Customization & Enhancement Guide

Using This Document

- This document provides information about installing the CloudPDF – INTERACTIVE application, subscribing to the free 30 day trial, and making customizations to your salesforce.com organization to use the Sample Templates for creating CloudPDF documents. (2 minutes to set up)

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1. Installing the CloudPDF – INTERACTIVE package and 30 day FREE Trial

What:	**Install package from AppExchange & Subscribing to the 30 Day FREE Trial**
Why:	To use CloudPDF – INTERACTIVE in your salesforce.com organization
How:	1. To Install CloudPDF into your salesforce.com Organization from the Appexchange (https://www.salesforce.com/us/appexchange/detail_overview.jsp?id=a0330000005KAMtAAO) click the "Get It Now" button and enter the requested information 2. Next register your Organization to use the 30 day FREE Trial. Go to: **Setup > App Setup > View Installed Packages** and click the "Configure" link.

Packages Installed from AppExchange

Action	Package Name
Uninstall | Configure	CloudPDF - Interactive Forms (Version 1.0)

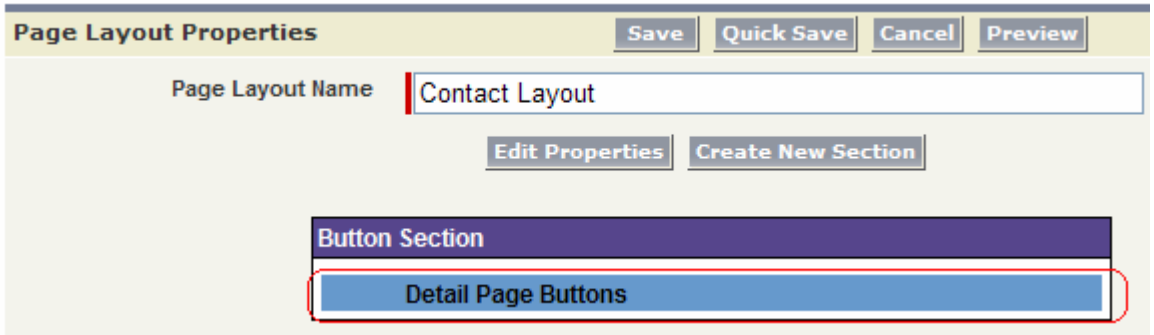
A new window opens. Enter / verify the subscription information and click the "Submit" button at the bottom of the form.

Company:	NinthWave_AppTEST	**Web Site:**	www.ninthwavesolutions.com
Address:	404 Dobson Street		
City:	Oakley	**Postal Code:**	94561
State:	CA	**Country:**	US

Submit

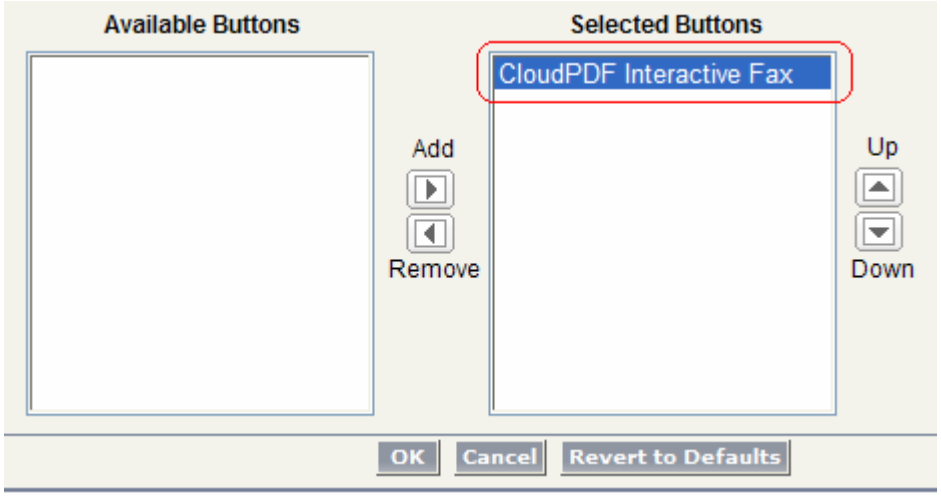
You are now ready to add the pre-configured sample templates.

2. Adding Custom Button on Contacts Page

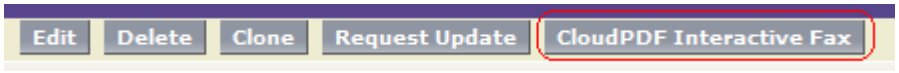
What:	**Add custom links to page layouts to use Sample Templates**
Why:	Sample Templates are provided to demonstrate CloudPDF usage and functionality. There are several PDF Template Forms for using dynamic salesforce.com content and turning them into PDF documents.
How:	**1.** Add the "CloudPDF Interactive Fax " Detail page button to the Contacts page layout. Modify the Contacts Page Layout by going to: **Setup > Customize > Contacts > Page Layouts** 2. Click on the Edit button to modify the Contact page layout: 3. Double click on the Detail Page Button section (red circled) 

How:

4. Then select (click once to highlight) “CloudPDF Interactive Fax” from the Available Buttons (left side) and click the Add arrow (top) button to move to the Selected Buttons (right side).



5. Click OK to save.
6. Click SAVE on the Contact Page Layout screen.
7. Open a Contact record to see your button.



You are now ready to use the Sample Templates for creating CloudPDF - Interactive documents.