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1. Introduction

TS Documents App allows you to generate documents based on your Salesforce data. Dynamically pull data from a record and any related records for any object and any fields using built-in Template Builder. Create Google Doc templates and generate documents by merging Salesforce fields. Automatically have the merged document saved to your Google Drive, emailed, attached to Salesforce, or download. You can generate documents in different formats and attach them to the related record. File formats supported: PDF, Word, html, odt, rtf, txt.

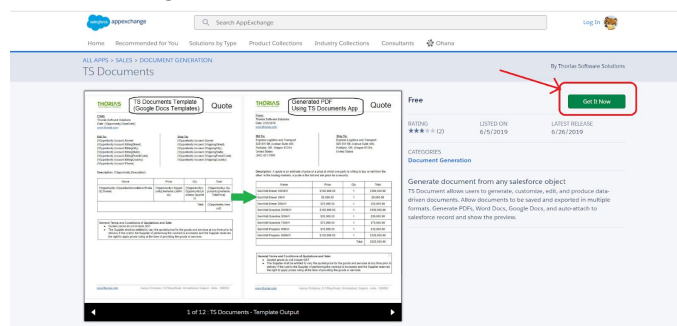
2. Install and Configure the App

TS Documents is using Google Docs functionality for managing merged document templates. We chose this platform for our app because we think Google Docs is the most modern and efficient platform for managing your documents in the cloud. It's extremely simple to adapt as it has most of the features Microsoft Office Word has to offer. You have to setup your Google account to access your Google Drive where you can create or upload your content prior to installing TS Documents app. You can learn more about Google Docs [here](#).

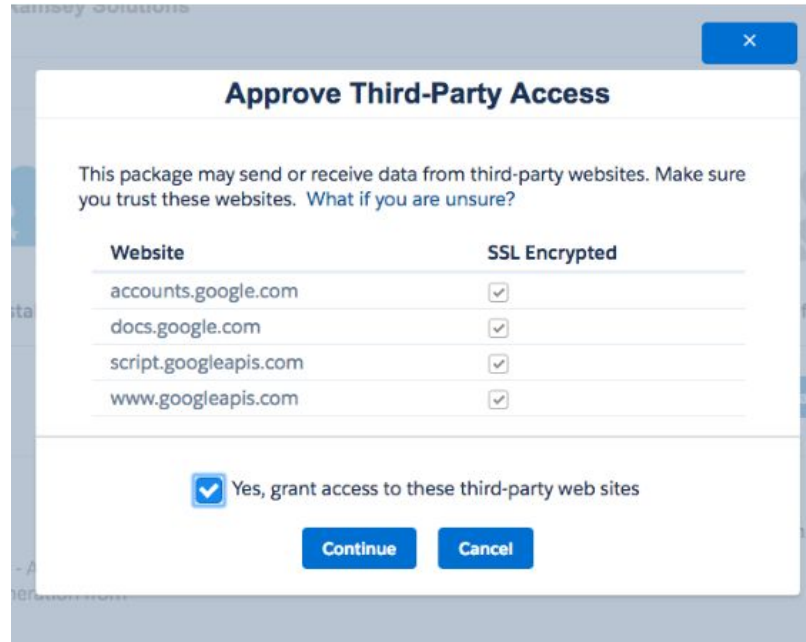
2.1. Install and Configure the App from AppExchange

Go to the [AppExchange](#) profile for TS Documents to install the app into your Salesforce org.

1. Click the Get It Now green button.



2. Follow the steps prompted to install the package in Production or Sandbox org.
3. After you click to install, you will be prompted to check box to “grant access” to the following Third-Party access by Google to use TS Documents app:

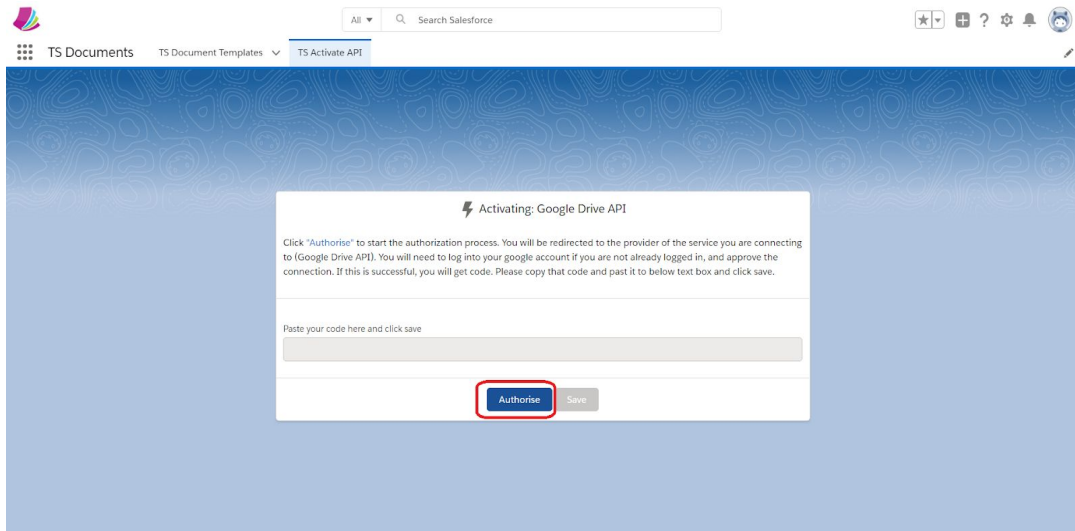


2.2. Authorize Your Google Drive Account to TS Documents

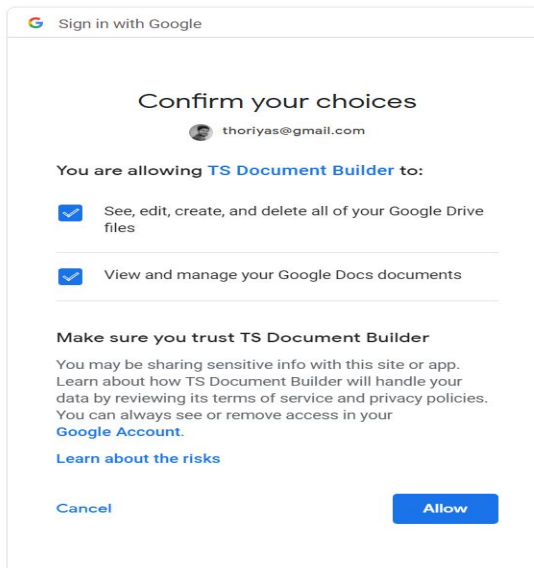
1. Click on “TS Activate API” tab after selecting "TS Documents" from your app window.
2. Authorize the App with a Google account you would like to use with TS Documents (can create a [free gmail/google drive account](#) to register or you can use a G Drive/Company drive). One Google Drive account required for all your Salesforce users

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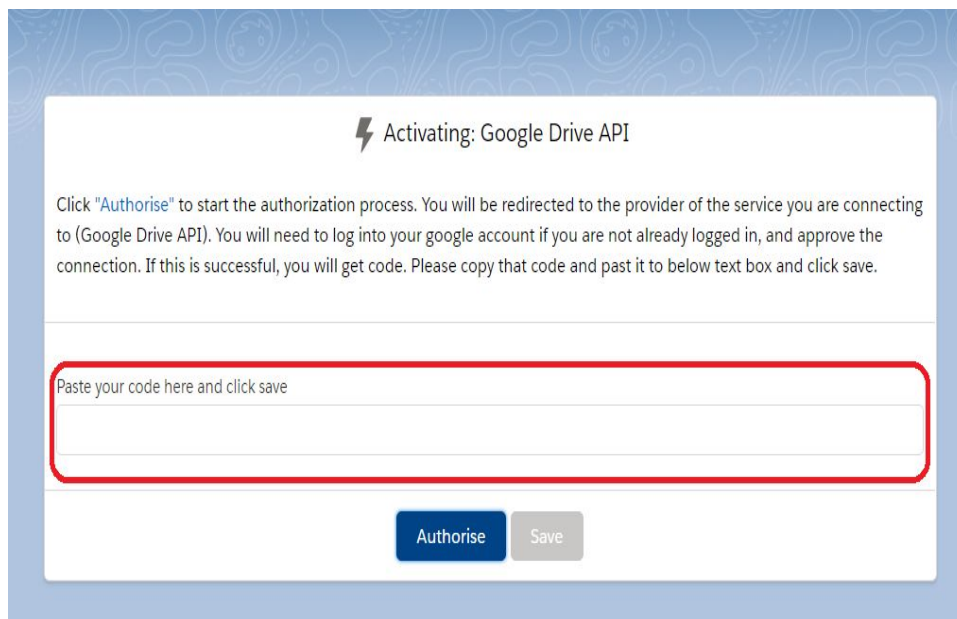
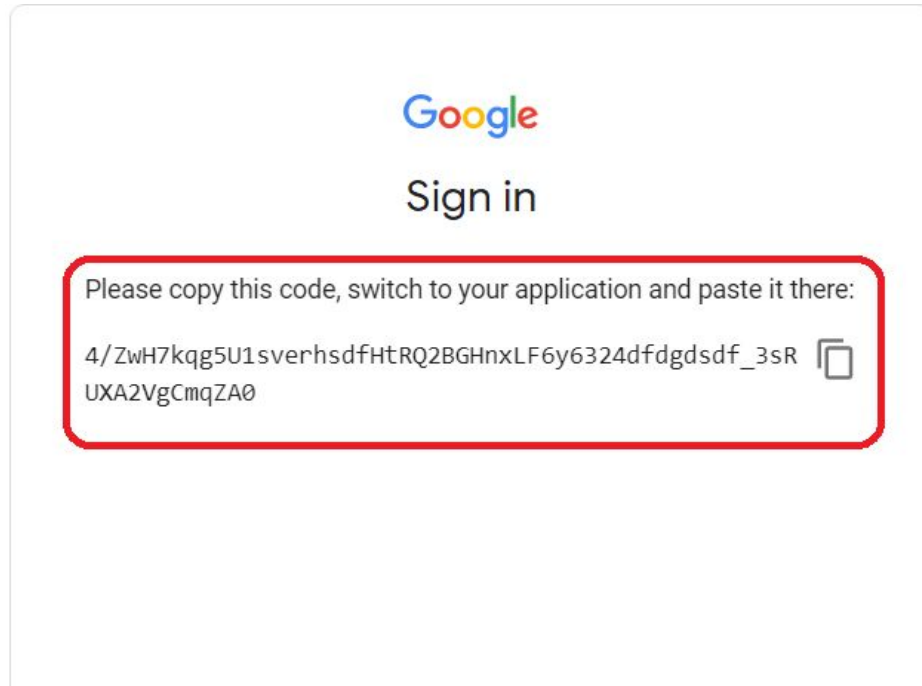
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3. You will be prompted to “allow” TS Documents to access to your G Drive:



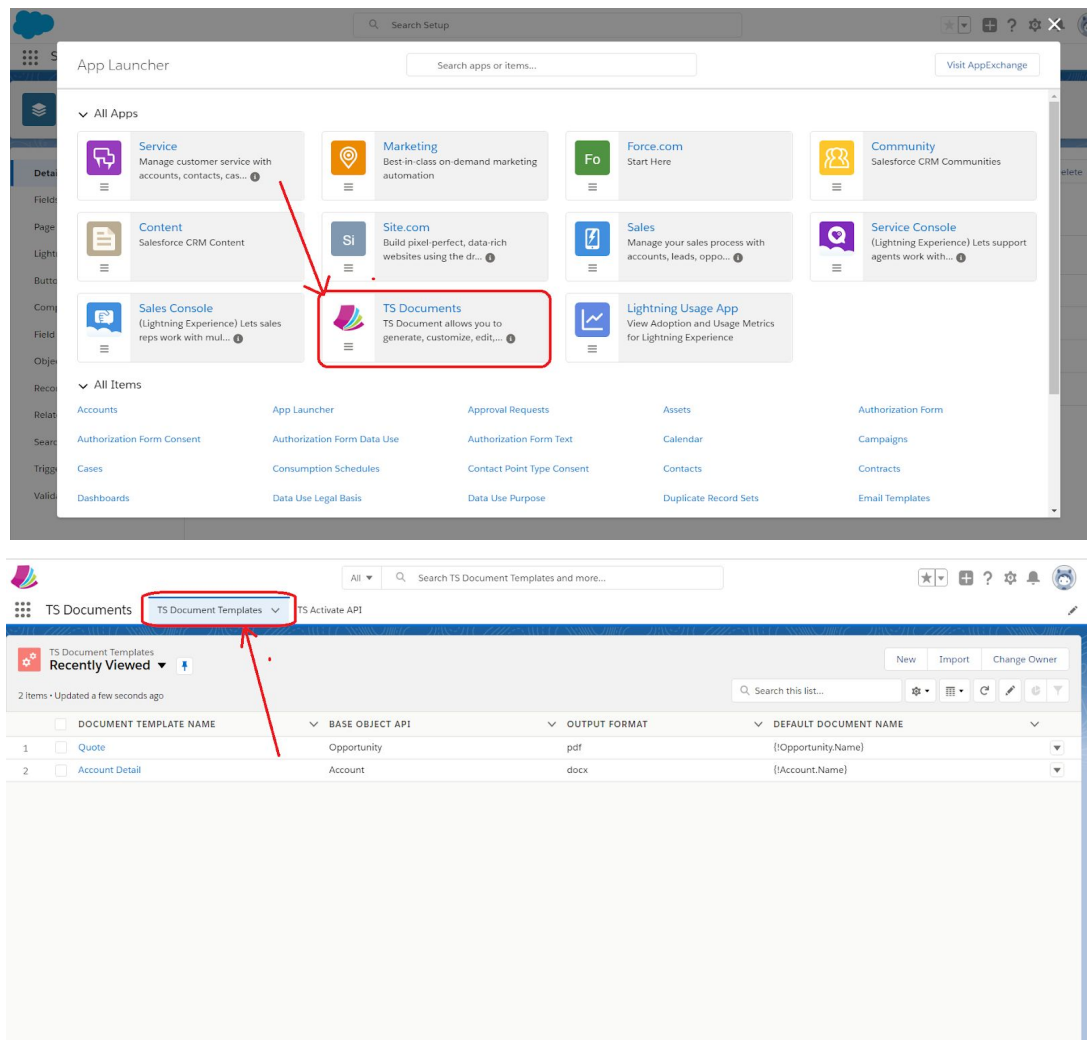
4. After clicking on allow you will get one code. Copy that code and past it in TS Documents Active API UI.



5. Click on Authorise. Now you are all set to use TS Documents.

3. TS Document Template

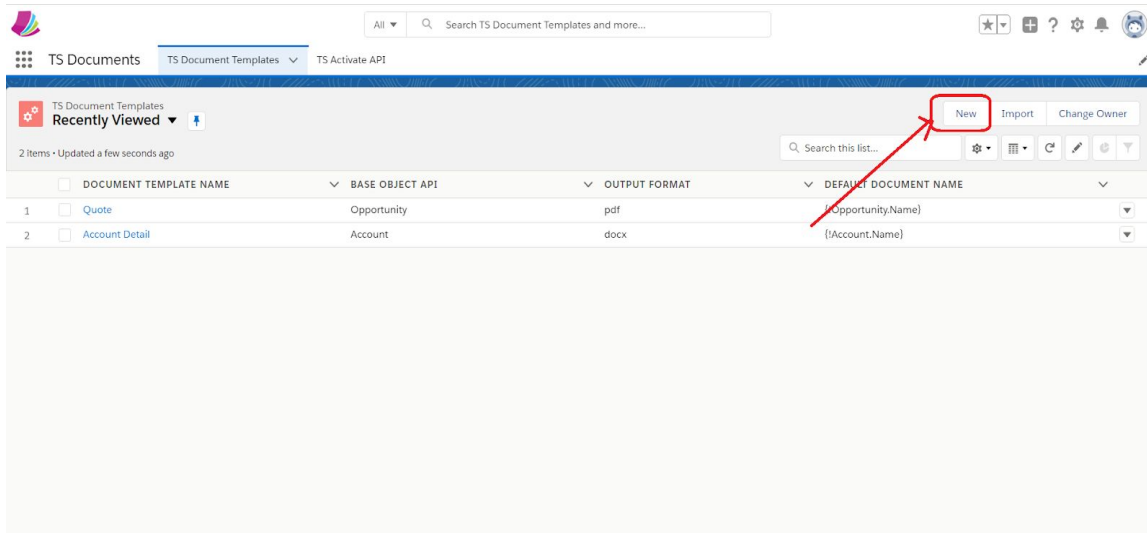
1. Open your Salesforce and create a new TS Document Template
2. TS Document Template custom object will be installed in your org as soon as the package completed installation.
 - a. You can access it in two ways: via selecting from All Tabs menu or via TS Documents App.
 - b. To access All Tabs menu click “” on your tab menu and select TS Document Template from the list of available tabs:
 - c. To access from TS Documents App switch app to “TS Documents App” from the top left corner, then select TS Document Template tab from the tab menu:



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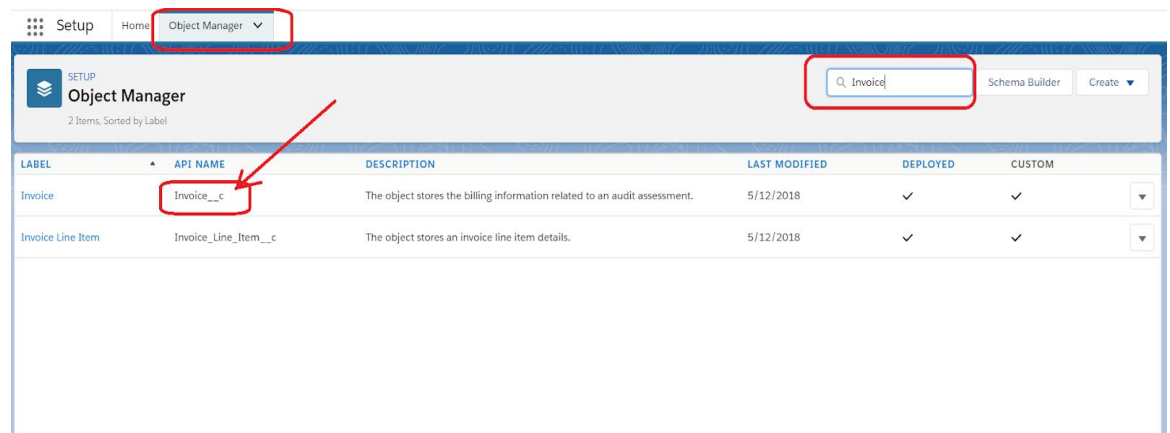
3. After selecting “TS Document Template” tab click “New” button to create a new TS Document Template:



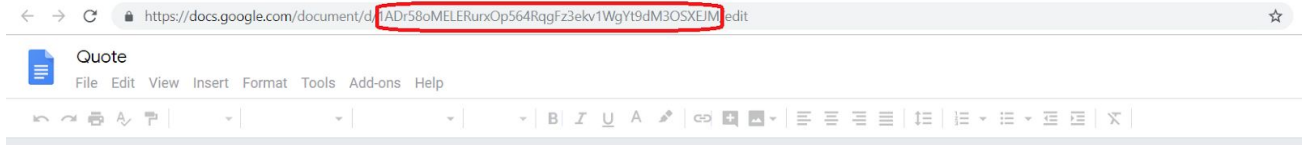
The 'New TS Document Template' modal form is displayed. It contains the following fields and controls:

- Information** section header.
- * Document Template Name**: Text input field.
- Owner**: Text field showing 'Sagar Patel'.
- * Default Document Name**: Text input field with an information icon.
- * Base object API**: Text input field with an information icon.
- GDoc Template Document ID**: Text input field with an information icon.
- Output format**: Dropdown menu showing 'pdf' with an information icon.
- Buttons at the bottom: 'Cancel', 'Save & New', and 'Save'.

- **Document Template Name:** Reference name of the template you wish to setup (e.g. “Generate Quote”, “Download Contract”, “Generate Invoice” etc.)
- **Base object API:** Provide the API name of the Object where the TS Documents App will be used (e.g. if you are generating invoice with the data merged from Opportunity, then you should put “Opportunity” into Base Object API field)
 - API names for standard Salesforce object are listed [here](#) (refer to blue underlined object names). Typically it will be exact name of the object with no space, like: Lead, Account, Contact, Opportunity, Case etc.
 - To access API names for custom object go to Setup, select “Object Manager” tab
 - Find a custom object and click on it. You will find an API Name field in Custom Object Definition Detail page:



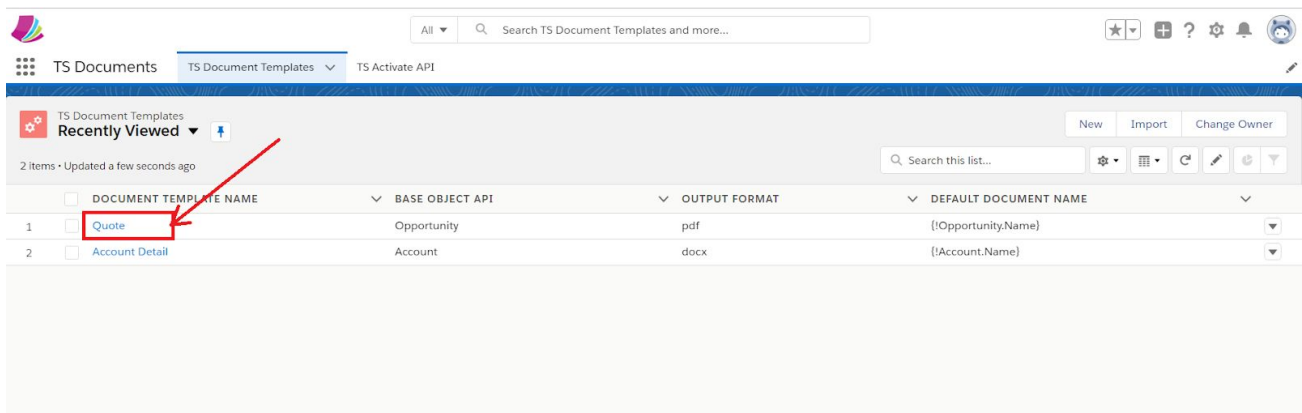
- **GDoc Template Document ID:** Paste Google Docs document ID. Open google doc in your google drive and copy the google doc ID from Google Doc URL.



- **Output format:** New document gets downloaded in the output format and attached to the Salesforce record. Supported outputs are: (.docx, .html, .odt, .pdf, .rtf, .txt)

4. TS Document Template Builder

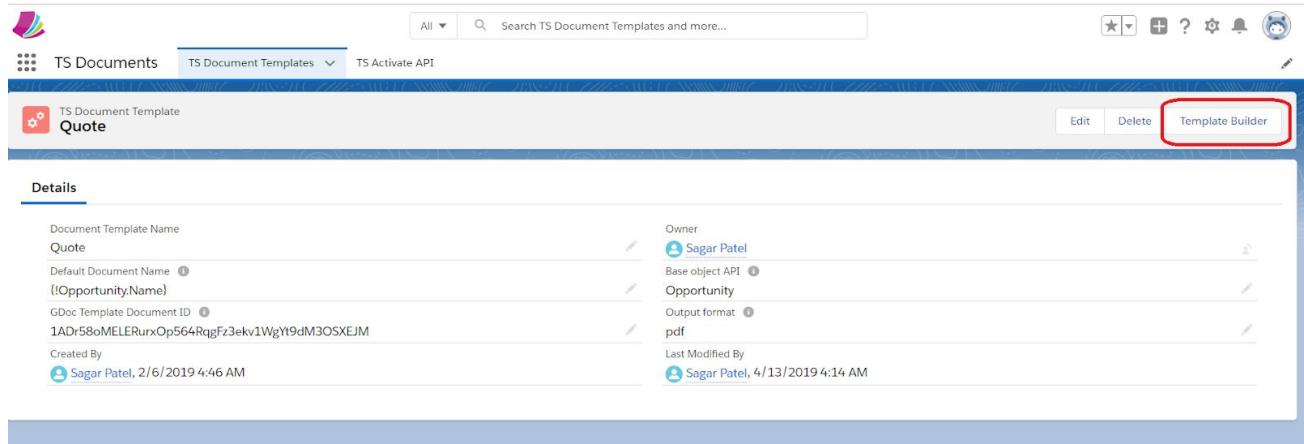
- Go to the TS Document Template tab and click on the template name



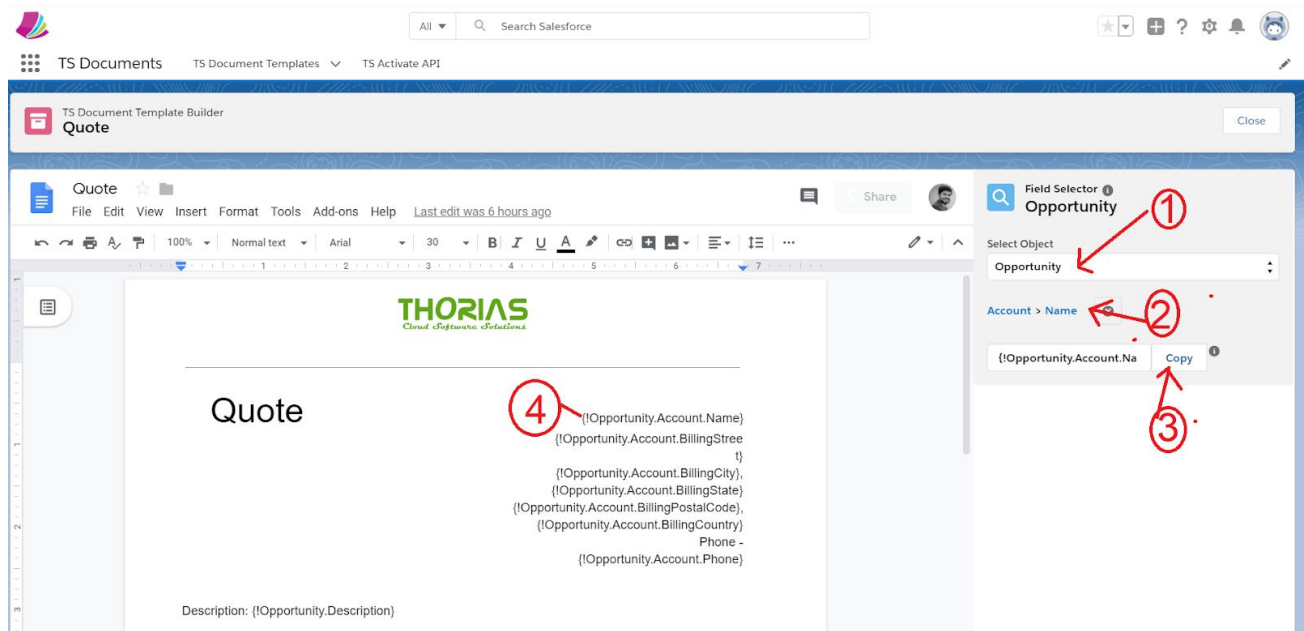
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- Now click on Template Builder button on the top right,



- Now Edit the template using template builder UI



- Add related object data in table format

The screenshot shows the TS Documents editor interface. The main document area contains a table with the following structure:

Name	Price	Qty	Total
{!Opportunity.r.OpportunityLineItems.Product2.Name}	{!Opportunity.r.OpportunityLineItems.ListPrice}	{!Opportunity.r.OpportunityLineItems.Quantity}	{!Opportunity.r.OpportunityLineItems.TotalPrice}
			{!Opportunity.Amount}

Annotations with red circles and arrows:

- ① Points to the 'Field Selector' panel on the right.
- ② Points to the 'Product2 > Name' field in the selector.
- ③ Points to the 'Copy' button in the selector.
- ④ Points to the table header 'Name'.

- Once you are done with template click on close and Add the TS Document Lightning Component in object record page. See next step.

5. TS Document Lightning Component

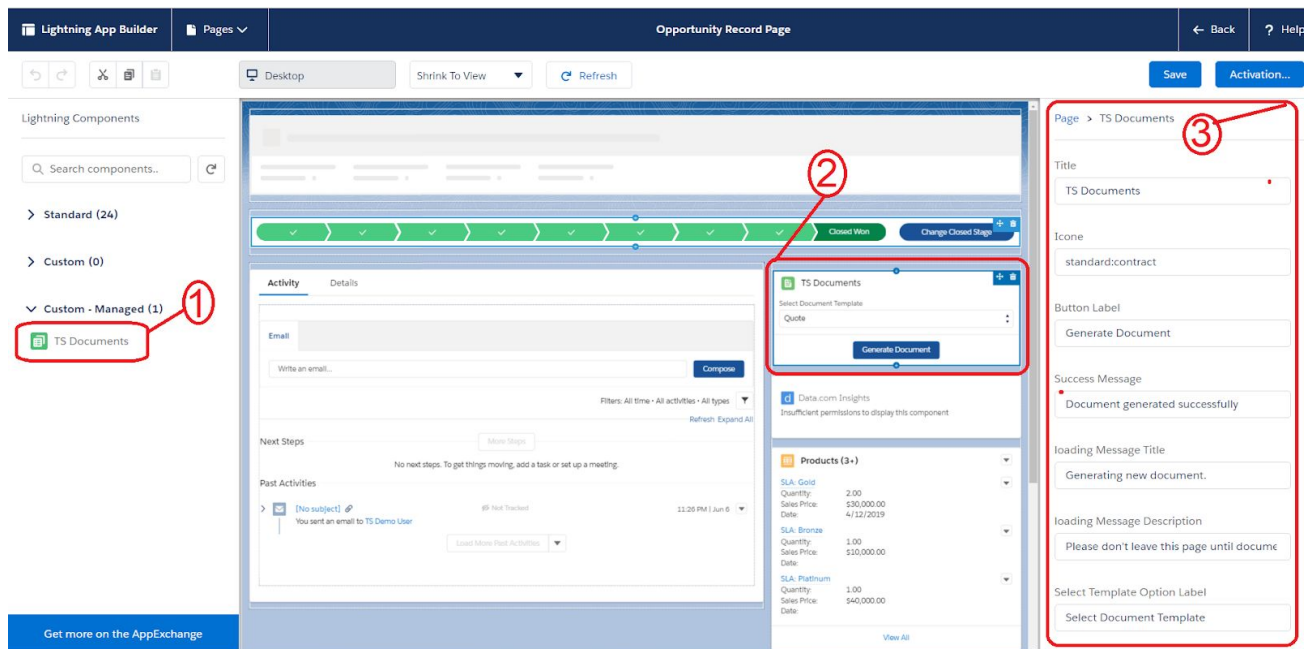
- Goto the Base object record detail page. For Example, here we are going to the opportunity object record detail page and click on the edit page.

The screenshot shows the Salesforce Opportunity record detail page for 'Express Logistics SLA'. The page includes fields for Account Name, Close Date, Amount, and Opportunity Owner. A dropdown menu is open on the right side, showing options: Setup, Service Setup, Developer Console, Edit Page (highlighted with a red box), and Edit Object.

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- Now you are on the App Builder Screen. Scroll to the manage package component area and drag and drop the TS Documents Component to the right side and click on save.



- Now you are all set to use TS Documents

