# 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](mailto: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 3: Explore Client-Side Document Generation

## 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."*

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

## Prerequisites

- Create .DOCX 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 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: Investigate the Sample Client-Side OmniScript

1. Using the **Lightning App Launcher**  , type `omniScript` in the search box. Click **OmniScripts**.

2. Click the expand icon next to **docGenerationSample/singleDocxLwc**.

3. Open the latest version. Click **Single Doc - DOCX (LWC)** to open the client-side sample OmniScript.

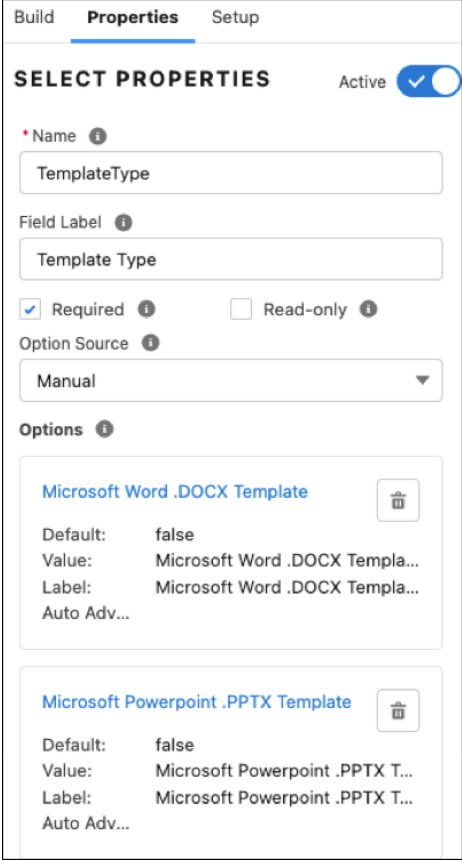   | OMNISTUDIO **OmniScripts** As of · Viewing as Industries Admin | | | | | Q singl |
   |---|---|---|---|---|---|
   | TYPE | | LANGUAGE | DESCRIPTION | LAST MODIFIED ... | LAST MODIFIE |
   | ∨ docGenerationSample/singleDocxLwc | | English | Demonstrates how a single document can be gene... | 6/27/22 11:06 PM | Industries Adm |
   | | Single Doc - DOCX (LWC) (Version 8) | English | Demonstrates how a single document can be gene... | 6/27/22 11:06 PM | Industries Adm |
   | | Single Doc - DOCX (LWC) (Version 7) | English | Demonstrates how a single document can be gene... | 6/27/22 11:06 PM | Industries Adm |

4. Click **Deactivate Version** to deactivate the OmniScript and then click **Done**.
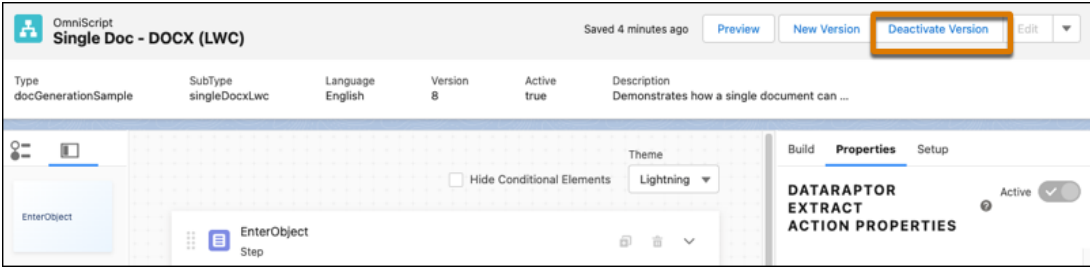


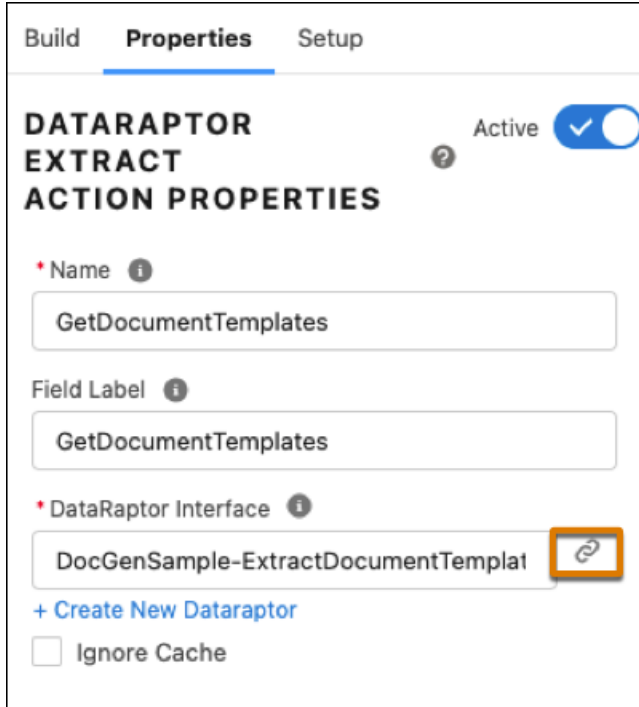5. Click on **EnterObject** step element. Notice the fields.

6. 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:        Microsoft Word .DOCX Templa...
Label:        Microsoft Word .DOCX Templa...
Auto Adv...

Microsoft Powerpoint .PPTX Template          🗑

Default:      false
Value:        Microsoft Powerpoint .PPTX T...
Label:        Microsoft Powerpoint .PPTX T...
Auto Adv...

7. Click the **GetDocumentTemplates** DataRaptor Extract Action element. In the right panel under Properties, click the ⌀ icon to open the DataRaptor Extract.



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

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

10. Click the back button to navigate to the omniscript.
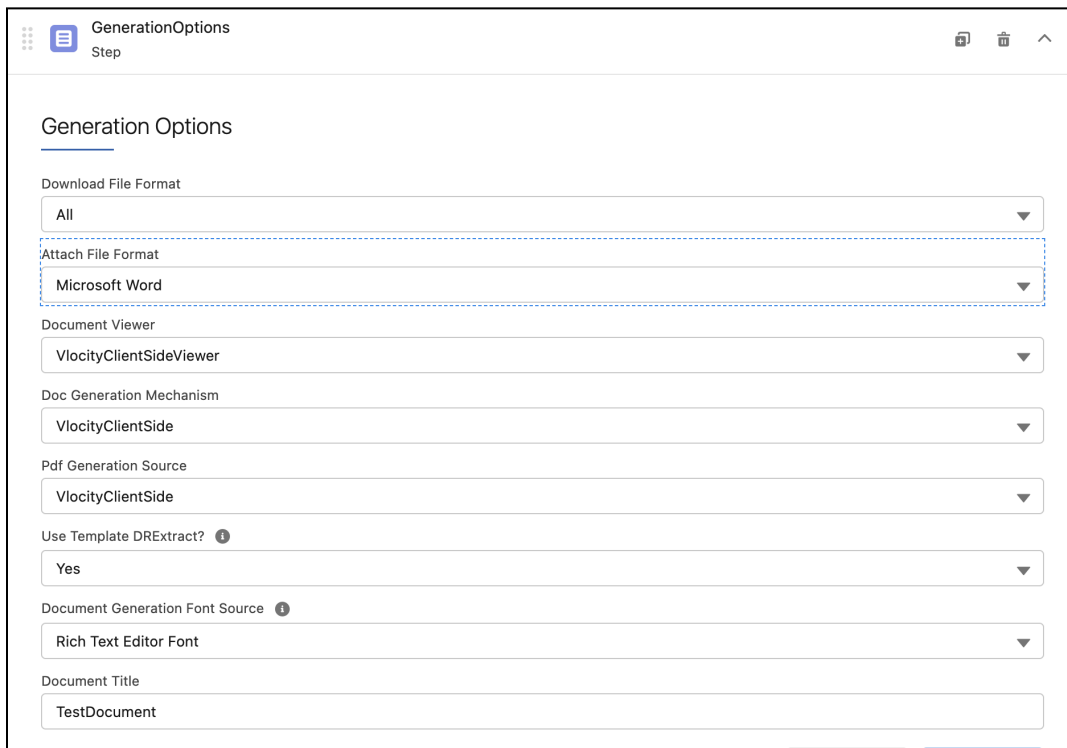
11. Back in the OmniScript, click the **PickTemplate** step element. Click the **SelectTemplate** element inside the step. Notice the custom Lightning Web Component. It displays the template types in a list so we can select one.
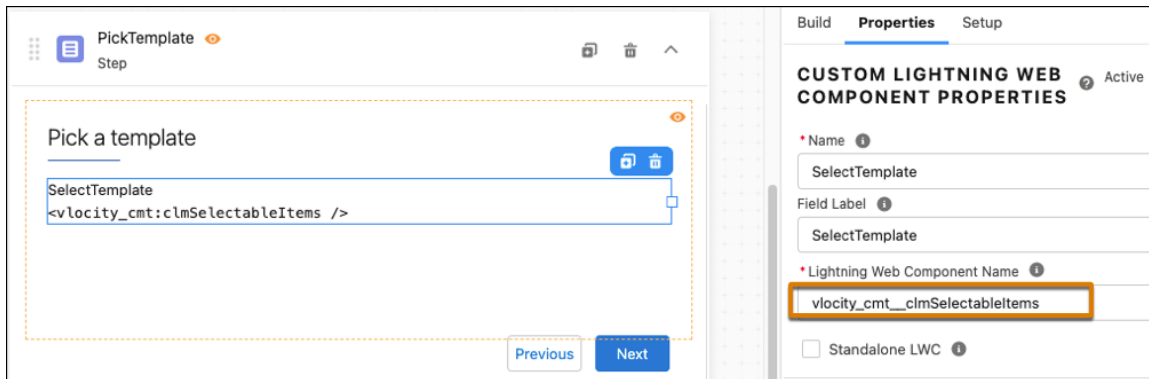


12. Click the **SetValues** element. Notice the **selectedTemplate** and **templateType** values. These values are passed to the **GenerationOptions** step.
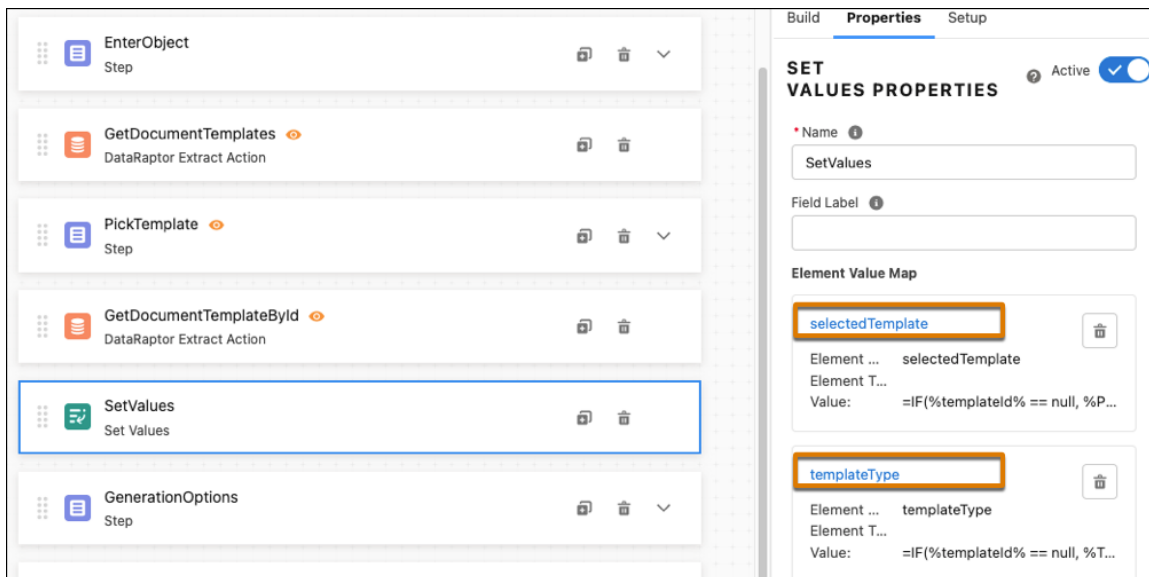
13. Click the **GenerationOptions** step element. Examine the fields.
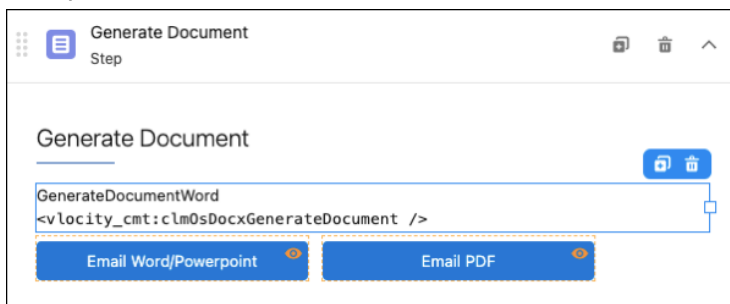


14. Click the **Set Generation Option** Set Values element. Notice the values in the **Properties** panel on the right. The element sets these values and passes them to the **Generate Document** step.

15. Click the **Generate Document** step element. Notice the custom Lightning Web Component and Email Action elements.
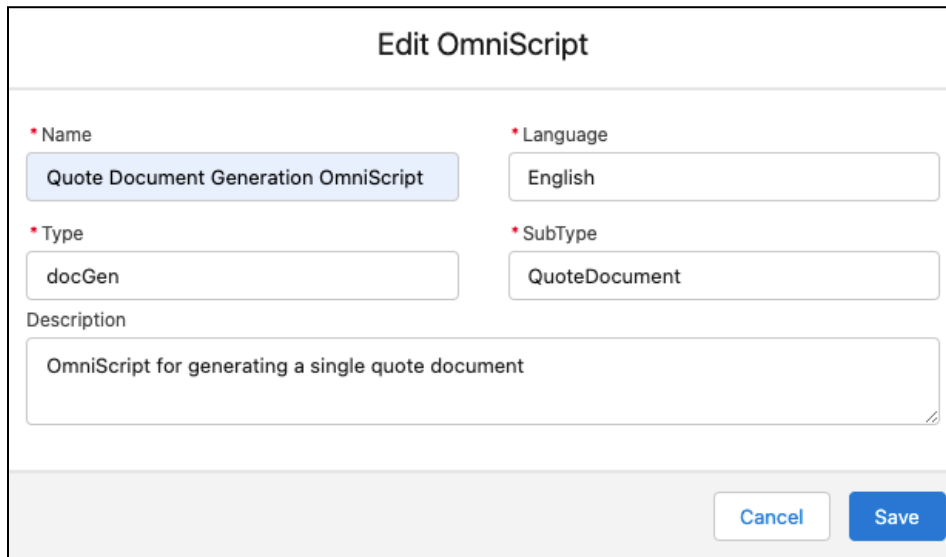
## Task 2: Version and Edit the Sample Client-Side OmniScript

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.
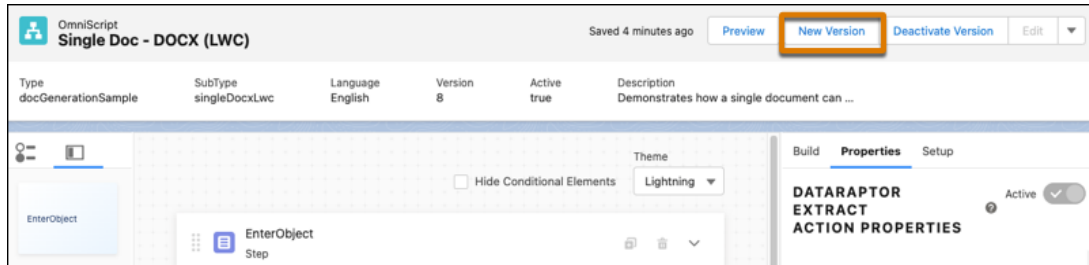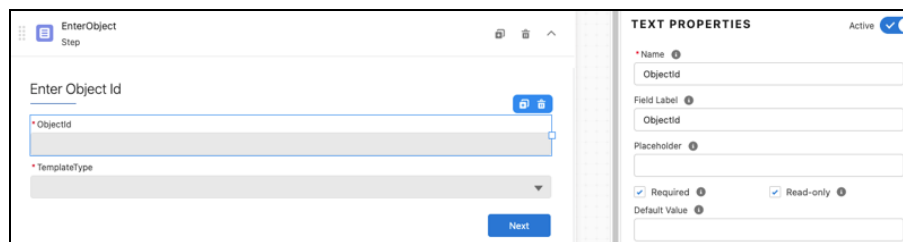


2. Click **Edit**.

3. Enter the following information:
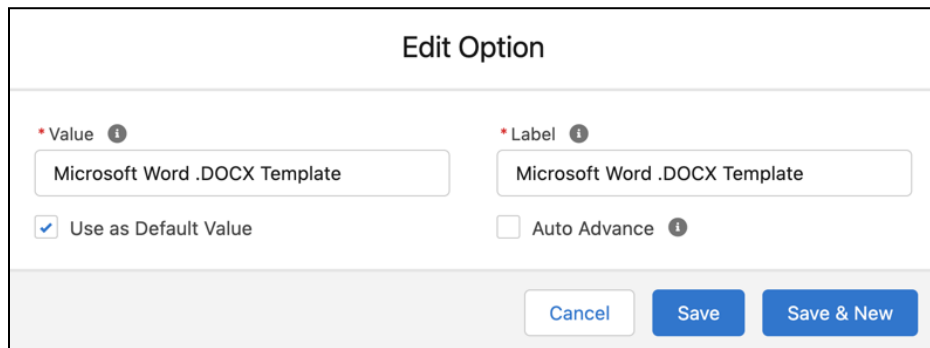
| Field | Value |
|---|---|
| Name | Quote Document Generation OmniScript |
| Language | **English** |
| Type | docGen |
| Subtype | QuoteDocument |
| Description | OmniScript for generating a single quote document |
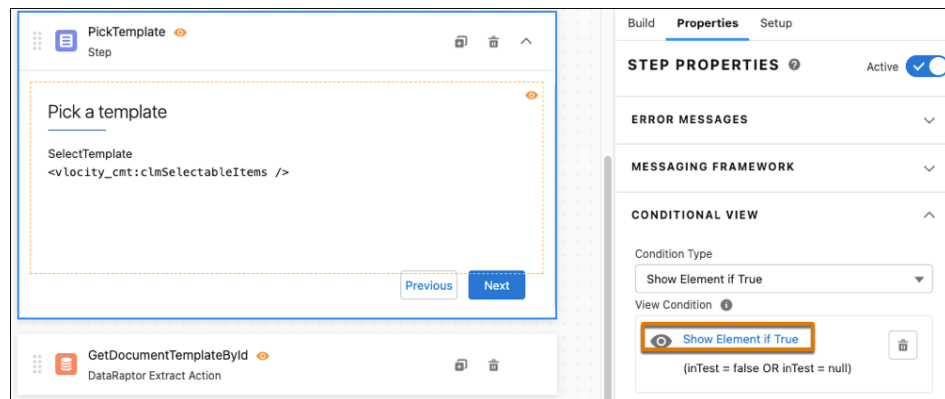
4. Click **Save**.

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**.

    f. Click **Microsoft Word .DOCX Template** and select the **Use as Default Value** checkbox.

g. Click **Save**.

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**.
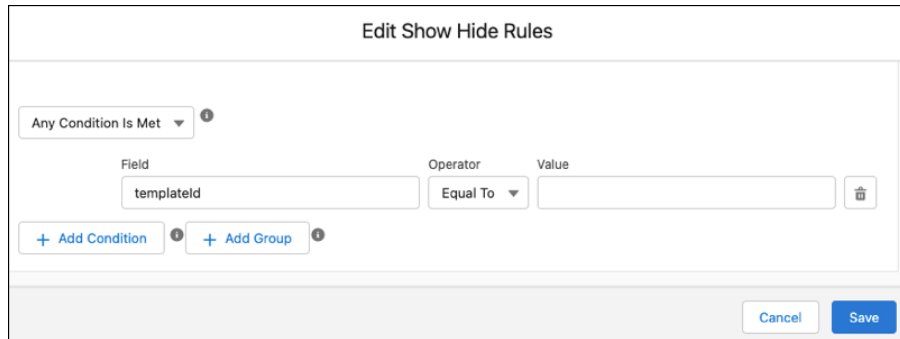


      iv. Edit the following fields:

| Field | Value |
| --- | --- |
| Field | `templateId` |
| Operator | **Equal To** |

| Value | [leave blank] |
|-------|---------------|
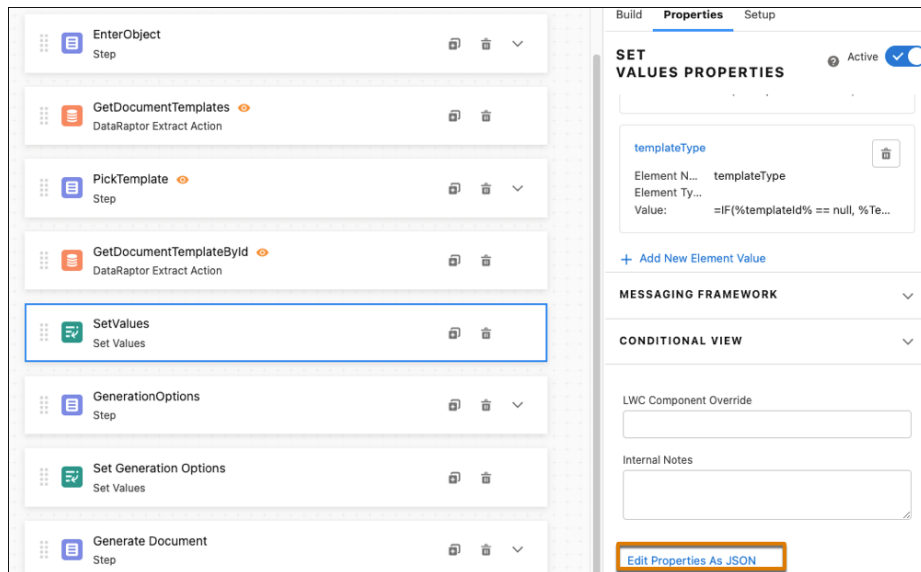
v.    Delete the second condition.



vi.    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%"
},
```



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:

| Field | Value |
|-------|-------|
| Element Name | `selectedTemplate` |
| Expression | `=IF(%templateId%!=NULL` `,` `%preSelectedTemplate%,` `%selectedTemplate%)` |



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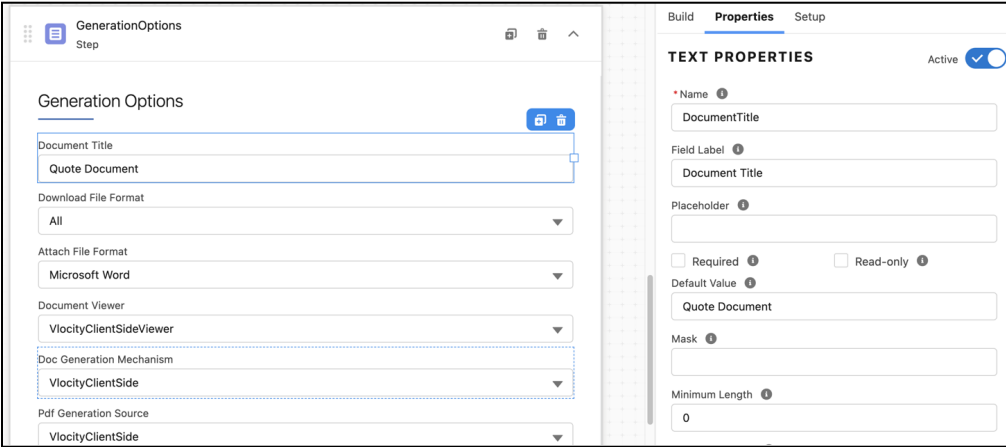
d.  Click the **Use Template DRExtract?** field and in the Properties panel, check **Read-only**.
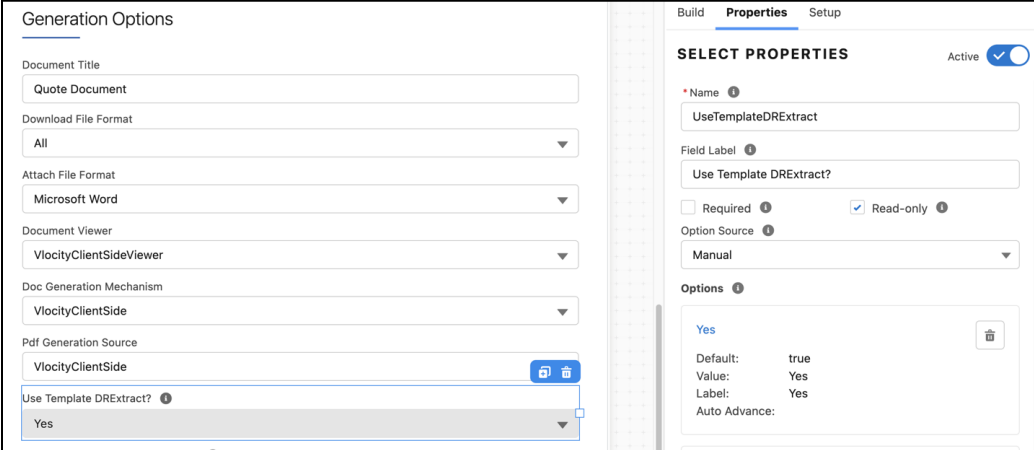


8.  Click **Activate Version** to activate the OmniScript and then click **Done**.

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

1.  Retrieve Lightning Launch URL.

    a.  From the Header section, click the dropdown and select **How To Launch**.
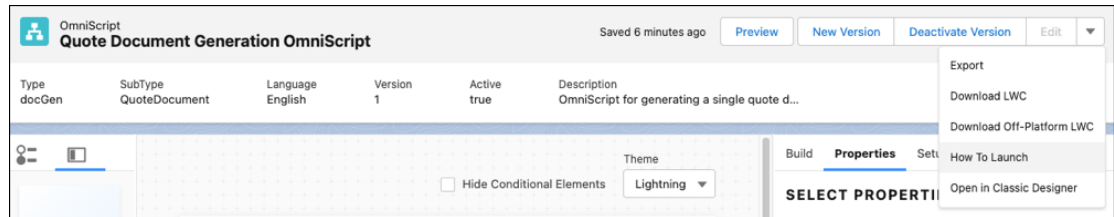
    

    b.  In the **Lightning** URL box, copy the URL starting from /lightning.
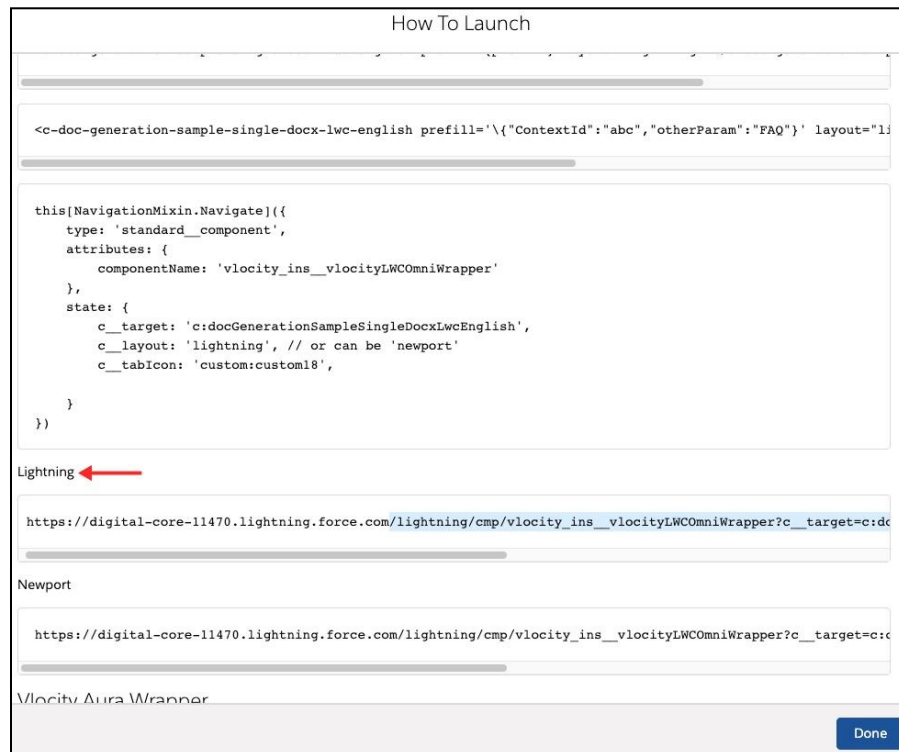
    

    c.  Click **Done** to close the How To Launch dialog.

2.  Retrieve the TemplateId.

a. Using the **Lightning App Launcher** , type `templates` in the search box. Click **Document Templates**.
b. From the list view, select **All Templates**.
c. Click **Multisite Quote (DOCX)** to open the template information.
d. Copy the alpha-numeric combination from the URL between DocumentTemplate__c/ and /view. This is the Template Id. Save it for later.
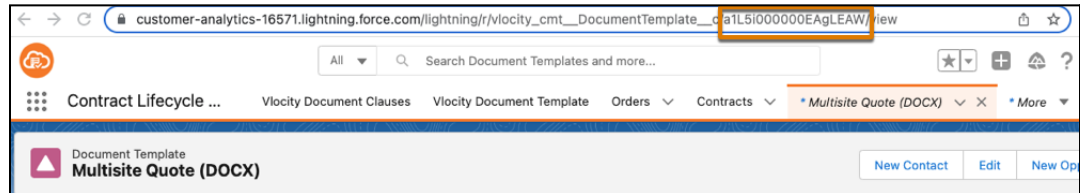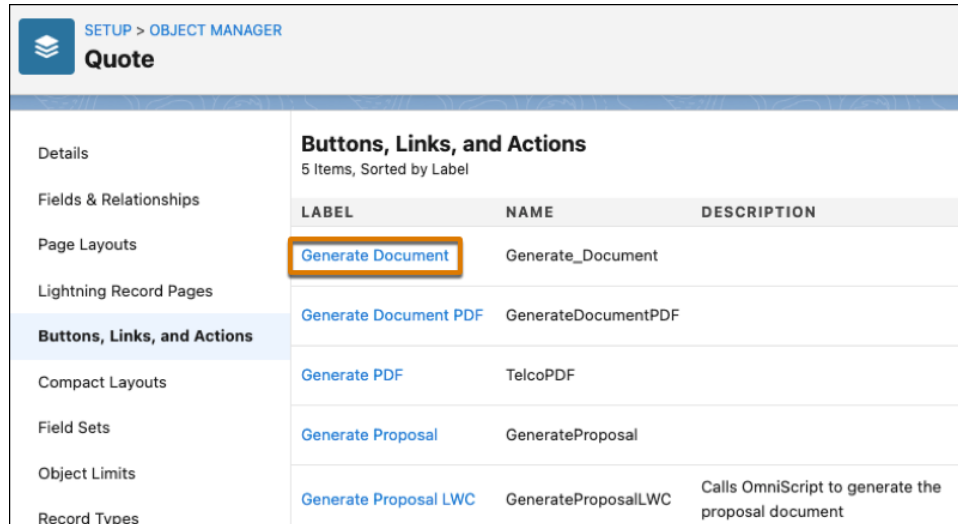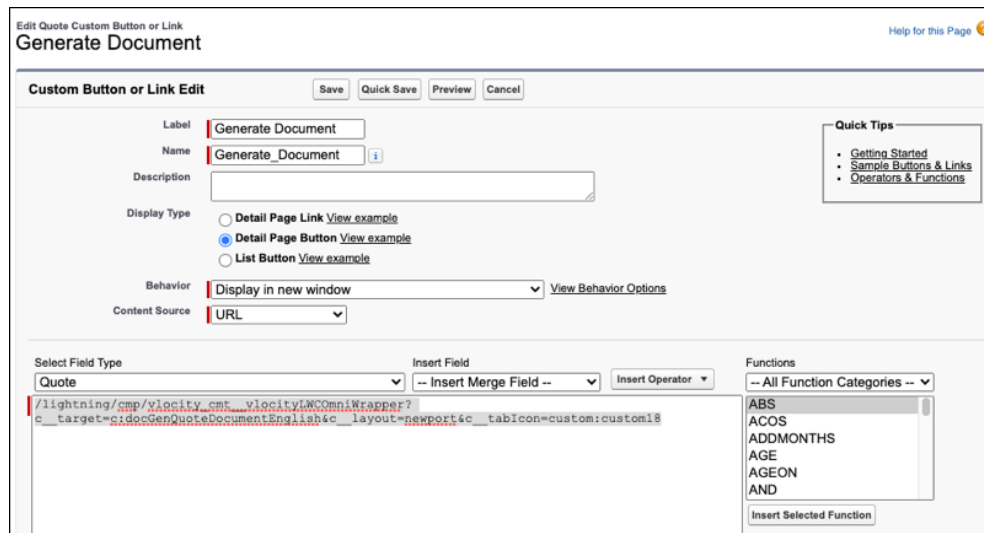


3. Edit Generate Document button.

a. Click **Setup**.
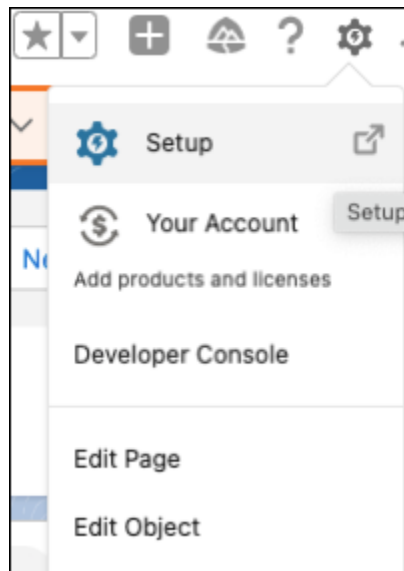


b. Click **Object Manager** and open the **Quote** object.
c. Click **Buttons, Links, and Actions**.

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. From the list view dropdown, select **All Quotes**.

c. Click **Quote Generation** to open the quote page.

d. Click the drop down in the header and click **Generate Document**.
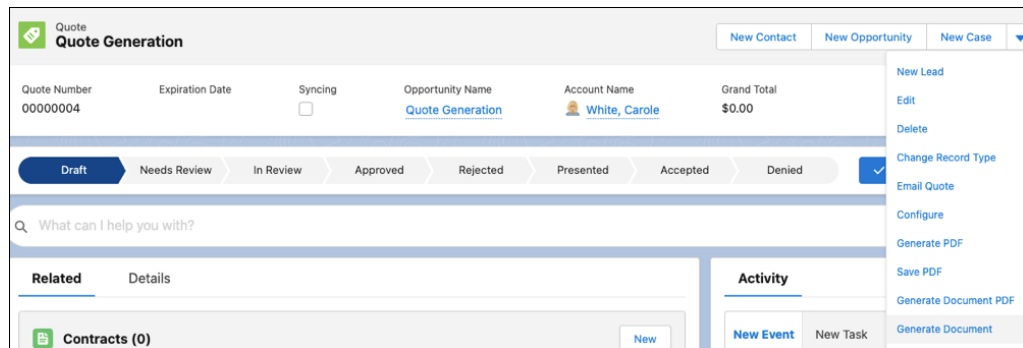


e. The OmniScript opens. Go through the OmniScript Steps to generate the quote document.
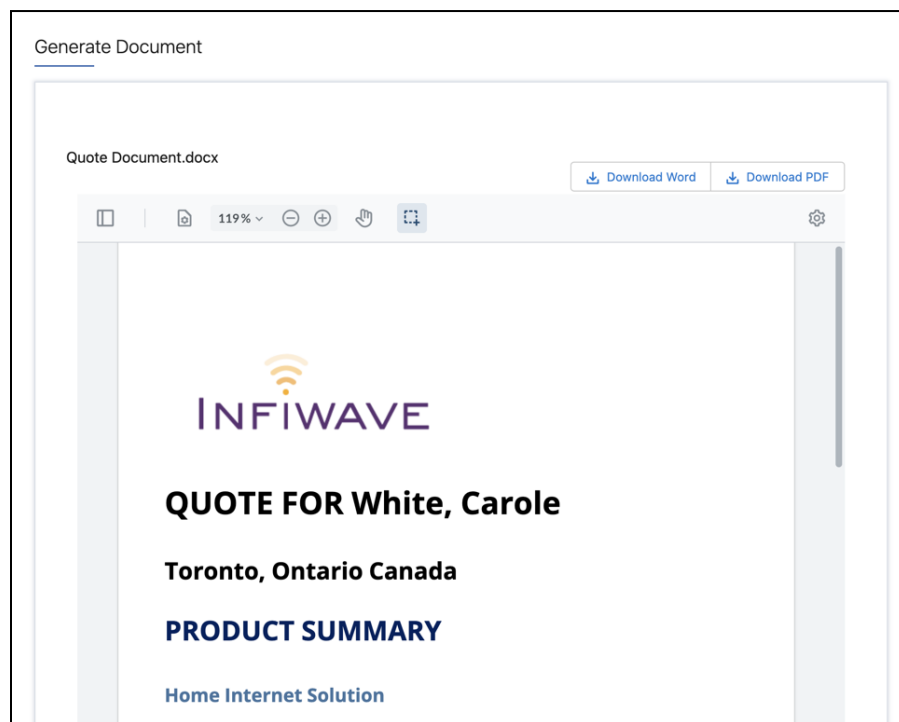


f. Close the Generate Document tab and go back to the **Quote Generation** Quote page.

g. Go to the **Notes & Attachments** related list and notice the quote document attached.