and is unique, but it doesn't need to be a valid email account (for example, yourname@industriestraining.com).
 - c. After you fill out the form, click **Sign me up**. A confirmation message appears.
3. When you receive the activation email (this might take about 30 minutes), open it and click **Verify Account**.
4. Complete your registration by setting your password and security challenge question.
Tip: Write down your username, password, and login URL for easy access later.

You are logged in to your Industries training playground and you can begin practicing.

Exercise 2: Create Microsoft Word DOCX Templates

Scenario

“As a Sales Rep, I’d like to generate contract 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 mins



NOTE:

There's a recent change to session settings that affects your experience using LWC OmniScript Designer. After you get your training playground, please make this quick change before beginning exercises.

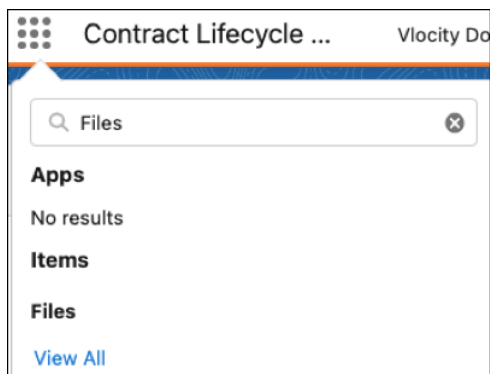
1. Click Setup (the gear icon) and choose Setup.
2. In the Quick Find, search for and then go to Session Settings.
3. Deselect Use Lightning Web Security for Lightning web components.
4. Clear Chrome cache after changing the setting or do a hard refresh.
 - a. In Chrome, select the three dots on the top right.
 - b. Go to Settings > Security and Privacy > Clear Browsing Data.

For more information, see:

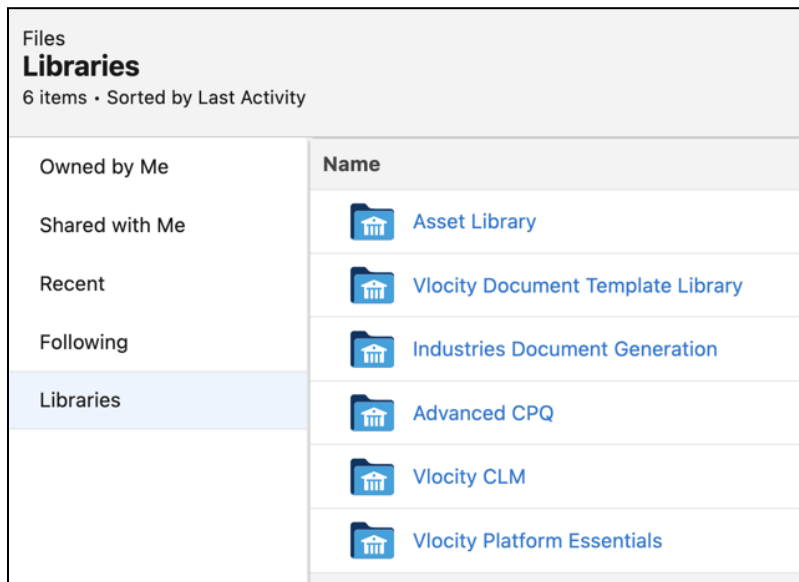
<https://help.salesforce.com/s/articleView?id=000393105&type=1>

Task 1: Insert tokens into Microsoft Word DOCX template

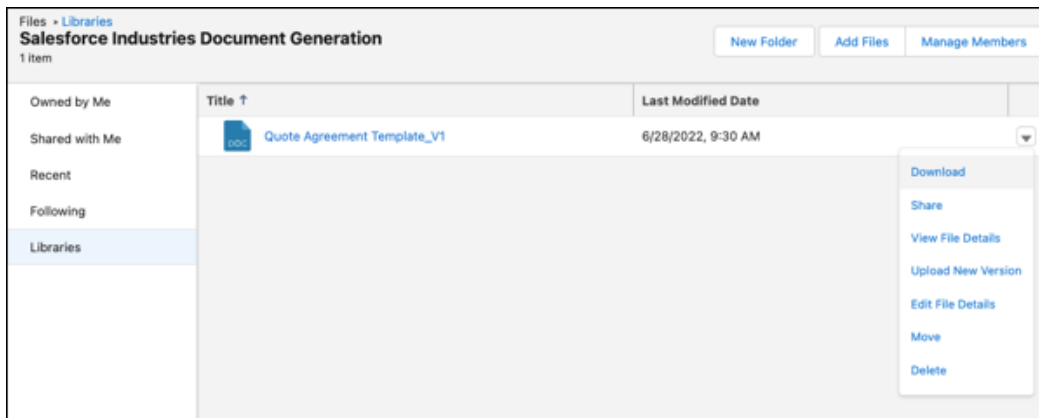
1. Using the **Lightning App Launcher** , type `files` in the search box. Under **Items**, click **Files**.



2. Click **Libraries**.
3. Click the **Industries Document Generation** library.




4. Click **Download** to download the file **Quote Agreement Template_V1**.



5. Open **Quote Agreement Template_V1** in Microsoft Word to edit the file.
6. Replace the fields with the **variable token** in the first section as shown below:

| Field | Variable Token |
|-----------------|---------------------|
| SUBSCRIBER NAME | {{SUBSCRIBER_NAME}} |
| STREET | {{STREET}} |
| CITY | {{CITY}} |
| STATE | {{STATE}} |
| POSTALCODE | {{ZIPCODE}} |
| COUNTRY | {{COUNTRY}} |



Subscription Agreement

This Subscription Agreement (the "Agreement") is by and between Infowave, with business offices located at 50 Fremont Street, Suite 2250, San Francisco, CA 94105, and **{{SUBSCRIBER_NAME}}** with business offices located at **{{STREET}}** **{{CITY}}** **{{STATE}}** **{{ZIPCODE}}** **{{COUNTRY}}** (the "Subscriber"). This Agreement shall be effective on the effective date provided on the Infowave signature block hereto ("Effective Date"). Each of Infowave and Subscriber is a "Party" and together they are the "Parties".

NOW, THEREFORE, the Parties hereto, for good and valuable consideration, the receipt, adequacy, and sufficiency of which are hereby acknowledged, and intending to be legally bound, hereby agree as follows.



NOTE:

Variable token displays 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.

7. In the **Items Ordered** grid add the following tokens:

a. Add the variable tokens below:

| Field | Variable Token |
|------------------|------------------|
| Product | {{product_name}} |
| Quantity | {{qty}} |
| One Time Charge | {{otc}} |
| Recurring Charge | {{mrc}} |

1. Items Ordered

| Product | Quantity | One Time Charge | Recurring Charge |
|------------------|----------|-----------------|------------------|
| {{product_name}} | {{qty}} | {{otc}} | {{mrc}} |
| | | | |

b. Use a repeating content **{{#lineitems}}** token to display contract line items. The line items will be repeated. For each line, it will display the product quantity, one time charge, and recurring charge. Use **{{/lineitems}}** to close the tag.

1. Items Ordered

| Product | Quantity | One Time Charge | Recurring Charge |
|---------------------------------|----------|-----------------|------------------------|
| {{#lineitems}} {{product_name}} | {{qty}} | {{otc}} | {{mrc}} {{/lineitems}} |
| | | | |

- In the **US Export Compliance** section, insert the conditional token `{{#IF_customer_not_in_US}}` to display the clause if the customer (account) on the contract has an address outside the USA. Insert the corresponding closing token `{{/IF_customer_not_in_US}}` at the end of the clause.

```

{{#IF_customer_not_in_US}}
2. US Export Compliance

The Services that Telecom makes available, and any derivatives thereof, may be subject to export laws of the United States and other jurisdictions. Each Party represents that it is not named on any US Department of Commerce Denied Person's List or Entity List. The Telecom Services, or any derivatives thereof, may not be exported to or used by: (i) any US embargoed countries; or (ii) anyone on the US Treasury Department's list of Specially Designated Nationals or the US Department of Commerce Denied Person's List or Entity List. Subscriber agrees to comply with all applicable laws regarding the transmission of technical data exported from the United States and the country in which Subscriber's customers or End-Users are located.
{{/IF_customer_not_in_US}}

```



NOTE:

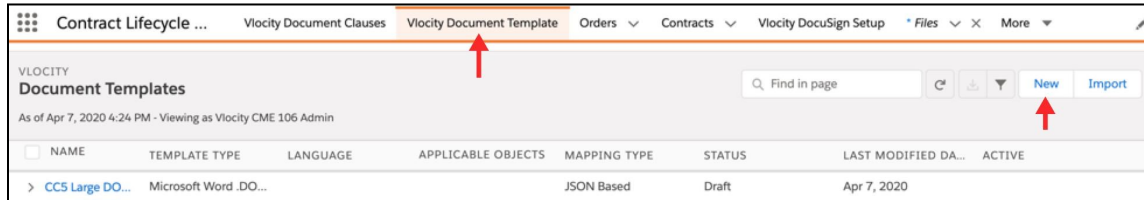
A token beginning with the pound sign, IF, and underscore (`#IF_`) indicates that, if the token value is true, the section appears once. If the token value is false, it does not appear.

A token beginning with the caret, IF, and underscore (`^IF_`) indicates that, if the token value is true, the section will not appear, but, if the token value is false, the section will appear once.

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

Task 2: Create a Microsoft Word DOCX template

1. Using the **Lightning App Launcher** , navigate to **Contract Lifecycle Management (CLM)**.
2. In the Lightning Navigation bar, click **Vlocity Document Template** tab.



3. Click **New** on the top right section to create a new document template. This will open **Start New Template** page.
4. In **Template Settings**, enter the following information:

| Field | Variable Token |
|-------------------------------------|--------------------------------------|
| Name | Quote Agreement Template |
| Template Type | Microsoft Word .DOCX Template |
| Language | English |
| Token Mapping | JSON Based |
| Token Mapping Method | DataRaptor |
| Mapping Dataraptor Bundle Name | transformQuoteDetails_v1 |
| Data Extract Dataraptor Bundle Name | extractQuoteDetails_v1 |
| Usage Type | Quote |

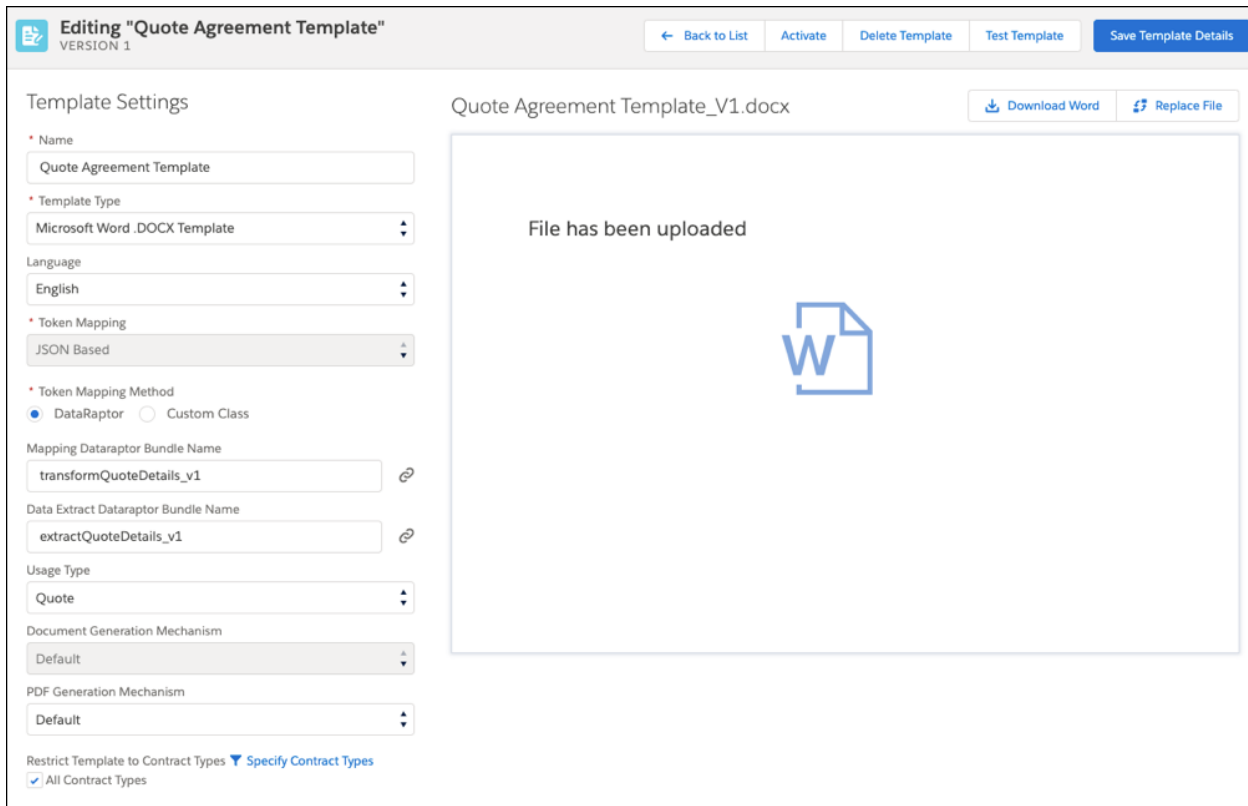
5. Drag the updated .docx file (Quote Agreement Template_V1) from your desktop into the Document Template Designer or click **Browse** to upload the .docx file.



NOTE:

The .docx maximum file size is 38 MB. You can associate only one .docx file with one Vlocity Document Template.

6. Click **Save Template Details**.




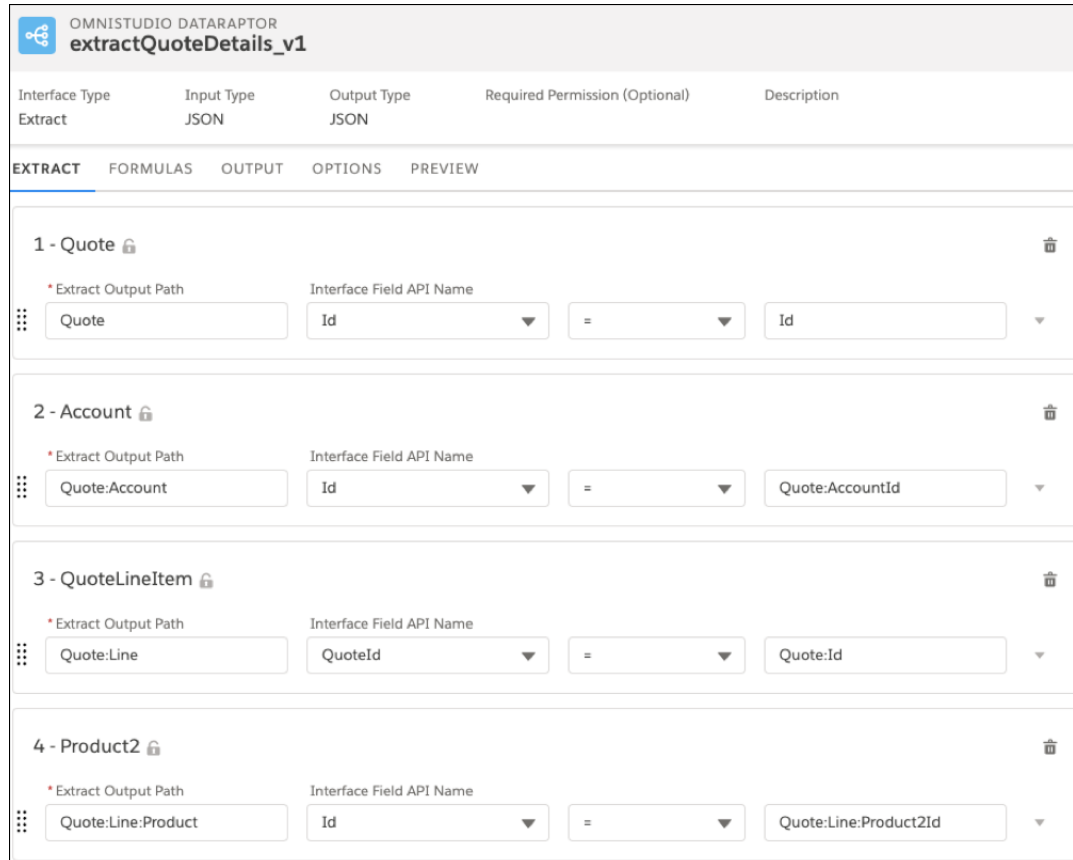
The screenshot displays the 'Editing "Quote Agreement Template"' interface. The top navigation bar includes buttons for 'Back to List', 'Activate', 'Delete Template', 'Test Template', and 'Save Template Details'. The left sidebar, titled 'Template Settings', contains the following configuration options:

- Name: Quote Agreement Template
- Template Type: Microsoft Word .DOCX Template
- Language: English
- Token Mapping: JSON Based
- Token Mapping Method: DataRaptor Custom Class
- Mapping Dataraptor Bundle Name: transformQuoteDetails_v1
- Data Extract Dataraptor Bundle Name: extractQuoteDetails_v1
- Usage Type: Quote
- Document Generation Mechanism: Default
- PDF Generation Mechanism: Default
- Restrict Template to Contract Types: All Contract Types

The main content area shows the document 'Quote Agreement Template_V1.docx' with a 'Download Word' and 'Replace File' button. A central message states 'File has been uploaded' next to a Word document icon.


7. Examine the extractQuoteDetails_v1 DataRaptor Extract.

- a. Click on the link  next to **Data Extract Dataraptor Bundle Name** 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.




| Interface Type | Input Type | Output Type | Required Permission (Optional) | Description |
|----------------|------------|-------------|--------------------------------|-------------|
| Extract | JSON | JSON | | |


EXTRACT FORMULAS OUTPUT OPTIONS PREVIEW

1 - Quote 


Extract Output Path: Quote Interface Field API Name: Id = Id

2 - Account 

Extract Output Path: Quote:Account Interface Field API Name: Id = Quote:AccountId

3 - QuoteLineItem 

Extract Output Path: Quote:Line Interface Field API Name: QuoteId = Quote:Id

4 - Product2 

Extract Output Path: Quote:Line:Product Interface Field API Name: Id = Quote:Line:Product2Id

- 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.
8. Copy Current JSON Output from the extractQuoteDetails_v1 DataRaptor Extract.
- a. Click the **OUTPUT** tab in the extractQuoteDetails_v1 DataRaptor Extract if you aren't there yet.

- b. Expand the **Current JSON Output** panel.



```
{
  "BillingCity": "Text",
  "BillingCountry": "Text",
  "BillingState": "Text",
  "BillingStreet": "Text",
  "CompanyName": "Text",
  "QuoteId": "Text",
  "Line": {
    "ProductName": "Text",
    "Quantity": "Text",
    "LineNumber": "Text",
    "OneTimeCharge": "Text",
    "OneTimeTotal": "Text",
    "RecurringCharge": "Text",
    "RecurringTotal": null
  },
  "QuoteNumber": "Text",
  "OneTimeTotal": "Text",
  "QuoteTotal": "Text",
  "RecurringTotal": "Text",
  "BillingZipCode": "Text"
}
```

- c. Copy the JSON Output and save it for later.
 - d. Close the DataRaptor Extract browser tab.
9. Create the transformQuoteDetails_v1 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 |
|--|--------------------------------|
| <code>IF (var:"BillingCountry" != "United States" , true, false)</code> | <code>country_not_in_US</code> |

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



```
{
  "BillingCity": "Text",
  "BillingCountry": "Text",
  "BillingState": "Text",
  "BillingStreet": "Text",
  "CompanyName": "Text",
  "QuoteId": "Text",
  "Line": {
    "ProductName": "Text",
    "Quantity": "Text",
    "LineNumber": "Text",
    "OneTimeCharge": "Text",
    "OneTimeTotal": "Text",
    "RecurringCharge":
    "Text",
    "RecurringTotal": null
  },
  "QuoteNumber": "Text",
  "OneTimeTotal": "Text",
  "QuoteTotal": "Text",
  "RecurringTotal": "Text",
  "BillingZipCode": "Text"
}
```

- 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.

- 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.
- 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 | | |
| BillingCity | CITY | | |
| BillingCountry | COUNTRY | | |
| BillingState | STATE | | |
| BillingStreet | STREET | | |
| BillingZipCode | ZIPCODE | | |
| CompanyName | SUBSCRIBER_NAME | | |
| country_not_in_US | IF_customer_not_in_US | | |
| Line:LineNumber | lineitems:otc | | |
| Line:ProductName | lineitems:product_name | | |
| Line:Quantity | lineitems:qty | | |
| Line:RecurringCharge | lineitems:mrc | | |

- m. Click **Edit**.
 - n. Change the Output type to **JSON**.
 - o. Click **Save**.
 - p. Close the DataRaptor Transform browser tab.
10. Click **Activate** on the Quote Agreement Template page to activate the document template.

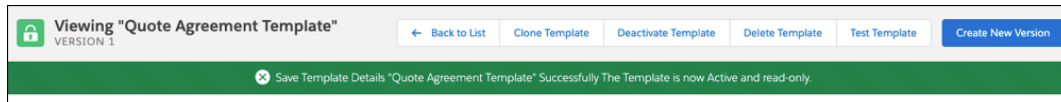


11. Click **Yes, Save Template** when you see the confirmation prompt. A message indicates that the template is now active and read-only.

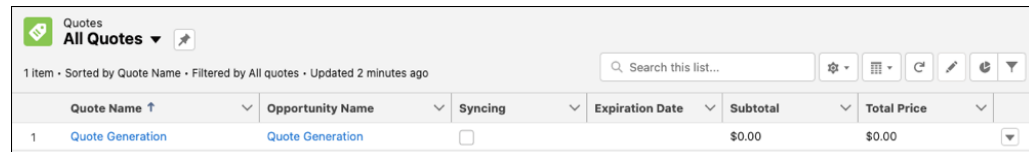
Task 3: Test Microsoft Word DOCX template

You can test the template from within the designer.

1. Select **Velocity Document Template** tab and then select **Quote Agreement Template (Version 1)**.
2. In the Document Template Designer, click **Test Template**. The Generic Document Generation OmniScript opens.

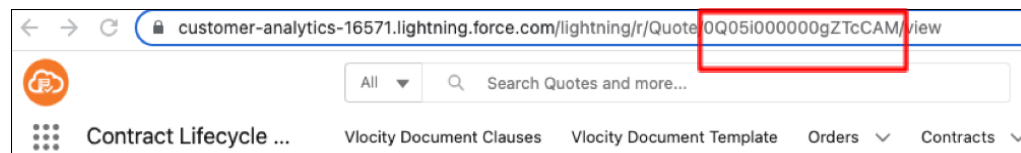


3. In the **ObjectId** box, enter the object Id for any contract.
 - a. In the Lightning Navigation bar, right-click the **Quotes** tab to open in a new browser tab.
 - b. Select the list **All Quotes** from the drop-down.
 - c. Click the **Quote Generation** quote from the list.

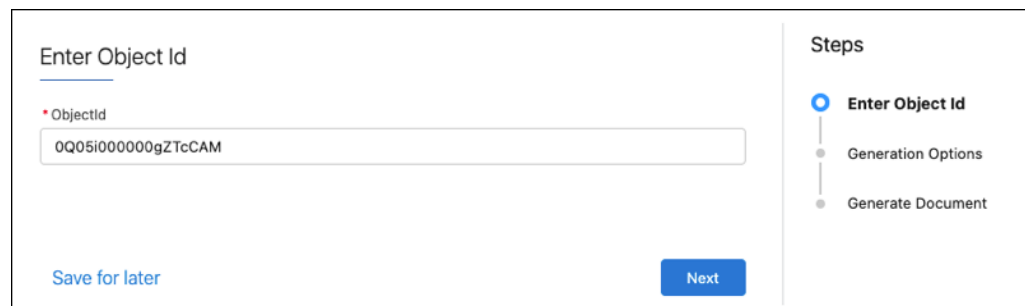


| Quote Name | Opportunity Name | Syncing | Expiration Date | Subtotal | Total Price |
|------------------|------------------|--------------------------|-----------------|----------|-------------|
| Quote Generation | Quote Generation | <input type="checkbox"/> | | \$0.00 | \$0.00 |

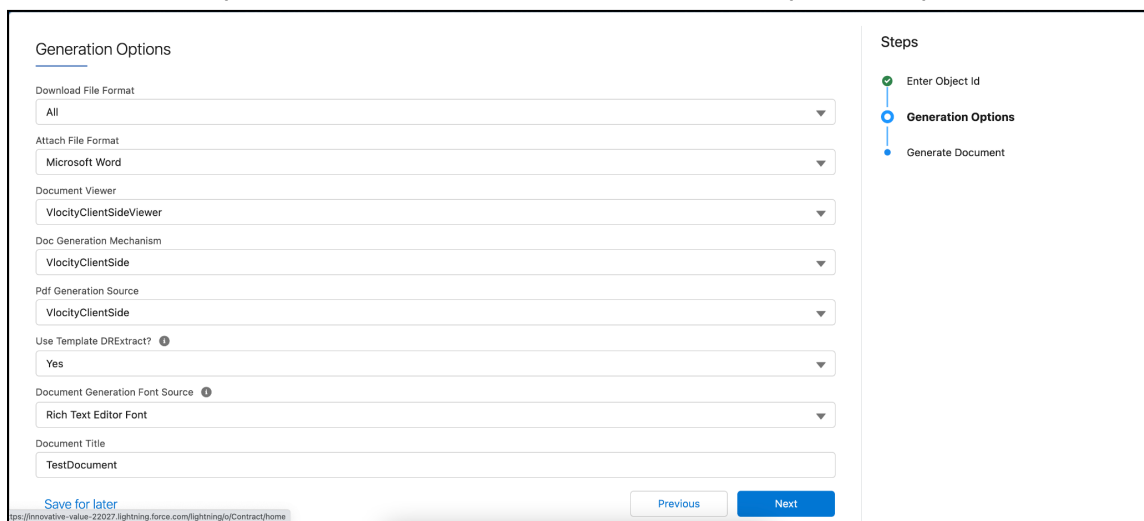
- d. Copy the portion of the address (the URL in your browser) directly after **Quote/** and before **/view** as shown below.



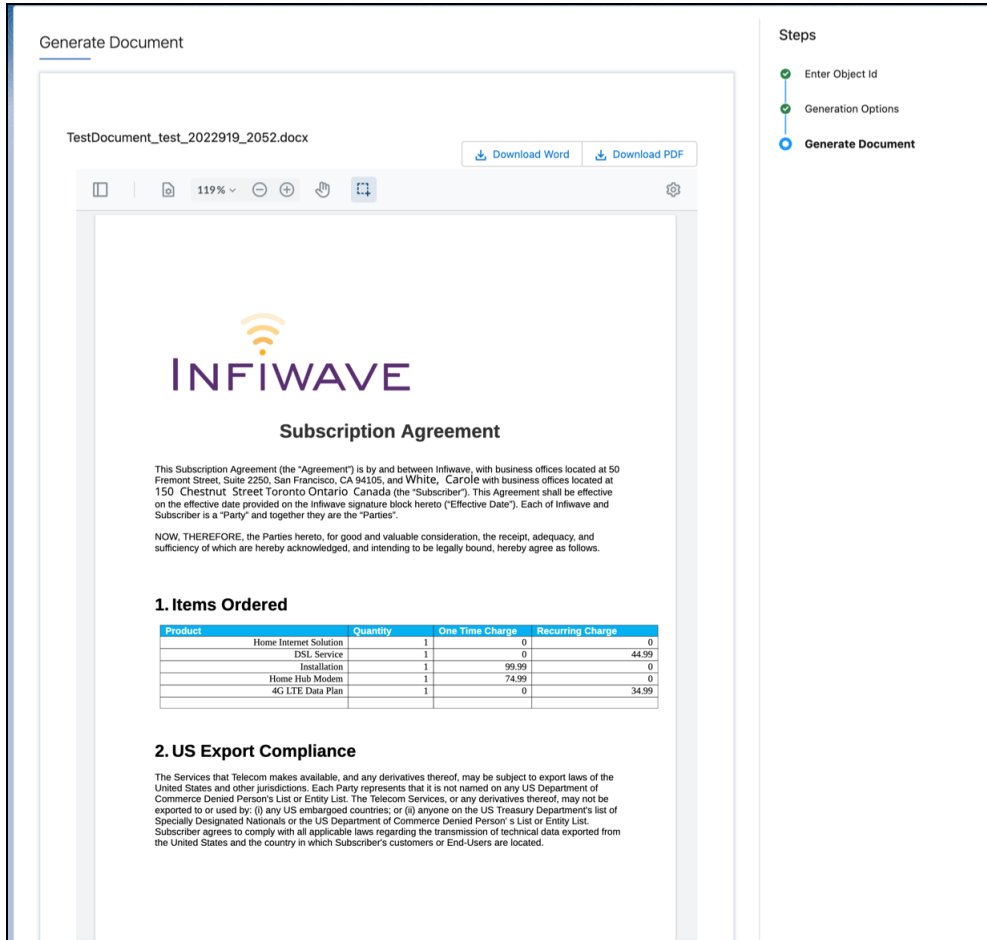
e. Paste the Id in the ObjectId box.



4. Click **Next**. Accept the default values on the Generation Options step.



- Click **Next**. The document is generated.
If the preview does not automatically appear, click **Refresh**. Click **Download Word** to download the file.



Generate Document

TestDocument_test_2022919_2052.docx

Download Word Download PDF

119%

INFIWAVE

Subscription Agreement

This Subscription Agreement (the "Agreement") is by and between Infiwave, with business offices located at 50 Fremont Street, Suite 2250, San Francisco, CA 94105, and White, Carole with business offices located at 150 Chestnut Street Toronto Ontario Canada (the "Subscriber"). This Agreement shall be effective on the effective date provided on the Infiwave signature block hereto ("Effective Date"). Each of Infiwave and Subscriber is a "Party" and together they are the "Parties".

NOW, THEREFORE, the Parties hereto, for good and valuable consideration, the receipt, adequacy, and sufficiency of which are hereby acknowledged, and intending to be legally bound, hereby agree as follows.

1. Items Ordered

| Product | Quantity | One Time Charge | Recurring Charge |
|------------------------|----------|-----------------|------------------|
| Home Internet Solution | 1 | 0 | 0 |
| DSL Service | 1 | 0 | 44.99 |
| Installation | 1 | 99.99 | 0 |
| Home Hub Modem | 1 | 74.99 | 0 |
| 4G LTE Data Plan | 1 | 0 | 34.99 |

2. US Export Compliance

The Services that Telecom makes available, and any derivatives thereof, may be subject to export laws of the United States and other jurisdictions. Each Party represents that it is not named on any US Department of Commerce Denied Person's List or Entity List. The Telecom Services, or any derivatives thereof, may not be exported to or used by: (i) any US embargoed countries; or (ii) anyone on the US Treasury Department's list of Specially Designated Nationals or the US Department of Commerce Denied Person's List or Entity List. Subscriber agrees to comply with all applicable laws regarding the transmission of technical data exported from the United States and the country in which Subscriber's customers or End-Users are located.

Steps

- Enter Object Id
- Generation Options
- Generate Document**

- Scroll through the template and note:
 - Subscriber Name is replaced with White, Carole.
 - Street, City, State, Postal Code, Country is also updated.
 - List of products in **Items Ordered**.
 - US Export Compliance** section is included as White, Carole has an address outside the USA.