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** ⠿ , navigate to **Contract Lifecycle Management (CLM)**.

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2. Type `files` in the search box. Under **Items**, click **Files**.
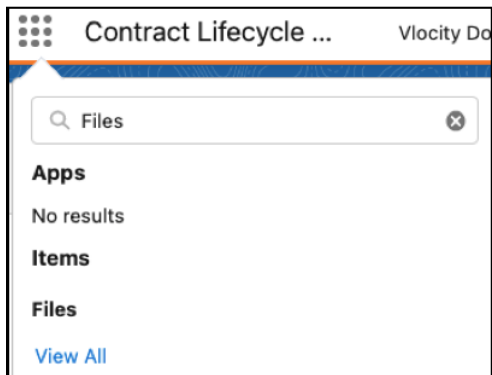
3. Click **Libraries**.

4. Click the **Industries Document Generation** folder.
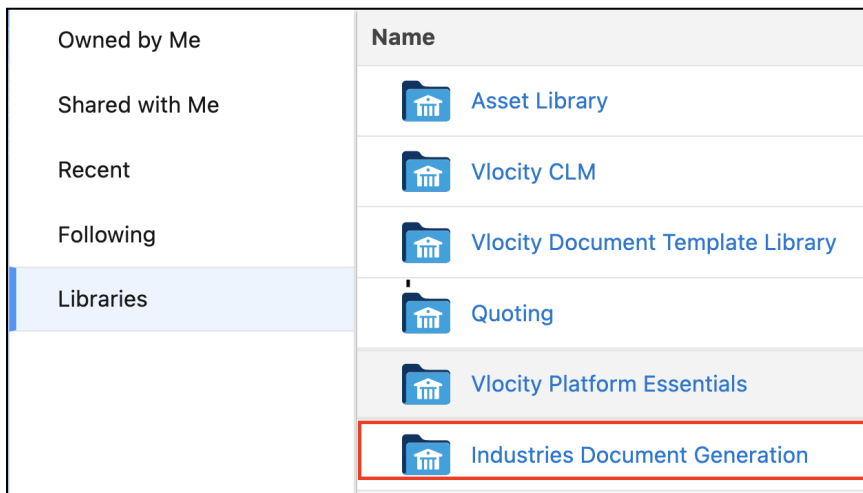
5. Click **Download** to download the file **Health care service provider agreement**.
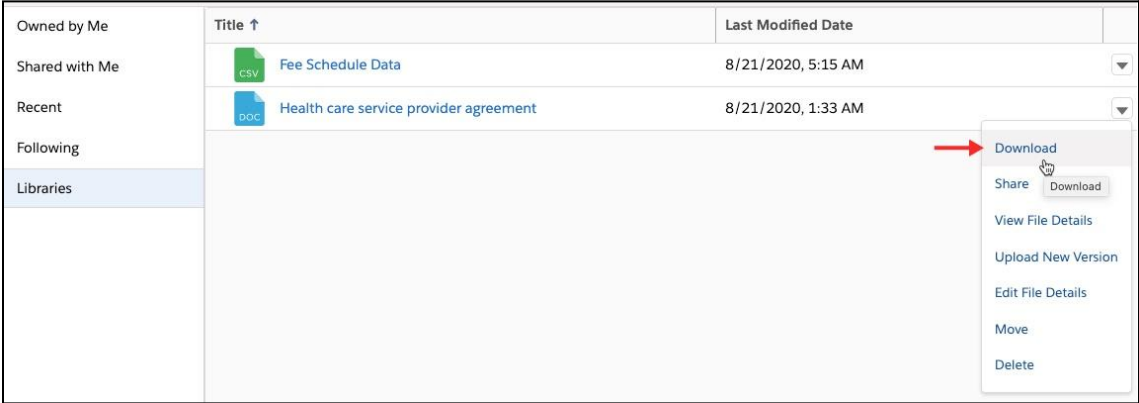
6. Open **Health care service provider agreement** in Microsoft Word to edit the file.

7. Replace the fields with the **variable token** in the first section as shown below:

Field	Variable Token
Provider Account Name	`{{ProviderAccountName}}`
Payer Name	`{{PayerName}}`

HEALTH CARE SERVICE PROVIDER AGREEMENT

THIS Agreement is made by and between **{{ProviderAccountName}}** (hereinafter referred to as "Provider"), a physician, group of physicians or similar provider of health care services or items, licensed to practice medicine and/or provide medical services in the state or states where services are provided and **{{PayerName}}**, (hereinafter referred to as "**{{PayerName}}**").

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.

8. In the **Execution in Counterparts** section add the following tokens.

   a. Add the following variable tokens.

Field	Variable Token
Provider Account Name	`{{ProviderAccountName}}`
Provider Street	`{{ProviderStreet}}`
Provider City	`{{ProviderCity}}`
Provider State	`{{ProviderState}}`
Provider Zip	`{{ProviderZip}}`

   b. Insert DocuSign signature tags in the signature section.

Field	Variable Token
Date	`\vlcSignDate1\`
Signature	`\vlcSignHere1\`

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18. Execution in Counterparts
This Agreement may be executed in any number of counterparts including facsimiles. Each counterpart shall be deemed to be an original against any part whose signature appears thereon, and all of which shall together constitute one and the same instrument.

This Agreement is effective upon the date of execution by Payer.

For and on behalf of:

{{ProviderAccountName}}
{{ProviderStreet}}
{{ProviderCity}}, {{ProviderState}},
{{ProviderZip}}

\vlcSignDate1\
_____
Date

\vlcSignHere1\
_____
Signature

For and on behalf of:

_____
_____
_____
_____
_____
Date

_____
Signature

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9. In the **PROVIDER FEE SCHEDULE** section add the following tokens.

a. Add the following variable tokens.

Field	Variable Token
Fee Schedule Name	`{{FeeScheduleName}}`
Fee Schedule Code	`{{FeeScheduleCode}}`
Fee Schedule From	`{{FeeScheduleFrom}}`
Fee Schedule To	`{{FeeScheduleTo}}`
Fee Name	`{{FeeName}}`
Code	`{{ProcedureCode}}`
Facility Price	`{{FacilityPrice}}`
Non-Facility Price	`{{NonFacilityPrice}}`

EXHIBIT B
PROVIDER FEE SCHEDULE

Fee Schedule Name:	{{FeeScheduleName}}		
Fee Schedule Code:	{{FeeScheduleCode}}		
Fee Schedule Effective Start/End Date:	{{FeeScheduleFrom}} – {{FeeScheduleTo}}		

Name	Code	Facility Price	Non-Facility Price
{{FeeName}}	{{ProcedureCode}}	{{FacilityPrice}}	{{NonFacilityPrice}}

b. Use a repeating content **{{#FeeEntries}}** token to display contract line items. The line items will be repeated. For each line it will display the name, code, facility price and non-facility price. Use **{{/FeeEntries}}** to close the tag.

c. Use a repeating token **{{#FeeSchedules}}** to group the items and then display. Use **{{/FeeSchedules}}** to close the tag.

EXHIBIT B
PROVIDER FEE SCHEDULE

{{#FeeSchedules}}

Fee Schedule Name:	{{FeeScheduleName}}		
Fee Schedule Code:	{{FeeScheduleCode}}		
Fee Schedule Effective Start/End Date:	{{FeeScheduleFrom}} – {{FeeScheduleTo}}		

Name	Code	Facility Price	Non-Facility Price
{{#FeeEntries}}{{FeeName}}	{{ProcedureCode}}	{{FacilityPrice}}	{{NonFacilityPrice}}{{/FeeEntries}}

{{/FeeSchedules}}

NOTE:

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

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

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

Task 2: Create a Microsoft Word DOCX template

1. In the **Lightning Navigation bar**, click **Vlocity Document Template**.

2. Click **New** on the top right section to create a new document template. This will open **Start New Template** page.

3. In **Template Settings,** enter the following information :

Field	Variable Token
Name	`Fee Schedule Agreement`
Template Type	**Microsoft Word .DOCX Template**
Language	**None**
Token Mapping	**JSON Based**
Token Mapping Method	**DataRaptor**
Mapping Dataraptor Bundle Name	`FeeSchedule_FeeScheduleEntry_XFormDR`
Data Extract Dataraptor Bundle Name	`FeeSchedule_FeeScheduleEntry_ExtractDR`
Usage Type	**Contract**
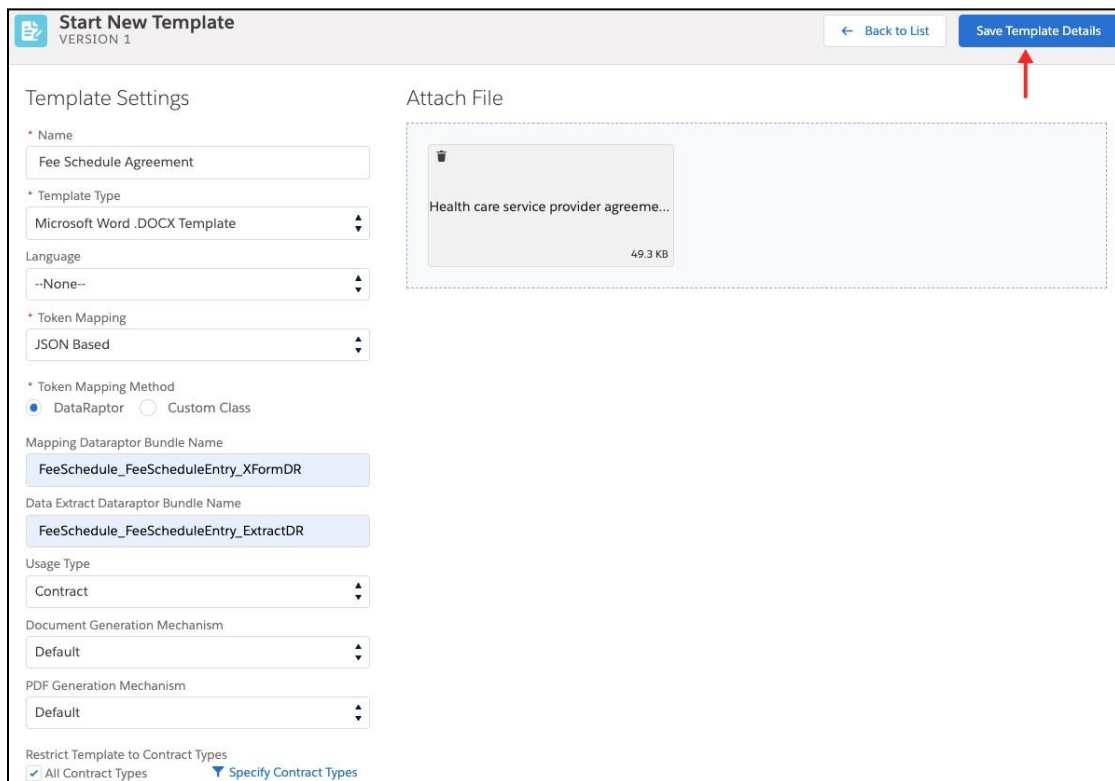
4. Drag the updated .docx file (Health care service provider agreement) from your desktop into the Document Template Designer or click **Browse** to upload the .docx file.

> **NOTE:**
> The .docx maximum file size is 38 MB. You can associate only one .docx file with one Vlocity Document Template.
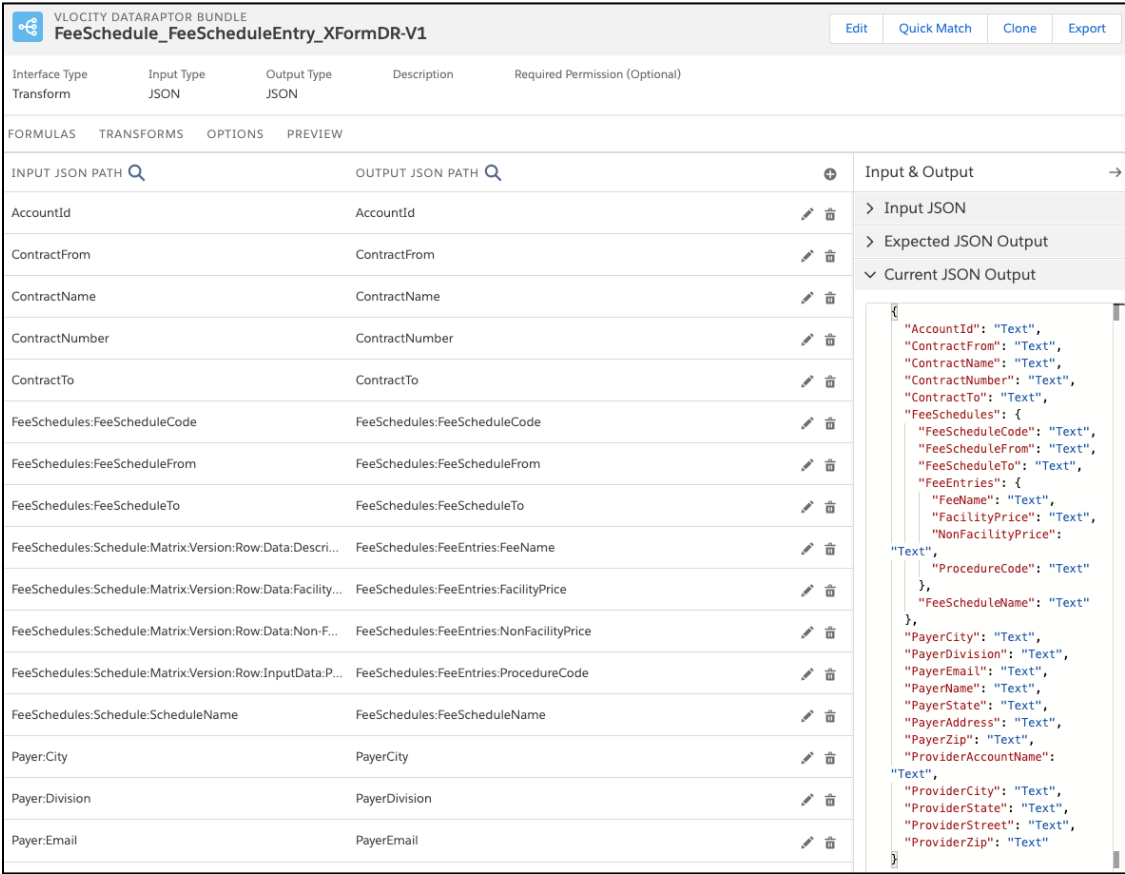
5. Select the file and click **Save Template Details**.

> **NOTE:**
>
> The Mapping and Data Extract DataRaptors have been provided for you in the training org. To learn more about DataRaptors, please see Build Guided Experiences with OmniStudio.

6. Click on the link ⊘ next to **Mapping Dataraptor Bundle Name** to review the DataRaptor. Make sure it matches the following image.

7. Click on the link 🔗 next to **Data Extract Dataraptor Bundle Name**. Click the **OUTPUT** tab and make sure it matches the following image.

8. Close the DataRaptor tabs.

9. Click **Activate** on the Fee Schedule Agreement page to activate the document template.

10. 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. Using the **Lightning App Launcher** ⠿ , type `files` in the search box. Under **Items**, click **Files**.
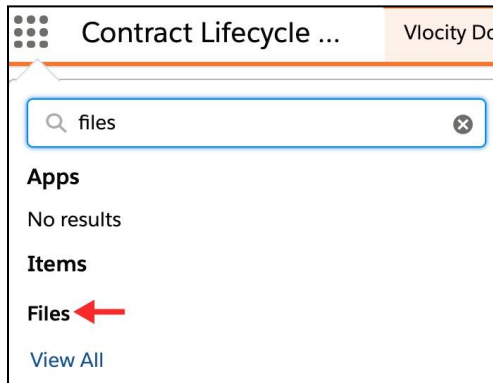
2. Click **Libraries**.

3. Click the **Industries Document Generation** folder.

4. Click **Download** to download the file **Fee Schedule Data**.
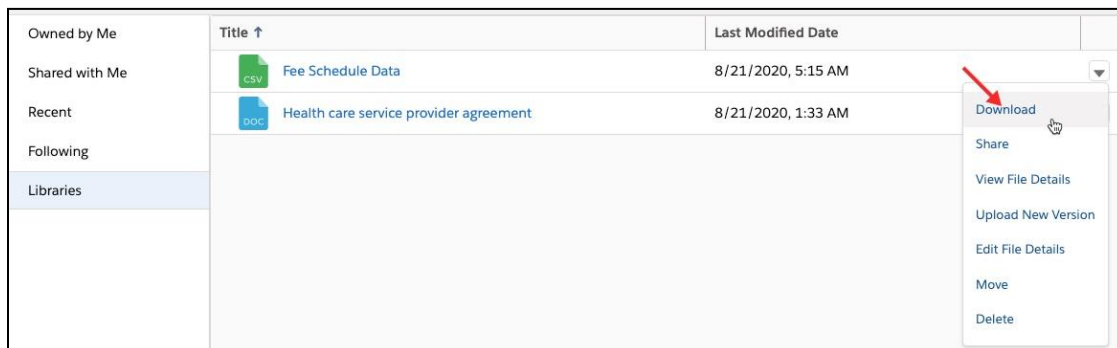
5. In the **Lightning Navigation bar**, click **Contracts**.

6. In the Contracts window, click **New.** Select **Contract** as the record type and click **Next** and provide the below information:

Field	Value
Language	**None**
Account Name	**Acme**
Contract Start Date	**[Today]**
Contract Term	2 4

New Contract: Contract

Contract Information

Contract Number

* Account Name

🏢 Acme ✕

Price Book

🔍 Search Price Books...

Producer

🔍 Search Contacts...

Agency/Brokerage

🔍 Search Accounts...

Underwriter

🔍 Search People...

Final Rating Census

🔍 Search Census...

* Status

Draft ▼

* Contract Start Date

12/9/2022 📅

Language

--None-- ▼

* Contract Term (months)

24

Term of Eligibility

Opportunity

🔍 Search Opportunities...

7. Click **Save**.

8. The contract is tied to a Fee Schedule. The Fee Schedule data will be used to merge into the document template.

    a. Select the **Fee Schedule** tab, click **New** to create Fee Schedule.

Related	Details	**Fee Schedule**
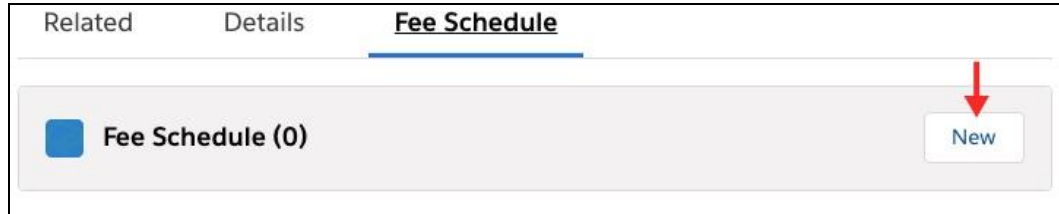
    Fee Schedule (0)   New

    b. Add the following details to create New Fee Schedule and click **Save**.

Field	Value
Name	Acme Health Fee Schedule
Effectivity Start Date	**[Today]**
Effectivity End Date	Any future date such as a month or 6 months from now
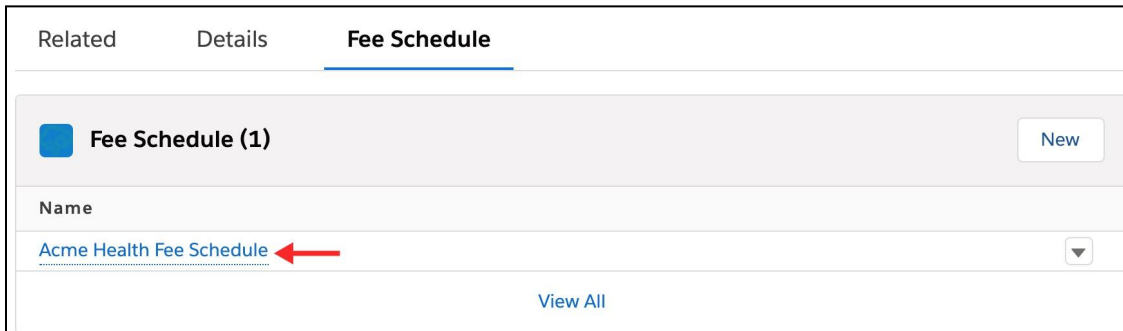
    New Fee Schedule

    Information

    * Name
    Acme Health Fee Schedule

    Owner
    Industries Admin

    Contract
    00000103   ×

    Effective Start Date
    9/27/2022

    Description

    Effective End Date
    3/3/2023

    Fee Schedule Data
    Search Vlocity Calculation Matrices...

    Fee Schedule Code

    Source
    --None--

    Cancel   Save & New   Save
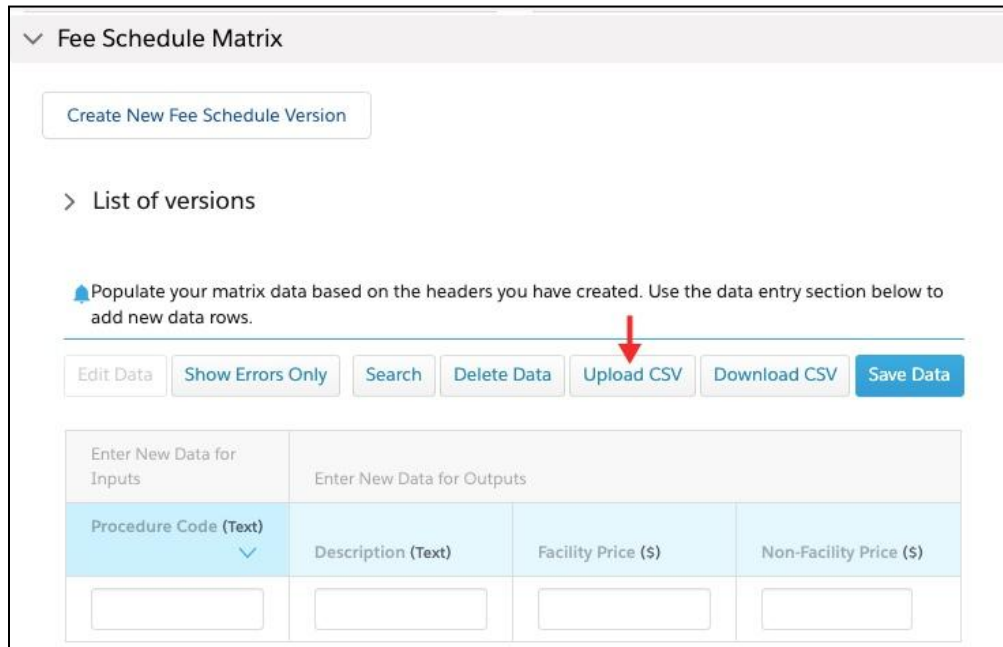
9. Click the newly created fee schedule **Acme Health Fee Schedule**.

10. Upload Fee Schedule data

a. On the Fee Schedule Details page, scroll down to **Fee Schedule Matrix** section, click **Upload CSV** to upload fee schedule data.

b. Click **Choose file** on UPLOAD CSV window and browse to the location where you have downloaded Fee Schedule Data.csv and select it.
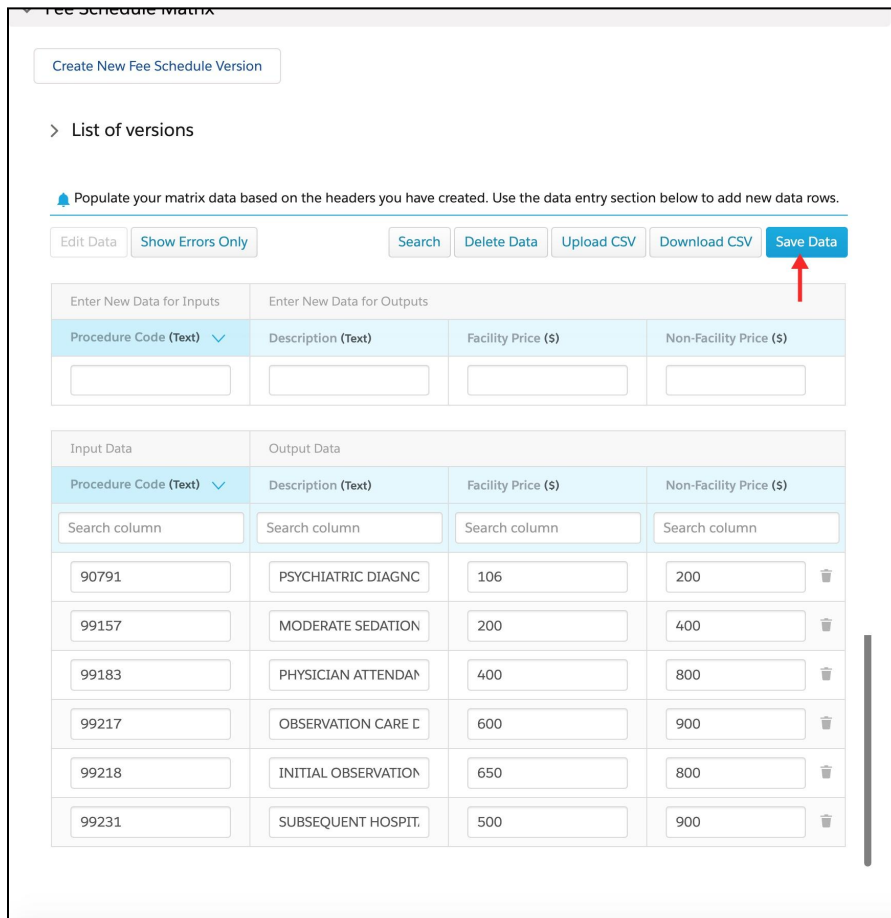
c. Click **Upload**.

d. Click **Close**.

e. Confirm that Fee Schedule Matrix has 6 records. Click **Save Data**.

f. Expand **List of versions**. Edit Acme Health Fee Schedule_Data V1 and check **Enabled** box and click **Save** button. To enable the checkbox click ✎ and edit it.
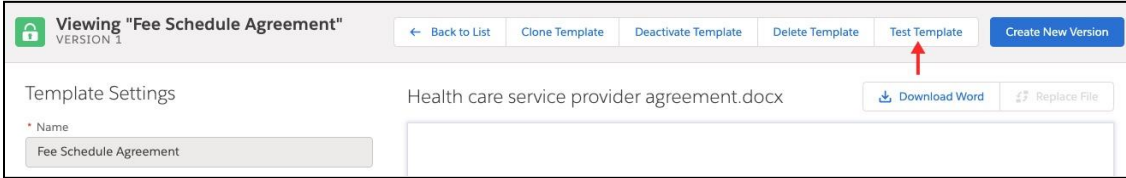

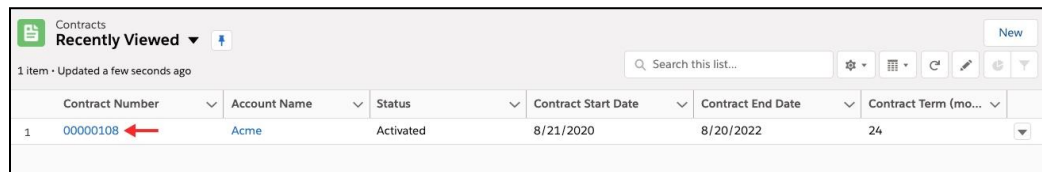Now we have a Fee Schedule with all the line items to use within the contract.

g. Click the contract number in the **Contract** field. This will redirect to the contract page for which the fee schedule was created.

11. Select **Vlocity Document Template** tab and then select **Fee Schedule Agreement (Version 1)**.

12. In the Document Template Designer, click **Test Template**. The Generic Document Generation OmniScript opens.

13. In the **ObjectId** box, enter the object Id for any contract.

a. In the **Lightning Navigation bar**, right-click the **Contracts** tab to open in a new browser tab.

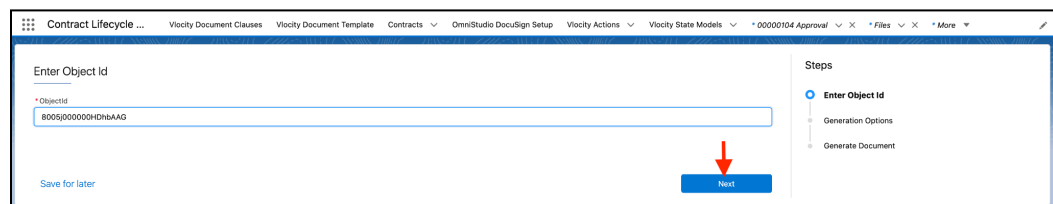b. Click the **contract number** created in the previous step.

c. Copy the portion of the address (the URL in your browser) directly after Contract/ and before /view as shown below.
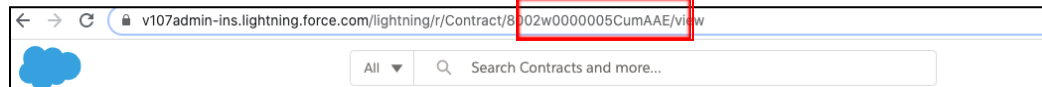
d. Paste the Id in the **ObjectId** box.
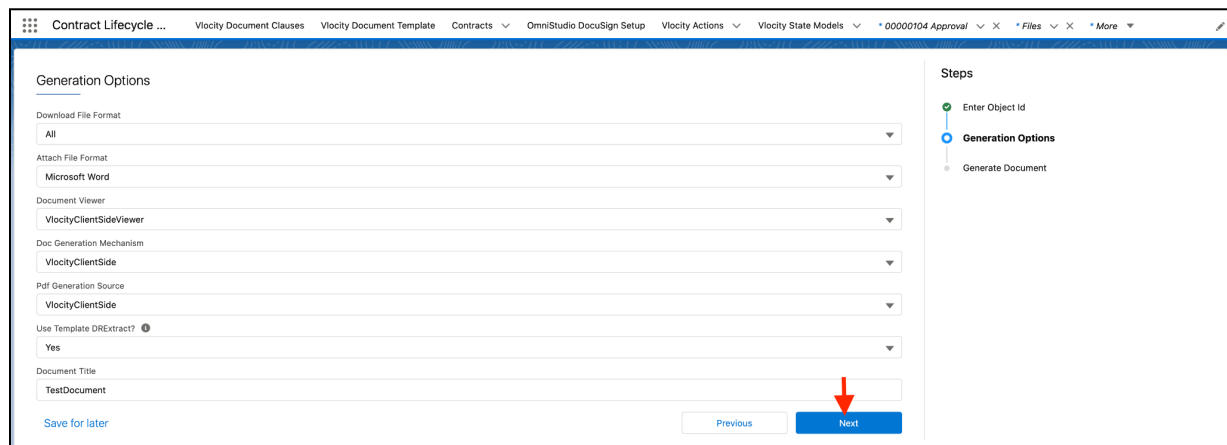
14. Click **Next**.

15. Click **Next**. The document is generated.

If the preview does not automatically appear, click **Refresh**. Click **Download Word** to download the file.

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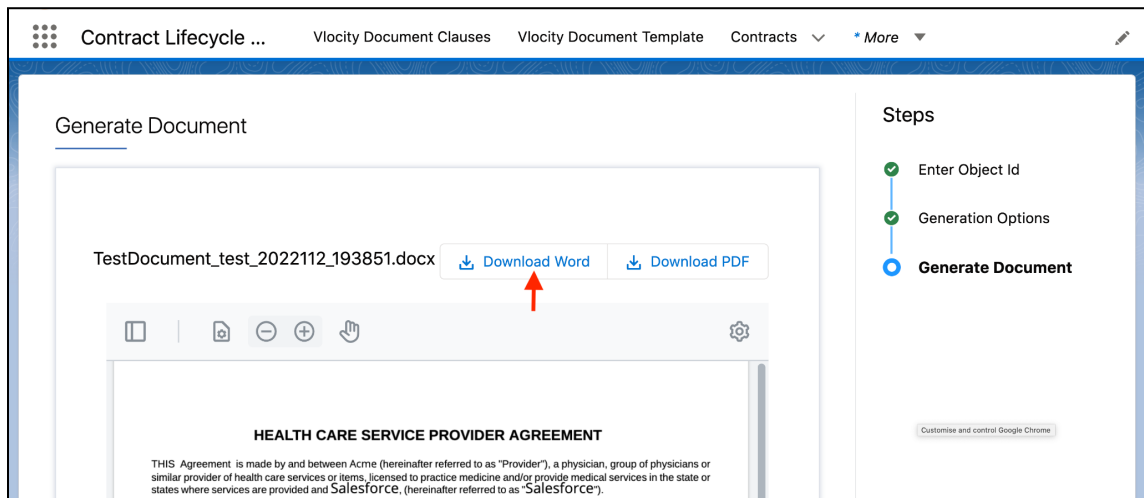
16. Scroll through the template and note:

    a.   Note Provider Account Name is replaced with Acme.

    b.   Payer Name is replaced with Salesforce.

    c.   Provider Street, City, Zip is also updated in **section 18**.

    d.   The fee schedule data is included in the PROVIDER FEE SCHEDULE table.