

PDF Wizard

User Manual



PDF Wizard

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PDF Wizard

Getting Started

Introduction

PDF Wizard is an application designed to create various formatted files (DOCX, PPTX, and PDF). It facilitates the document generation process by extracting Salesforce-selected data based on the uploaded template file, such as DOCX and PPTX.

Installation

Very easy to install. Just Install the AppExchange package and good to go.

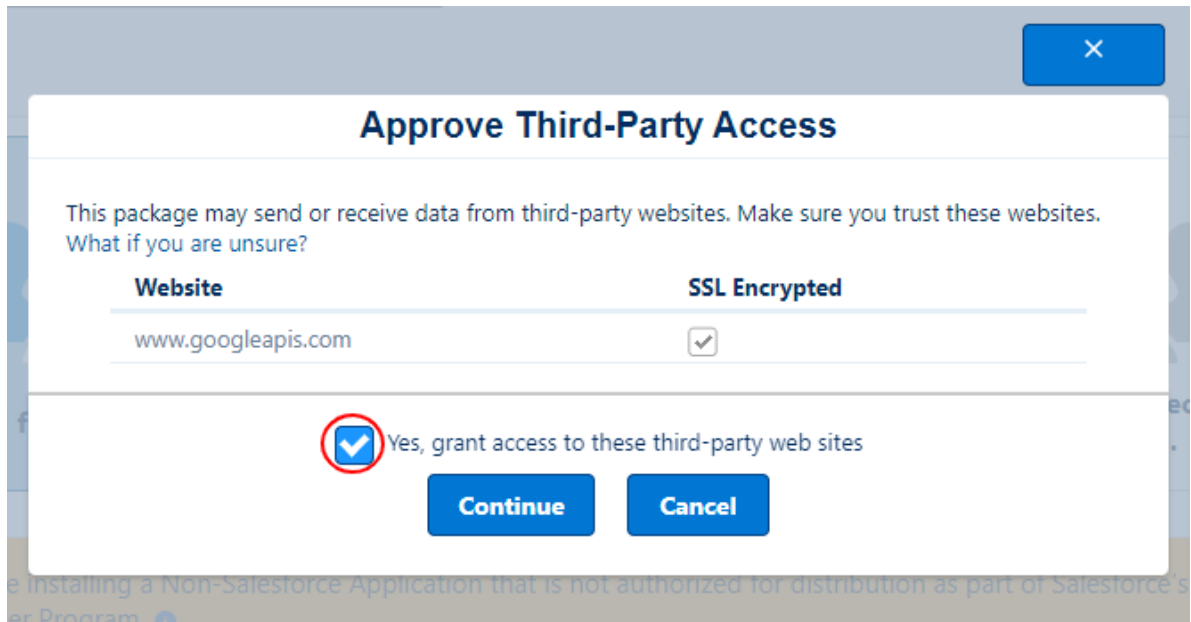
Steps to follow:

- Go to **AppExchange**
- Search '**PDF Wizard**' in the Search Box of AppExchange
- Click on '**PDF Wizard**' App Icon
- Click on '**Get It Now**' Button
- Check the '**I Acknowledge**' checkbox.

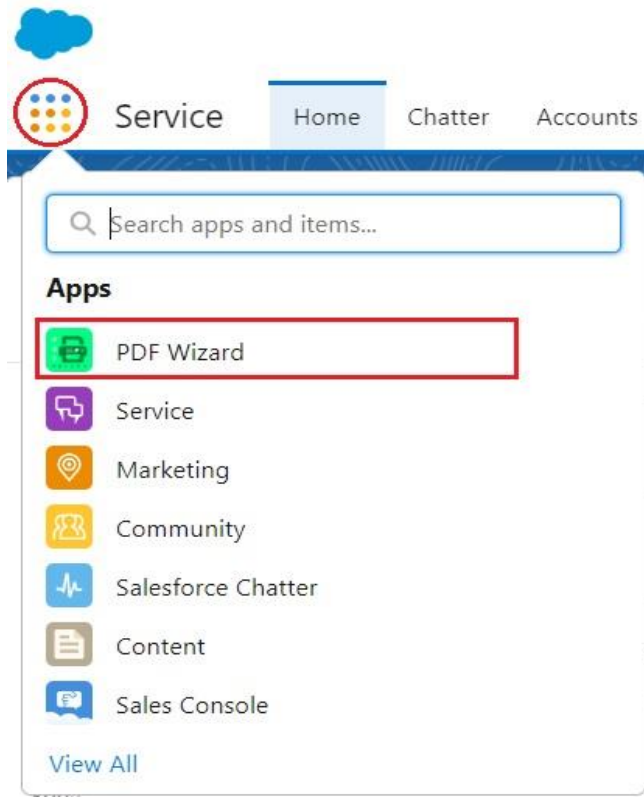
App Name	Publisher	Version Name	Version Number
pdfwizarddemo	BJIT	ver 0.1	0.1 (Beta 3)

[Additional Details](#) [View Components](#)

- Click '**Install**' Button
- Give permission to '**Google API**' Third-party access.



- Click '**Continue**' button.
- After the installation the app will appear in the **App Launcher**



App Configuration

- Add Document Layout Category
 - Go to **Gear Icon**
 - Click **Setup**
 - Go to **Quick Find**
 - Search 'Picklist Value Sets'
 - Click '**CategoryPicklistValues**'
 - Click '**New**' Button from the Value Section
 - Enter the necessary categories in the **Textarea**
 - Click **Save** Button
 - **Back** to the Record Page
- Add Export Component to Record Page
 - Go to the Record Page of any object from where you want to generate document.
 - Go to **Gear Icon**
 - Click **Edit Page**
 - Add '**Export Document**' component from the Custom Section
 - Click **Save** Button
 - Click **Activate** Button
 - **Assign** to an ORG
 - Click **Save** Again
 - **Back** to record page

App Operating Guidelines

Create Document Layouts

In the '**PDF Wizard**' app, you can find the Document Layout tab. To create a new Document Layout, just give it a unique name and select a category from the dropdown menu. Providing a name is a must, but choosing a category is optional during the initial setup. However, it's important to remember that you will need to specify a category later when you want to generate the output file.

New Document Layout

* Name

Owner

PDF Wizard

Category

Select Category
▼

Cancel

Save & New

Save

Create SOQL Query

For getting data from the salesforce database, need to create SOQL queries. 'Create SOQL Query' tool helps to make queries in an easy and error freeway.

Can generate queries -

1. Normal SOQL
2. Related SOQL (Child to Parent)
3. Conditional SOQL (WHERE Clause)
4. Aggregate Query (SOQL with SUM (), AVG (), COUNT () etc.
5. Filter Logic Panel (Helps user to write complex SOQL logic

The screenshot shows the 'Create SOQL Query' tool interface. At the top, there's a title 'Create SOQL Query'. Below it, there's a section for 'Field', 'Operator', and 'Value' with dropdown menus and a 'Remove' button. A blue 'Add Filter Criteria' button is also present. The 'Order By' section has a dropdown for 'Select Order' and radio buttons for 'Ascending' and 'Descending'. The 'Limit' section has an 'Enter Limit' input and a 'Set' button. The 'Filter' section has 'AND' and 'OR' buttons, a checkbox for 'Custom Filter Logic?' (labeled 'Custom Logic Option' with a red arrow), and a blue 'Build' button. The 'SOQL' section has a text area with the placeholder 'Here is the SOQL...' and a 'Copy To Clipboard' button (indicated by a red arrow). At the bottom, there are 'Cancel' and 'Save' buttons.

The screenshot shows the 'Create SOQL Query' tool interface for a related object query. It includes fields for '* SOQL Query Name' and 'Description'. The '* Object' section has a dropdown for 'Select Object' and a checkbox for 'Aggregate Query?' (labeled 'Aggregate Query Option' with a red arrow). The 'Fields' section has a dropdown for 'Select Fields'. The 'Related Object' checkbox is checked (labeled 'Related object' with a red arrow). Below this, there's a section for 'Field', 'Operator', and 'Value' with dropdown menus and a 'Remove' button. A blue 'Add Filter Criteria' button is also present. The 'Order By' section has a dropdown for 'Select Order' and radio buttons for 'Ascending' and 'Descending'. The 'Limit' section has an input field and a blue button. At the bottom, there are 'Cancel' and 'Save' buttons.

Aggregate Query Option: Select the aggregate query option. After selecting the option, it enables to use the aggregate query in their SOQL-

The screenshot shows the 'Create SOQL Query' form. The 'Aggregate Query?' checkbox is checked and circled in red. Below it, the 'Aggregate Options' section is visible, showing a list of aggregate functions: None, AVG(), COUNT(), COUNT_DISTINCT(), MAX(), MIN(), and SUM(). An arrow points from the 'None' option to the 'Aggregate Query Function' label.

Related Object Option: Select Related Object Option. After selecting the option, it will enable the opportunity to get related object fields data -

The screenshot shows the 'Create SOQL Query' form. The 'Related Object' checkbox is checked and circled in red. Below it, the 'Related Object Option' section is visible, showing fields for 'Select Related Object' and 'Select Related Object Field'. Below these fields, there are sections for 'Field', 'Operator', and 'Value' with dropdown menus and input fields. A 'Remove' button is also present.

Filter Logic: Use the filter logic option for applying complex logic in an easy manner.

The screenshot shows the 'Create SOQL Query' dialog. At the top, there's a 'Related Object' dropdown. Below it are three input fields: 'Field' (with a 'Select Field' dropdown), 'Operator' (with a 'Select Operator' dropdown), and 'Value' (with an 'Enter Value' text box). A red 'Remove' button is to the right of the 'Value' field. Below these is a blue 'Add Filter Criteria' button. Further down is an 'Order By' dropdown with 'Select Order' as the placeholder. Below that are two radio buttons: 'Ascending' and 'Descending'. Then is a 'Limit' section with an 'Enter Limit' text box and a blue 'Set' button. The 'Filter' section has three options: 'AND', 'OR', and 'Custom Filter Logic?'. The 'Custom Filter Logic?' option is selected, indicated by a red circle and a checkmark. Below this is a text box containing '1 AND 2 OR 3'. To the right of this text box is a red label 'Filter Logic Option'. Below the text box is a blue 'Build' button. At the bottom is an 'SOQL' section with a text box containing 'Here is the SOQL...' and a copy icon button.

Copy To Clipboard: For copying the generated SOQL, click on the copy to clipboard button.

This screenshot shows the same 'Create SOQL Query' dialog, but now the 'SOQL' text box contains the generated query: 'SELECT Name FROM Account'. The 'Filter Logic' option is now unchecked. A red label 'Copy To Clipboard' with an upward arrow points to a copy icon button next to the SOQL text box. Below the copy icon is a green 'Copied!' message. At the bottom of the dialog are 'Cancel' and 'Save' buttons.

Sample Query Creation with Query Builder

- **Create Normal SOQL - *SELECT Id, Name FROM Account***
 - **Steps -**
 - Press '**Create SOQL Query**' Button
 - Enter a Unique '**SOQL Query name**'
 - Select *Account* Object from the '**Select Object**' Dropdown
 - Select *Id* and *Name* from the '**Select Field**' Dropdown
 - Press '**Build**' Button
 - **Below steps are required -**
 - SOQL Query Name (*Unique*)
 - Select Object
 - Select Fields (*At least one*)
- **Create Related SOQL - *SELECT Id, Account.Name FROM Contact***
 - **Steps -**
 - Press '**Create SOQL Query**' Button.
 - Enter a Unique '**SOQL Query name**'
 - Select *Contact* Object from the '**Select Object**' Dropdown
 - Select *Id* from the '**Select Field**' Dropdown
 - Check the '**Related Object**' Checkbox
 - Select *Account(Account)* From '**Select Related Object**' Dropdown
 - Select *Account.Name* From '**Select Related Object Field**' Dropdown
 - Press '**Build**' Button
 - **Below steps are required -**
 - SOQL Query Name (*Unique*)
 - Select Object
 - Select Fields (*At least one- Either from 'Select Field' dropdown or 'Select Related Object Field' dropdown*)
- **Create Conditional SOQL - *SELECT Id, Name FROM Account WHERE Name = 'Test'***
 - **Steps -**
 - Press '**Create SOQL Query**' Button
 - Enter a Unique '**SOQL Query name**'
 - Select *Account* Object from the '**Select Object**' Dropdown
 - Select *Id* and *Name* from the '**Select Field**' Dropdown
 - Select *Name* From the '**Field**' Dropdown
 - Select *equal (=)* operator from '**Operator**' Dropdown
 - Enter the *Test* in the '**Value**' Field
 - Press '**Build**' Button
 - **Below steps are required -**
 - SOQL Query Name (*Unique*)
 - Select Object
 - Select Fields (*At least one*)
 - Select Field, Operator and Value

- **Create Aggregate SOQL - *SELECT COUNT(Active__c) act FROM Account***
 - **Steps -**
 - Press 'Create SOQL Query' Button
 - Enter a Unique 'SOQL Query name'
 - Select *Account* Object from the 'Select Object' Dropdown
 - Check the 'Aggregate Query' Checkbox
 - Select *COUNT()* From the 'Function' Dropdown
 - Select *Active__c* operator from 'Field' Dropdown
 - Enter the *act* in the 'Alias' Field
 - Press 'Build' Button
 - **Below steps are required -**
 - SOQL Query Name (*Unique*)
 - Select Object
 - Select Function, Field, and Alias
- **Create SOQL Using Filter Logic- *SELECT Id, Name FROM Account WHERE Name = 'Test' AND Active__c = 'true'***
 - **Steps -**
 - Press 'Create SOQL Query' Button
 - Enter a Unique 'SOQL Query name'
 - Select *Account* Object from the 'Select Object' Dropdown
 - Select *Id* and *Name* from the 'Select Field' Dropdown
 - Select *Name* From the 'Field' Dropdown
 - Select *equal(=)* operator from 'Operator' Dropdown
 - Enter the *Test* in the 'Value' Field
 - Press 'Add Filter Criteria'
 - Select *Active__c* From the 'Field' Dropdown
 - Select *equal(=)* operator from 'Operator' Dropdown
 - Enter the *true* in the 'Value' Field
 - Check the 'Custom Filter Logic' Checkbox
 - Enter *1 AND 2* in the Custom Filter Logic text area.
 - Press 'Build' Button
 - **Below steps are required -**
 - SOQL Query Name (*Unique*)
 - Select Object
 - Select Field, Operator and Value
 - Custom Filter Logic or AND/ OR Button (Need to Choose One)
- **Create SOQL with OrderBy and Limit - *SELECT Id, Name FROM Account WHERE Name = 'Test' ORDER BY Active__c ASC LIMIT 5***
 - **Steps -**
 - Press 'Create SOQL Query' Button
 - Enter a Unique 'SOQL Query name'
 - Select *Account* Object from the 'Select Object' Dropdown
 - Select *Id* and *Name* from the 'Select Field' Dropdown
 - Select *Name* From the 'Field' Dropdown
 - Select *equal(=)* operator from 'Operator' Dropdown
 - Enter the *Test* in the 'Value' Field
 - Select *Active__c* from 'Order By' Dropdown

- Check *Ascending* Checkbox
- Enter 5 in '**Limit**' Field
- Press '**Set**'
- Press '**Build**' Button
- **Below steps are required -**
 - SOQL Query Name (*Unique*)
 - Select Object
 - Select Fields (*At least one*)
 - Select Field, Operator and Value

Select SOQL Query

'Select SOQL Query' Component helps to select needed SOQL Queries from earlier created All SOQL Query List. Use the search box for sorting down the list by object name.

Select SOQL Query

Steps to follow for Select Query

- For fast finding the desired Query from All Query List Click '**Search Object**'
- Select the *Object* from the Dropdown (It will narrow down the Available Query list according to the object)
- Select a SOQL Query from the '**Available SOQL Query**'
- Click on '**Add Query**' Button for adding a Query to Selected Query List (If needed)
- Select a SOQL Query from the '**Selected SOQL Query**'
- Click on '**Remove Query**' Button for removing a Query from Selected Query List (If needed)
- After Clicking on a Query one can see the preview panel
- Click '**Save**' Button

Preview Option for Query to select.

Preview option enables the scope to see the Query Details by clicking on the name of Query. It will help to understand which query want to select. Delete option is provided to delete the SOQL query. If the SOQL query is already selected or used by any other Document layout, it will not be deleted.

Select SOQL Query

Search Object

Select Object to narrow down the SOQL Query list

Available SOQL Query

Test Contact - 1

Test Account - 2

Selected SOQL Query

Test Account - 1

SOQL Preview

SELECT AccountNumber,AccountSource,Active__c FROM Account

Owner Name

mdtarikul islam

LastModified Date

2023-07-25

Cancel Save

SOQL Preview

Delete button

Upload Template

The Upload Template Component allows you to upload a template file. You can select a file by either clicking the 'Upload Files' button or dragging and dropping the file into the designated section. The delete icon allows you to remove the uploaded file. Only one file can be uploaded at a time, and to delete a file, you must change the status of the Document layout to something other than 'Published'.

Before Uploading a file:

Upload Template

Pdf Wizard File Upload

Upload your template file

Upload Files Or drop files

Can upload file

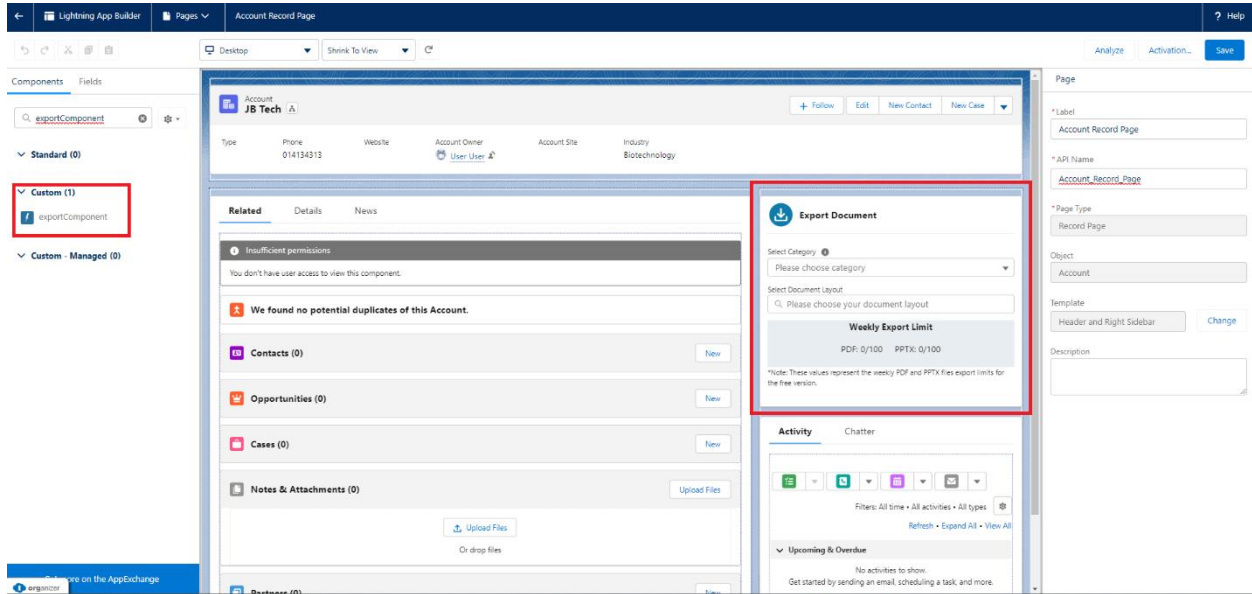
Can drop selected file here

Note: To upload a new file please delete the existing file.

- After Uploading the template file '**Template Field**' list will be shown in the mapped field list table. It can take some time to show the list after uploading.
- Double click on desired '**Query Name**' Rows.
- Select '**Query Name**' from the dropdown.
- Double click on desired '**Query Field**' Rows.
- Select '**Query Field**' from the dropdown.
- Follow the same steps for all the template fields which are needed to map.
- Click '**Save**' Button
- To delete a particular map, click the Delete icon on the left to delete.
- To delete all the mapping at once, click the Delete icon on the top left of the component.

Export Document

In this step, go to an custom/standard object's record page from where you want to generate document and go to the edit page of from the setup. Search for 'exportComponent' and drag the custom component to your desired position like below image.



By adding the Export Document Component to the object record page, you can access the functionality to export documents. Once the component is added, you are ready to generate documents that are associated with the same object.

Export Document

Select Category ⓘ
Default

Select Document Layout
Please choose your document layout

DOC CONFIG NAME	FORMAT
Account Report	Docx Pdf

Weekly Export Limit
PDF: 0/100 PPTX: 0/100

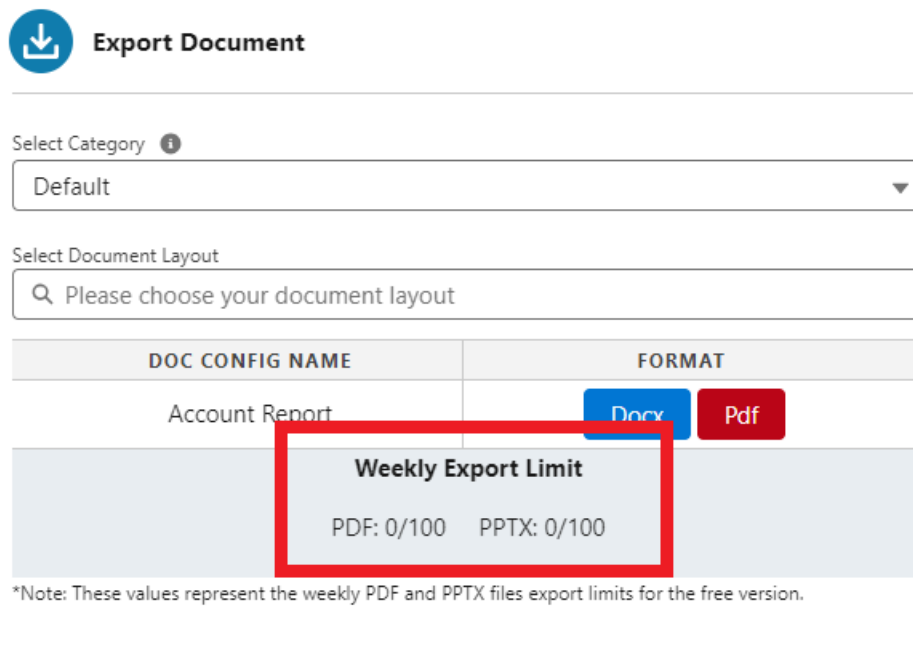
*Note: These values represent the weekly PDF and PPTX files export limits for the free version.

It provides you the ability to generate 'DOCX' and 'PDF' type files if the document layout has the docx type file uploaded as template file.

If the document layout named 'Account Report' uses a DOCX template file, it can generate both DOCX and PDF files. Consequently, two buttons for DOCX and PDF will be displayed. Conversely, if the uploaded template in the document layout is a PPTX file, the Export Document component will show a PPTX button instead of DOCX and PDF.

Export Document Limit

You can export Docx documents without any time restrictions. However, there is a weekly limit of 100 for generating PDF and PPTX files each. This limit resets at the beginning of each week.



Export Document

Select Category ⓘ
Default ▼

Select Document Layout
🔍 Please choose your document layout

DOC CONFIG NAME	FORMAT
Account Report	Docx Pdf
Weekly Export Limit PDF: 0/100 PPTX: 0/100	

*Note: These values represent the weekly PDF and PPTX files export limits for the free version.

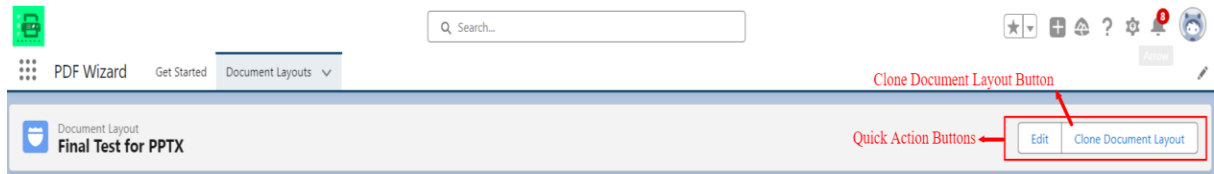
Clone Document Layout

PDF Wizard gives the liberty to clone a document. Cloning a document means making a Complete copy of the existing document without taking any time and effort. Create a clone by following two steps.

The 'Clone Document Layout' button will be shown in the record page of Document Layout. It will be shown as a Quick Action button.

Steps to Clone a Document

1. Click on '**Clone Document Layout**' Button



2. A Modal will open. The default name will show like 'Copy of the name'. Can use other names as well. Fill in other input fields according to their requirements. After completing this step Click the '**Next button**'.

3. Also give the ability to copy the Mapping and Selected Query for the new cloned Document Layout from Existing Document Layout. There is a checkbox in the new modal which will pop up after clicking the '**Next**' button. Check or uncheck as per requirements. The default option will be unchecked.
4. Press the '**Clone**' button.

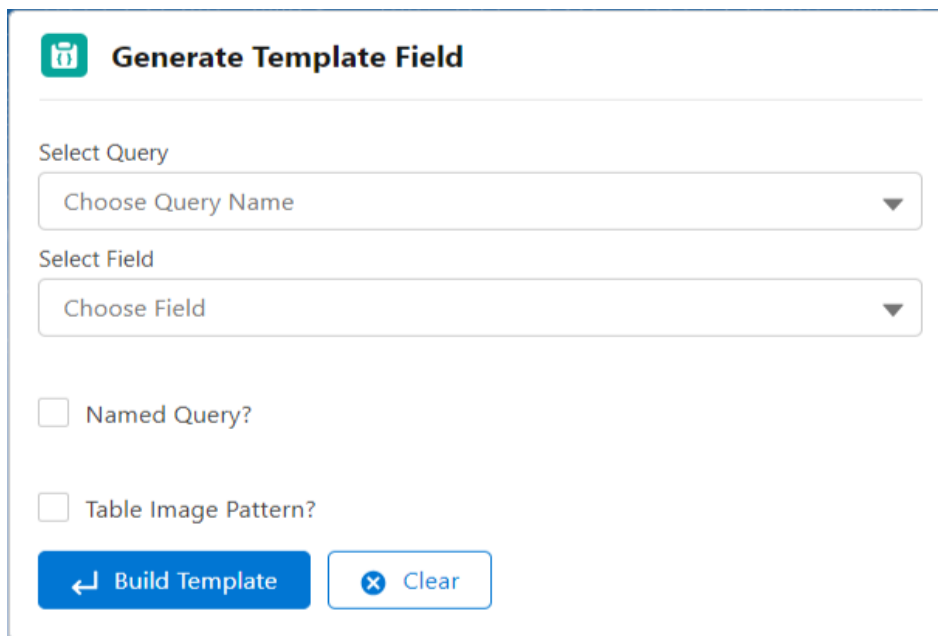
5. After pressing the '**Clone**' button a '**Successful**' alert message will appear. The Cloning is done.

Publish the Document Layout

For exporting the document, need to publish it by changing the status from the details page of the document layout record. Status should be **Published**.

Generate Template Field (Helper Tool)

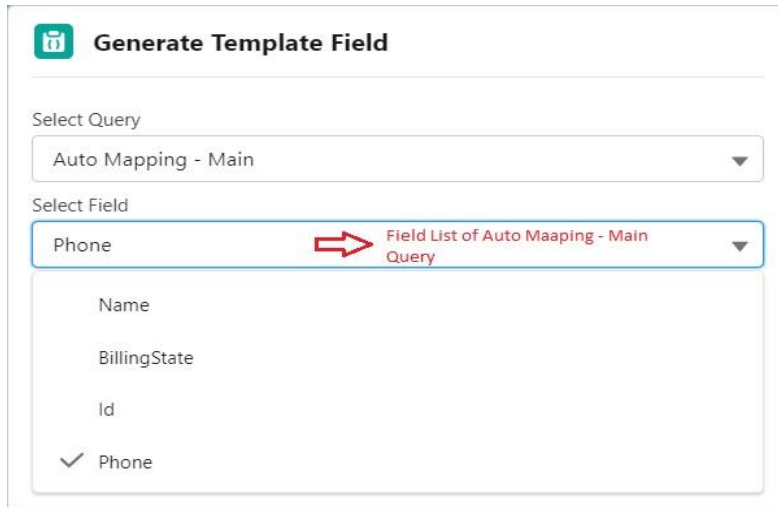
The 'Generate Template field' component empowers users to generate template fields accurately and meaningfully. This component is exceptionally user-friendly, making it easy to operate. With this component, there is no need to manually write the template fields for the template. While users can still write the template fields themselves, it is recommended to utilize this component for generating the template fields. This approach ensures an error-free and time-saving process.



The screenshot shows a web interface titled "Generate Template Field" with a green icon. It contains two dropdown menus: "Select Query" with the placeholder "Choose Query Name" and "Select Field" with the placeholder "Choose Field". Below these are two checkboxes: "Named Query?" and "Table Image Pattern?". At the bottom are two buttons: a blue "Build Template" button with a left arrow icon and a white "Clear" button with a red 'x' icon.

Select Query: Select a query first. Document layouts selected query will be shown here.

Select Field: Select a field. Fields of the selected query will be shown here in the dropdown. After selecting a query which is an aggregate query then one more checkbox option will appear.



Generate Template Field

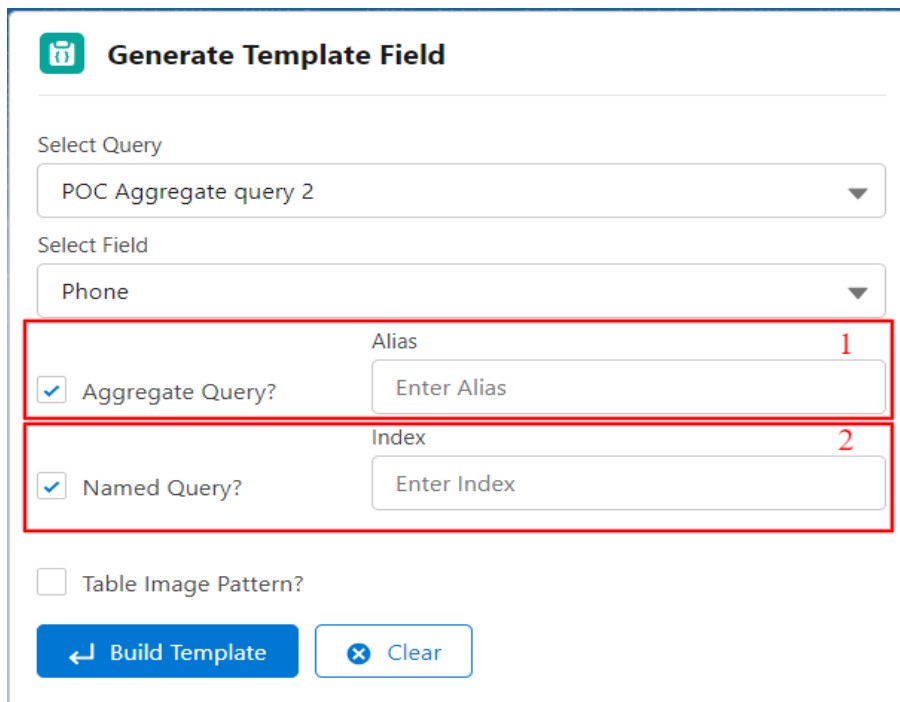
Select Query
Auto Mapping - Main

Select Field
Phone

Field List of Auto Mapping - Main Query

Name
BillingState
Id
✓ Phone

Auto Mapping - Main : ***SELECT Name,BillingState,Id,Phone FROM Account.*** As the selected query's fields are Name, BillingState, Id and Phone the dropdown contains these fields only.



Generate Template Field

Select Query
POC Aggregate query 2

Select Field
Phone

Alias 1

☒ Aggregate Query? Enter Alias

Index 2

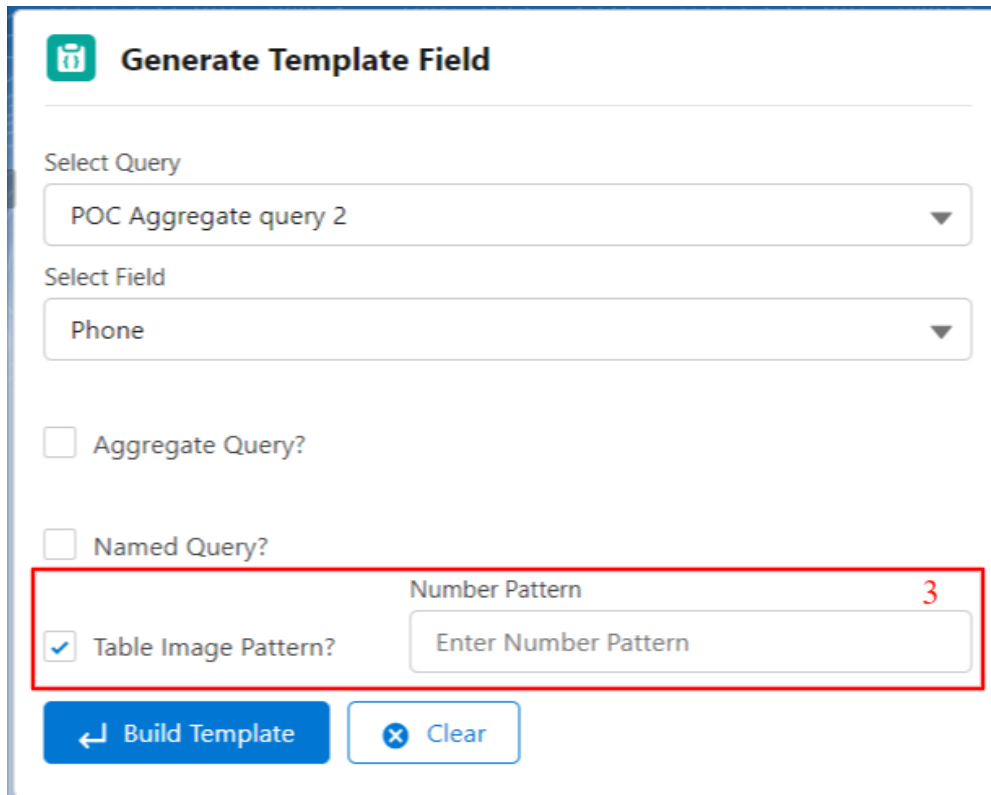
☒ Named Query? Enter Index

☐ Table Image Pattern?

Build Template Clear

Aggregate Query (1): Select the Aggregate Query option by checking the checkbox. Then need to put an Alias. Alias is used to identify the field name in SOQL when using the aggregate query option.

Named Query (2) : Select the Named Query option by checking the checkbox. Then need to provide an index. Indexing can get the specific record values.



Generate Template Field

Select Query
POC Aggregate query 2 ▼

Select Field
Phone ▼

☐ Aggregate Query?

☐ Named Query?

☒ Table Image Pattern? Number Pattern 3
Enter Number Pattern

← Build Template ✕ Clear

Table Image Pattern (3): Select the Table image pattern option by checking the checkbox. Then need to provide a number. The provided number is used to get the image in a particular manner. The image pattern looks like: **_Image_Table_Number**

N.B - One can create an aggregate query and a named query at a time. But if one selects Table image pattern checkbox then cannot select other two options and vice versa.

 **Generate Template Field**

Select Query

POC Aggregate query 2

Select Field

Phone

☒ Aggregate Query?

Alias

Phn

☒ Named Query?

Index

5

☐ Table Image Pattern?

← Build Template

✕ Clear

← Clear Button to clean the Generated Template field

Generated Template Field
[[!POC Aggregate query 2.Account.Phn(5)]]

↓ Copy to clipboard



After completing the steps one can generate their desired Template field by clicking the '**Build Template**' Button. Can Copy the Generated Template field by clicking the '**Copy to Clipboard**' button and also can clear the Template field by clicking the '**Clear**' button.