SimpleDocs

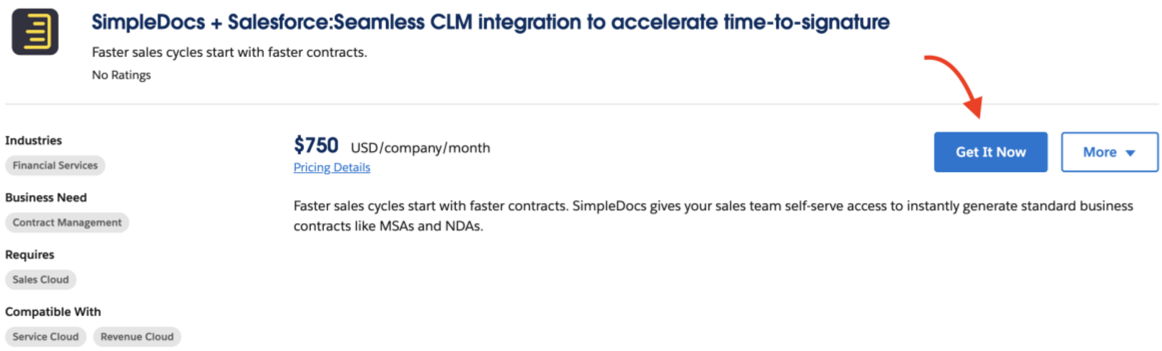
SimpleDocs App Documentation

Index

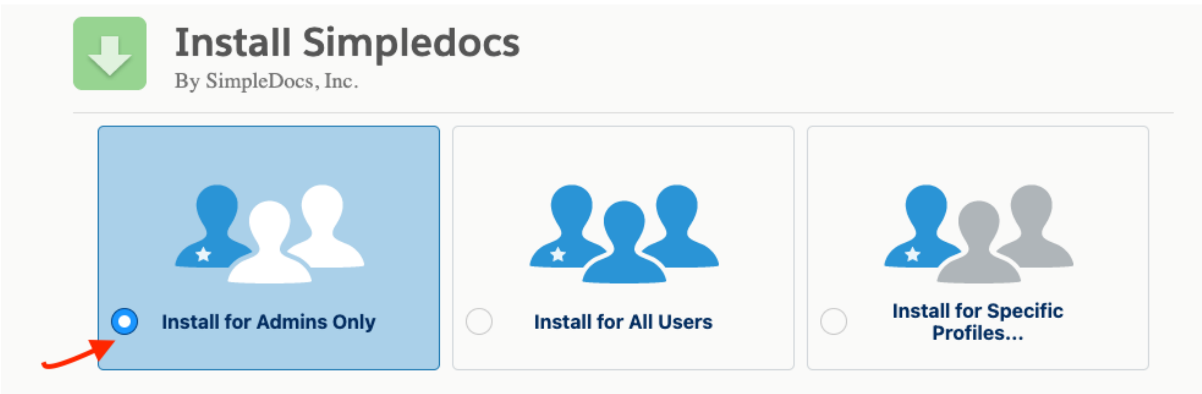
→ Installation & Setup

→ Installation

Admin can install the SimpleDocs application from the Salesforce AppExchange Marketplace. You can Click here to install the application.



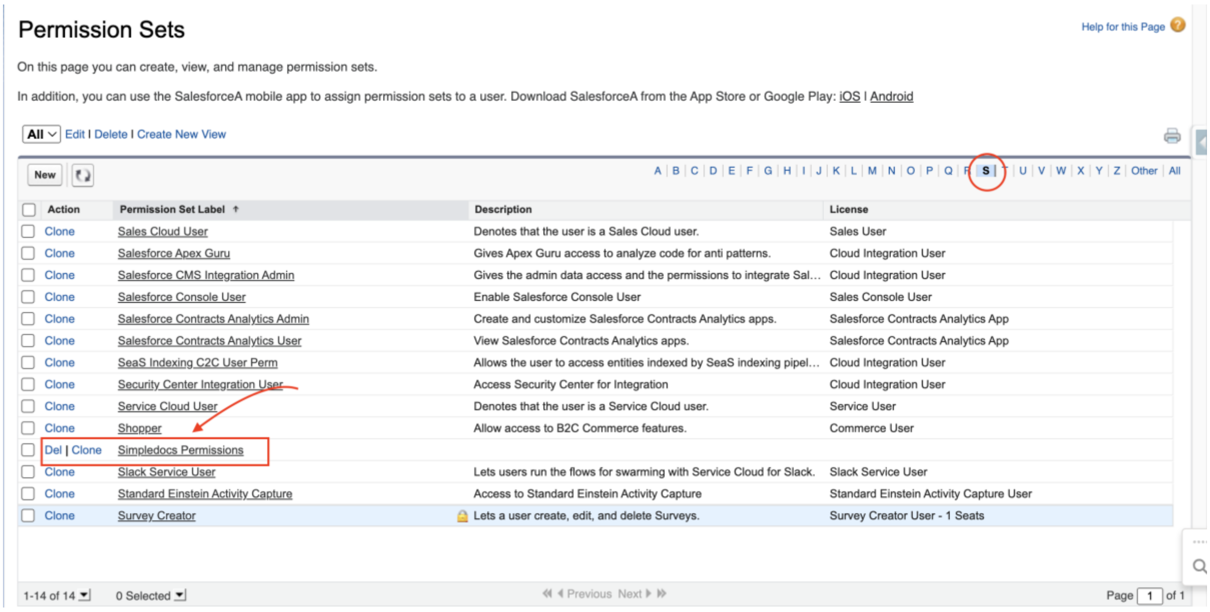
We recommend to install the application for the System Administrator only.



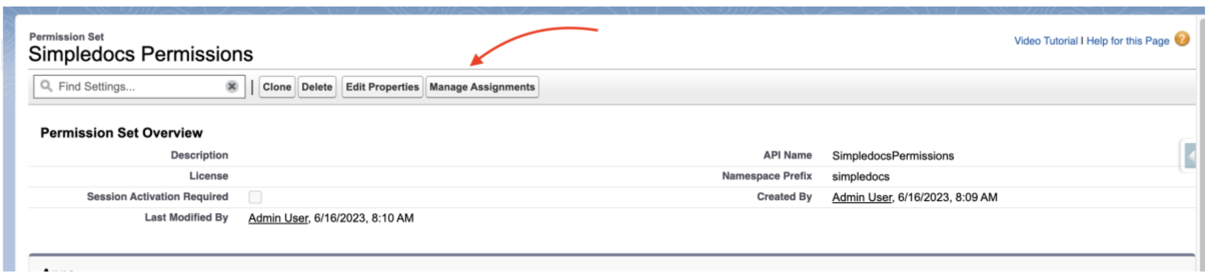
→ Permission Set Assignment

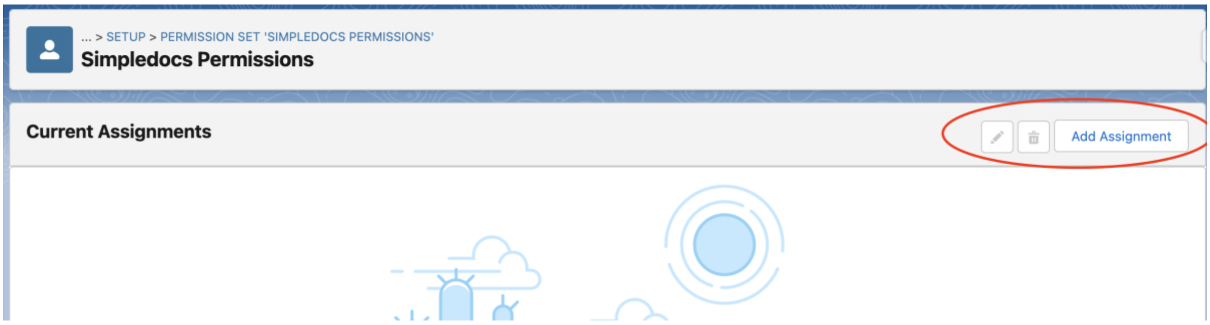
By default, the application will be **installed for System Administrator**, if You are an admin and want to give the application access to other users, follow the below steps.

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

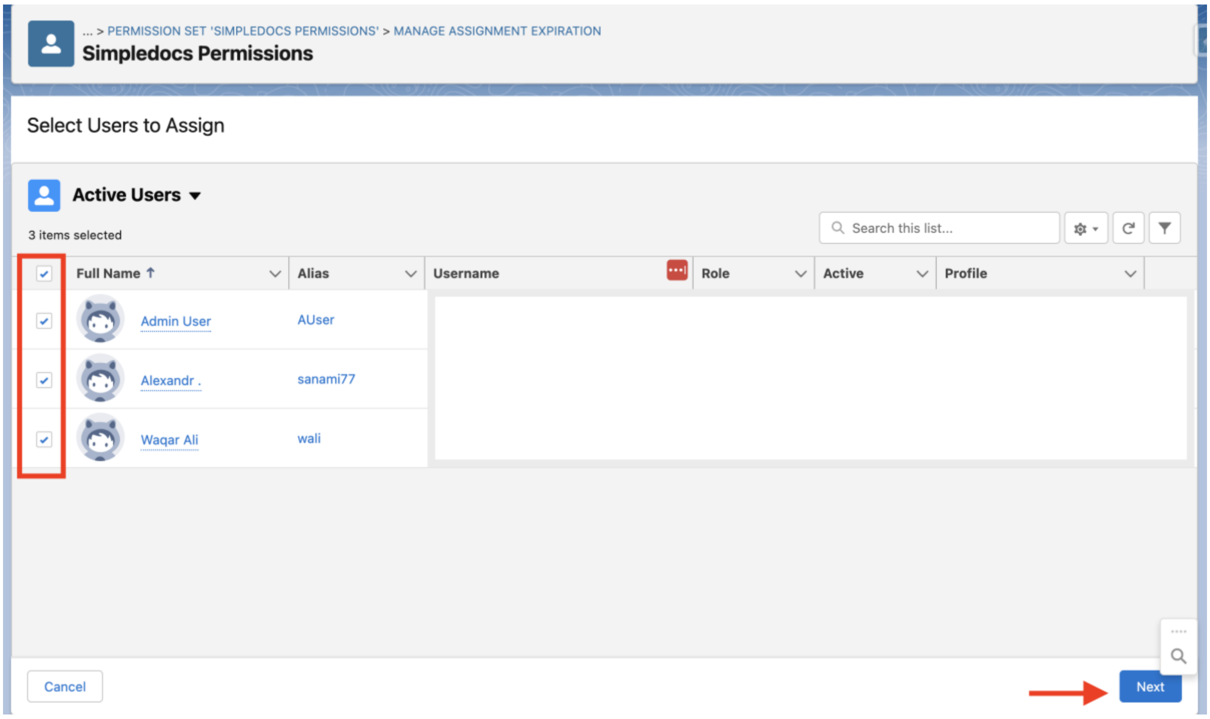


Now Click on "**Manage Assignments**" button and then click on "**Add Assignment**"

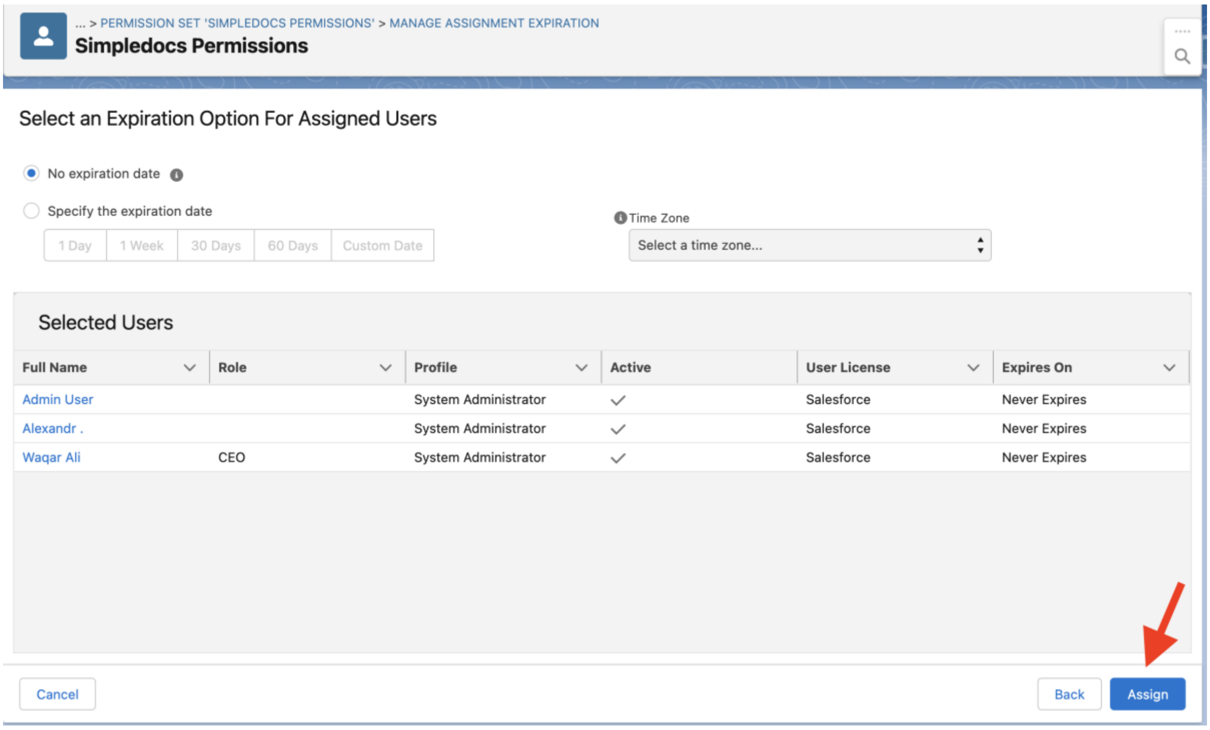




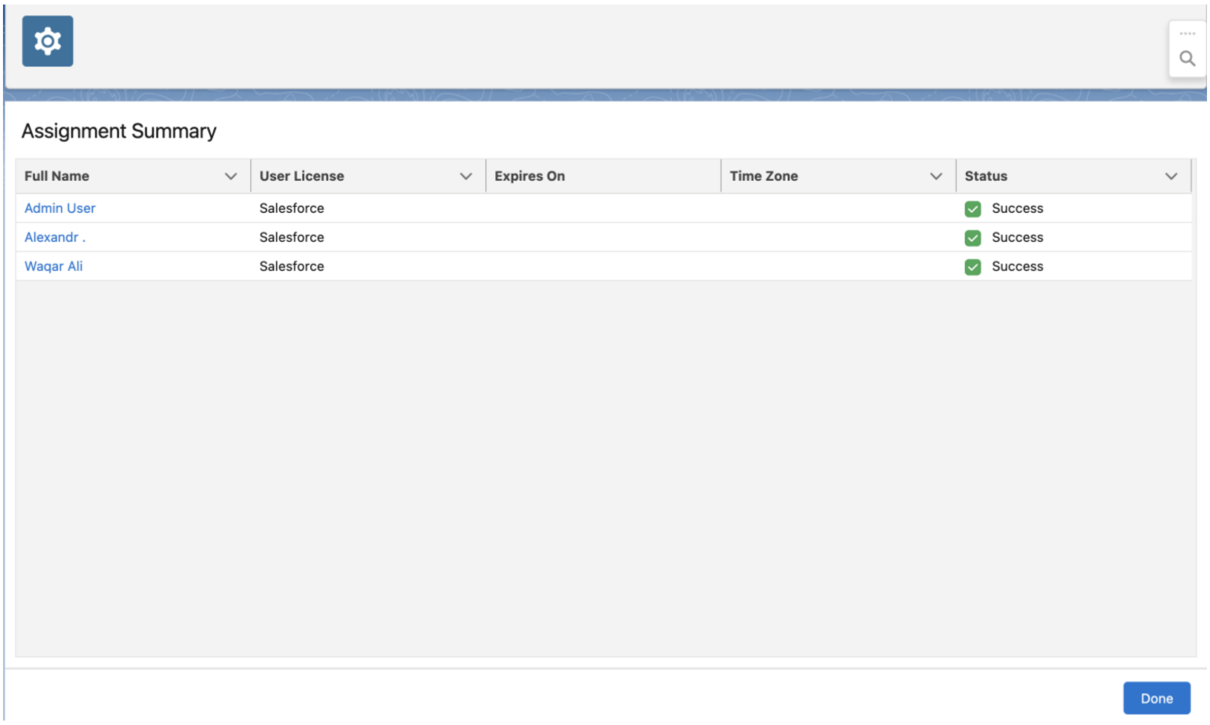
There you will see the list of users, Select users whom you want to provide the access to the SimpleDocs Application and click on the next button



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



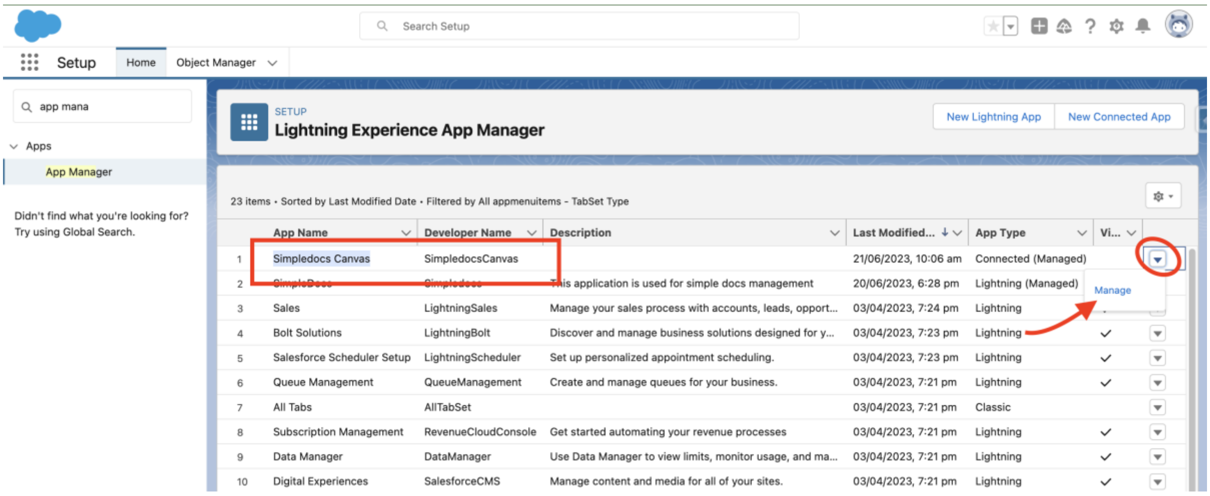
You will see the success message like below after the successful assignment of the permissionset.



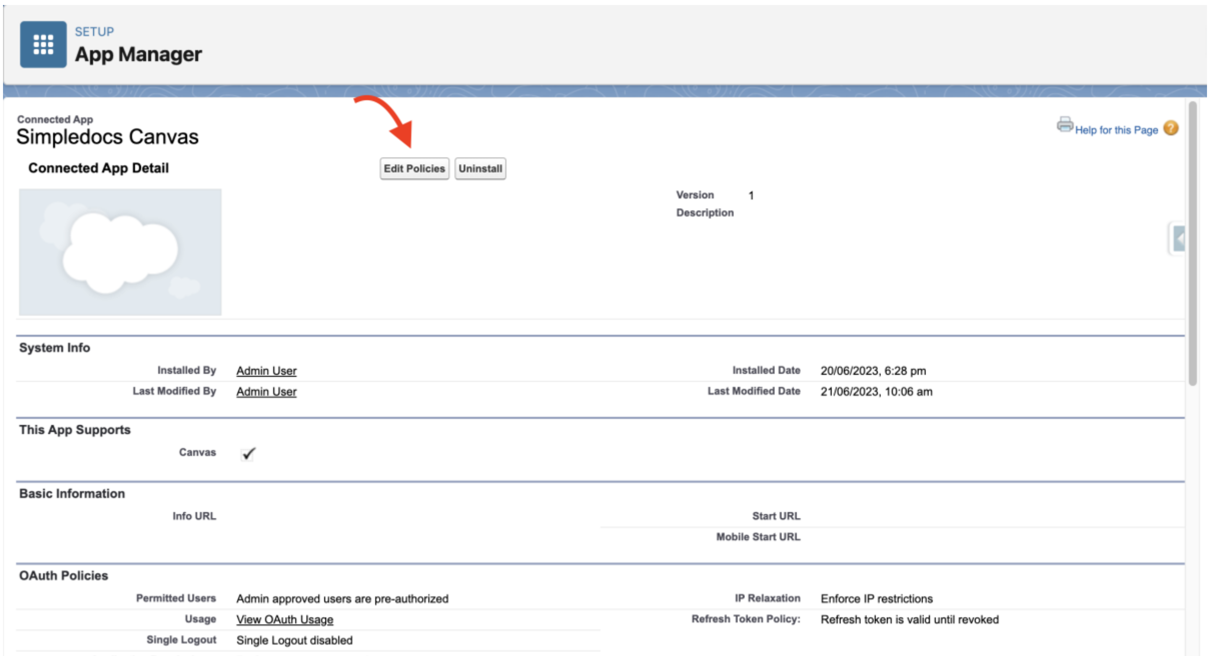
→ Connected App Setup

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

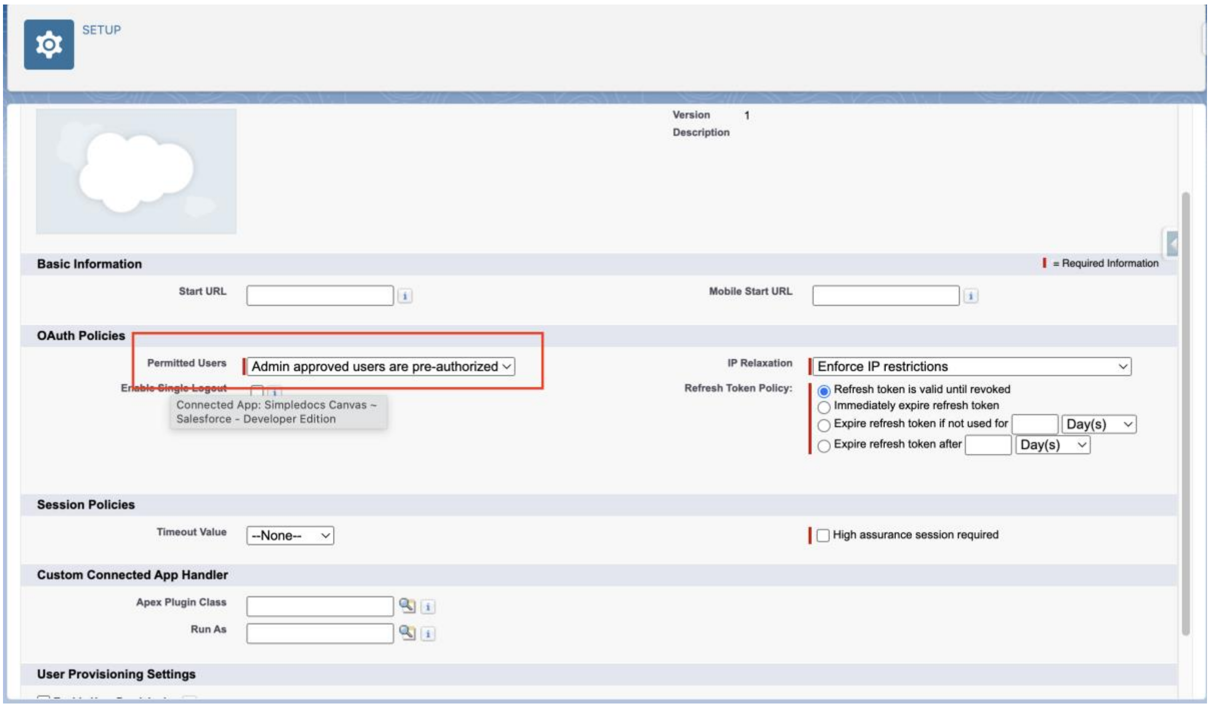
- Navigate to Setup → App Manager
- Find **Simpledocs Canvas** App from the List
- Click on the dropdown next to app and Click Manage



- Now click on **Edit Policies** Button

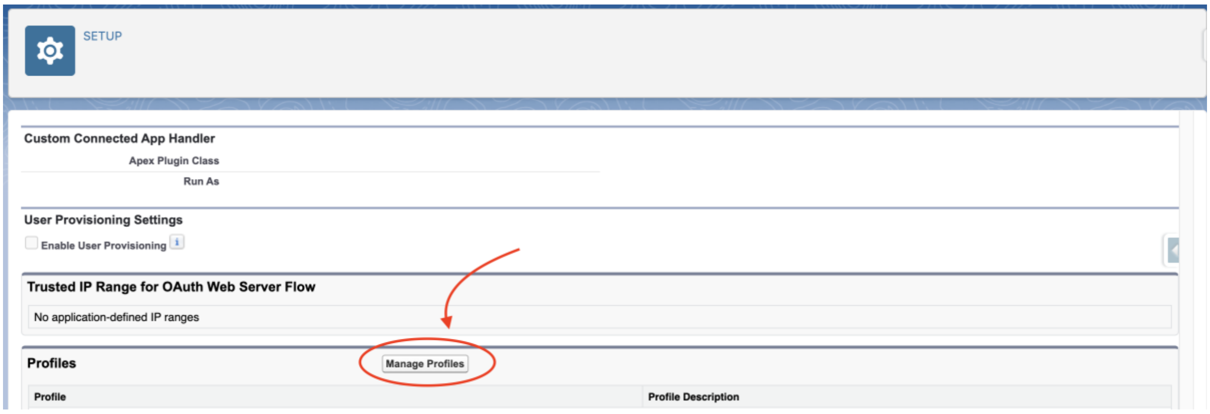


- Select “**Admin approved users are pre-authorized**” for “**Permitted Users**” & click on save

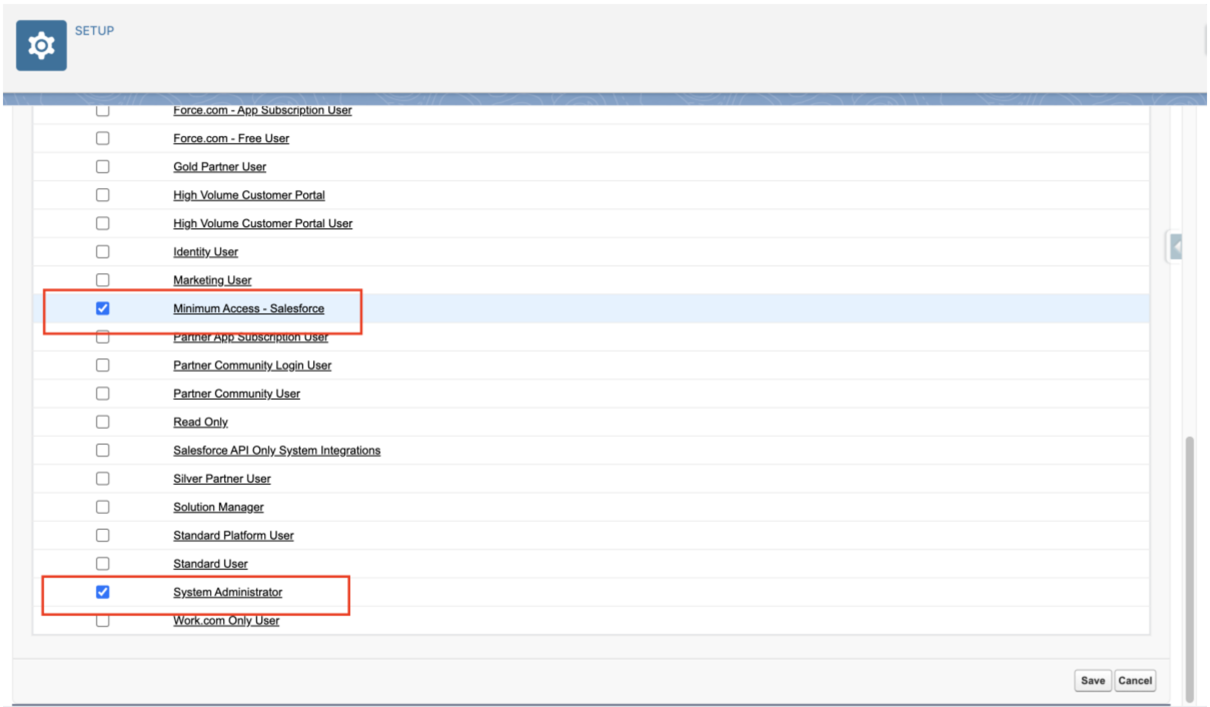


→ Assign the Connected Application to the Appropriate Users

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

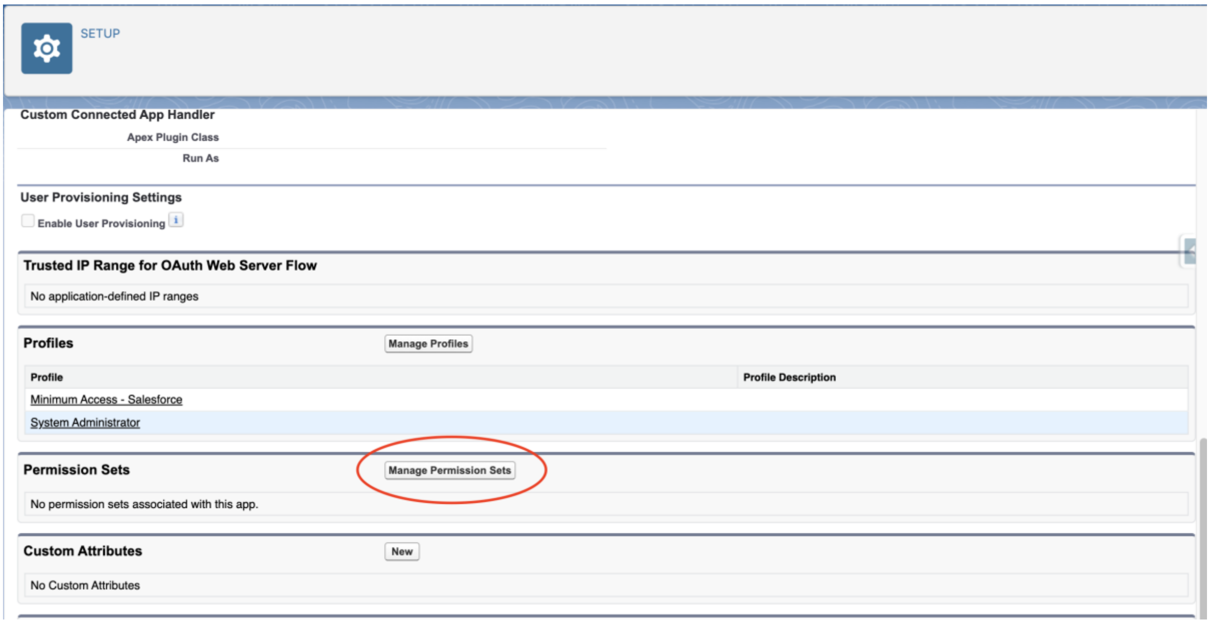


This will show you the all-available Profiles in your Salesforce org. Select the profiles for which you want the users to access the Connected App. Click "**Save**" for the changes to take place.

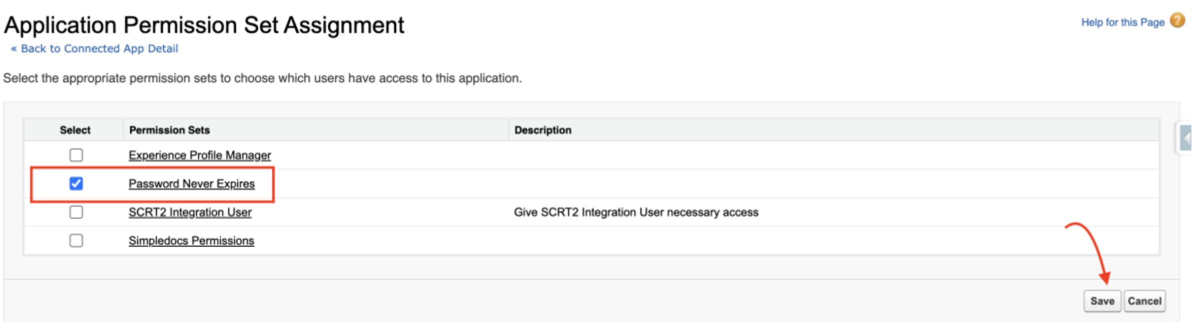


Note:- If you are selecting the profile the Connected App will be accessible by all the users having that specific profile.

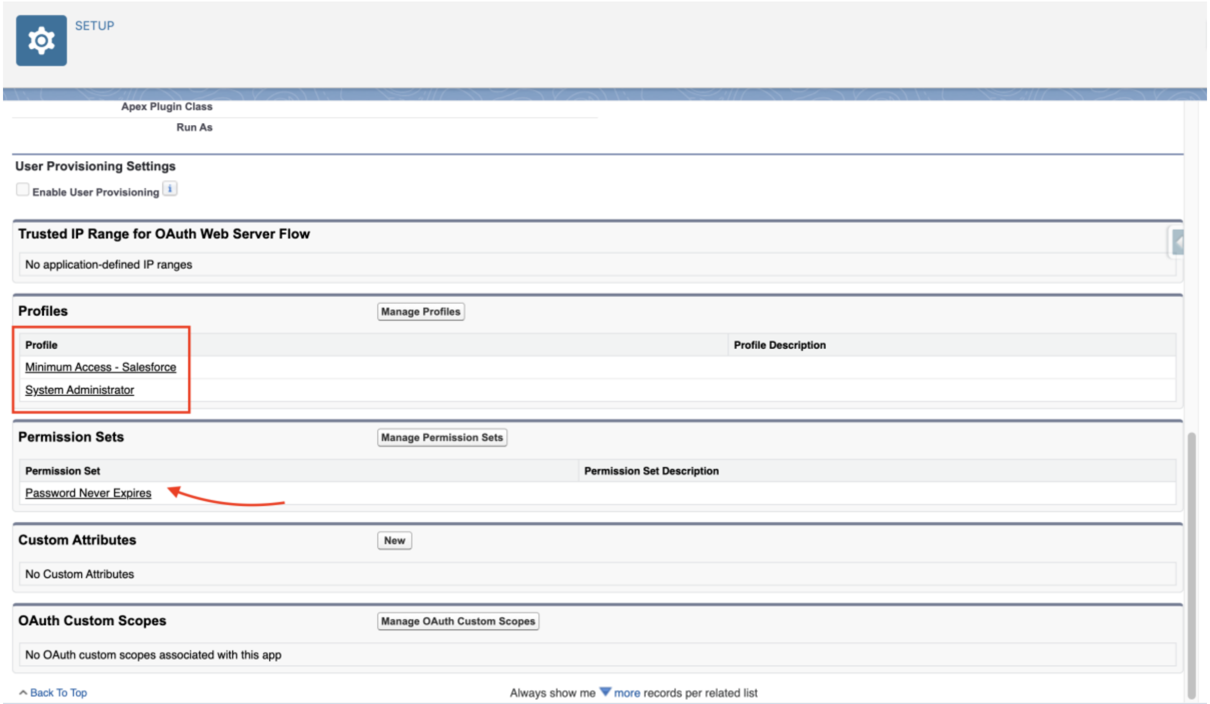
If you want that specific users are able to access the app then scroll down to the **Manage Permission Sets section** of the connected application. Click on “**Manage Permission Sets**” button



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.



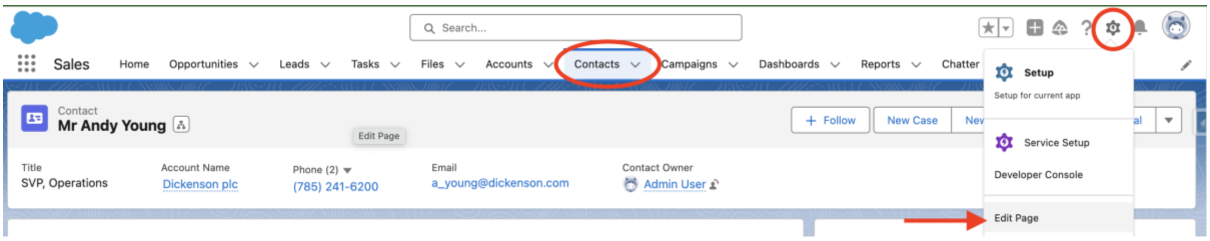
Your application page will look like below



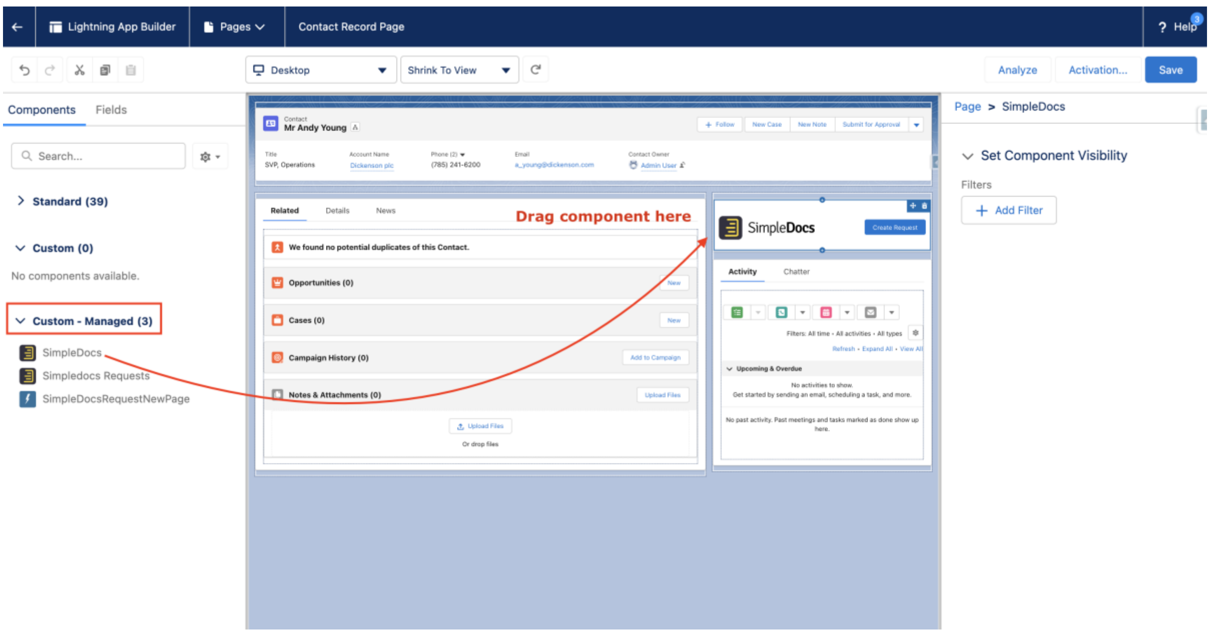
→ Page Layout Setup

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



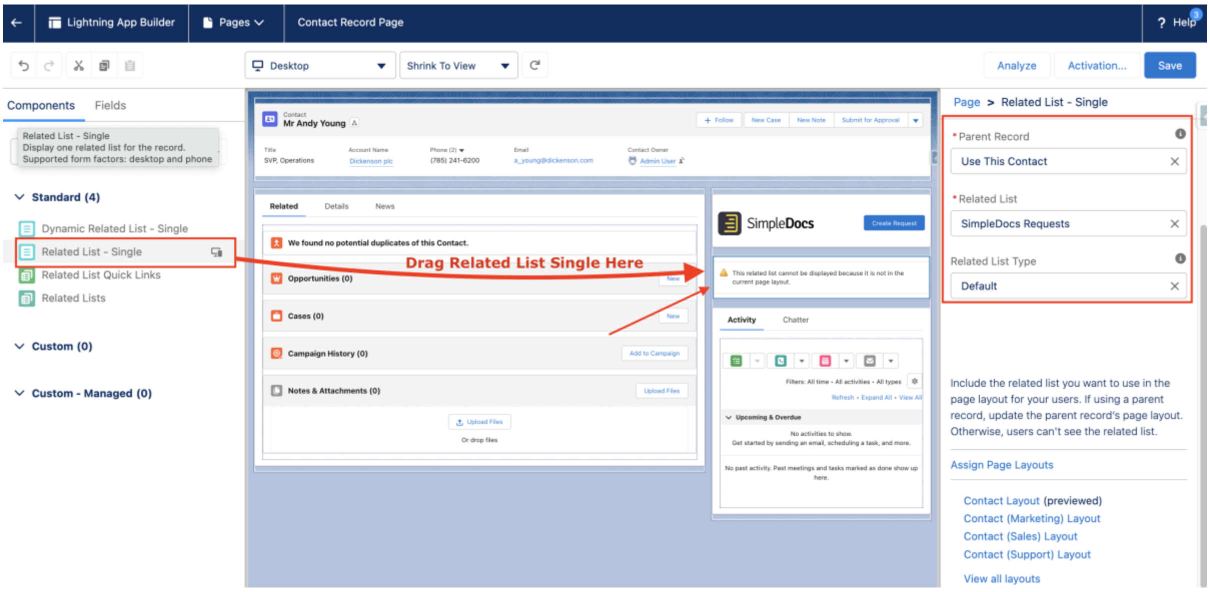
While you are on the Edit page of Lighting App Builder for Contact. Search for SimpleDocs from the left-hand side. Drag & drop the component inside the page where you want to add. Below is the example for the same



Repeat the same step for Account & Opportunity.

2. Add Related list into the Record Page

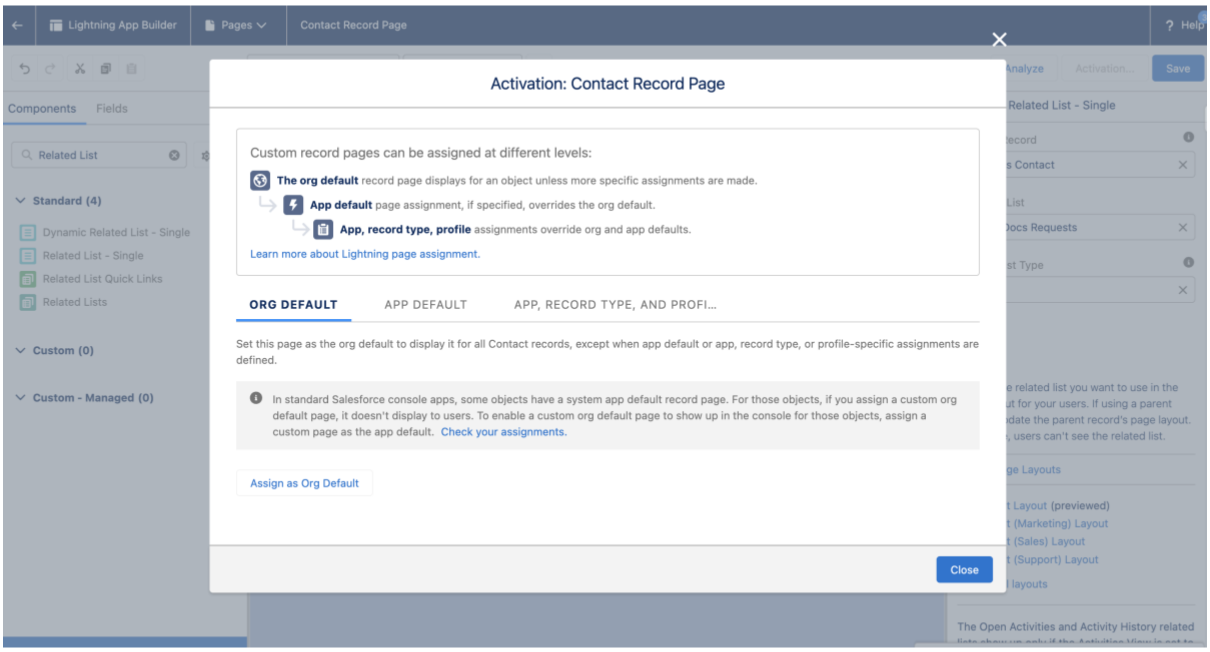
From the left panel search for “**Related List Single**”, do Drag & Drop the component below the SimpleDocs component that you have added in the previous step



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.



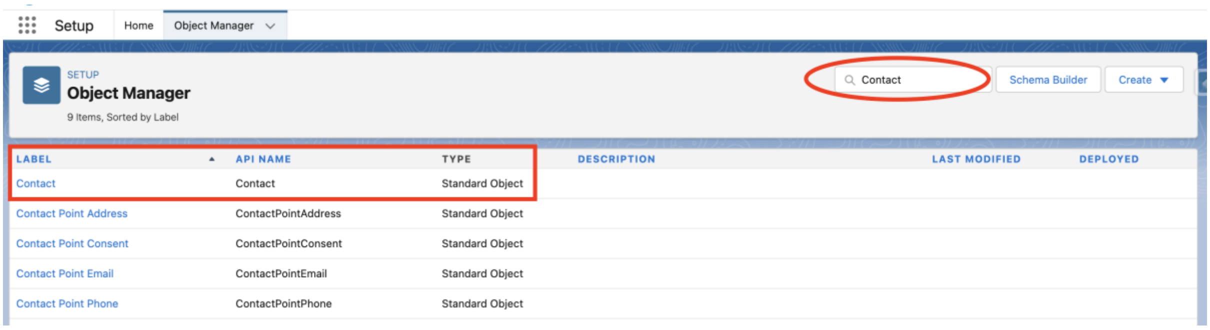
Click on Back button to go to Contact Detail Page.

3. Add the Related List into the Page Layouts

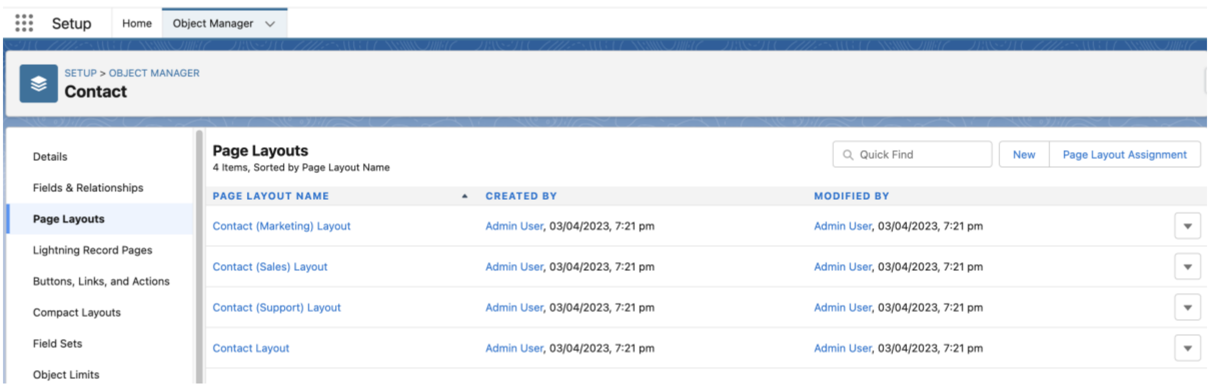
After we have made the changes to the Record Pages for Account, Contact & Opportunity.

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

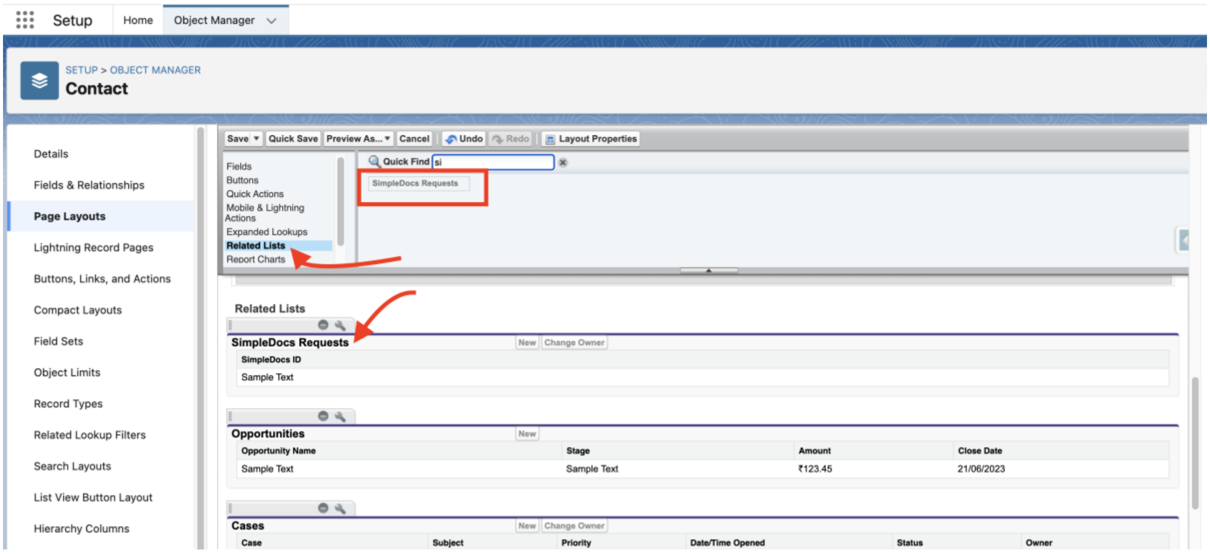
- Navigate to Setup → Object Manager → Search for Contact



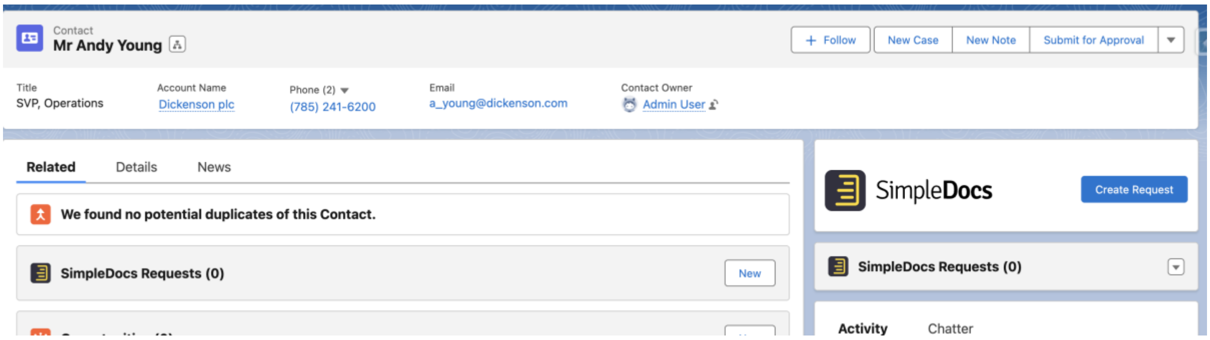
- From the left panel, Select Page layouts and Click on the name of the Page Layout in which you want to add the Related List



- Drag & drop the "**SimpleDocs Request**" related list under the related list section



- Save the Changes.



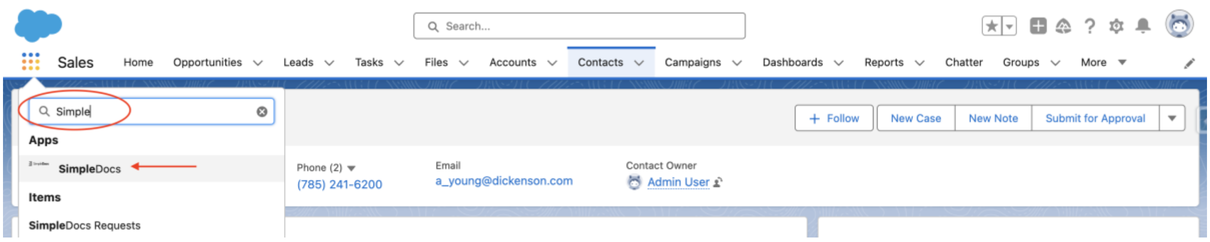
Note: -

- 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.

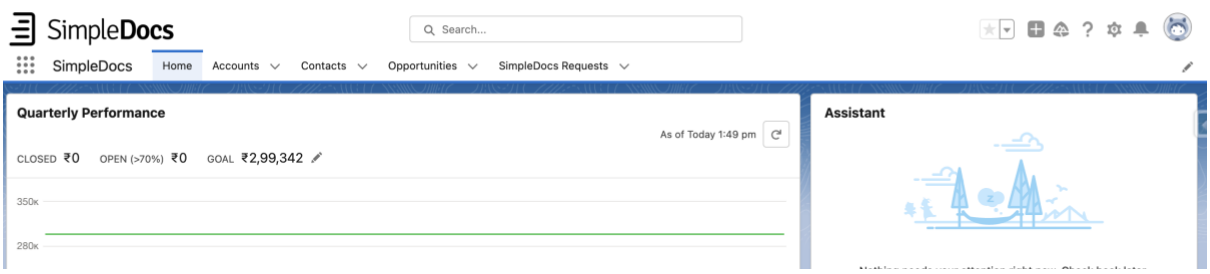
→ Test the Application

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

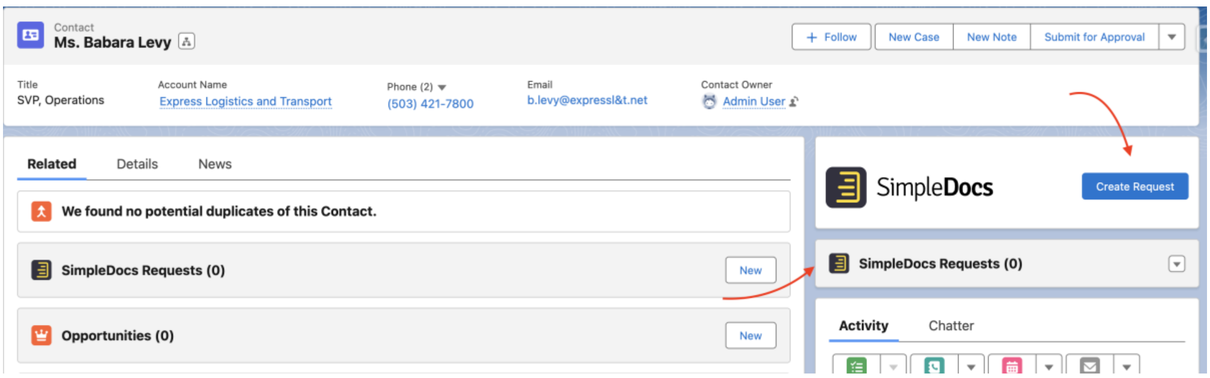
From the 9 dots [App Launcher], Search for **SimpleDocs** & **Select SimpleDocs under Apps**



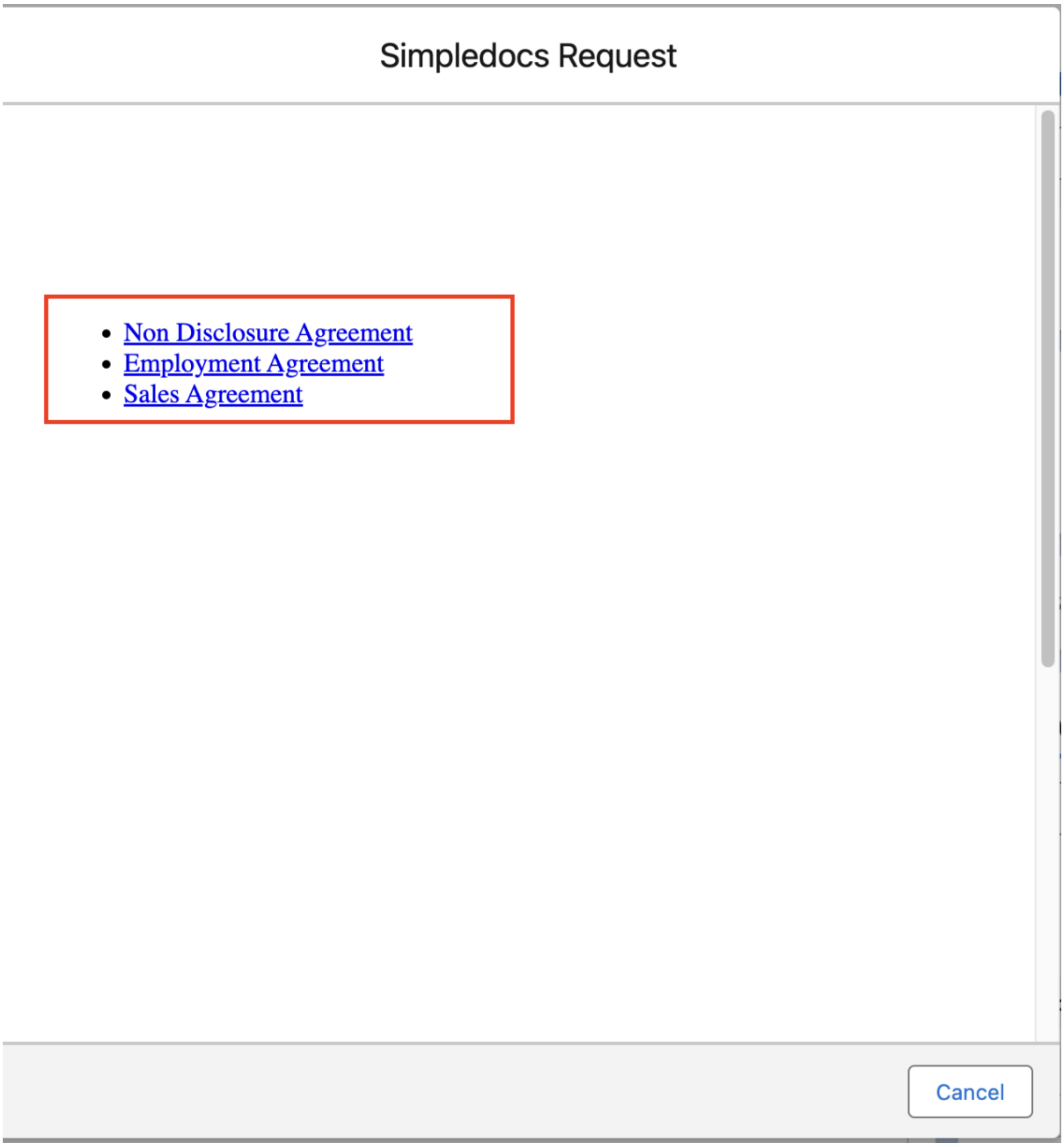
This is how your application will look like



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



→ 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