

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:

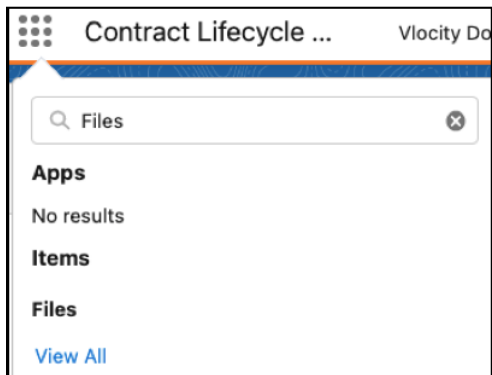
<https://help.salesforce.com/s/articleView?id=000393105&type=1>

Task 1: Insert tokens into Microsoft Word DOCX template

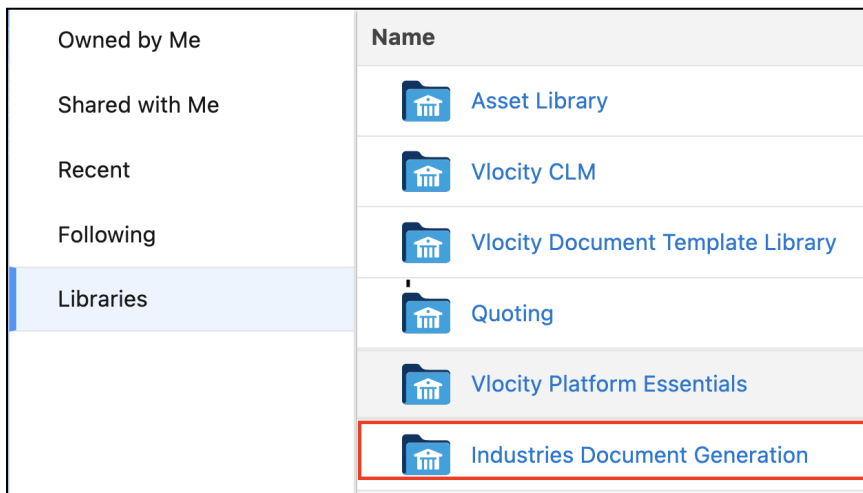
1. Using the **Lightning App Launcher**  , navigate to **Contract Lifecycle Management (CLM)**.



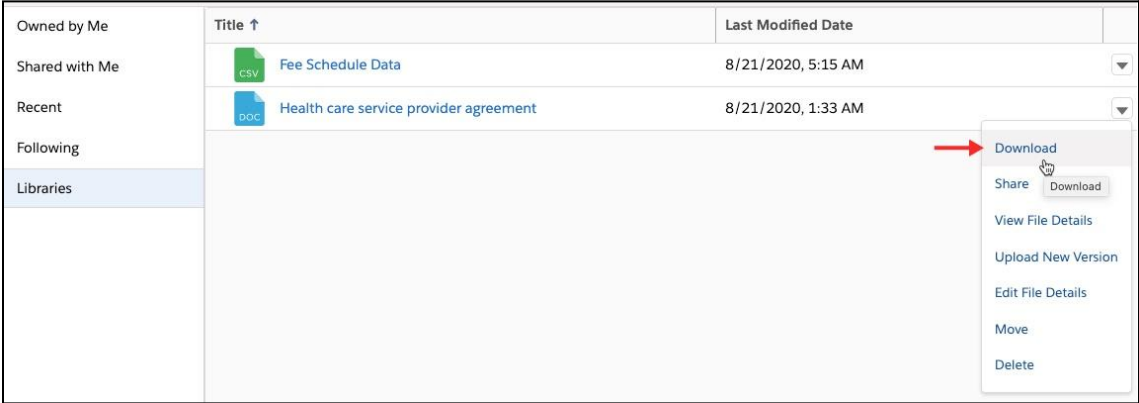
2. Type `files` in the search box. Under **Items**, click **Files**.



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\

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.

<p>For and on behalf of:</p> <p><u>{{ProviderAccountName}}</u> <u>{{ProviderStreet}}</u> <u>{{ProviderCity}}, {{ProviderState}},</u> <u>{{ProviderZip}}</u></p> <p><u>\vlcSignDate1\</u> Date</p> <p><u>\vlcSignHere1\</u> Signature</p>	<p>For and on behalf of:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Date</p> <p>_____</p> <p>Signature</p>
--	--



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

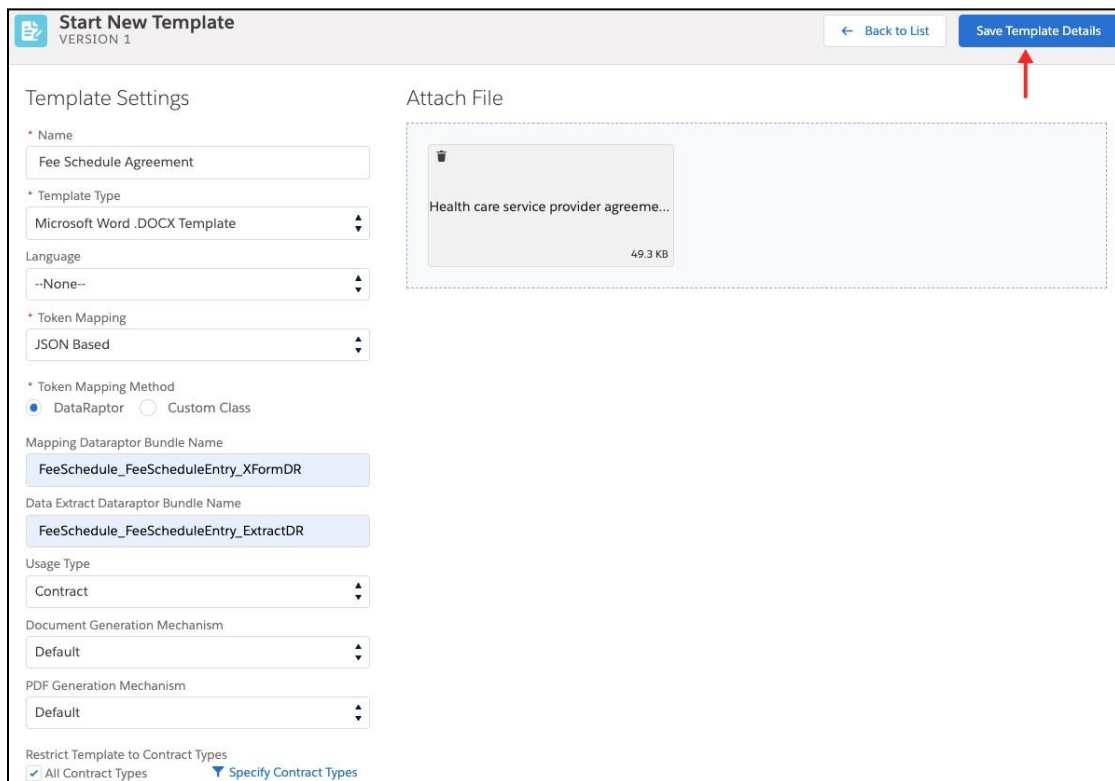
4. Drag the updated .docx file (Health care service provider agreement) from your desktop into the Document Template Designer or click **Browse** to upload the .docx file.



NOTE:

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

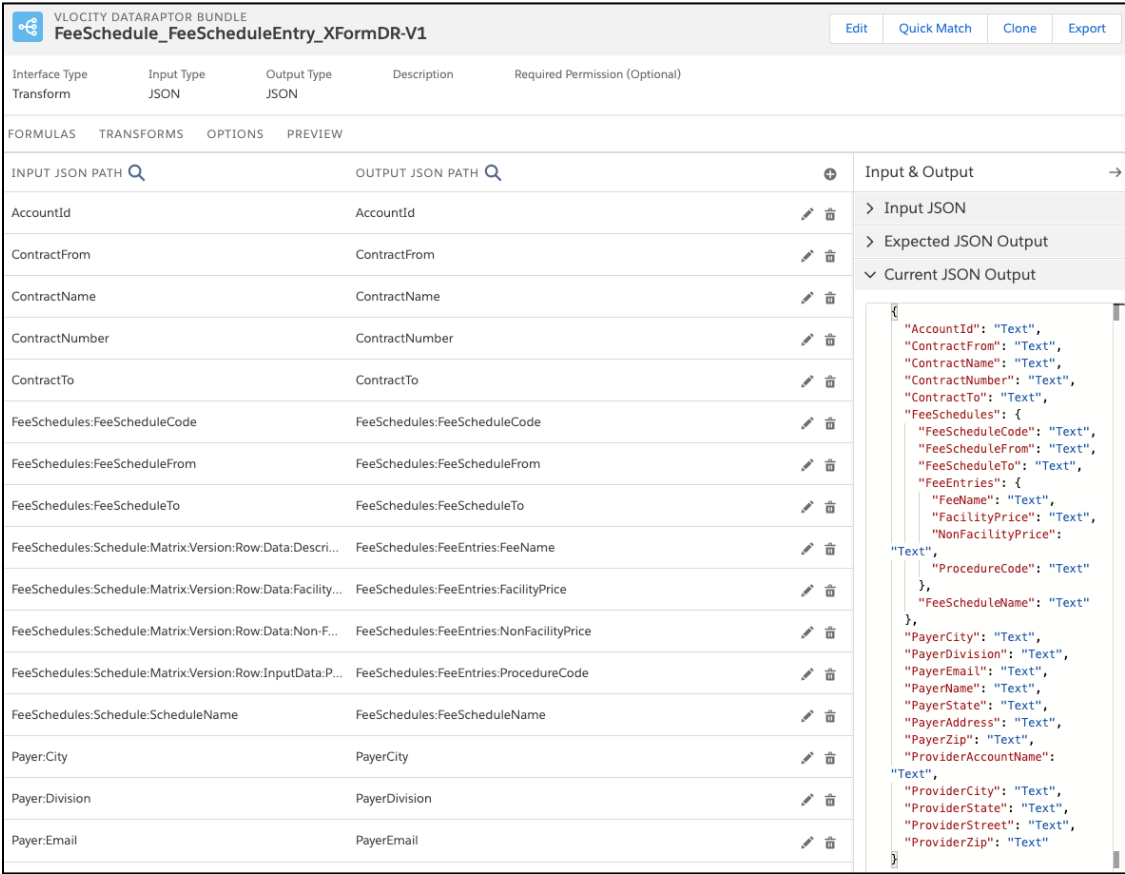
5. Select the file and click **Save Template Details**.



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.



The screenshot displays the configuration for a Dataraptor bundle. The main table lists the following mappings:


Interface Type	Input Type	Output Type	Description	Required Permission (Optional)
Transform	JSON	JSON		

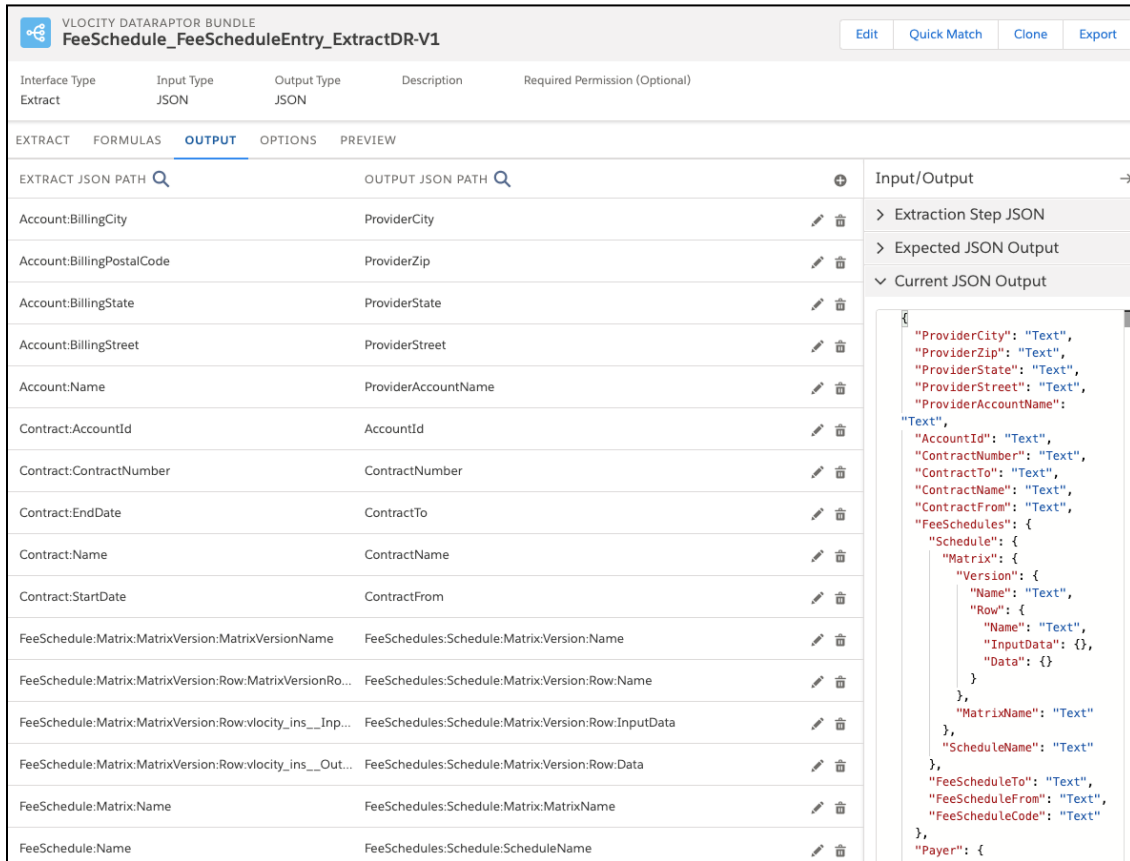
Below the table, there are tabs for FORMULAS, TRANSFORMS, OPTIONS, and PREVIEW. The PREVIEW tab is active, showing the 'Current JSON Output' as a JSON object with the following structure:

```

{
  "AccountId": "Text",
  "ContractFrom": "Text",
  "ContractName": "Text",
  "ContractNumber": "Text",
  "ContractTo": "Text",
  "FeeSchedules": {
    "FeeScheduleCode": "Text",
    "FeeScheduleFrom": "Text",
    "FeeScheduleTo": "Text",
    "FeeEntries": {
      "FeeName": "Text",
      "FacilityPrice": "Text",
      "NonFacilityPrice":
    "Text",
      "ProcedureCode": "Text"
    },
    "FeeScheduleName": "Text"
  },
  "PayerCity": "Text",
  "PayerDivision": "Text",
  "PayerEmail": "Text",
  "PayerName": "Text",
  "PayerState": "Text",
  "PayerAddress": "Text",
  "PayerZip": "Text",
  "ProviderAccountName":
  "Text",
  "ProviderCity": "Text",
  "ProviderState": "Text",
  "ProviderStreet": "Text",
  "ProviderZip": "Text"
}

```

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



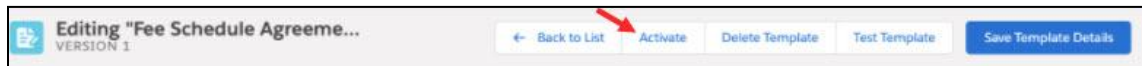
Interface Type	Input Type	Output Type	Description	Required Permission (Optional)
Extract	JSON	JSON		

EXTRACT JSON PATH	OUTPUT JSON PATH	Input/Output
Account:BillingCity	ProviderCity	> Extraction Step JSON
Account:BillingPostalCode	ProviderZip	> Expected JSON Output
Account:BillingState	ProviderState	∨ Current JSON Output
Account:BillingStreet	ProviderStreet	
Account:Name	ProviderAccountName	
Contract:AccountId	AccountId	
Contract:ContractNumber	ContractNumber	
Contract:EndDate	ContractTo	
Contract:Name	ContractName	
Contract:StartDate	ContractFrom	
FeeSchedule:Matrix:MatrixVersion:MatrixVersionName	FeeSchedules:Schedule:Matrix:Version:Name	
FeeSchedule:Matrix:MatrixVersion:Row:MatrixVersionRo...	FeeSchedules:Schedule:Matrix:Version:Row:Name	
FeeSchedule:Matrix:MatrixVersion:Row:vlocity_ins__Inp...	FeeSchedules:Schedule:Matrix:Version:Row:InputData	
FeeSchedule:Matrix:MatrixVersion:Row:vlocity_ins__Out...	FeeSchedules:Schedule:Matrix:Version:Row:Data	
FeeSchedule:Matrix:Name	FeeSchedules:Schedule:Matrix:MatrixName	
FeeSchedule:Name	FeeSchedules:Schedule:ScheduleName	


```

{
  "ProviderCity": "Text",
  "ProviderZip": "Text",
  "ProviderState": "Text",
  "ProviderStreet": "Text",
  "ProviderAccountName":
  "Text",
  "AccountId": "Text",
  "ContractNumber": "Text",
  "ContractTo": "Text",
  "ContractName": "Text",
  "ContractFrom": "Text",
  "FeeSchedules": {
    "Schedule": {
      "Matrix": {
        "Version": {
          "Name": "Text",
          "Row": {
            "Name": "Text",
            "InputData": {},
            "Data": {}
          }
        },
        "MatrixName": "Text"
      },
      "ScheduleName": "Text"
    },
    "FeeScheduleTo": "Text",
    "FeeScheduleFrom": "Text",
    "FeeScheduleCode": "Text"
  },
  "Payer": {
  
```

- Close the DataRaptor tabs.
- Click **Activate** on the Fee Schedule Agreement page to activate the document template.



Editing "Fee Schedule Agreeme..."
 VERSION 1

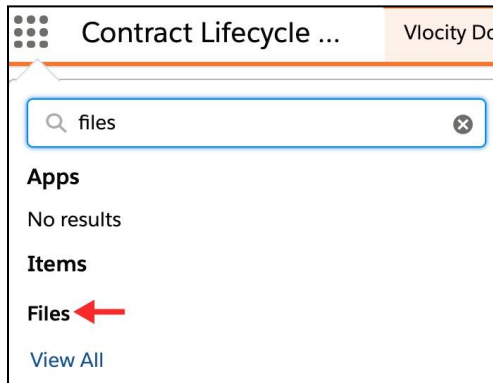
[← Back to List](#)
[Activate](#)
[Delete Template](#)
[Test Template](#)
[Save Template Details](#)

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

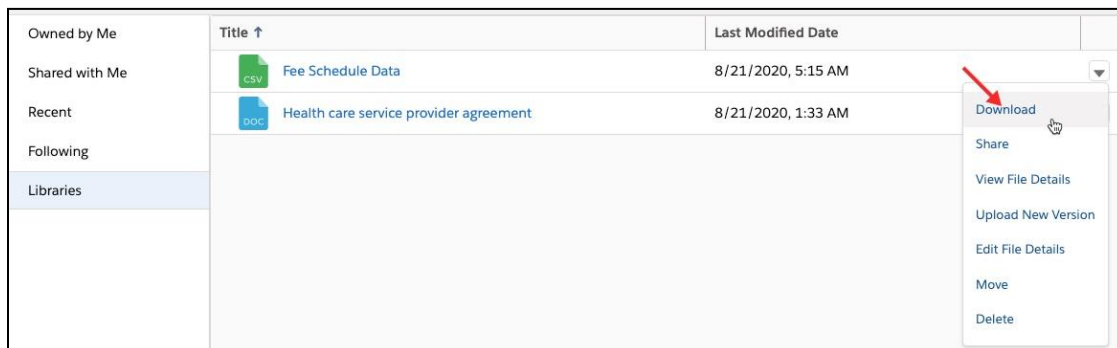
Task 3: Test Microsoft Word DOCX template

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	24

New Contract: Contract

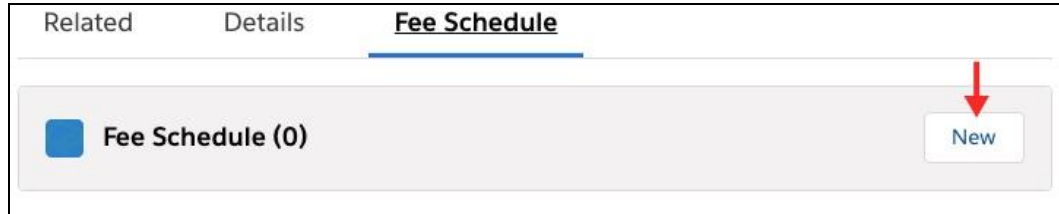
Contract Information

Contract Number	* Status Draft
* Account Name Acme	* Contract Start Date 12/9/2022
Price Book Search Price Books...	Language --None--
Producer Search Contacts...	* Contract Term (months) 24
Agency/Brokerage Search Accounts...	Term of Eligibility
Underwriter Search People...	Opportunity Search Opportunities...
Final Rating Census Search Census...	

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.



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

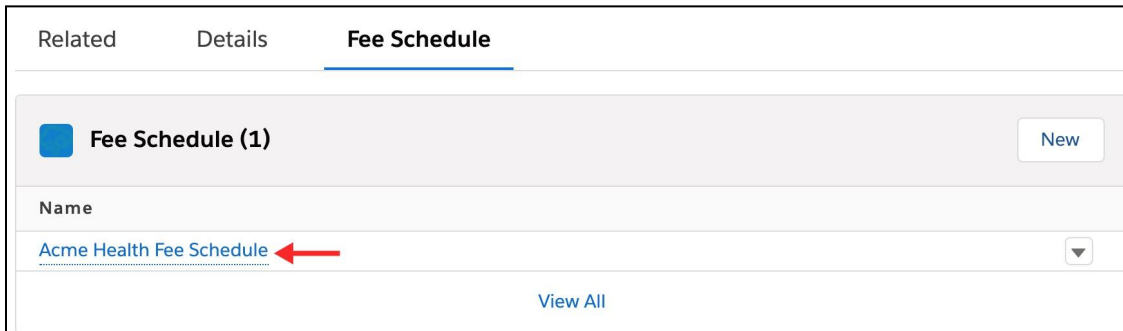
New Fee Schedule

Information

<p>Name ↶</p> <input style="width: 95%;" type="text" value="Acme Health Fee Schedule"/>	<p>Owner</p> <p> Industries Admin</p>
<p>Contract</p> <p> 00000103 ✕</p>	<p>Effective Start Date ↶</p> <p><input style="width: 95%;" type="text" value="9/27/2022"/> </p>
<p>Description</p> <input style="width: 95%;" type="text"/>	<p>Effective End Date ↶</p> <p><input style="width: 95%;" type="text" value="3/3/2023"/> </p>
<p>Fee Schedule Data</p> <input style="width: 95%;" type="text" value="Search Vlocity Calculation Matrices..."/> 🔍	<p>Fee Schedule Code</p> <input style="width: 95%;" type="text"/> <p>Source</p> <p>--None-- ▼</p>

Cancel
Save & New
Save

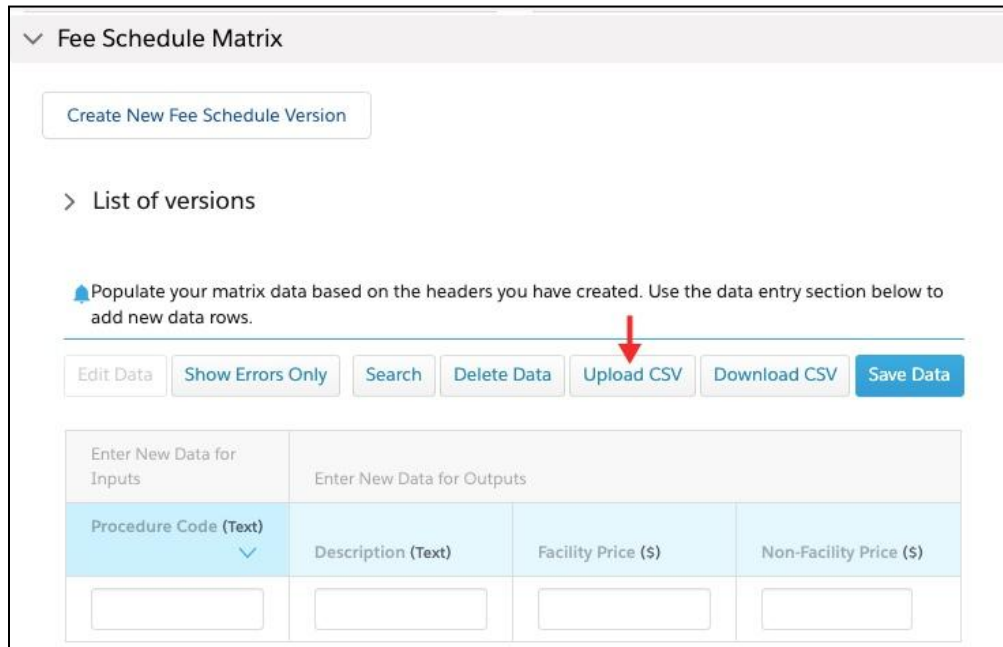
9. Click the newly created fee schedule **Acme Health Fee Schedule**.



The screenshot shows a web interface with three tabs: 'Related', 'Details', and 'Fee Schedule'. The 'Fee Schedule' tab is active. Below the tabs, there is a header 'Fee Schedule (1)' with a 'New' button. Underneath, there is a 'Name' field containing 'Acme Health Fee Schedule', which is highlighted with a red arrow. A 'View All' link is visible at the bottom of the list.

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.



The screenshot shows the 'Fee Schedule Matrix' section. It includes a 'Create New Fee Schedule Version' button, a 'List of versions' link, and a blue bell icon with the text: 'Populate your matrix data based on the headers you have created. Use the data entry section below to add new data rows.' Below this text is a row of buttons: 'Edit Data', 'Show Errors Only', 'Search', 'Delete Data', 'Upload CSV' (highlighted with a red arrow), 'Download CSV', and 'Save Data'. At the bottom, there is a data entry table with two columns: 'Enter New Data for Inputs' and 'Enter New Data for Outputs'. The 'Inputs' column has a header 'Procedure Code (Text)' with a dropdown arrow. The 'Outputs' column has headers 'Description (Text)', 'Facility Price (\$)', and 'Non-Facility Price (\$)'. Each header has a corresponding input field below it.

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



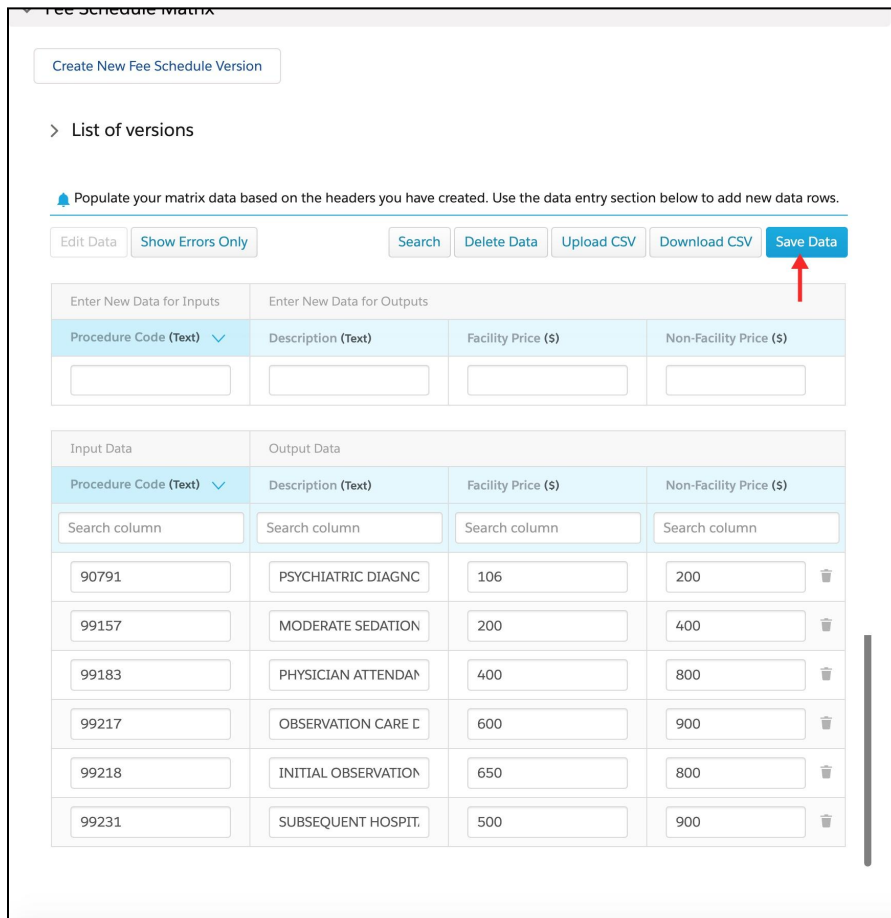
- c. Click **Upload**.




- d. Click **Close**.




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



Procedure Code (Text)	Description (Text)	Facility Price (\$)	Non-Facility Price (\$)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>




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.



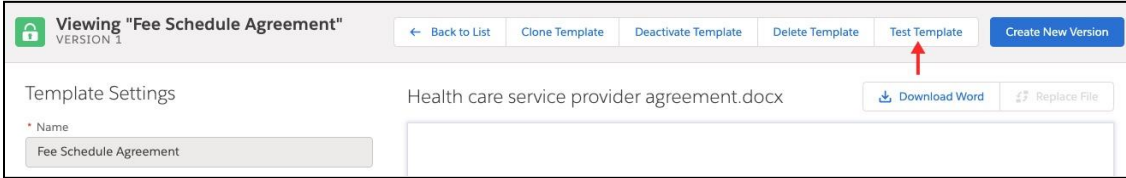
Name	Start Date	End Date	Priority	Enabled
Acme Health Fee Schedule_Data V1	08/21/2020	11/30/2020	1	<input checked="" type="checkbox"/>

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

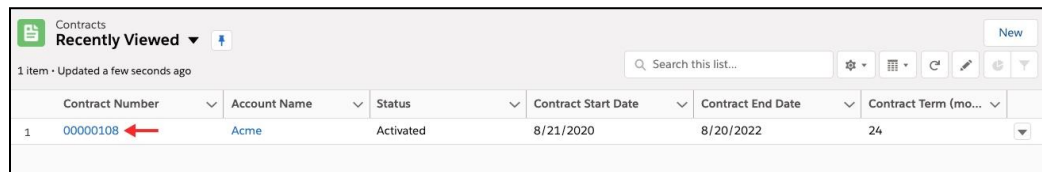
- g. Click the contract number in the **Contract** field. This will redirect to the contract page for which the fee schedule was created.

Related	Details
Name	Owner
Acme Health Fee Schedule	 Industries Admin
Contract	Effective Start Date
00000103	9/28/2022
Description	Effective End Date
	8/31/2023
Fee Schedule Data	Fee Schedule Code
Acme Health Fee Schedule_Data	
	Source
Created By	Last Modified By
 Industries Admin , 9/27/2022, 11:24 PM	 Industries Admin , 9/27/2022, 11:24 PM

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.

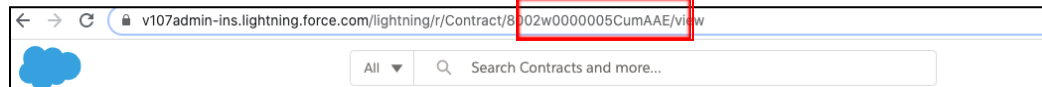


13. In the **ObjectId** box, enter the object Id for any contract.
- In the **Lightning Navigation bar**, right-click the **Contracts** tab to open in a new browser tab.
 - Click the **contract number** created in the previous step.

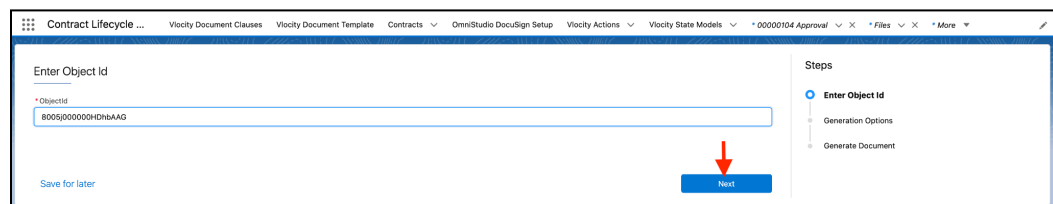


	Contract Number	Account Name	Status	Contract Start Date	Contract End Date	Contract Term (mo...)
1	00000108	Acme	Activated	8/21/2020	8/20/2022	24

- 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.



Enter Object Id

ObjectId

8005000000HDhBAAG

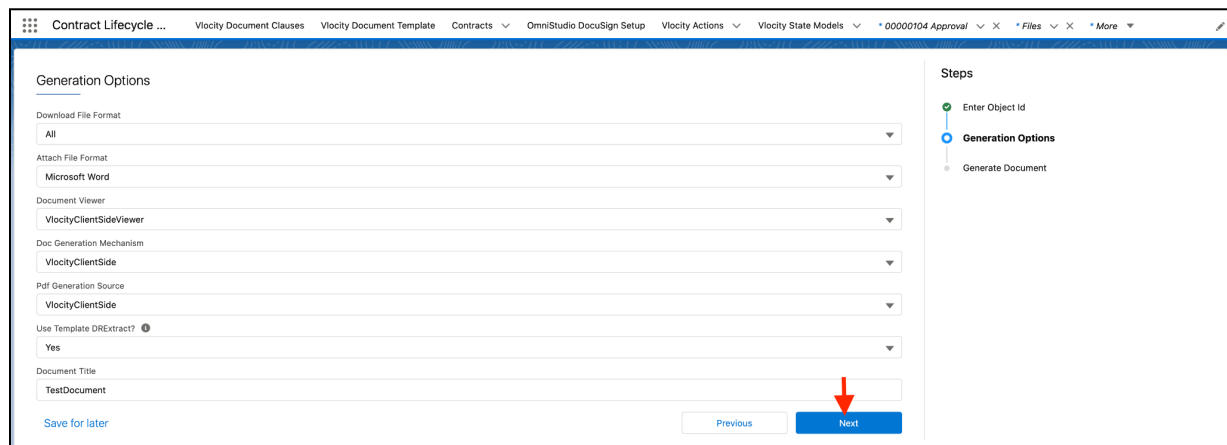
Save for later

Next

Steps

- Enter Object Id
- Generation Options
- Generate Document

14. Click **Next**.



Generation Options

Download File Format

All

Attach File Format

Microsoft Word

Document Viewer

VlocityClientSideViewer

Doc Generation Mechanism

VlocityClientSide

Pdf Generation Source

VlocityClientSide

Use Template DRExtract?

Yes

Document Title

TestDocument

Save for later

Previous

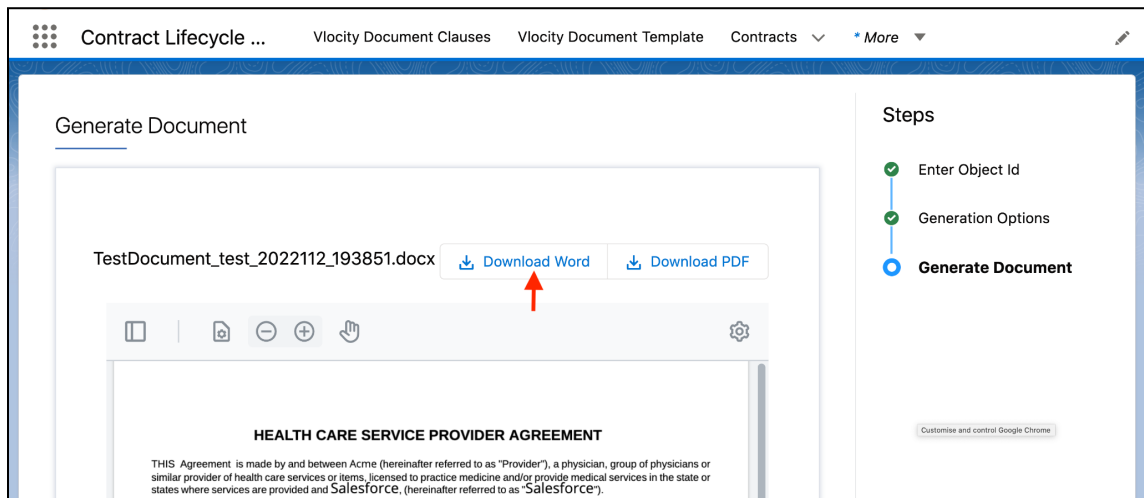
Next

Steps

- Enter Object Id
- Generation Options
- Generate Document

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

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



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.