

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 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>

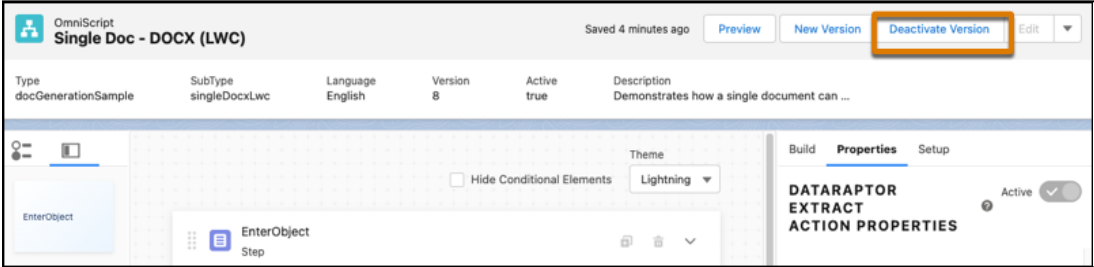
Task 1: Investigate the Sample Client-Side OmniScript

1. Using the **Lightning App Launcher**  , type `omniScripts` 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.



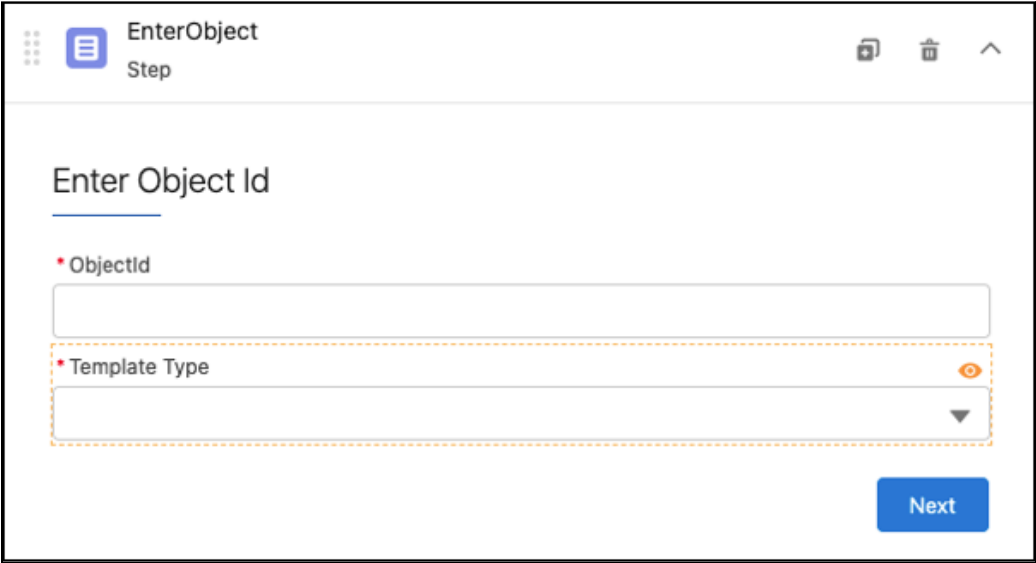
<input type="checkbox"/> TYPE	LANGUAGE	DESCRIPTION	LAST MODIFIED ...	LAST MODIFIED
▼ <code>docGenerationSample/singleDocxLwc</code>	English	Demonstrates how a single document can be gene...	6/27/22 11:06 PM	Industries Adm
<input type="checkbox"/> <code>Single Doc - DOCX (LWC) (Version 8)</code>	English	Demonstrates how a single document can be gene...	6/27/22 11:06 PM	Industries Adm
<input type="checkbox"/> <code>Single Doc - DOCX (LWC) (Version 7)</code>	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.

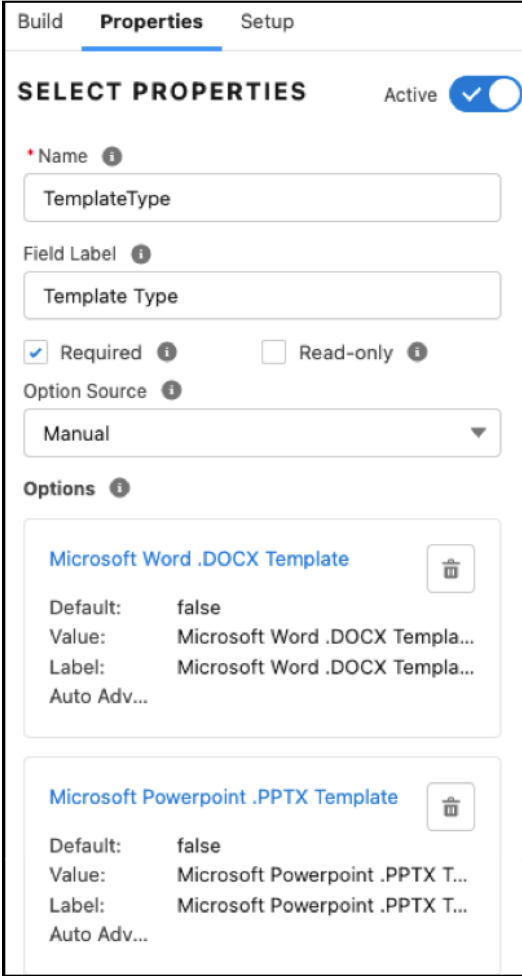


5. click **Done**.

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



- 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.



Build **Properties** Setup

SELECT PROPERTIES Active


* Name ⓘ
TemplateType

Field Label ⓘ
Template Type


Required ⓘ Read-only ⓘ

Option Source ⓘ
Manual


Options ⓘ

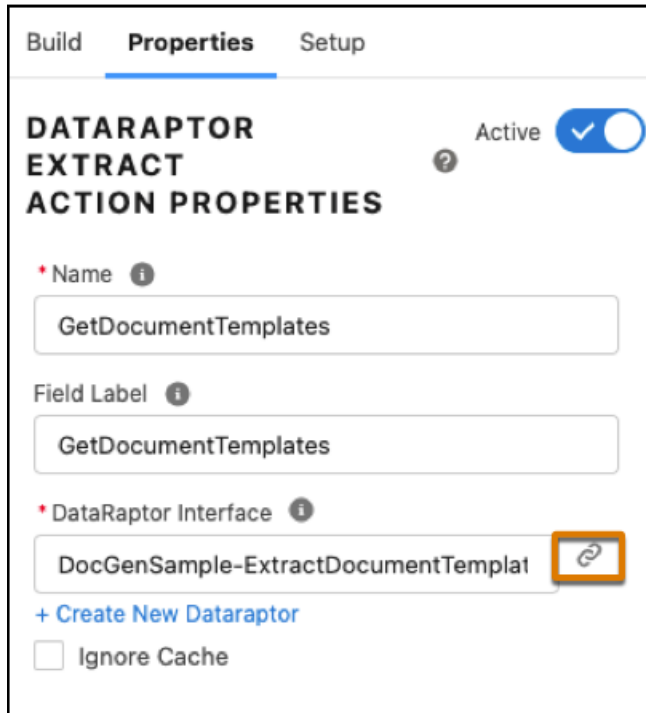
Microsoft Word .DOCX Template 

Default: false
Value: Microsoft Word .DOCX Templa...
Label: Microsoft Word .DOCX Templa...
Auto Adv...

Microsoft Powerpoint .PPTX Template 

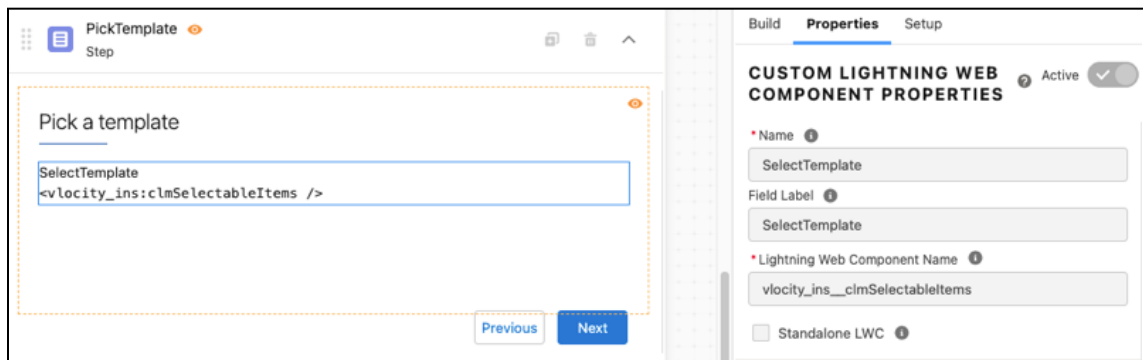
Default: false
Value: Microsoft Powerpoint .PPTX T...
Label: Microsoft Powerpoint .PPTX T...
Auto Adv...

- 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.

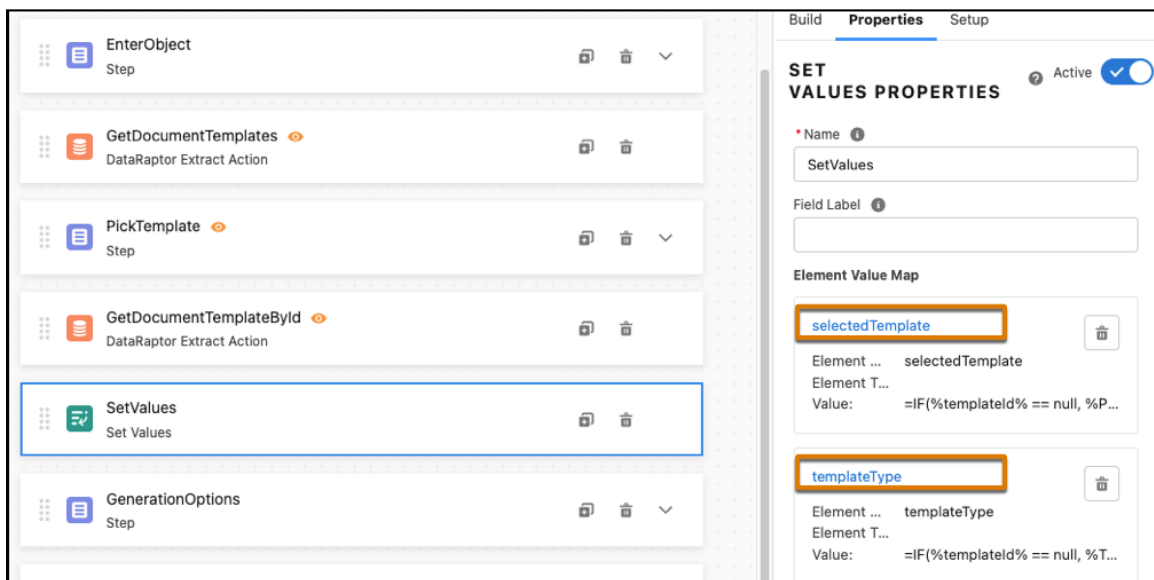


- In the **EXTRACT** tab of the DataRaptor, notice the filter options.
- In the **OUTPUT** tab, notice the Extract and Output JSON paths.
- Close the DataRaptor browser tab.

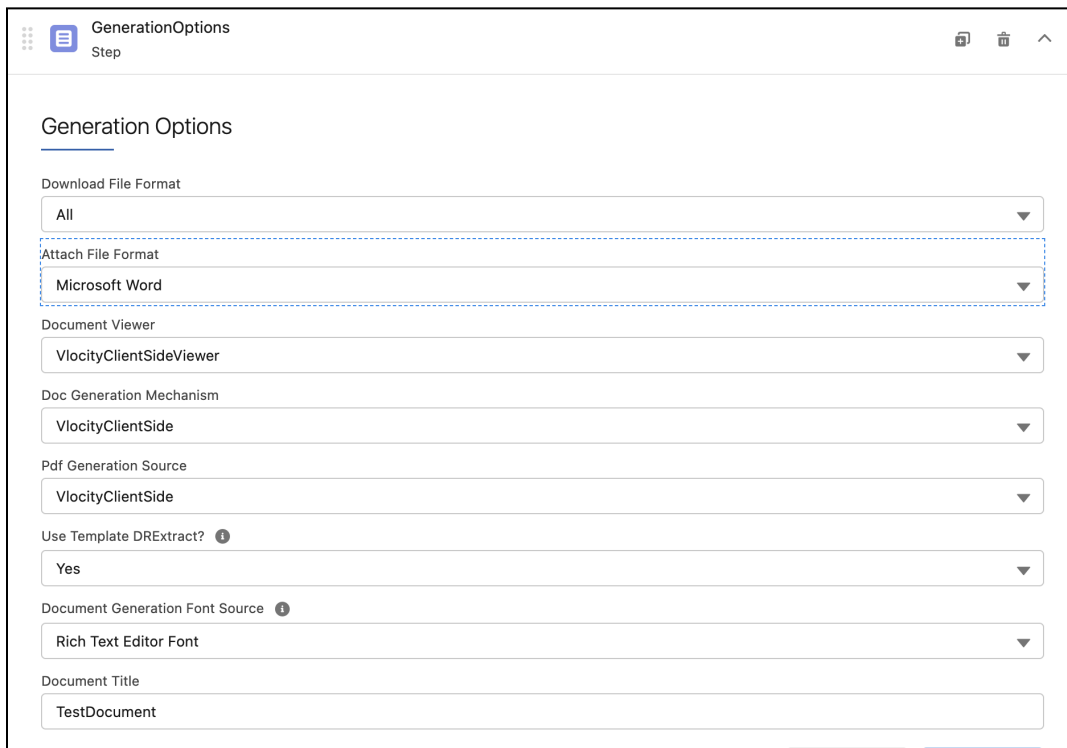
12. Back in the OmniScript, click the **PickTemplate** step element. Click the **SelectTemplate** element inside the step. Notice the custom Lightning Web Component. It displays the template types in a list so we can select one.



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



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

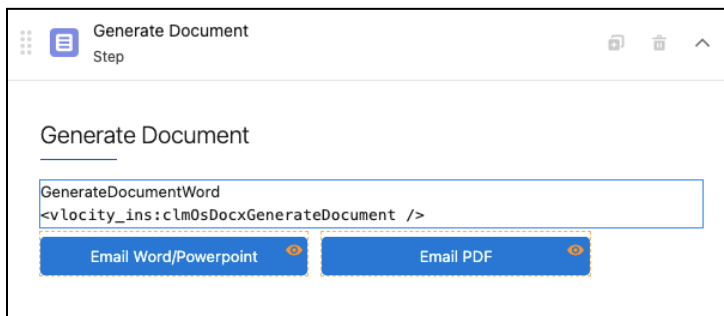


The screenshot shows the configuration interface for the 'GenerationOptions' step. The title is 'Generation Options'. The fields are as follows:

- 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 Generation Font Source: Rich Text Editor Font
- Document Title: TestDocument

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.

16. Click the **Generate Document** step element. Notice the custom Lightning Web Component and Email Action elements.

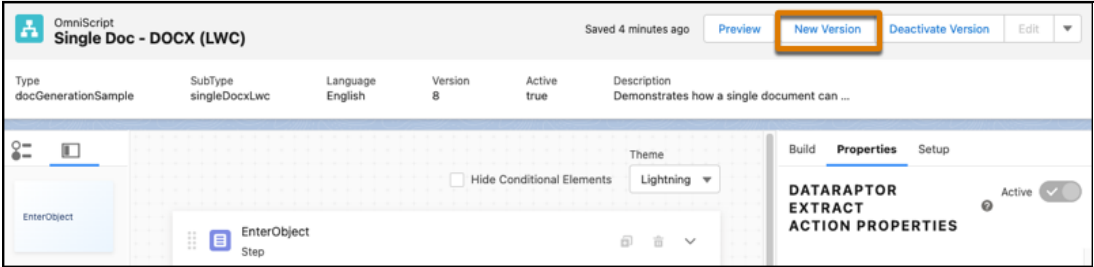


The screenshot shows the configuration interface for the 'Generate Document' step. The title is 'Generate Document'. The fields are as follows:

- GenerateDocumentWord: <vlocity_ins:clm0sDocxGenerateDocument />
- Email Word/Powerpoint
- Email PDF

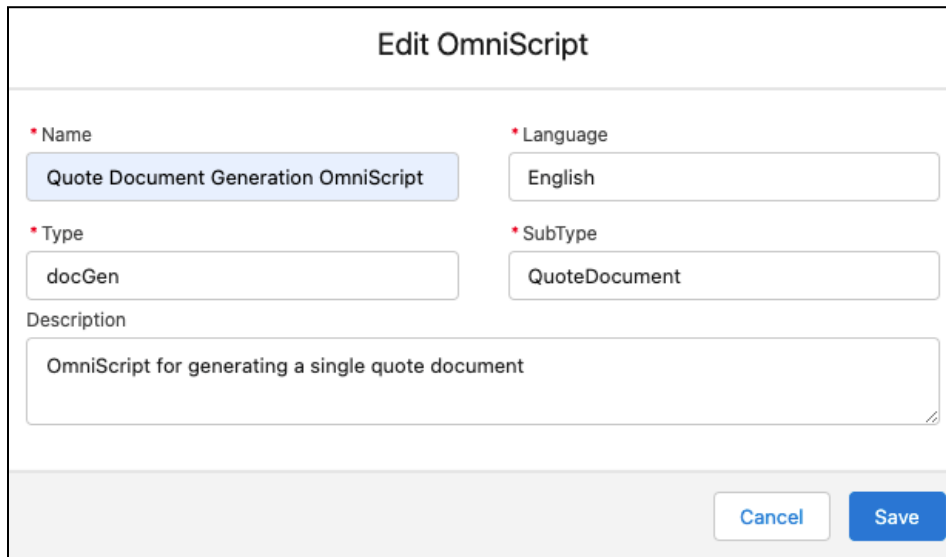
Task 2: Version and Edit the Sample Client-Side OmniScript

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.

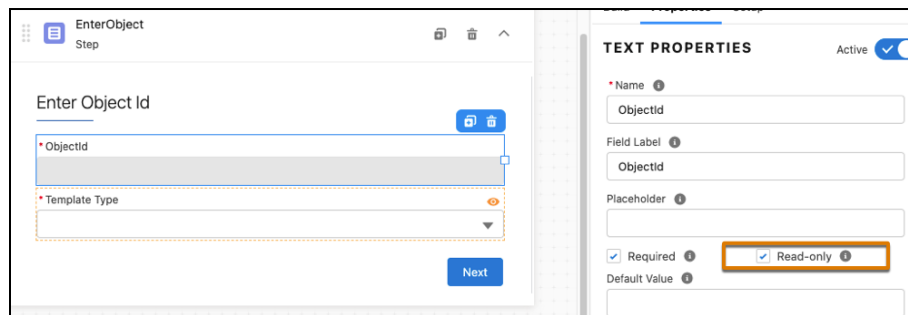


2. Click **Edit**.
3. Enter the following information:

Field	Value
Name	Quote Document Generation OmniScript
Language	English
Type	docGen
Subtype	QuoteDocument
Description	OmniScript for generating a single quote document

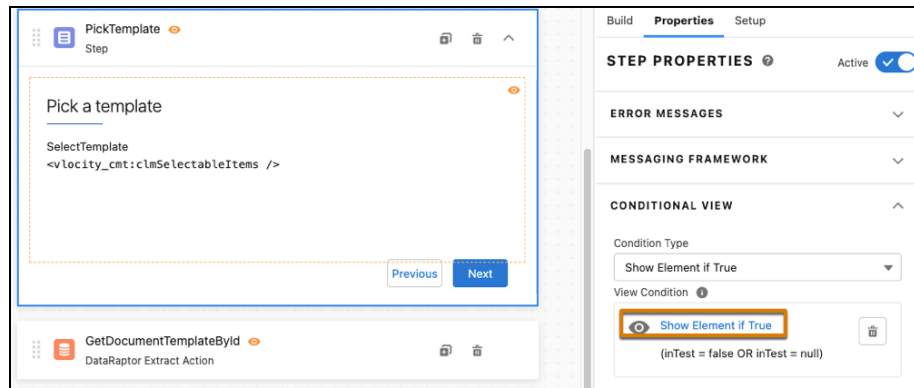


4. Click **Save**.
5. Edit **EnterObject** step fields to read only.
 - a. Click the **EnterObject** step to expand it.
 - b. Click the **ObjectId** field.
 - c. In the Properties panel on the right, select **Read-only**.



- d. Click the **Template Type** field.
 - e. In the Properties panel on the right, select **Read-only**.
 - f. Click **Microsoft Word .DOCX Template** and check **Use as Default Value**.
 - g. Click **Save**.
6. Edit the OmniScript to pre-select the template.

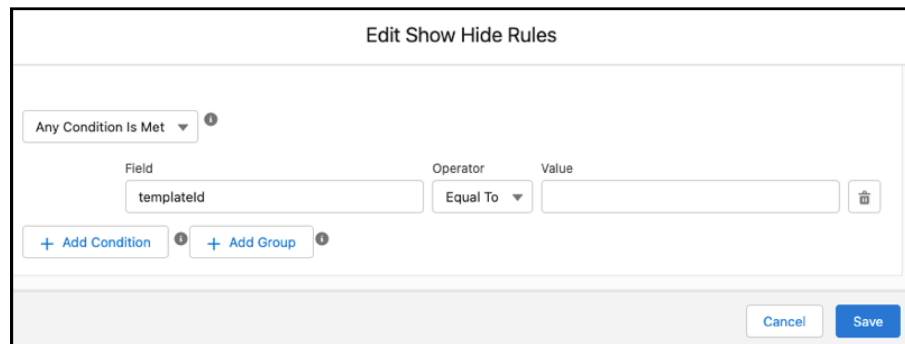
- a. Add a conditional view to hide the PickTemplate step if templateId is provided.
 - i. Click the **PickTemplate** step.
 - ii. In the Properties panel on the right, expand **CONDITIONAL VIEW**.
 - iii. Click **Show Element if True**.



- iv. Edit the following fields:

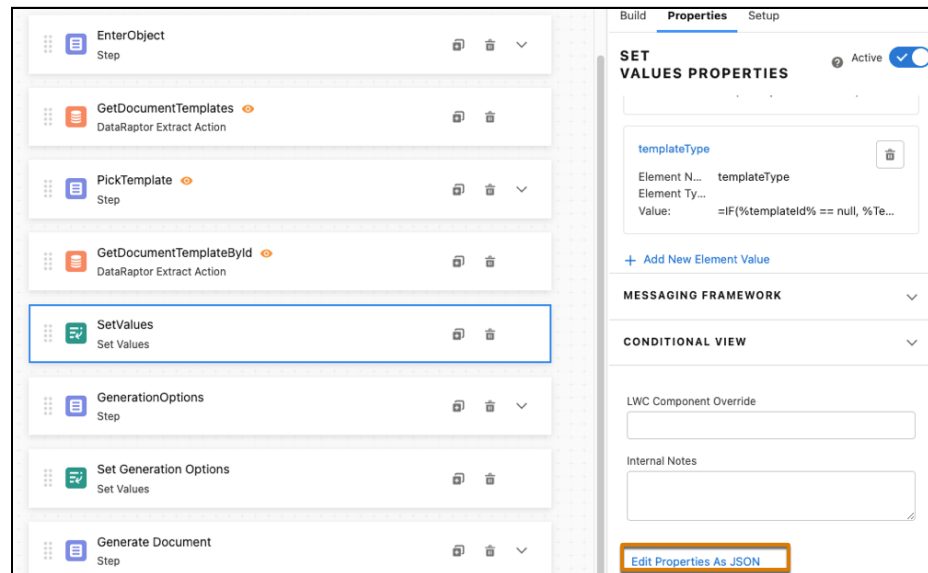
Field	Value
Field	templateId
Operator	Equal To
Value	[leave blank]

- 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.

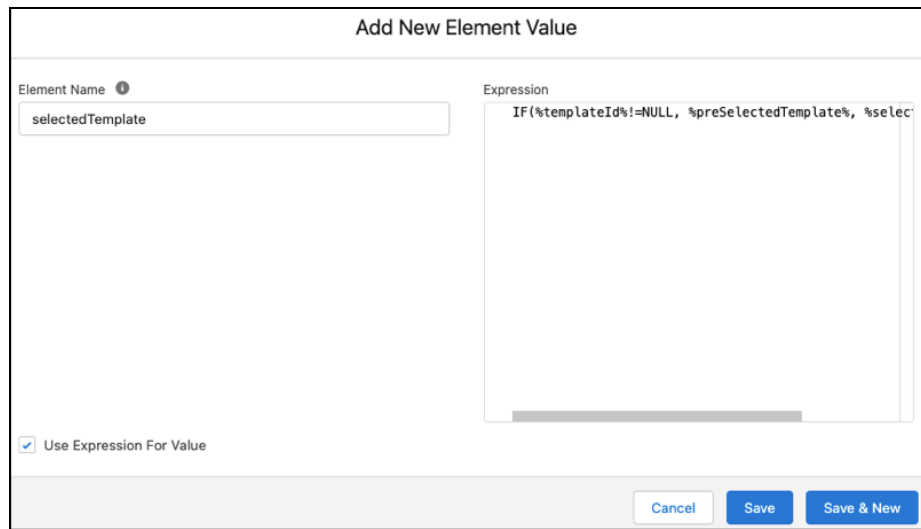
```
"elementValueMap": {  
  "preSelectedTemplate": {  
    "Id": "=%templateId%",  
    "TemplateType": "=%TemplateType%"  
  },  
  "selectedTemplate": "=%IF(%templateId% == null,  
%PickTemplate|1:SelectTemplate|1%,  
%preSelectedTemplate%)",  
  "templateType": "=%TemplateType%"  
},
```



- iv. Click **Close JSON Editor**.
- c. Edit **Set Generation Options** element.
- i. Click the **Set Generation Options** element.

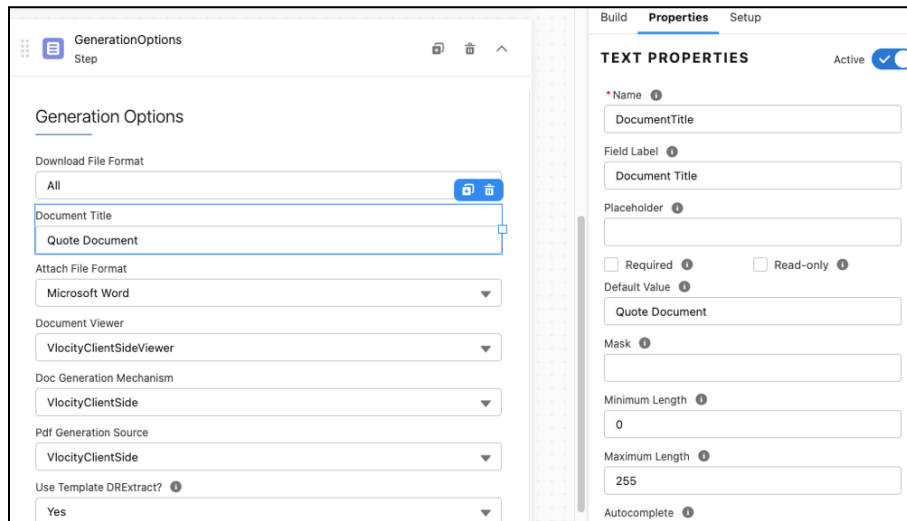
- ii. In the Properties panel on the right, click **+Add New Element Value**.
- iii. Edit the following fields:

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

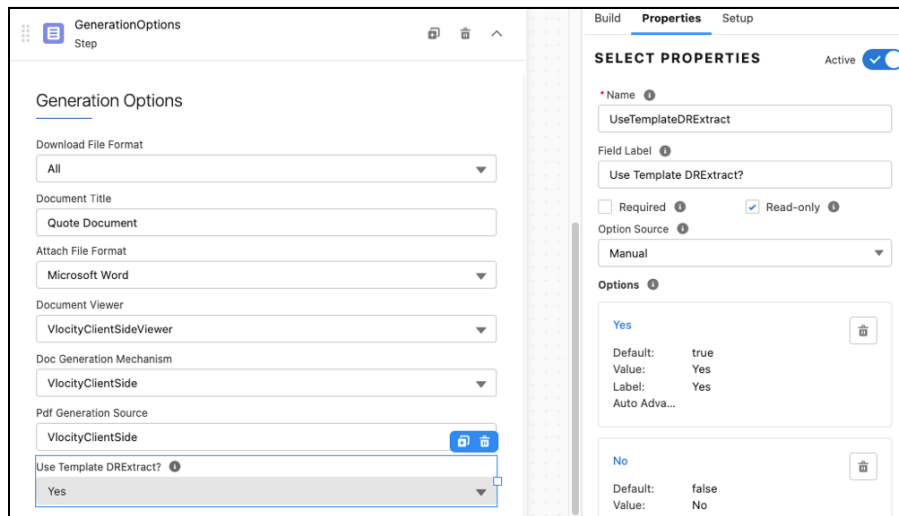


The screenshot shows a dialog box titled "Add New Element Value". It has two main input areas: "Element Name" and "Expression". The "Element Name" field contains the text "selectedTemplate". The "Expression" field contains the code: `=IF (%templateId%!=NULL, %preSelectedTemplate%, %selectedTemplate%)`. Below these fields is a checkbox labeled "Use Expression For Value" which is checked. At the bottom right of the dialog are three buttons: "Cancel", "Save", and "Save & New".

- iv. Click **Save**.
7. Edit **Generation Options** step.
- a. Click the **Generation Options** step
 - b. Click the **Document Title** field and move it right below 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**.

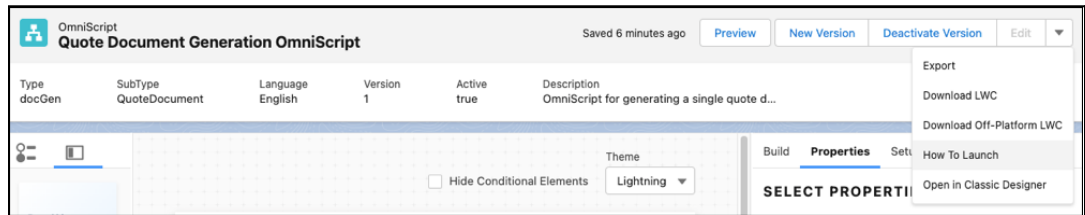


8. Click **Activate Version** to activate the OmniScript and then click **Done**.

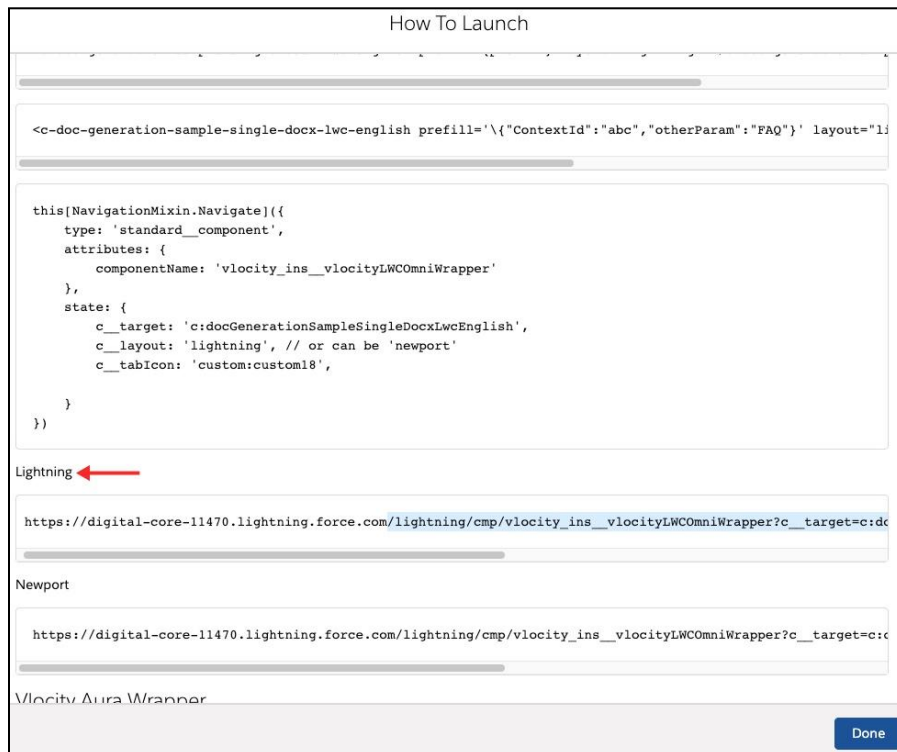
Type	SubType	Language	Version	Active	Description
docGen	QuoteDocument	English	1	false	OmniScript for generating a single quote d...

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**.




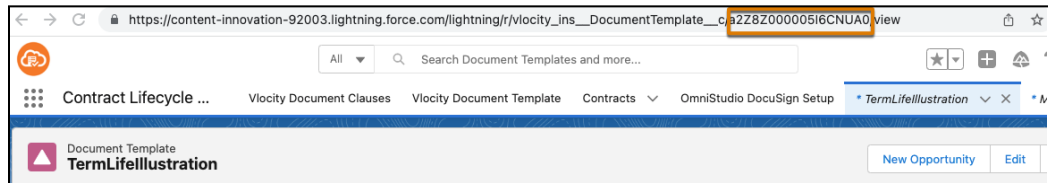
- b. In the **Lightning** URL box, copy the URL starting from /lightning.



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

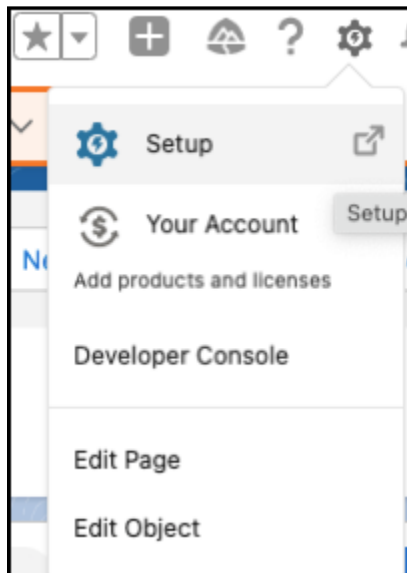
2. Retrieve the TemplateId.

- a. Using the **Lightning App Launcher**  , type `templates` in the search box. Click **Document Templates**.
- b. Select **All Items** from the dropdown.
- c. Click **TermLifeIllustration** 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.



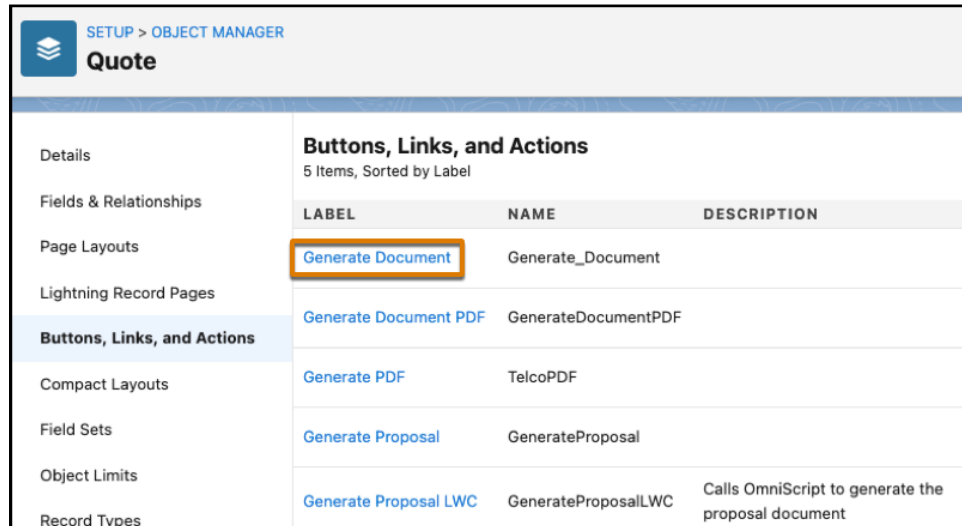
3. Edit Generate Document button.

- a. Click **Setup**.



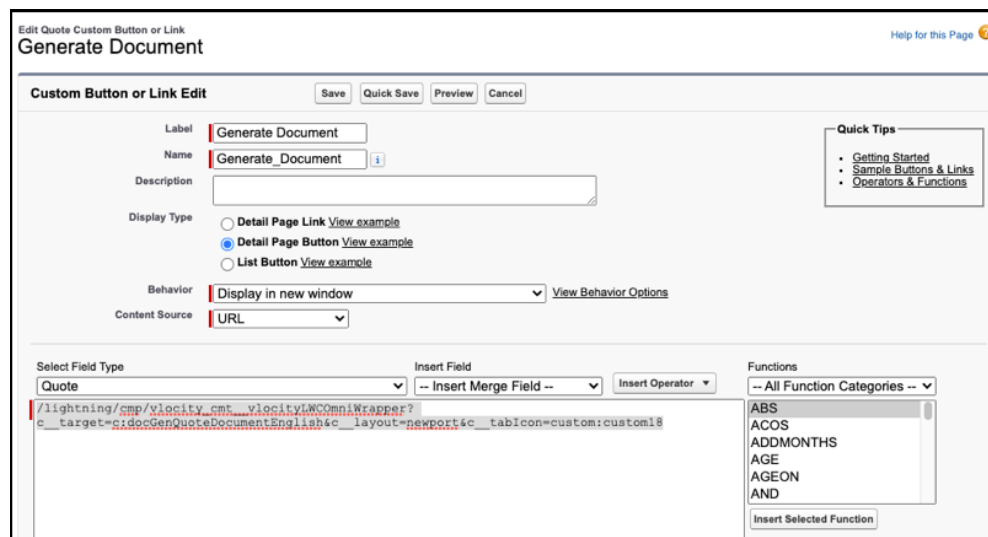
- b. Click **Object Manager** and open the **Quote** object.
- c. Click **Buttons, Links, and Actions**.

- d. Click **Generate Document**. We pre-built this custom button for training purposes.



DETAILS	Buttons, Links, and Actions		
	5 Items, Sorted by Label		
	LABEL	NAME	DESCRIPTION
	Generate Document	Generate_Document	
	Generate Document PDF	GenerateDocumentPDF	
	Generate PDF	TelcoPDF	
	Generate Proposal	GenerateProposal	
	Generate Proposal LWC	GenerateProposalLWC	Calls OmniScript to generate the proposal document

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



Generate Document

Custom Button or Link Edit

Label: Generate Document

Name: Generate_Document

Display Type: Detail Page Button

Behavior: Display in new window

Content Source: URL

Select Field Type: Quote

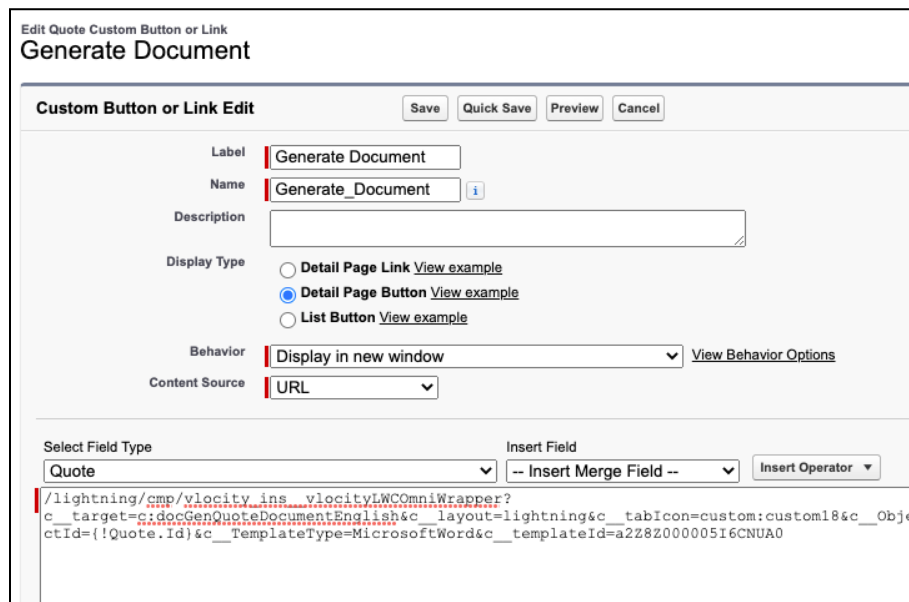
Insert Field: -- Insert Merge Field --

Insert Operator: --

Functions: -- All Function Categories --

```
/lightning/cmp/vlocity_cmt_vlocityLWC OmniWrapper?  
c_target=c:docGenQuoteDocumentEnglish&c_layout=newport&c_tabIcon=custom:custom18
```

- 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.

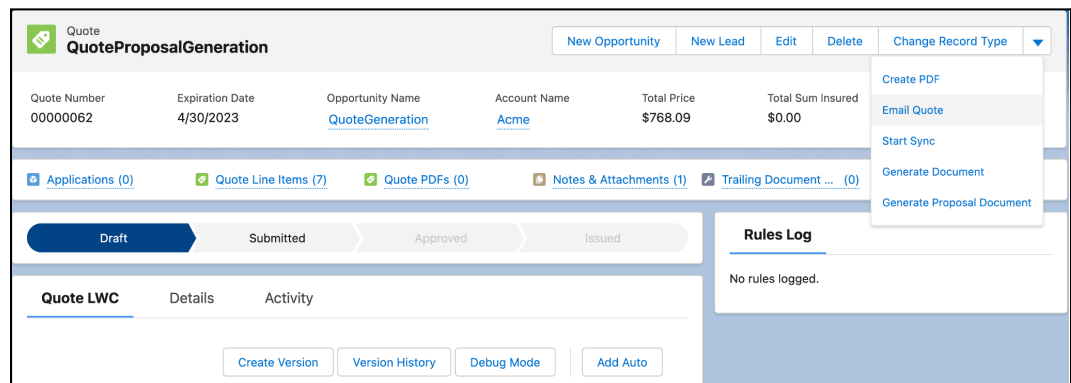


The screenshot shows the 'Edit Quote Custom Button or Link' configuration page for a 'Generate Document' button. The 'Label' is 'Generate Document' and the 'Name' is 'Generate_Document'. The 'Display Type' is set to 'Detail Page Button'. The 'Behavior' is 'Display in new window' and the 'Content Source' is 'URL'. The URL field contains the following code:

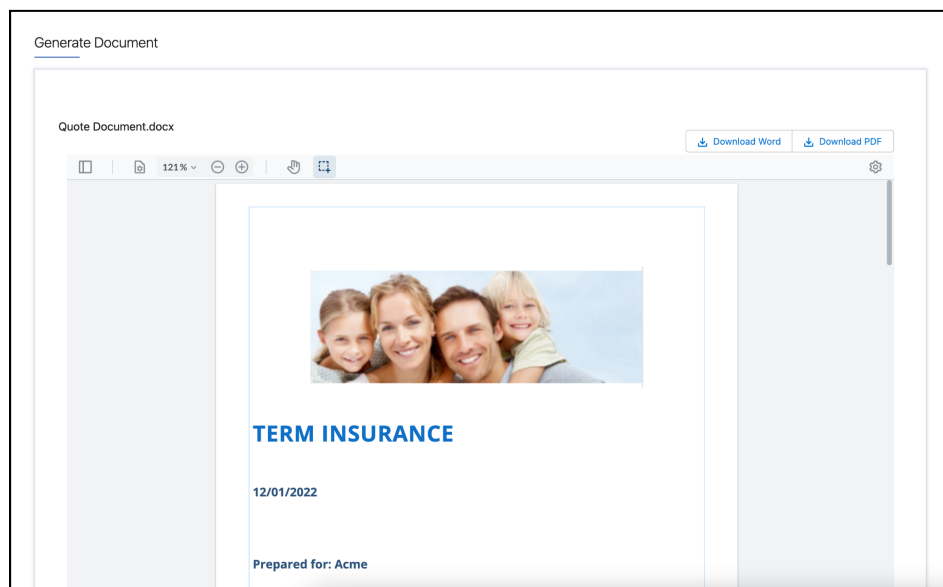
```
/lightning/cmp/vlocity_ins_vlocityLWC OmniWrapper?  
c__target=c:docGenQuoteDocumentEnglish&c__layout=lightning&c__tabIcon=custom:custom18&c__Obj  
ctId={!Quote.Id}&c__TemplateType=MicrosoftWord&c__templateId=a228200005I6CNUA0
```

- k. Click **Save**.
4. Test the Document Generation process.
- a. In the Lightning Navigation bar, click **Quotes** tab.
 - b. Select **All Quotes** from the dropdown.
 - c. Click **QuoteProposalGeneration** to open the quote page.

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



- e. The OmniScript opens in a separate tab. Go through the OmniScript Steps to generate the quote document.



- f. Close the Generate Document tab and go back to the **QuoteProposalGeneration** Quote page.
- g. Go to the **Notes & Attachments** related list and notice the quote document attached.