

SimpleDocs App Documentation

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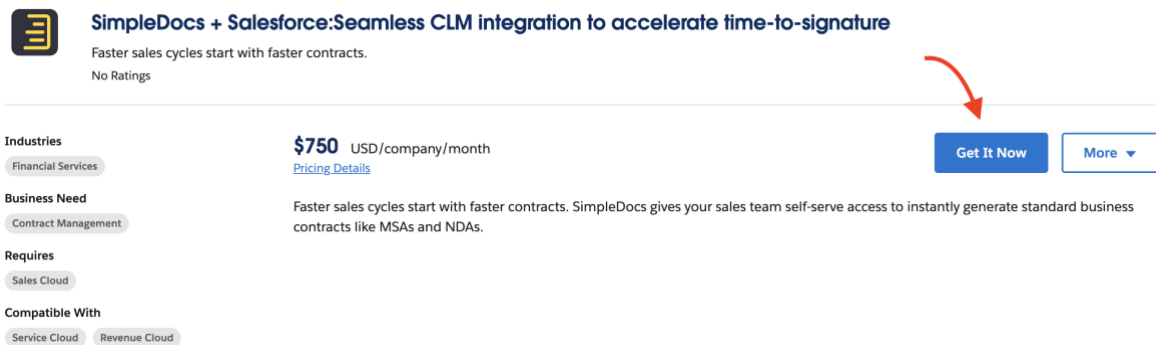
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→ Installation & Setup

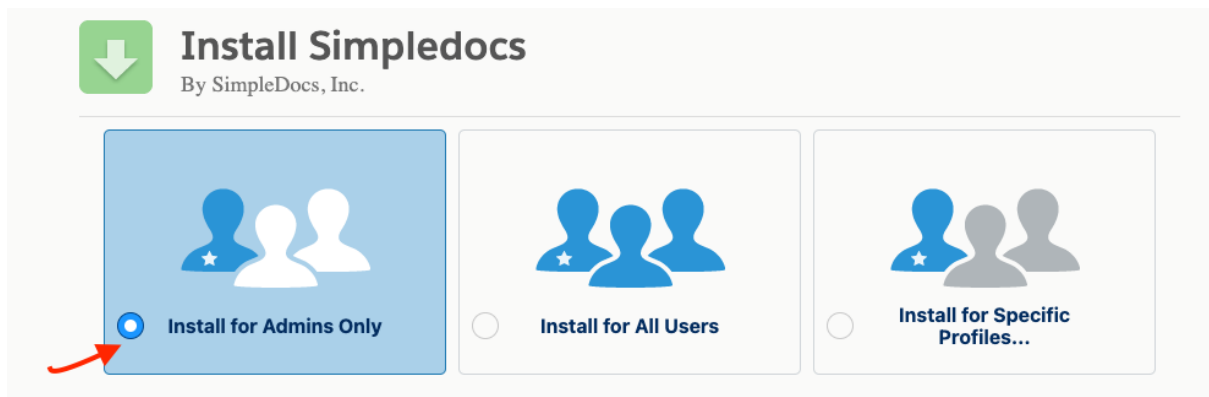
→ Installation

Admin can install the SimpleDocs application from the Salesforce AppExchange Marketplace. You can [Click here](#) to install the application.



The image shows the SimpleDocs application listing on the Salesforce AppExchange. The title is "SimpleDocs + Salesforce: Seamless CLM integration to accelerate time-to-signature". Below the title, it says "Faster sales cycles start with faster contracts." and "No Ratings". On the left, there are filters for "Industries" (Financial Services), "Business Need" (Contract Management), "Requires" (Sales Cloud), and "Compatible With" (Service Cloud, Revenue Cloud). The price is listed as "\$750 USD/company/month" with a link to "Pricing Details". On the right, there is a red arrow pointing to the "Get It Now" button, and a "More" button with a dropdown arrow.

We recommend to install the application for the System Administrator only.

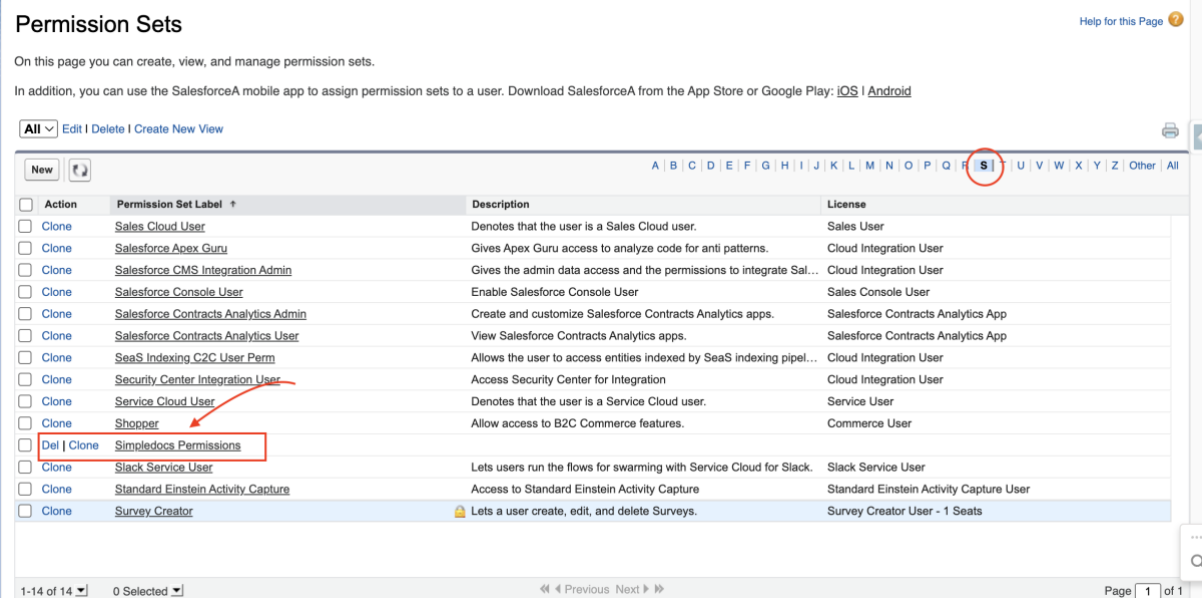


The image shows the "Install SimpleDocs" screen. At the top, there is a green download icon and the text "Install SimpleDocs By SimpleDocs, Inc.". Below this, there are three installation options, each with a radio button and an icon of three people. The first option, "Install for Admins Only", is selected (radio button is filled) and has a red arrow pointing to it. The second option is "Install for All Users" and the third is "Install for Specific Profiles...".

→ Permission Set Assignment

By default, the application will be **installed for System Administrator**, if You are an admin and want to give the application access to other users, follow the below steps.

From the setup, search for permission set, Select Permission Sets and then Select the letter “S” there you will find the permission set “**Simpledocs Permissions**”. Click to open it



Permission Sets

On this page you can create, view, and manage permission sets.

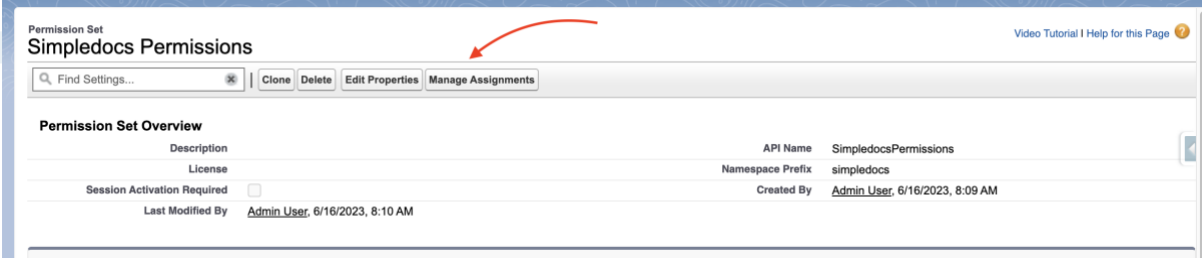
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All | Edit | Delete | Create New View

Action	Permission Set Label	Description	License
☐ Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
☐ Clone	Salesforce Apex Guru	Gives Apex Guru access to analyze code for anti patterns.	Cloud Integration User
☐ Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Sal...	Cloud Integration User
☐ Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
☐ Clone	Salesforce Contracts Analytics Admin	Create and customize Salesforce Contracts Analytics apps.	Salesforce Contracts Analytics App
☐ Clone	Salesforce Contracts Analytics User	View Salesforce Contracts Analytics apps.	Salesforce Contracts Analytics App
☐ Clone	SeaS Indexing C2C User Perm	Allows the user to access entities indexed by SeaS indexing pipel...	Cloud Integration User
☐ Clone	Security Center Integration User	Access Security Center for Integration	Cloud Integration User
☐ Clone	Service Cloud User	Denotes that the user is a Service Cloud user.	Service User
☐ Clone	Shopper	Allow access to B2C Commerce features.	Commerce User
☐ Del Clone	Simpledocs Permissions	Lets users run the flows for swarming with Service Cloud for Slack.	Slack Service User
☐ Clone	Slack Service User	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
☐ Clone	Survey Creator	Lets a user create, edit, and delete Surveys.	Survey Creator User - 1 Seats

1-14 of 14 | 0 Selected | Page 1 of 1

Now Click on “**Manage Assignments**” button and then click on “**Add Assignment**”

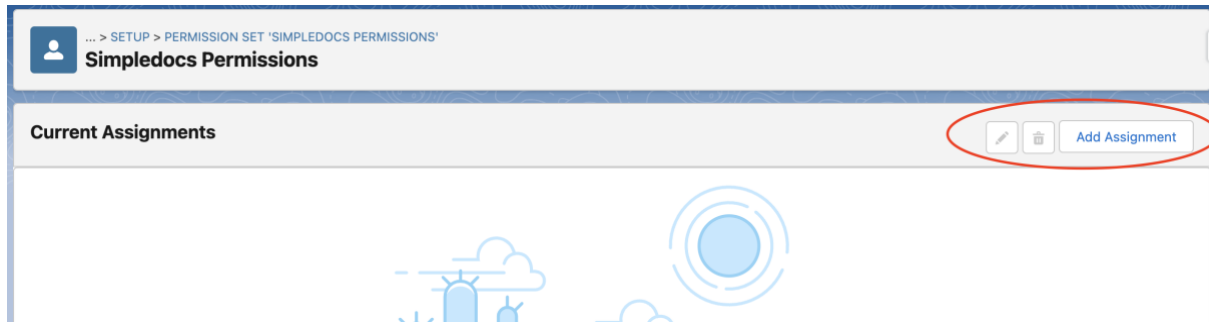


Permission Set
Simpledocs Permissions

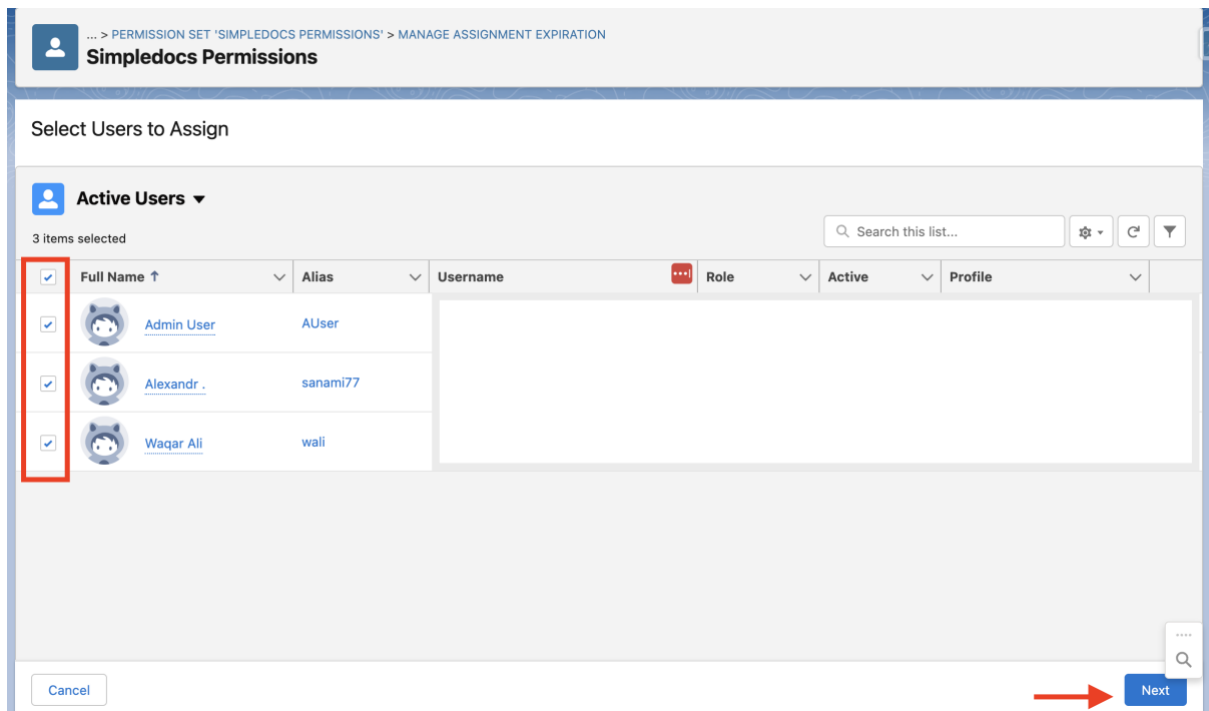
Find Settings... | Clone | Delete | Edit Properties | **Manage Assignments**

Permission Set Overview

Description	API Name	SimpledocsPermissions
License	Namespace Prefix	simpledocs
Session Activation Required	Created By	Admin User, 6/16/2023, 8:09 AM
Last Modified By	Admin User, 6/16/2023, 8:10 AM	



There you will see the list of users, Select users whom you want to provide the access to the SimpleDocs Application and click on the next button



You will be navigated to another screen where it will ask for you to provide the expiration date for the permission set. If you want to have some expiration for the permission then provide the same and click on Assign button

... > PERMISSION SET 'SIMPLEDOCS PERMISSIONS' > MANAGE ASSIGNMENT EXPIRATION
Simpledocs Permissions

Select an Expiration Option For Assigned Users

☒ No expiration date ⓘ
☐ Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

ⓘ Time Zone
Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Admin User		System Administrator	✓	Salesforce	Never Expires
Alexandr .		System Administrator	✓	Salesforce	Never Expires
Waqar Ali	CEO	System Administrator	✓	Salesforce	Never Expires

Cancel
Back
Assign

You will see the success message like below after the successful assignment of the permissionset.

Assignment Summary

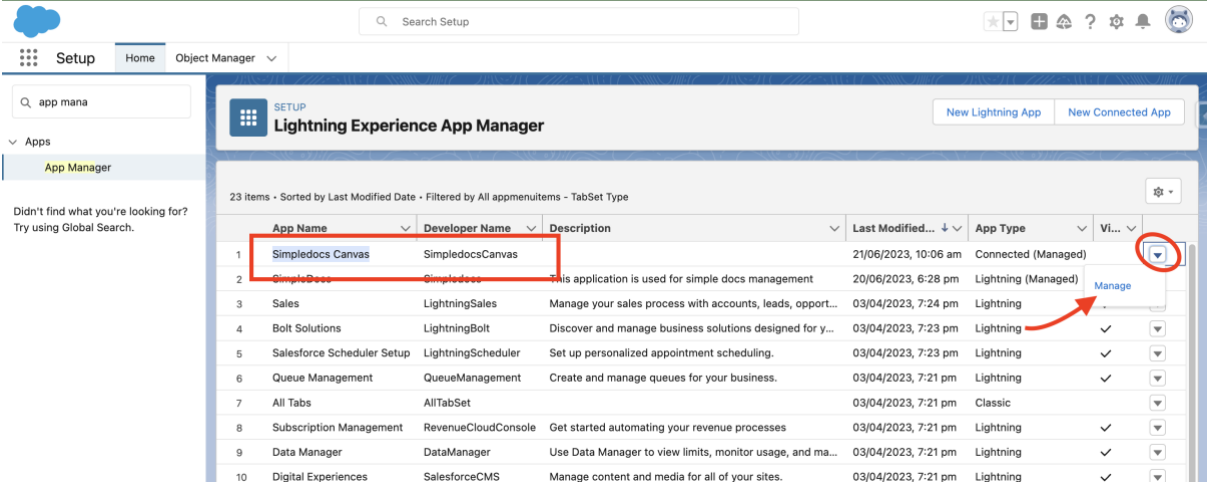
Full Name	User License	Expires On	Time Zone	Status
Admin User	Salesforce			✓ Success
Alexandr .	Salesforce			✓ Success
Waqar Ali	Salesforce			✓ Success

Done

→ Connected App Setup

As SimpleDocs application is a canvas application, this is very important step to configure the Connected Application. Follow the below steps for the same

- Navigate to Setup → App Manager
- Find **Simpledocs Canvas** App from the List
- Click on the dropdown next to app and Click Manage

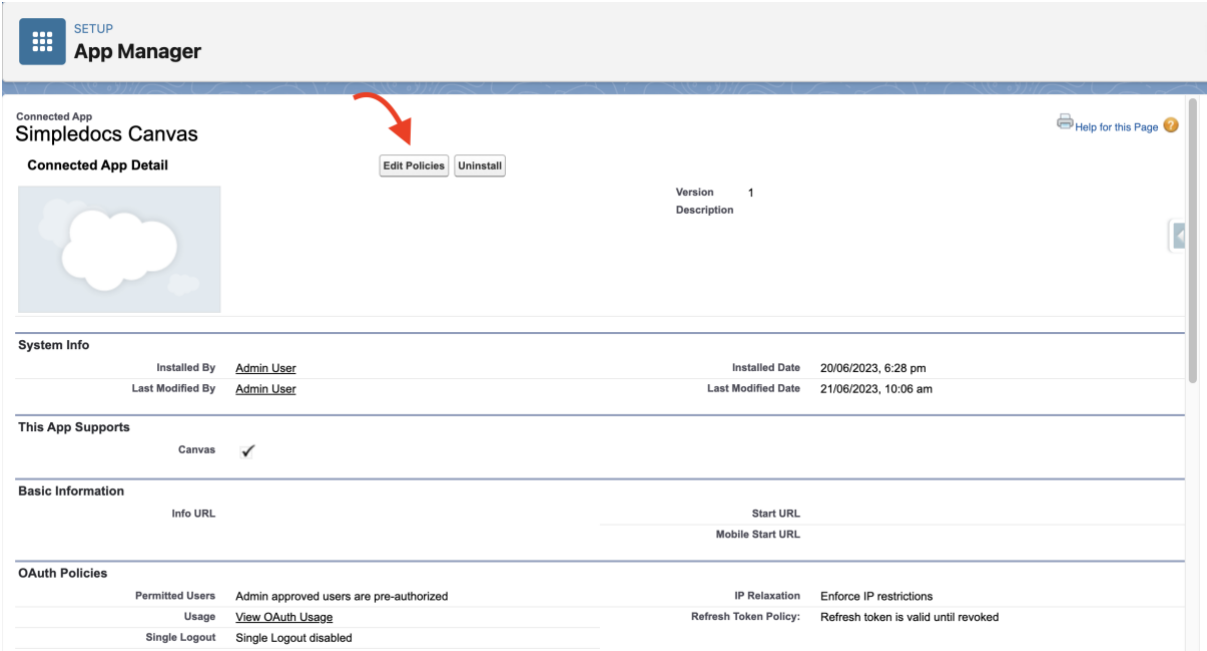


Lightning Experience App Manager

23 Items • Sorted by Last Modified Date • Filtered by All appmenuitems - TabSet Type

App Name	Developer Name	Description	Last Modified...	App Type	Vi...
Simpledocs Canvas	SimpledocsCanvas		21/06/2023, 10:06 am	Connected (Managed)	Manage
SimpleDocs	SimpleDocs	This application is used for simple docs management	20/06/2023, 6:28 pm	Lightning (Managed)	
Sales	LightningSales	Manage your sales process with accounts, leads, opport...	03/04/2023, 7:24 pm	Lightning	
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for y...	03/04/2023, 7:23 pm	Lightning	
Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	03/04/2023, 7:23 pm	Lightning	
Queue Management	QueueManagement	Create and manage queues for your business.	03/04/2023, 7:21 pm	Lightning	
All Tabs	AllTabSet		03/04/2023, 7:21 pm	Classic	
Subscription Management	RevenueCloudConsole	Get started automating your revenue processes	03/04/2023, 7:21 pm	Lightning	
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and ma...	03/04/2023, 7:21 pm	Lightning	
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	03/04/2023, 7:21 pm	Lightning	

- Now click on **Edit Policies** Button



App Manager

Connected App
Simpledocs Canvas

Connected App Detail

[Edit Policies](#) [Uninstall](#)

Version 1
Description

System Info

Installed By	Admin User	Installed Date	20/06/2023, 6:28 pm
Last Modified By	Admin User	Last Modified Date	21/06/2023, 10:06 am

This App Supports

Canvas	✓
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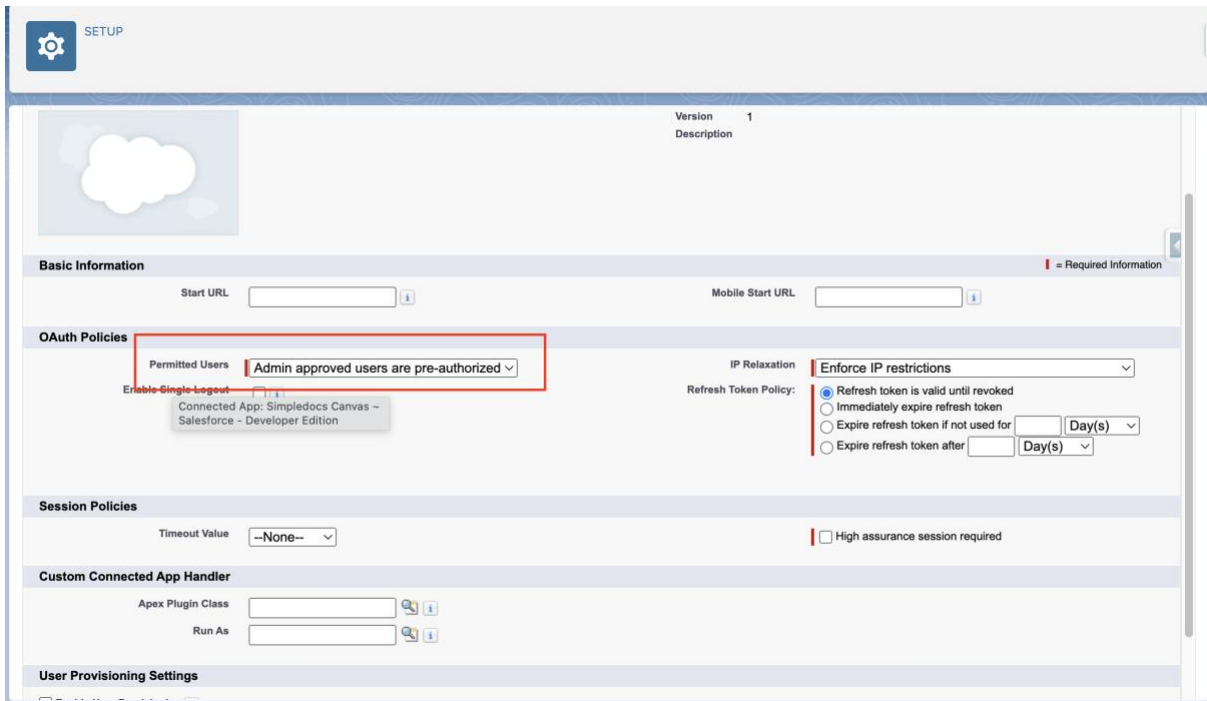
Basic Information

Info URL	Start URL
	Mobile Start URL

OAuth Policies

Permitted Users	Admin approved users are pre-authorized	IP Relaxation	Enforce IP restrictions
Usage	View OAuth Usage	Refresh Token Policy:	Refresh token is valid until revoked
Single Logout	Single Logout disabled		

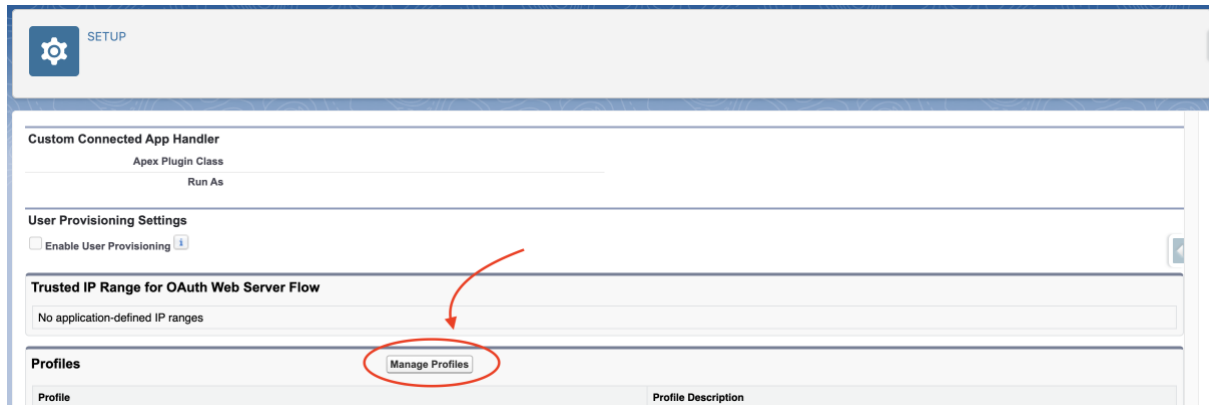
- Select **“Admin approved users are pre-authorized”** for **“Permitted Users”** & click on save



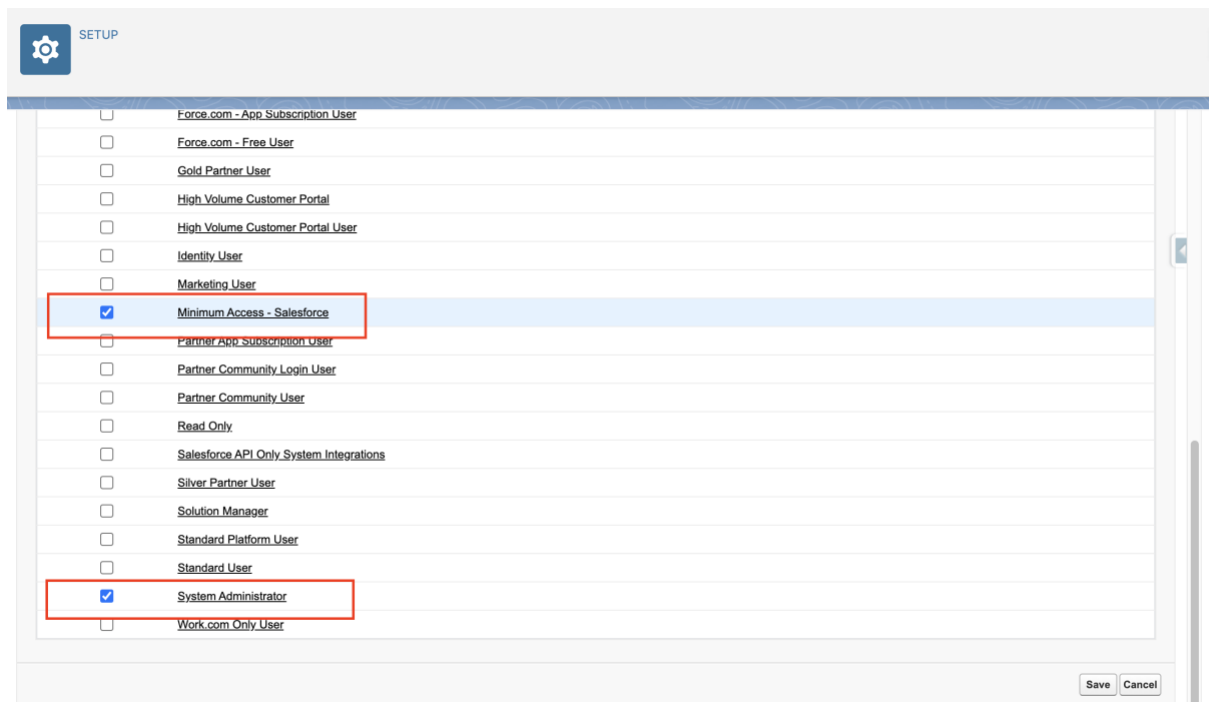
The screenshot displays the SimpleDocs Setup interface. At the top left is a 'SETUP' button with a gear icon. The main content area is divided into several sections: 'Basic Information' with fields for 'Start URL' and 'Mobile Start URL'; 'OAuth Policies' which includes a 'Permitted Users' dropdown menu (highlighted with a red box and containing the text 'Admin approved users are pre-authorized'), an 'IP Relaxation' dropdown set to 'Enforce IP restrictions', and a 'Refresh Token Policy' section with radio buttons for 'Refresh token is valid until revoked' (selected), 'Immediately expire refresh token', and 'Expire refresh token if not used for' followed by a 'Day(s)' dropdown; 'Session Policies' with a 'Timeout Value' dropdown set to '--None--' and a checkbox for 'High assurance session required'; 'Custom Connected App Handler' with fields for 'Apex Plugin Class' and 'Run As'; and 'User Provisioning Settings' at the bottom. A red line is drawn across the 'Permitted Users' dropdown and the 'Refresh Token Policy' section. A tooltip for 'Enable Single Logout' is visible near the 'Permitted Users' dropdown.

→ Assign the Connected Application to the Appropriate Users

While you are on the connected application page from the about step. Scroll down to the **“Manage Profile”** Section and Click on **Manage Profile**

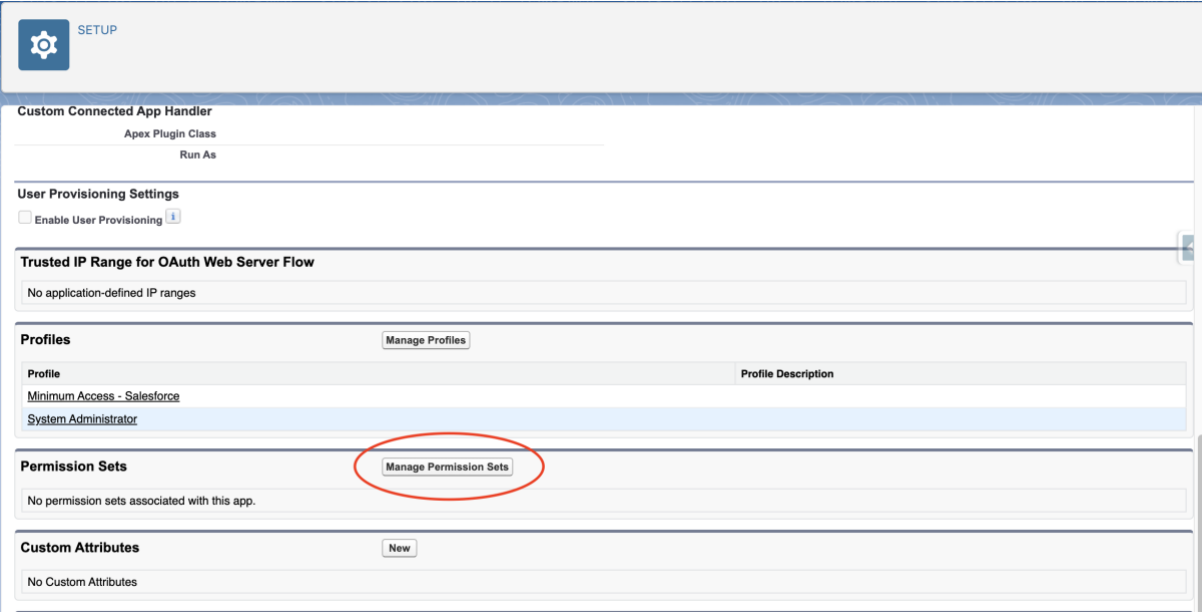


This will show you the all-available Profiles in your Salesforce org. Select the profiles for which you want the users to access the Connected App. Click **“Save”** for the changes to take place.



Note:- If you are selecting the profile the Connected App will be accessible by all the users having that specific profile.

If you want that specific users are able to access the app then scroll down to the **Manage Permission Sets section** of the connected application. Click on “**Manage Permission Sets**” button



SETUP

Custom Connected App Handler

Apex Plugin Class

Run As

User Provisioning Settings

☐ Enable User Provisioning ⓘ

Trusted IP Range for OAuth Web Server Flow

No application-defined IP ranges

Profiles Manage Profiles

Profile	Profile Description
Minimum Access - Salesforce	
System Administrator	

Permission Sets Manage Permission Sets

No permission sets associated with this app.

Custom Attributes New

No Custom Attributes

You will see the list of all the permission set. Select the specific permission set that you want to provide the access for the SimpleDocs Canvas Application. Click “Save” to confirm the changes.

Application Permission Set Assignment

[Help for this Page](#) ⓘ

[← Back to Connected App Detail](#)

Select the appropriate permission sets to choose which users have access to this application.

Select	Permission Sets	Description
☐	Experience Profile Manager	
☒	Password Never Expires	
☐	SCRT2 Integration User	Give SCRT2 Integration User necessary access
☐	Simpledocs Permissions	

Save Cancel

Your application page will look like below

 SETUP

Apex Plugin Class

Run As

User Provisioning Settings

☐ Enable User Provisioning 

Trusted IP Range for OAuth Web Server Flow

No application-defined IP ranges

Profiles



Profile	Profile Description
Minimum Access - Salesforce	
System Administrator	

Permission Sets



Permission Set	Permission Set Description
Password Never Expires	

Custom Attributes



No Custom Attributes

OAuth Custom Scopes



No OAuth custom scopes associated with this app

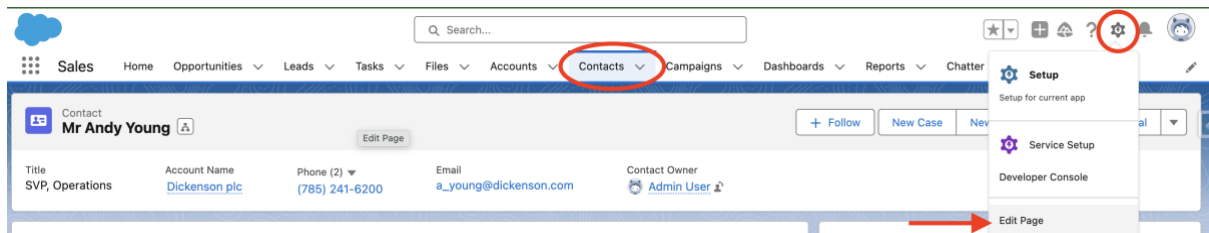
[^ Back To Top](#)

Always show me  more records per related list

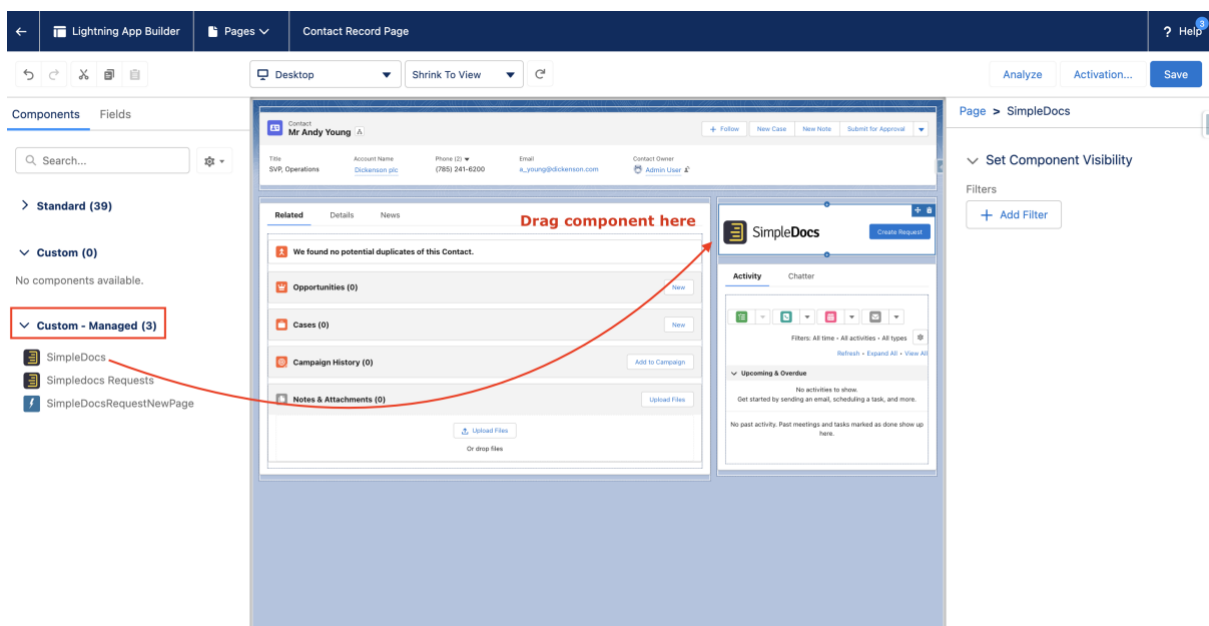
→ Page Layout Setup

1. Add the Component into the Contact/Account & Opportunity Record Page

- After the administrator setup, we need to make the modification for the Account, Contact & Opportunity page layouts.
- Follow the below steps to modify the Contact Record Page.
- to Contact Tab → Open any contact record page → Click on gear Icon and then select Edit Page



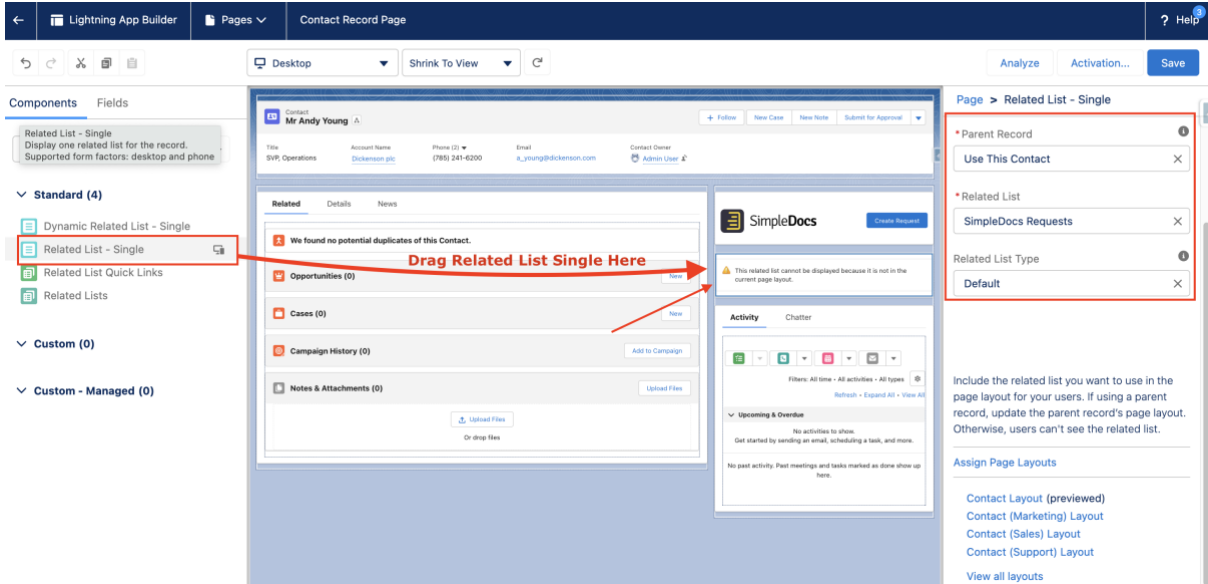
While you are on the Edit page of Lightning App Builder for Contact. Search for SimpleDocs from the left-hand side. Drag & drop the component inside the page where you want to add. Below is the example for the same



Repeat the same step for Account & Opportunity.

2. Add Related list into the Record Page

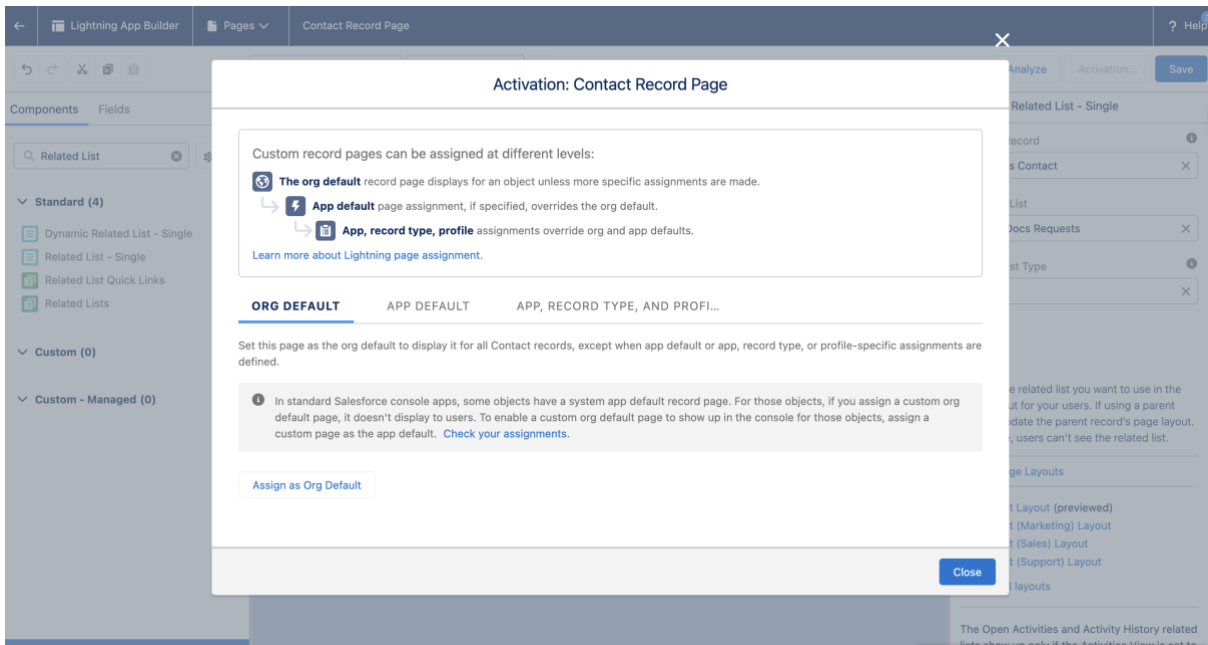
From the left panel search for “**Related List Single**”, do Drag & Drop the component below the SimpleDocs component that you have added in the previous step



For the related List Select “**SimpleDocs Request**”.

Click on **Save** button to save the Changes.

If it is asking for activating the page then please do activate the page as per your need.



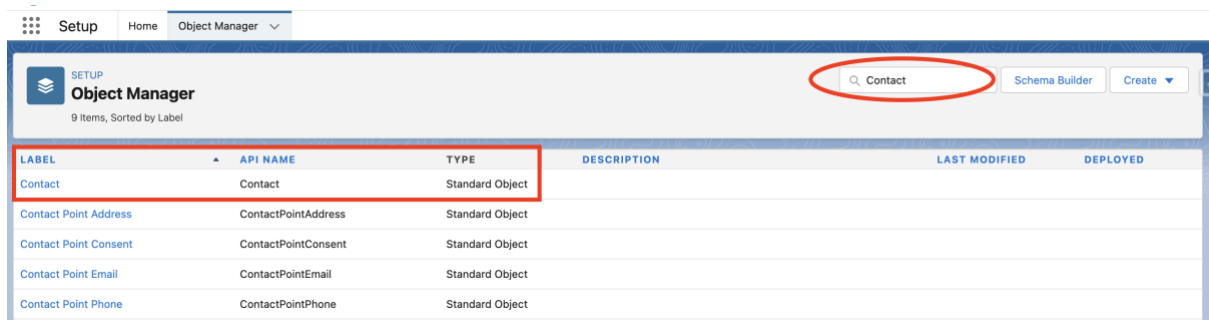
Click on Back button to go to Contact Detail Page.

3. Add the Related List into the Page Layouts

After we have made the changes to the Record Pages for Account, Contact & Opportunity.

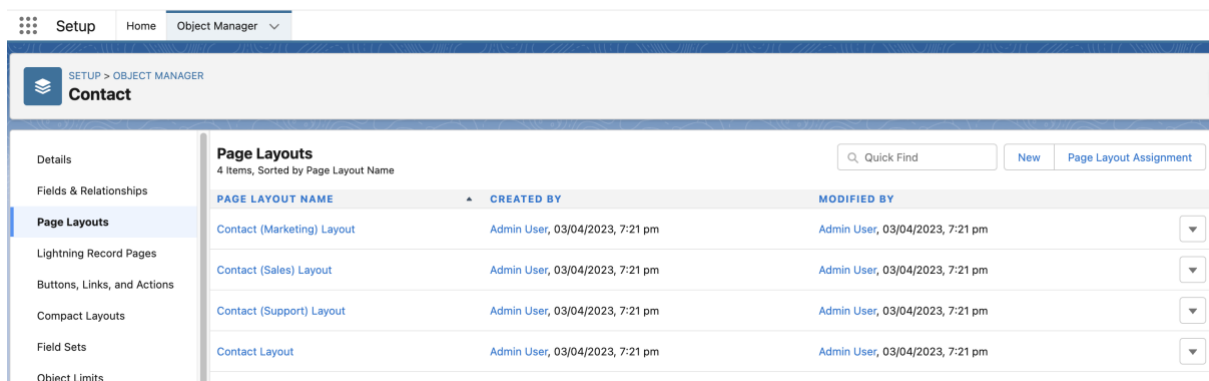
Let's add the **SimpleDocs** Request related list to these objects Page-Layout.

- Navigate to Setup → Object Manager → Search for Contact



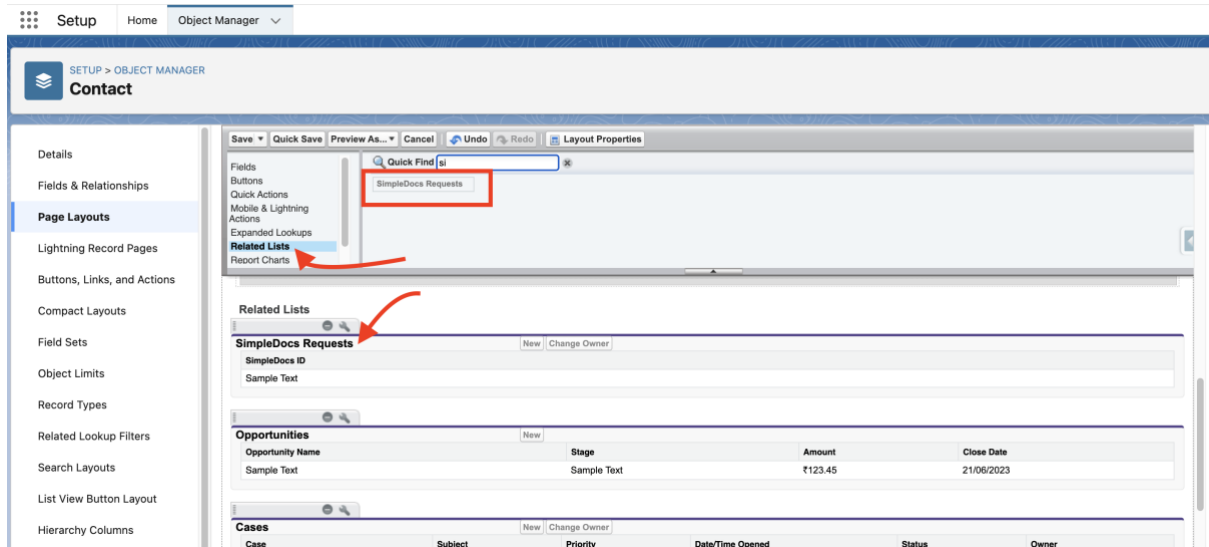
Label	API Name	Type	Description	Last Modified	Deployed
Contact	Contact	Standard Object			
Contact Point Address	ContactPointAddress	Standard Object			
Contact Point Consent	ContactPointConsent	Standard Object			
Contact Point Email	ContactPointEmail	Standard Object			
Contact Point Phone	ContactPointPhone	Standard Object			

- From the left panel, Select Page layouts and Click on the name of the Page Layout in which you want to add the Related List

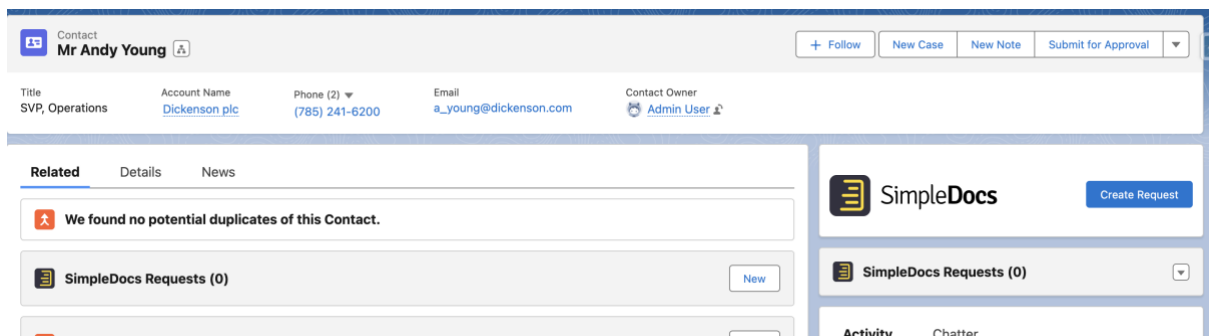


Page Layout Name	Created By	Modified By
Contact (Marketing) Layout	Admin User, 03/04/2023, 7:21 pm	Admin User, 03/04/2023, 7:21 pm
Contact (Sales) Layout	Admin User, 03/04/2023, 7:21 pm	Admin User, 03/04/2023, 7:21 pm
Contact (Support) Layout	Admin User, 03/04/2023, 7:21 pm	Admin User, 03/04/2023, 7:21 pm
Contact Layout	Admin User, 03/04/2023, 7:21 pm	Admin User, 03/04/2023, 7:21 pm

- Drag & drop the “SimpleDocs Request” related list under the related list section



- Save the Changes.



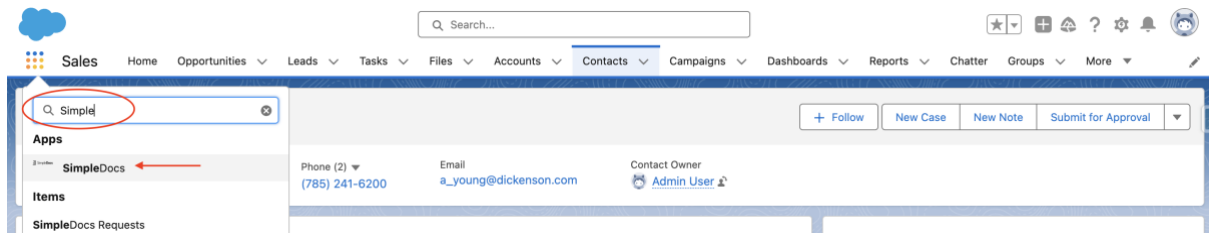
Note: -

- Repeat the steps for all the page layout where you want to add the related list.
- Repeat the same steps for Account & Opportunity Page Layouts.

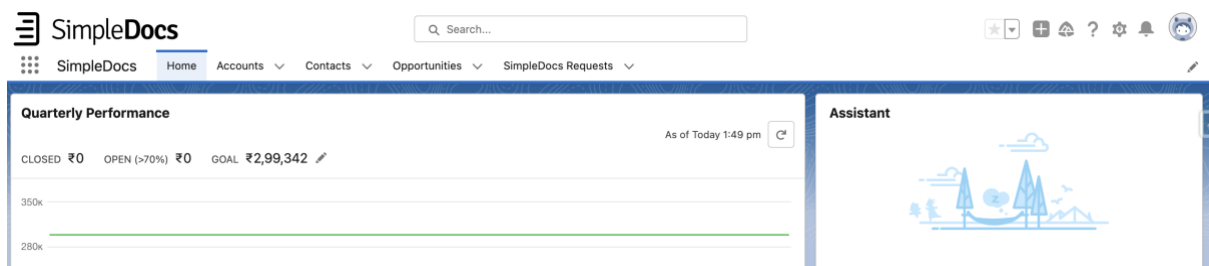
→ Test the Application

Once you are done with the completed setup. You are ready to test the application. Follow the below steps to test the application

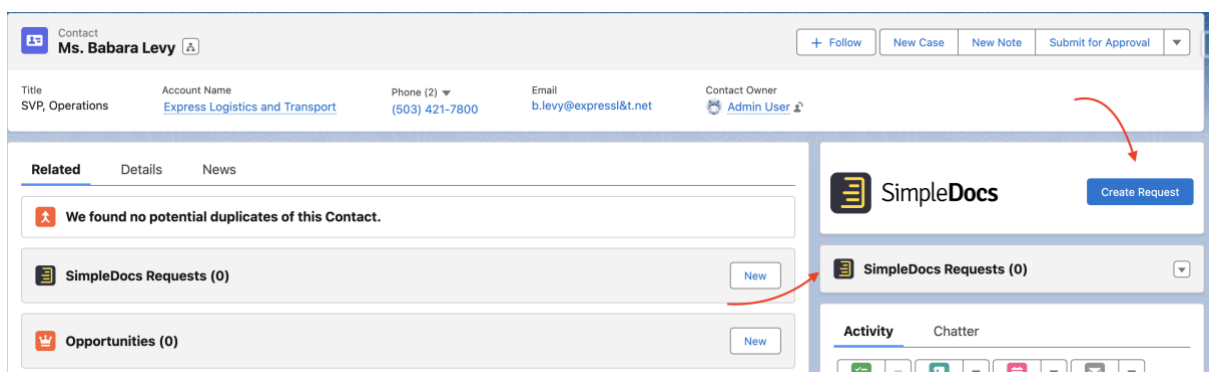
From the 9 dots [App Launcher], Search for **SimpleDocs** & **Select SimpleDocs** under Apps



This is how your application will look like



Click on the Contact or Account or Opportunity tab and open any record. As you have already done the setup you will see the record detail page like below



Click on the create Request button to create the request in the SimpleDocs

Simpdocs Request

- [Non Disclosure Agreement](#)
- [Employment Agreement](#)
- [Sales Agreement](#)

Cancel

→ Troubleshooting

If you are getting the error like below then please check if you have added the profile/permission set into the Connected App Level

Canvas - SimpledocsCanvas

You don't have permissions to view application with namespace [simpledocs] and API name [SimpledocsCanvas].
