

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 4: Explore Server-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 server-side OmniScript. Add a button to the quote record page that launches the OmniScript.


Prerequisites

- Create .DOCX Document Templates

Tasks

1. Review the sample server-side OmniScript
2. Version and edit the sample server-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 Server-Side OmniScript

1. Using the **Lightning App Launcher**  , type `omniScripts` in the search box. Click **OmniScripts**.
2. Click the expand icon next to **docGenerationSample/singleDocxServerSideLwc**.
3. Open the latest version. Click **Single Doc - DOCX ServerSide(LWC)** to open the server-side sample OmniScript.

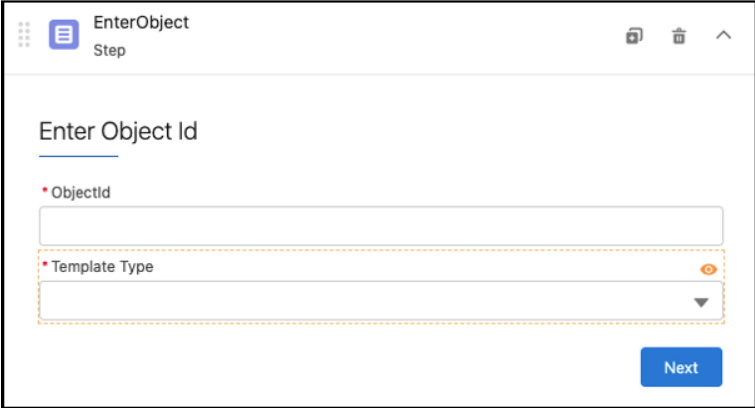
OMNISTUDIO		
OmniScripts		
As of - Viewing as Industries Admin		
<input type="checkbox"/> TYPE	LANGUAGE	DESCRIPTION
<input checked="" type="checkbox"/> docGenerationSample/singleDocxServersideLwc	English	Sample omniscrypt for service side
<input type="checkbox"/> Single Doc - DOCX Serverside(LWC) (Version 5)	English	Sample omniscrypt for service side
<input type="checkbox"/> Single Doc - DOCX Serverside(LWC) (Version 4)	English	Sample omniscrypt for service side

4. Click **Deactivate Version** to deactivate the OmniScript.

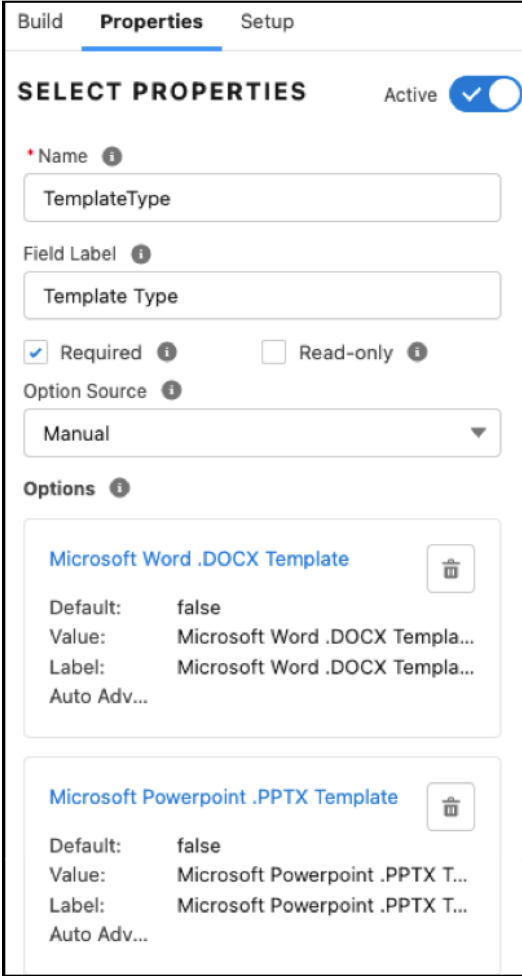


5. click **Done**.

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




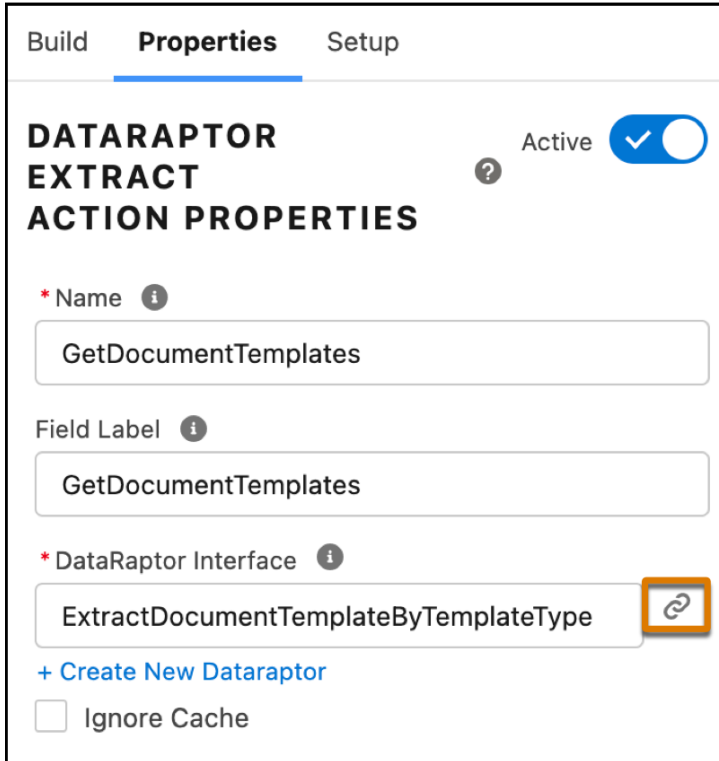
- 7. Click the **TemplateType** select field and notice the select options in the right panel under the **Properties** tab. The user has the option to select between Microsoft Word and Powerpoint templates.



The screenshot shows the 'Properties' tab of a Salesforce configuration page. At the top, there are tabs for 'Build', 'Properties', and 'Setup'. The main heading is 'SELECT PROPERTIES' with an 'Active' toggle switch. Below this, the field configuration is shown:

- 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.




Build **Properties** Setup

DATARAPTOR EXTRACT ACTION PROPERTIES Active

* Name ⓘ
GetDocumentTemplates

Field Label ⓘ
GetDocumentTemplates

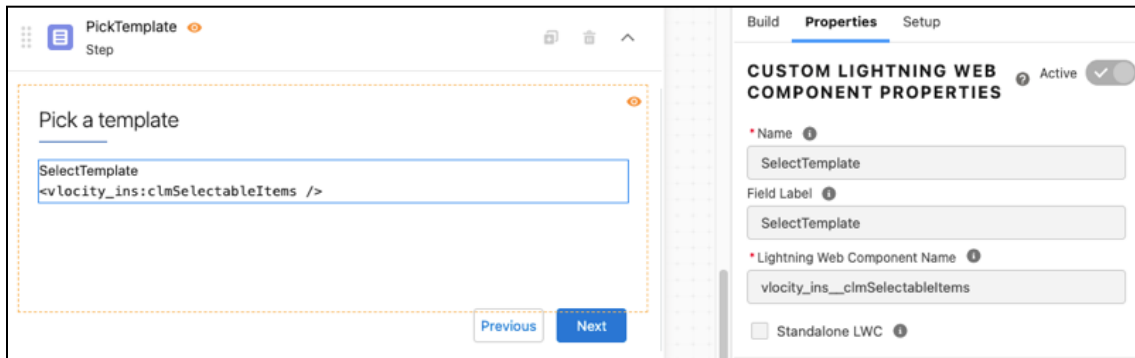
* DataRaptor Interface ⓘ
ExtractDocumentTemplateByTemplateType 

+ Create New Dataraptor

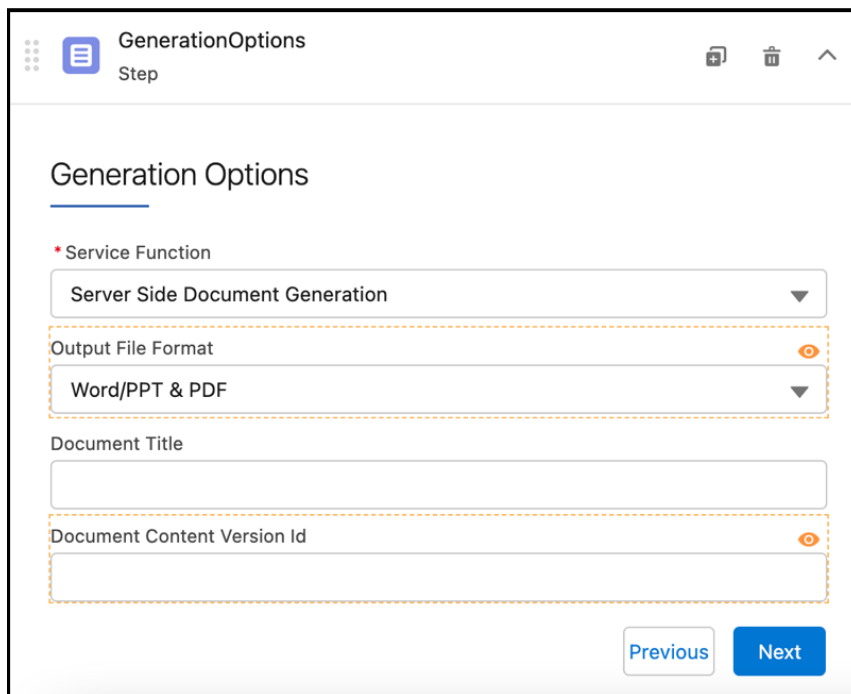
Ignore Cache

- 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.

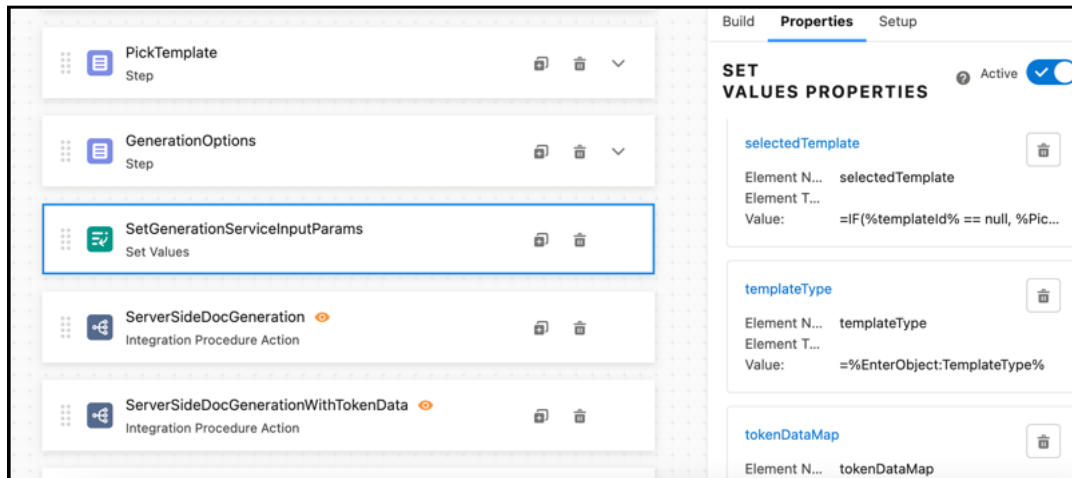
12. Back in the OmniScript, click the **PickTemplate** step element. Click the **SelectTemplate** element inside the step. Notice the custom Lightning Web Component. It displays the template types in a list so we can select one.



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



- Click the **SetGenerationServiceInputParams** element. Notice the **selectedTemplate** and **templateType** values. These values are passed to the Integration Procedure Action step.



- Click the **ServerSideDocGeneration** Integration Procedure Action step. The document is generated if the Service Function is set to Server Side Document Generation in the GenerationOptions step.
- Click the **ServerSideDocGenerationwithTokenData** step. The document is generated if the Service Function is set to Server Side Document Generation with Token Data in the GenerationOptions step.
- Click the **ServerSidePdfGeneration** step. The pdf document is generated if the ServiceFunction value is set to Server Side PDF Generation in the GenerationOptions step.
- Click the **ResponseMessage** step. In this last step of the OmniScript, the user generates the document and previews it under Notes & Attachments of the respective ObjectId. The OmniScript displays a JobId once the document generation job is successful.

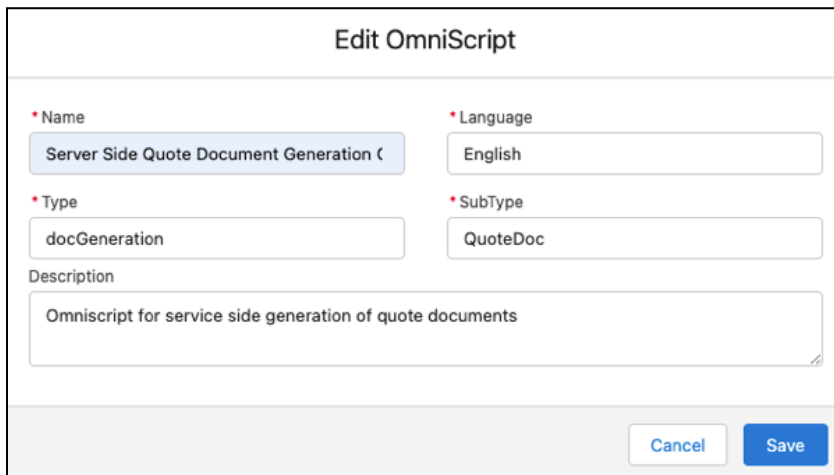
Task 2: Version and Edit the Sample Server-Side OmniScript

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.

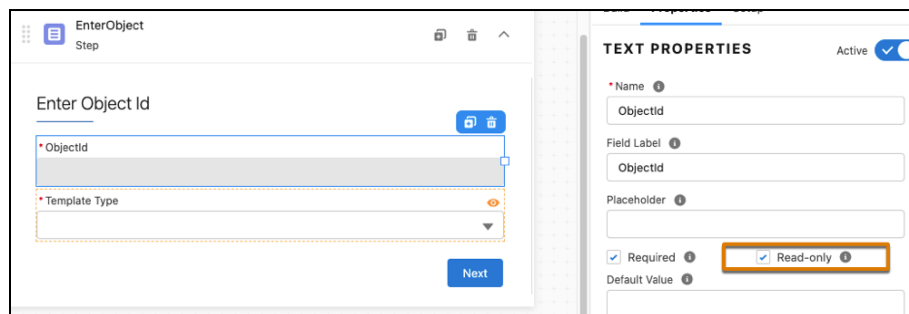


2. Click **Edit**.
3. Enter the following information:

Field	Value
Name	Server Side Quote Document Generation OmniScript
Language	English
Type	docGeneration
Subtype	QuoteDoc
Description	OmniScript for server side generation of quote documents

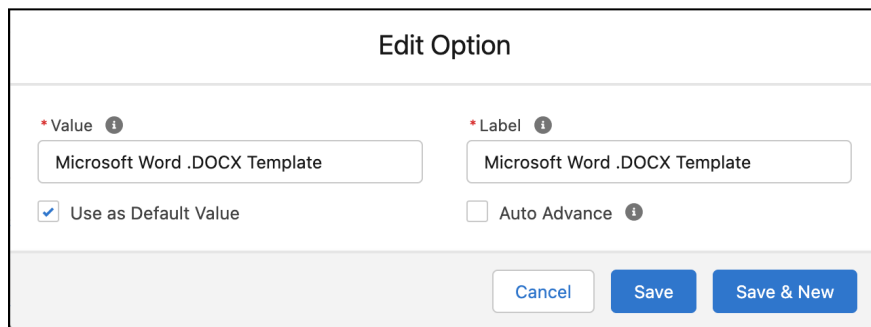


4. Click **Save**.
5. Edit **EnterObject** step fields to read only.
 - a. Click the **EnterObject** step to expand it.
 - b. Click the **ObjectId** field.
 - c. In the Properties panel on the right, uncheck **Read-only** if checked.



- d. Click the **Template Type** field.
- e. In the Properties panel on the right, select **Read-only**.

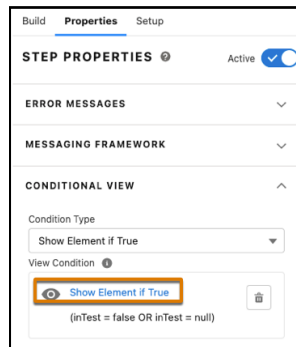
- f. Click **Microsoft Word .DOCX Template** and check **Use as Default Value**.



- g. Click **Save**.

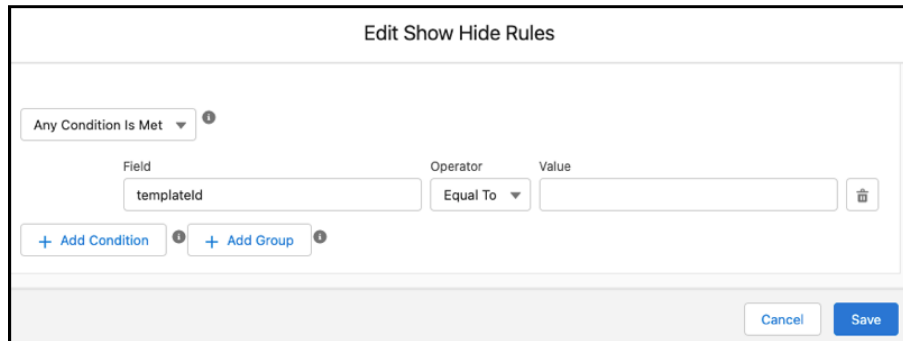
6. Edit the OmniScript to pre-select the template.

- 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**.

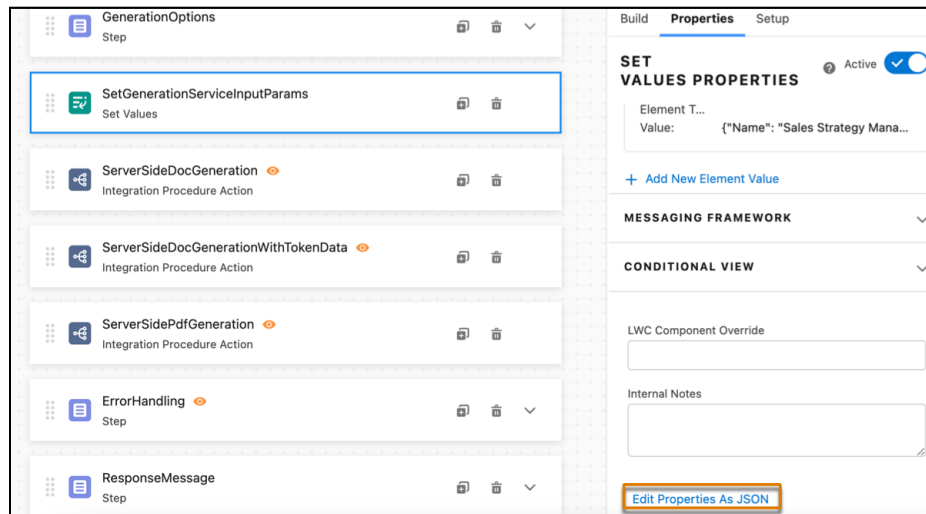


- iv. Edit the following fields:

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



- v. Click **Save**.
- b. Edit `SetGenerationServiceInputParams` element to add the pre-selected template.
 - i. Click the **SetGenerationServiceInputParams** element.
 - ii. Click **Edit Properties As JSON** on the bottom of the Properties panel.



- iii. Replace the `elementValueMap` node with the value below.

```
"elementValueMap": {
  "attachFileFormat":
    "=%GenerationOptions:OutputFileFormat%",
  "contextId": "=%EnterObject:ObjectId%",
  "documentTitle": "=%GenerationOptions:DocumentTitle%",
```

```
    "docxContentVersionId":  
    "%GenerationOptions:DocumentContentVersionId%",  
    "downloadFileFormat":  
    "%GenerationOptions:OutputFileFormat%",  
    "objectId": "%EnterObject:ObjectId%",  
    "outputFileFormat":  
    "%GenerationOptions:OutputFileFormat%",  
    "preSelectedTemplate": {  
      "Id": "%templateId%",  
      "TemplateType": "%TemplateType%"},  
    "templateType": "%EnterObject:TemplateType%",  
    "tokenDataMap": "{\\"Name\\": \\"Sales Strategy Manager\\"}"  
  },
```



iv. Click **Close JSON Editor**.

7. Configure SelectedTemplate

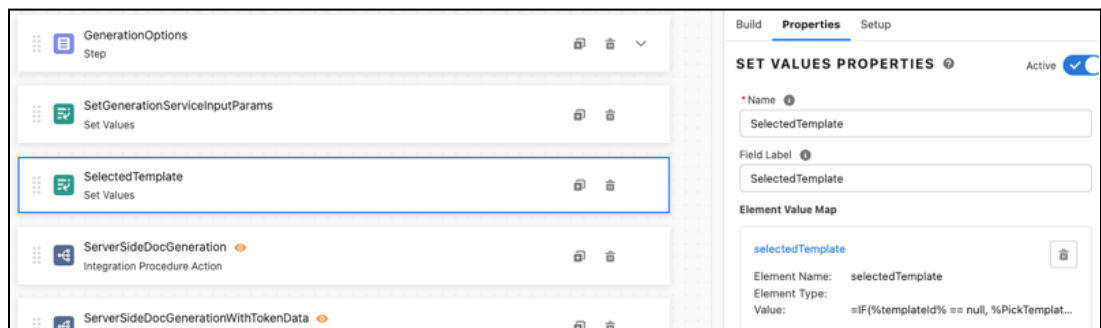
- From the Build panel, expand **ACTIONS** and drag the **Set Values** into the OmniScript's Canvas after SetGenerationServiceInputParams.
- In the Properties panel, update the fields as follows.

Field	Value
Name	SelectedTemplate
Field Label	SelectedTemplate

- c. Click **+ Add New Element Value** to add values as follows:

Element Name	Value
selectedTemplate	<code>=IF(%templateId% == null, %PickTemplate 1:SelectTemplate 1%, %preSelectedTemplate%)</code>

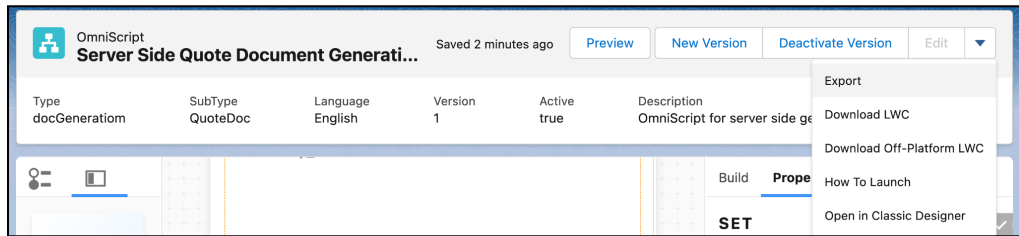
- d. Click **Save**.



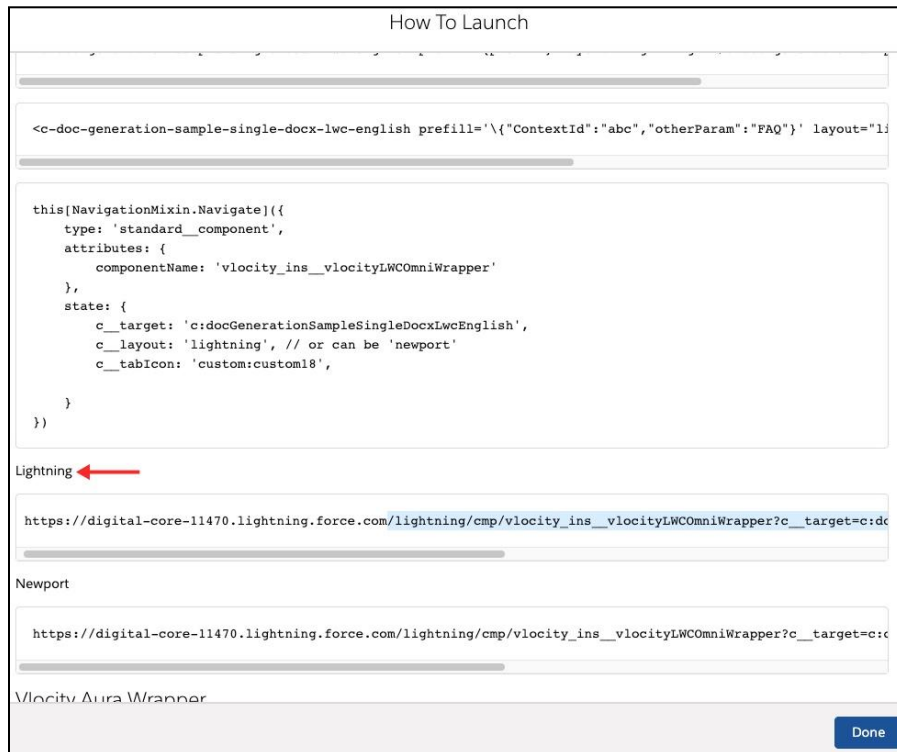
8. Click **Activate Version** to activate the OmniScript and then click **Done**.

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**.




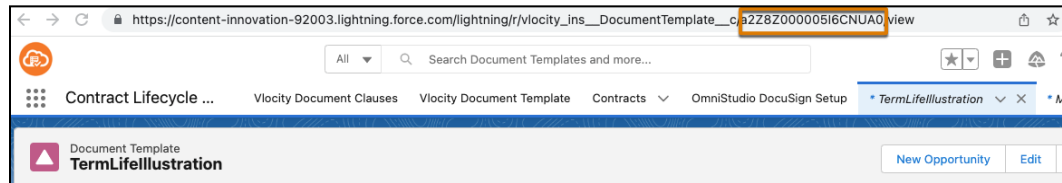
- b. In the **Lightning** URL box, copy the URL starting from /lightning.



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

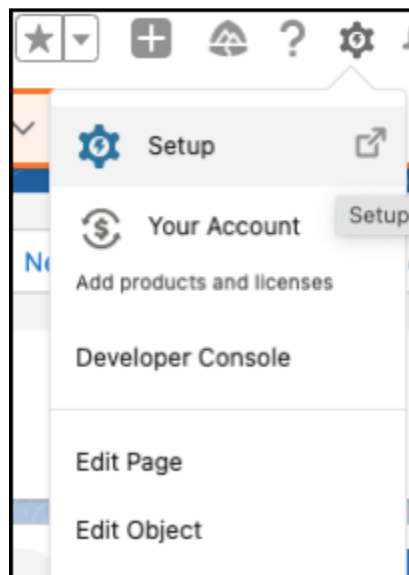
2. Retrieve the TemplateId.

- a. Using the **Lightning App Launcher**  , type `templates` in the search box. Click **Document Templates**.
- b. From the list view, select **All Items**.
- 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 Proposal Document**. We pre-built this custom button for training purposes.

Buttons, Links, and Actions	
3 Items, Sorted by Label	
LABEL	NAME
Generate Proposal	GenerateProposal
Generate Proposal Document	Generate_Proposal_Document
Generate Proposal LWC	GenerateProposalLWC

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

Edit Quote Custom Button or Link

Generate Proposal Document

Custom Button or Link Edit Save Quick Save Preview Cancel

Label:

Name:

Description:

Display Type: Detail Page Link [View example](#)
 Detail Page Button [View example](#)
 List Button [View example](#)

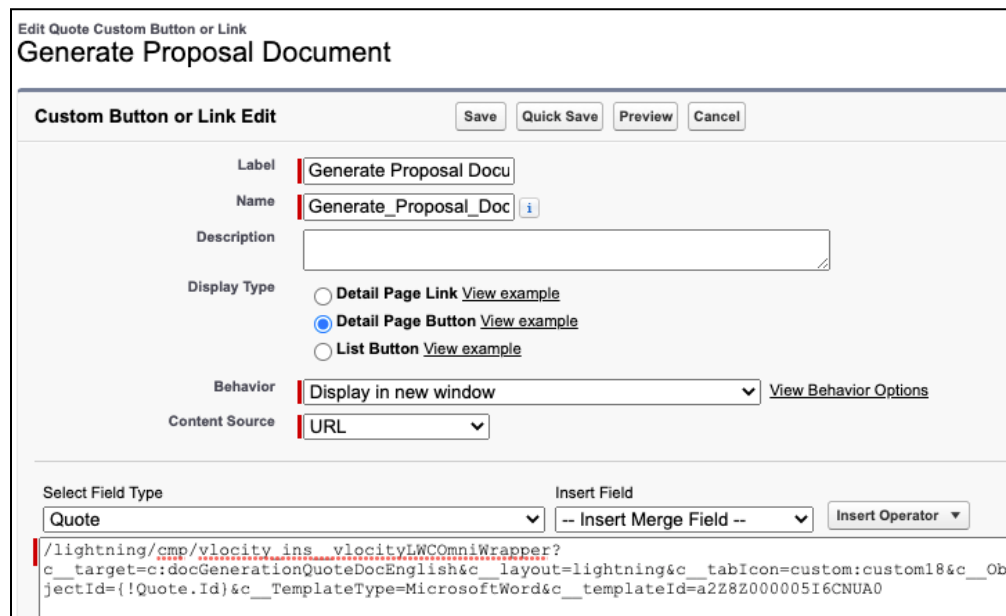
Behavior: [View Behavior Options](#)

Content Source:

Select Field Type: Insert Field: Insert Operator:

```
lightning/cmp/vlocity_cmt_vlocityLWComniWrapper?  
c_target=c:docGenQuoteDocumentEnglish&c_layout=lightning&c_tabIcon=custom:custom18
```

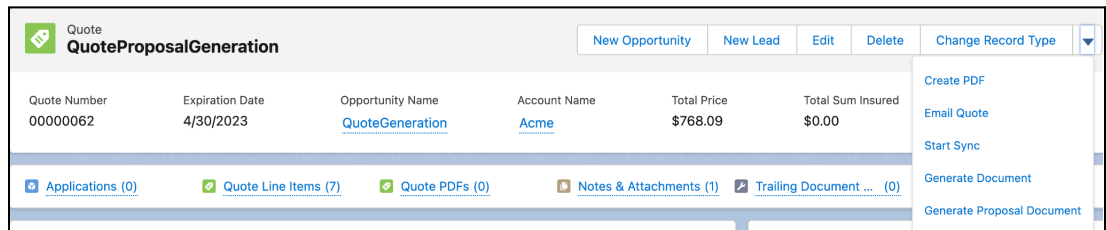
- g. Append `&c__ObjectId={!Quote.Id}&c__TemplateType=MicrosoftWord` at the end of the URL. This passes QuoteId from the record into the OmniScript and pre-selects the template type.
- h. Append `&c__templateId=`.
- i. Append template Id you saved in an earlier step at the end of the URL. This passes 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' interface for 'Generate Proposal Document'. The 'Custom Button or Link Edit' section includes fields for Label ('Generate Proposal Docu'), Name ('Generate_Proposal_Doc'), and Description. The 'Display Type' section has three radio buttons: 'Detail Page Link', 'Detail Page Button' (selected), and 'List Button'. The 'Behavior' dropdown is set to 'Display in new window', and the 'Content Source' dropdown is set to 'URL'. Below this, the 'Select Field Type' is 'Quote' and the 'Insert Field' is '-- Insert Merge Field --'. The URL field contains the following code: `/lightning/cmp/vlocity_ins_vlocityLWComniWrapper?c_target=c:docGenerationQuoteDocEnglish&c_layout=lightning&c_tabIcon=custom:custom18&c__ObjectId={!Quote.Id}&c__TemplateType=MicrosoftWord&c__templateId=a2282000005I6CNUA0`

- 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 **QuoteProposalGeneration** to open the quote page.

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

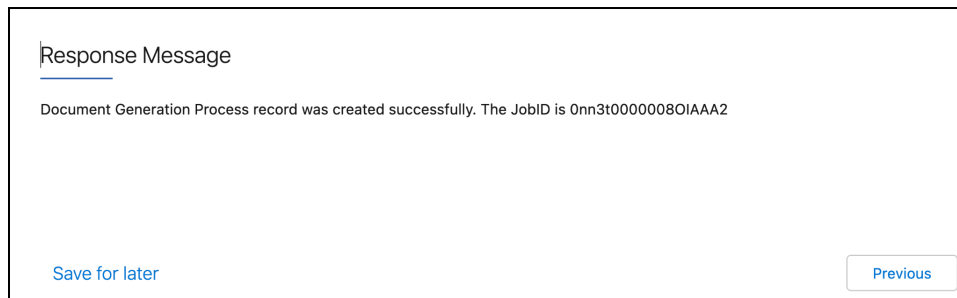


Quote Number	Expiration Date	Opportunity Name	Account Name	Total Price	Total Sum Insured
00000062	4/30/2023	QuoteGeneration	Acme	\$768.09	\$0.00

Applications (0) | Quote Line Items (7) | Quote PDFs (0) | Notes & Attachments (1) | Trailing Document ... (0)

- Create PDF
- Email Quote
- Start Sync
- Generate Document
- Generate Proposal Document

- e. The OmniScript opens in a separate tab. Go through the OmniScript Steps to generate the quote document.
- f. After you generate the document, you can retrieve the information about the Document Generation Process using the JobId in the response message.



Response Message

Document Generation Process record was created successfully. The JobId is 0nn3t00000080IAAA2

Save for later | Previous

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



NOTE:

If the OmniScript completed with a JobId but no document was generated, you can use the JobId to view the Document Generation Process record page and troubleshoot the problem. Use the url <https://org-hostname/JobId>.