



iDialogue Template Designer Guide

Last updated February 2020

Overview and Prerequisites	2
Enabling The Template Tag Builder	2
Document Template Configuration	4
Template Preview Console	5
Tag Structure	7
Objects	7
Tag Builder	8
Merge Tags	10
Tag Value Types	11
String	11
DateTime	11
Currency	11
Table Row Collection Tags	12
Table Filtering	13
Template Preview	15
Test Records	16
System Tags	18
DateTime	18
Dynamic Tags / Formula Fields	20
iDialogue Merge Tags (Email and Portals)	21
Member Object	22
Room Object	22
Contact and Support	23

Overview and Prerequisites

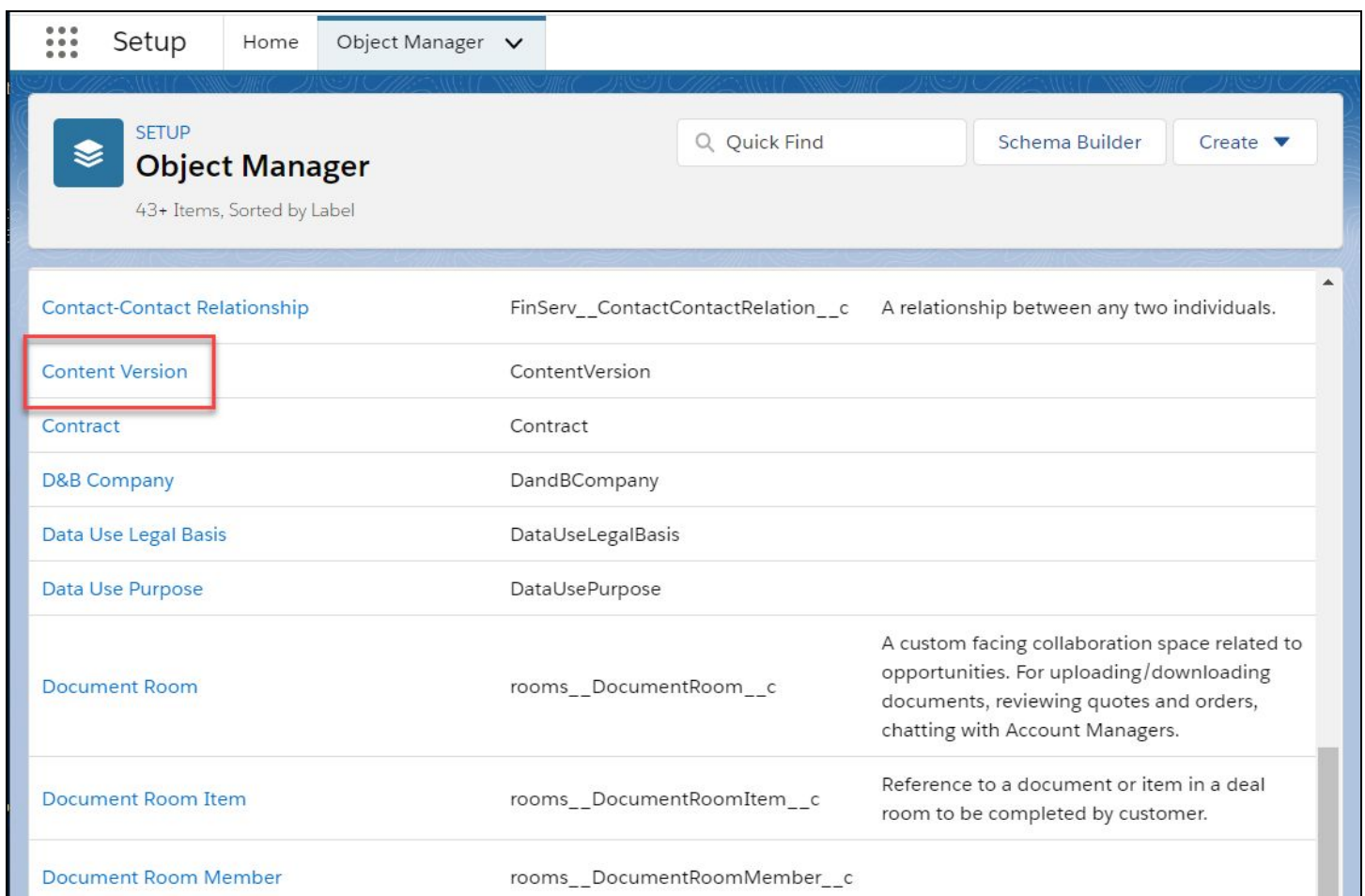
Documents generated by iDialogue use Microsoft Word DOCX formatted files containing formatted merge tags. This document provides complete details for template design and development.

Intended user is a Salesforce System Administrator or legal document Author with basic Salesforce knowledge.

It's assumed the steps in the iDialogue Admin Quick Start Guide have been completed prior to reading this document.

Enabling The Template Tag Builder

From Setup -> Object Manager, search for "Content Version" and then select a page layout.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main header area displays the 'Object Manager' title, a search bar labeled 'Quick Find', and buttons for 'Schema Builder' and 'Create'. Below the header, a table lists various objects. The 'Content Version' object is highlighted with a red box. The table columns are: Object Name, API Name, and Description.

Object Name	API Name	Description
Contact-Contact Relationship	FinServ__ContactContactRelation__c	A relationship between any two individuals.
Content Version	ContentVersion	
Contract	Contract	
D&B Company	DandBCompany	
Data Use Legal Basis	DataUseLegalBasis	
Data Use Purpose	DataUsePurpose	
Document Room	rooms__DocumentRoom__c	A custom facing collaboration space related to opportunities. For uploading/downloading documents, reviewing quotes and orders, chatting with Account Managers.
Document Room Item	rooms__DocumentRoomItem__c	Reference to a document or item in a deal room to be completed by customer.
Document Room Member	rooms__DocumentRoomMember__c	

Drag the “Template Tag Builder” custom formula field onto the page layout and Save.
Additional fields describing the document template are also available, such as word count, tag count, etc...

Setup Home Object Manager

SETUP > OBJECT MANAGER
Content Version

Details
Fields & Relationships
Page Layouts
Compact Layouts
Field Sets
Object Limits
Record Types
Search Layouts
Search Layouts for Salesforce Classic

Save Quick Save Cancel Undo Redo Layout Properties

Fields
Buttons
Mobile & Lightning Actions
Expanded Lookups
Report Charts

Quick Find Field Name

Section	Created Date	External Data Sou...	Form Input Count	Is S
Blank Space	Data Source	File Extension	Front Matter	Is Tr
Asset File Enabled	Description	File Privacy on R...	iDialogue API Las...	Lan
Created By	Error Count	File Type	Is Fillable	Las

Content Version Detail

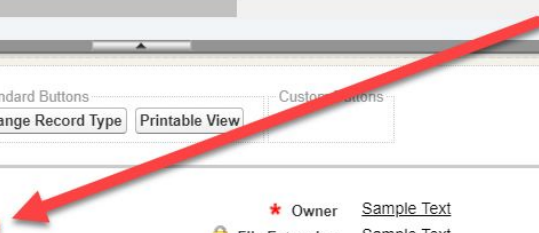
Standard Buttons
Change Record Type Printable View

Custom Buttons

Fields (Header not visible)

* Title	Sample Text
Template Tag Builder	Sample Text
Description	Sample Text
Created By	Sample Text
Last Modified Date	10/24/2019 6:12 AM

* Owner	Sample Text
File Extension	Sample Text
File Type	Sample Text
Size	45,196



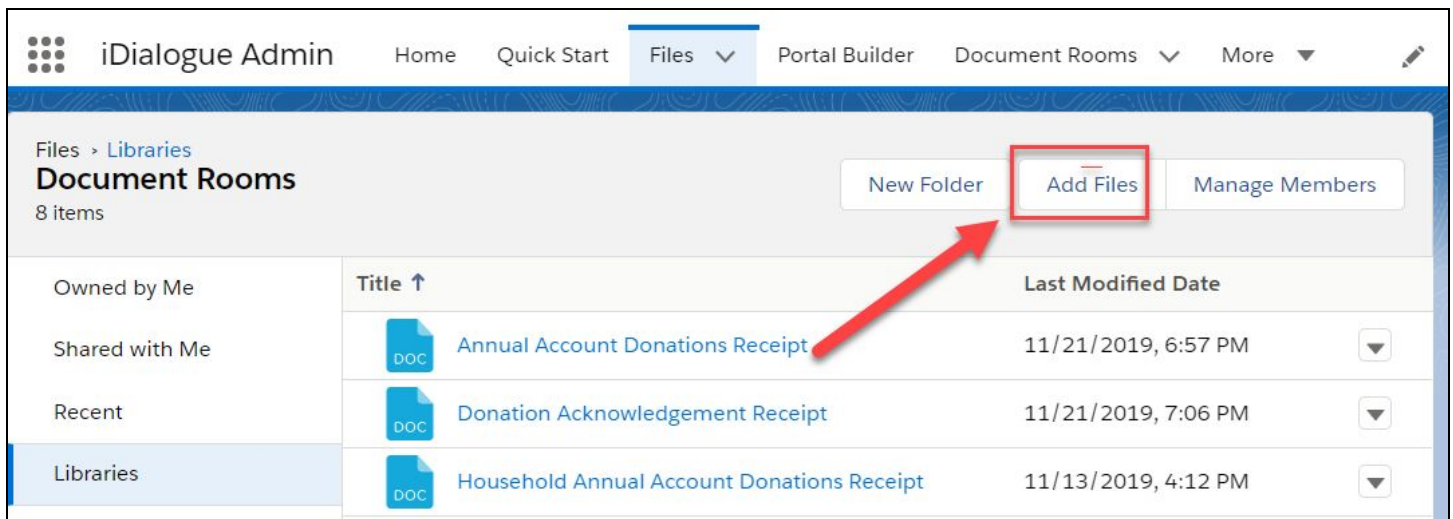
Document Template Configuration

Visit the “Templates” page at <https://www.getpacificapps.com/templates.html> to download and start with example document templates, or upload your own.

iDialogue supports Microsoft Word DOCX files as templates. Optionally, Google Documents exported to Word DOCX format are also supported.

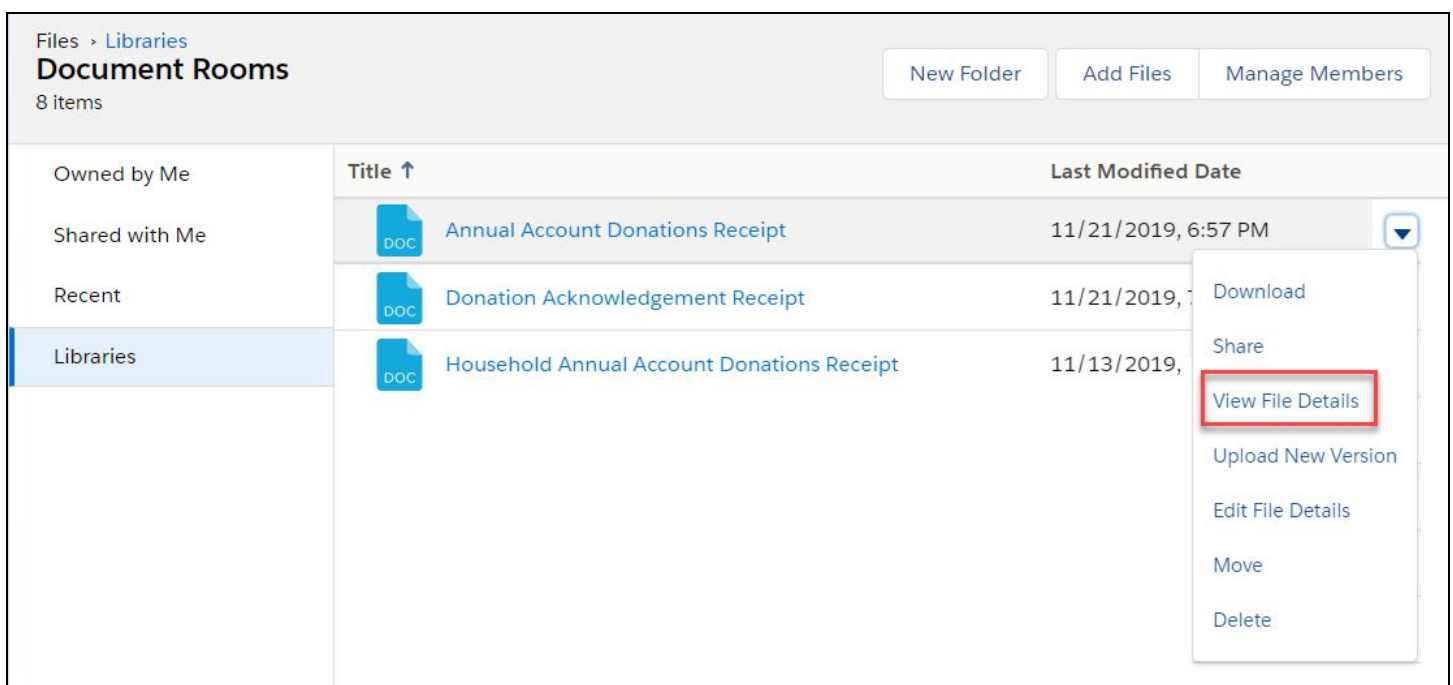
Select a library and click “Add Files” to upload a new template file.

Salesforce users with permission to generate documents must also have access to the uploaded document and library. “View” library permissions are sufficient.



The screenshot shows the iDialogue Admin interface. The top navigation bar includes 'Home', 'Quick Start', 'Files', 'Portal Builder', 'Document Rooms', and 'More'. The 'Files' tab is selected. The main content area is titled 'Document Rooms' and shows a list of documents. The 'Add Files' button is highlighted with a red box, and a red arrow points to it from the first document row.

	Title ↑	Last Modified Date
Owned by Me		
Shared with Me	 Annual Account Donations Receipt	11/21/2019, 6:57 PM
Recent	 Donation Acknowledgement Receipt	11/21/2019, 7:06 PM
Libraries	 Household Annual Account Donations Receipt	11/13/2019, 4:12 PM



The screenshot shows the iDialogue Admin interface. The top navigation bar includes 'Home', 'Quick Start', 'Files', 'Portal Builder', 'Document Rooms', and 'More'. The 'Files' tab is selected. The main content area is titled 'Document Rooms' and shows a list of documents. The 'View File Details' option in the context menu for the first document is highlighted with a red box.

	Title ↑	Last Modified Date
Owned by Me		
Shared with Me	 Annual Account Donations Receipt	11/21/2019, 6:57 PM
Recent	 Donation Acknowledgement Receipt	11/21/2019, 7:06 PM
Libraries	 Household Annual Account Donations Receipt	11/13/2019, 4:12 PM

- Download
- Share
- View File Details
- Upload New Version
- Edit File Details
- Move
- Delete

Click on “View File Details” for a Salesforce File.

File

Annual Account Donations Receipt

DownloadShareUpload New Version

Size

File Extension

Owner

35KB

docx

Christine r

Preview

Details

Title

Annual Account Donations Receipt

Template Tag Builder

Open template tag builder

Description

File Engagement

Views

11

Downloads

2

Shared with (1)

Document Rooms

From file details click on the “Open template tag builder” link.

Template Preview Console

Clicking on the “Open template tag builder” link opens the template preview app.

Note: If the document is not published to a public library, or the document is not of type Word DOCX, then an error message may be displayed. Return to the content library and verify a Word DOCX template is uploaded to a public library before continuing.

Major components of the template preview console:

1. Document template name
2. Master record type
3. Template object entities list
4. Template tags
5. Template preview (HTML)
6. Template Status
7. Manage Test records

The screenshot shows the 'Template Preview Console' interface. At the top, the document name 'Annual Account Donations Receipt' is displayed with a red circle 1. Below it, the file size '34KB' and extension 'docx' are shown. The 'Master Object Type' is set to 'Opportunity' with a red circle 2. The main area has three tabs: 'Objects' (selected, with red circle 3), 'Tags' (with red circle 4), and 'Preview' (with red circle 5). The 'Objects' tab contains a table with columns 'Tag', 'Object Type', and 'Source'. The table lists six objects: Organization, Signer, Account, Item, Opportunity, and User, each with a 'Tag Builder' link. To the right, the 'Template Status' section (with red circle 6) shows 'Status: Valid' and two boxes: 'Objects Mapped 6 of 6' and 'Fields Mapped 29 of 29'. Below that, the 'Recent Test Records' section (with red circle 7) includes a table with columns 'Name', 'Last Gen...', and 'Action'. It lists two records: 'Express L...' and 'Edge SLA', each with a 'Generate N' link.

Tag	Object Type	Source
Organization	Global Record	Tag Builder
Signer	Related Record	rooms__Primary
Account	Related Record	AccountId
Item	Table Row	OpportunityLine
Opportunity	Master Record	Query
User	Related Record	OwnerId

Name	Last Gen...	Action
Express L...	2019-12-29 05:38:31 download	Generate N
Edge SLA	2019-11-13 03:49:08 download	Generate N

Tag Structure

iDialogue uses the Salesforce Lightning Handlebars Merge Language (HML) with additional support for formatting attributes.

The syntax consists of two open curly braces, followed by the object name, a period, the field name, and two closing curly braces.

For example, to include your recipient's first name, the merge field is `{{Recipient.FirstName}}`. If you want to include the account ID number of the account related to the email, use this merge field: `{{Account.Id}}`. When you preview or send the email, ID: 001234567890123 displays where you inserted the merge field.

See https://help.salesforce.com/articleView?id=handlebars_template_language.htm

To make sure you're using the correct syntax, select merge fields from the tag builder (see below).

Example tag structure:

```
{{ObjectName.FieldName attributeKey="Attribute value"}}
```

Document tags consist of:

- Tag Start
- Object name
- Field name
- Attribute keys
- Attribute values
- Tag End

Upon uploading a Word DOCX to Salesforce, iDialogue will parse the document to determine if it contains any merge tags.

Objects

Tag object labels can be mapped to 4 types of Salesforce objects:

- Master Record
- Related Record
- Table Row
- Global Record

As the object type is selected, a picklist of possible data sources are refreshed. The data source for the Master Record is assumed to be the Master Record Type selected at the top of the page.

If “Related Record” is selected, then a list of all lookup reference fields are displayed in the source picklist. Example: if the Master Record Type is “Opportunity” then the “Account” object tag can be mapped to the Opportunity.AccountId lookup field. All tags in the document labeled “Account” will be merged with data from the specific Account record in context.

Selecting the “Table Row” object displays all possible child records that refer to the Master Record via lookup. Example: a “LineItem” tag of type “Table Row” would likely select “OpportunityLineItem” as its data source.

And finally, the “Global Record” object type is for reserved tags, like “Organization”.

Tag Builder

Once an object type is selected, the tag builder link will open a window of all possible valid tags for the object.

 Document Template

Annual Account Donations Receipt

Size
34KB

File Extension
docx

Master Object Type

Opportunity ▼

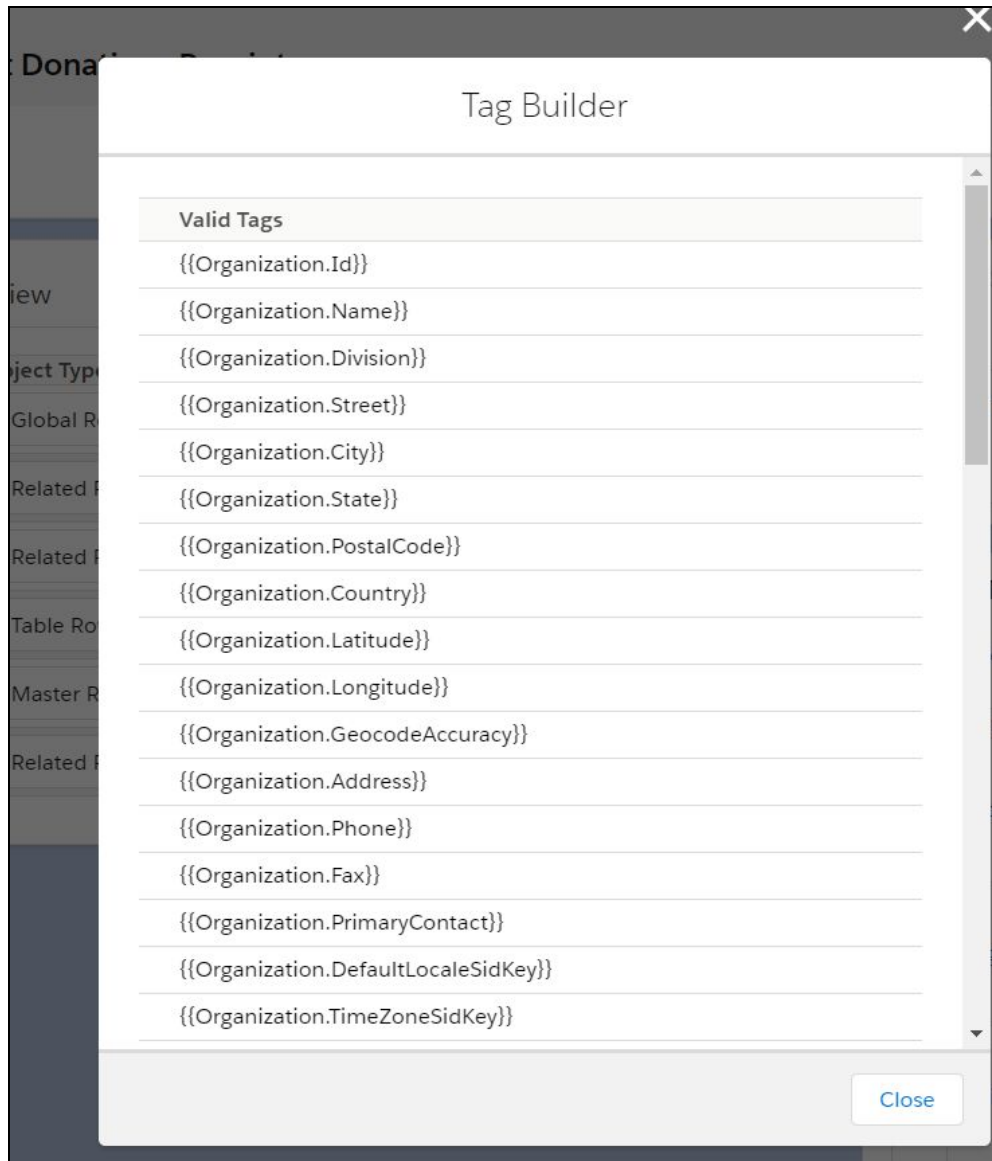
Objects

Tags

Preview

Tag	Object Type		Source
Organization	Global Record ▼	Tag Builder	
Signer	Related Record ▼	Tag Builder	rooms__PrimarySigner ▼
Account	Related Record ▼	Tag Builder	AccountId ▼

Once an object type is mapped to a tag... use the Tag Builder to select from available tags. Paste into Word Document



If the ObjectName portion is missing, then the FieldName is assumed to refer to the Master record type defined for the template.

The “ObjectName” portion refers to a Salesforce object. The exact API name is not required. The mapping of Object names to actual Salesforce API names is accomplished in the Template Preview Designer (See section below)

Merge Tags

The “Tags” tab in the template builder contains a list of all merge tags discovered in the document. As object sources are mapped, the tags are validated against the Salesforce schema to verify the objects and fields are valid. “Yes/No” validation feedback is provided in the far right column. Any fields that cannot be matched to API names in Salesforce are highlighted in red and flagged.

Objects **Tags** Preview

Tag	Type	Salesforce Object	Field	Valid
{{Organization.Name}}	Merge Tag	Organization	Name	Yes
{{Organization.Street}}	Merge Tag	Organization	Street	Yes
{{Organization.City}}	Merge Tag	Organization	City	Yes
{{Organization.State}}	Merge Tag	Organization	State	Yes
{{Organization.PostalCode}}	Merge Tag	Organization	PostalCode	Yes
{{Name}}	Merge Tag	Opportunity	Name	Yes
{{Signer.Name}}	Merge Tag	Contact	Name	Yes

Tag Value Types

String

All Salesforce text fields are rendered as type “String” in template documents.

DateTime

Salesforce fields of type DateTime may be formatted and merged into Word documents.

{{DateTime format=""}}

See sample format template table on following pages.

Currency

Salesforce native currency types are detected and auto-formatted to use 2-point decimals and commas. The currency symbol is auto-detected if multi-currency is enabled in the org. Otherwise, the actual currency symbol may be defined as a tag prefix or using the currency="\$" attribute.

Description	Qty	Unit Price	Discount	Total Price
{{Item.Description}}	{{Item.Quantity}}	{{Item.UnitPrice currency="\$"}}	{{Item.Discount}}%	{{Item.TotalPrice currency="\$"}}
		Sub Total		{{Opportunity.Amount currency="\$"}}
		Discount		
		Subtotal Less Discount		
		Tax Rate		
		Total Tax		
		Quote Total		{{Opportunity.Amount currency="\$"}}

Sample template table with currency values

Table Row Collection Tags

iDialogue supports the binding of Salesforce record collections to table rows.

Table template concepts

1. **First Row:** Table Header
2. **Second Row:** Template row containing child record tags.
3. **All other rows:** Merge tag cells.



{{Organization.Name}}
{{Organization.Street}} {{Organization.City}} {{Organization.State}} {{Organization.PostalCode}}
email@domain.com
Phone

Quote: {{Name}}

Bill To

{{Account.BillingStreet}}
{{Account.BillingCity}}
{{Account.BillingState}}
{{Account.BillingPostalCode}}
{{Account.BillingCountry}}

Ship To

{{Account.ShippingStreet}}
{{Account.ShippingCity}}
{{Account.ShippingState}}
{{Account.ShippingPostalCode}}
{{Account.ShippingCountry}}

Quote Date: {{Date}}

Valid For: 14 days

Front matter should define this

1	Description	Qty	Unit Price	Total Price	2
	{{Item.Description}}	{{Item.Quantity}}	{{Item.UnitPrice}}	{{Item.TotalPrice}}	
			Sub Total	{{Opportunity.Amount}}	
			Discount		
			Subtotal Less Discount		
			Tax Rate		
			Total Tax		
			Shipping / Handling		
			Quote Total	{{Opportunity.Total}}	

Generated By: {{User.Name}}

Generated Date: {{Date format="yyyy-MM-dd"}}

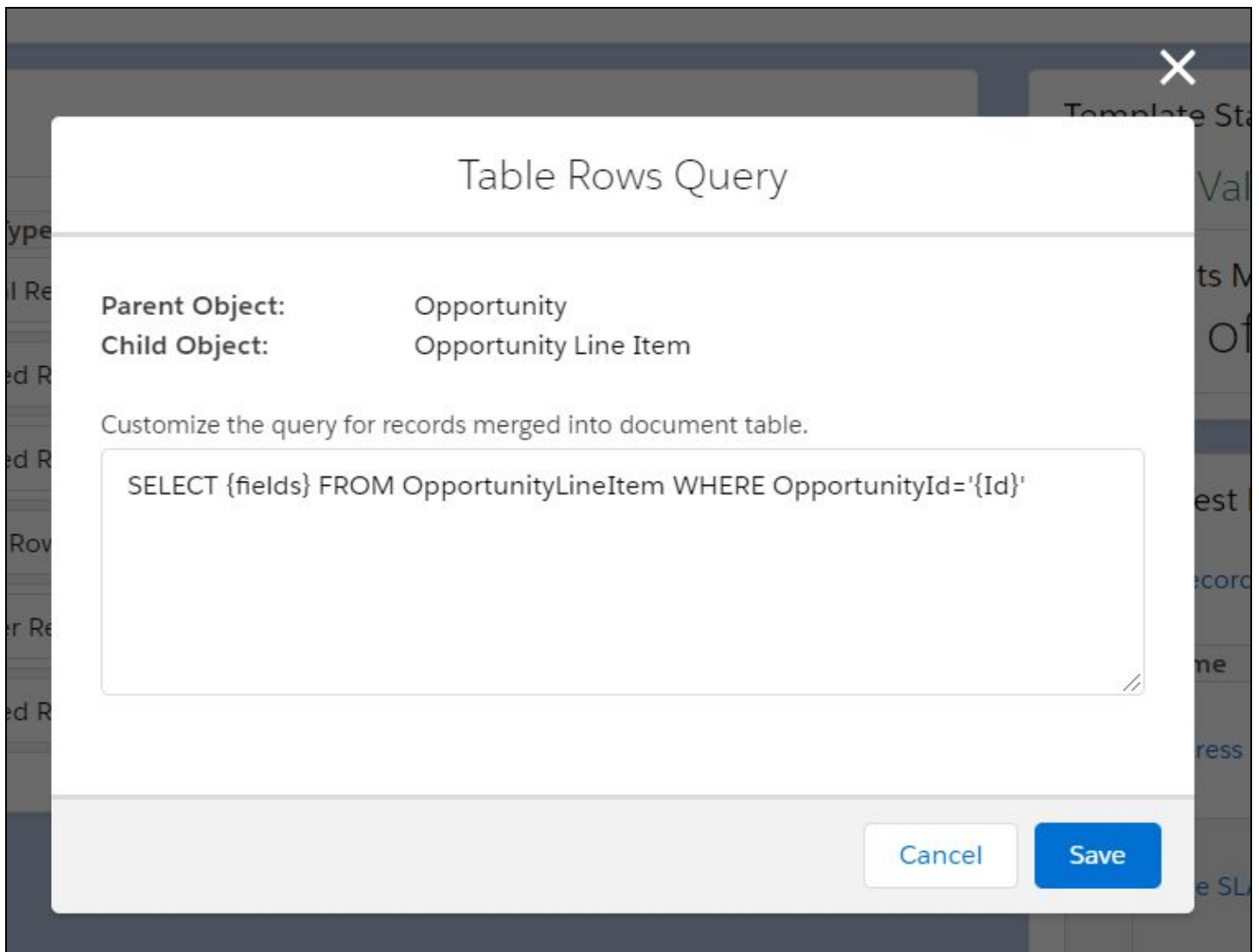
Sample Table template

Table Filtering

The scope of actual child records rendered in a table, and their order, are defined in the tag builder by clicking on the “Query” link in the object tab.

ObjectsTagsPreview

Tag	Object Type		Source
Organization	Global Record ▼	Tag Builder	
Signer	Related Record ▼	Tag Builder	rooms__PrimarySig ▼
Account	Related Record ▼	Tag Builder	AccountId ▼
Item	Table Row ▼	Tag Builder	OpportunityLineIte ▼ Query
Opportunity	Master Record ▼	Tag Builder	
User	Related Record ▼	Tag Builder	OwnerId ▼



Adding a WHERE clause to the query can filter the table items to specific records. By default, all related child records are included in the query.

Template Preview

An HTML preview of the template is available from the “TEMPLATE” tab. For fillable forms, this is the layout end users will see.

Size	File Extension	Master Object Type	
34KB	docx	Opportunity	

Objects

Tags

Preview

Quote Template {{Organization.Name}}

iDialogue

{{Organization.Name}}
{{Organization.Street}}
{{Organization.City}} {{Organization.State}}
{{Organization.PostalCode}}
[email@domain.com](#)
Phone

Sales Order: {{Name}}
Prepared For: {{Signer.Name}} at {{Account.Name}}

Bill To {{Account.BillingStreet}} {{Account.BillingCity}} {{Account.BillingState}} {{Account.BillingPostalCode}} {{Account.BillingCountry}}	Ship To {{Account.ShippingStreet}} {{Account.ShippingCity}} {{Account.ShippingState}} {{Account.ShippingPostalCode}} {{Account.ShippingCountry}}	Quote Date: {{DateTime}} Valid For: 14 days
---	--	--

Test Records

Once all objects and tags in a template have been validated, an actual document may be generated from live data. Click on “Add Test Record” (top right) for a list of recent master record types. Click on a record or paste an actual record ID to define a test record.

×

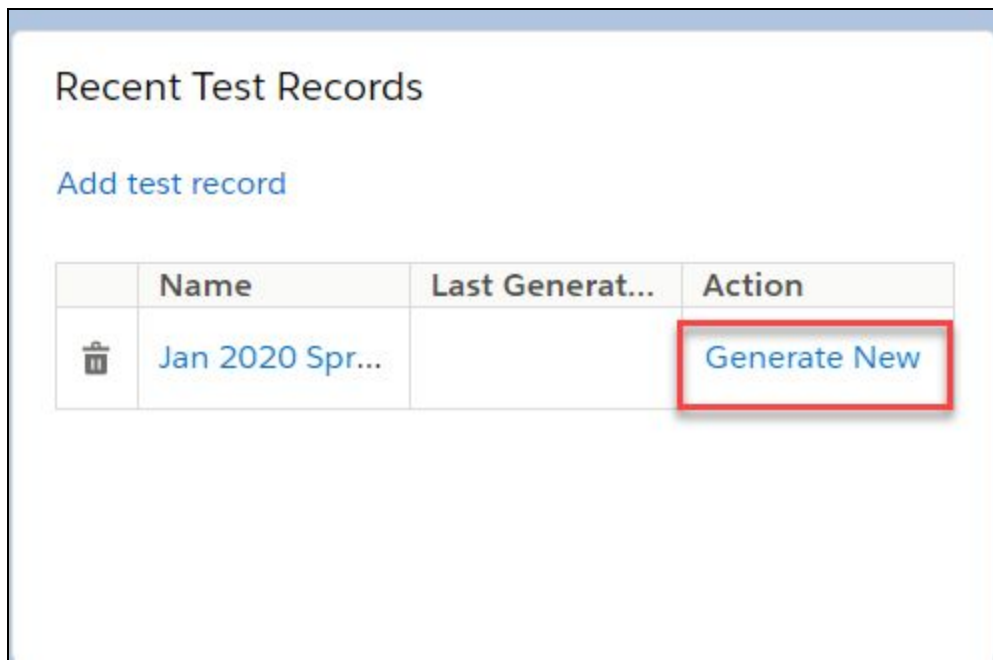
Test Record

Select a record from the list below, or paste a record ID and submit.

Record ID

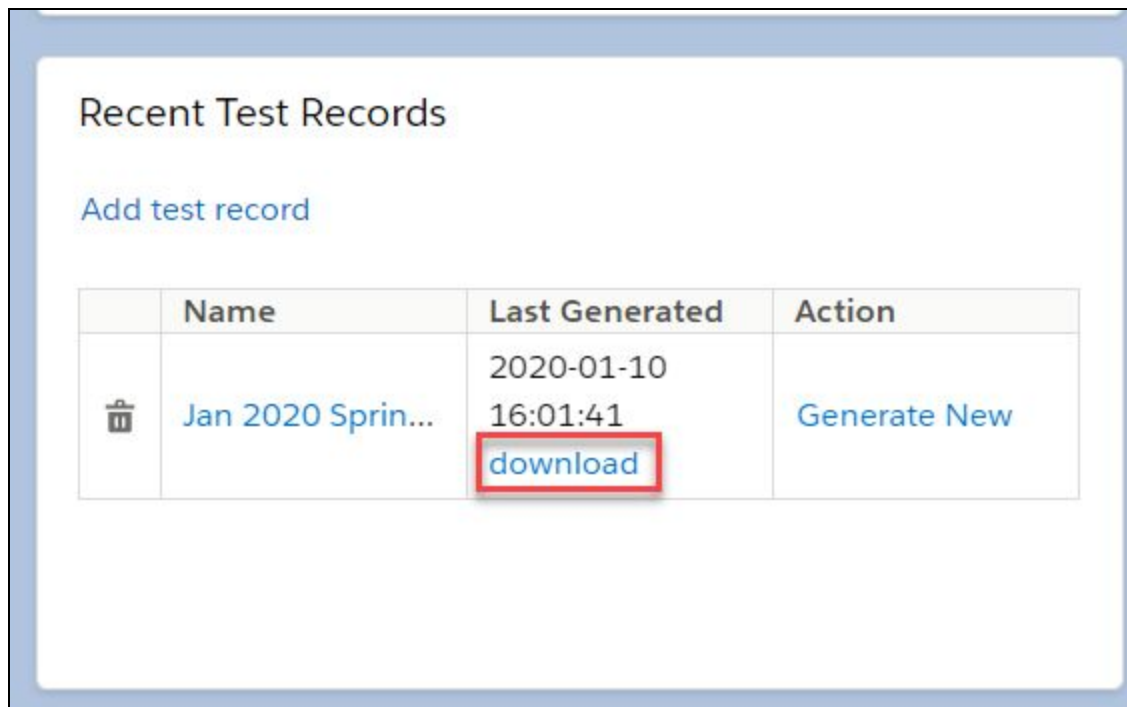
Name	Last Modified	ID
Feb 2020 Spring Food Drive	2020-01-08 17:46:45	0061U00000EPZQ5QAP
Jan 2020 Spring Food Drive	2020-01-08 17:43:46	0061U00000EPZO5QAP

Click on “Generate New” to generate a document using the template.



Generate New link

Click on the “download” link to review the generated document. Note that any recent test records may also be deleted by clicking trash bin icon.



Download link
Merged data

System Tags

Embedding current date and time into documents is accomplished using pre-defined DateTime System tag.

DateTime

Bill To {{Account.BillingStreet}} {{Account.BillingCity}} {{Account.BillingState}} {{Account.BillingPostalCode}} {{Account.BillingCountry}}	Ship To {{Account.ShippingStreet}} {{Account.ShippingCity}} {{Account.ShippingState}} {{Account.ShippingPostalCode}} {{Account.ShippingCountry}}	Quote Date: {{Date}} Valid For: 14 days
---	--	--

Front matter should define this

Description	Qty	Unit Price	Total Price
{{Item.Description}}	{{Item.Quantity}}	{{Item.UnitPrice}}	{{Item.TotalPrice}}
		Sub Total	{{Opportunity.Amount}}
		Discount	
		Subtotal Less Discount	
		Tax Rate	
		Total Tax	
		Shipping / Handling	
		Quote Total	{{Opportunity.Total}}

Generated By: {{User.Name}}
Generated Date: {{Date format="yyyy-MM-dd"}}
Generated Time: {{DateTime format="yyyy-MM-dd HH:mm:ss"}}
Generated For: {{Contact.FirstName}} {{Contact.LastName}}
Approved and Signed by: {{Contact.Signature}}
Signed Date: {{Contact.SignedDate}}

Template with Date format

Tag format:

```
{{DateTime format="display format"}}
```

The format attribute supports all Java SimpleDateFormat formats.

<https://docs.oracle.com/javase/7/docs/api/java/text/SimpleDateFormat.html>

Letter	Date or Time Component	Presentation	Examples
G	Era designator	Text	AD
y	Year	Year	1996; 96
Y	Week year	Year	2009; 09
M	Month in year	Month	July; Jul; 07
w	Week in year	Number	27
W	Week in month	Number	2
D	Day in year	Number	189
d	Day in month	Number	10
F	Day of week in month	Number	2
E	Day name in week	Text	Tuesday; Tue
u	Day number of week (1 = Monday, ..., 7 = Sunday)	Number	1
a	Am/pm marker	Text	PM
H	Hour in day (0-23)	Number	0
k	Hour in day (1-24)	Number	24
K	Hour in am/pm (0-11)	Number	0
h	Hour in am/pm (1-12)	Number	12
m	Minute in hour	Number	30
s	Second in minute	Number	55
S	Millisecond	Number	978
z	Time zone	General time zone	Pacific Standard Time; PST; GMT-08:00
Z	Time zone	RFC 822 time zone	-0800
X	Time zone	ISO 8601 time zone	-08; -0800; -08:00

Examples

Date and Time Pattern	Result
"yyyy.MM.dd G 'at' HH:mm:ss z"	2001.07.04 AD at 12:08:56 PDT
"EEE, MMM d, 'yy"	Wed, Jul 4, '01
"h:mm a"	12:08 PM
"hh 'o'clock' a, zzzz"	12 o'clock PM, Pacific Daylight Time
"K:mm a, z"	0:08 PM, PDT

"yyyyy.MMMMM.dd GGG hh:mm aaa"	02001.July.04 AD 12:08 PM
"EEE, d MMM yyyy HH:mm:ss Z"	Wed, 4 Jul 2001 12:08:56 -0700
"yyMMddHHmmssZ"	010704120856-0700
"yyyy-MM-dd'T'HH:mm:ss.SSSZ"	2001-07-04T12:08:56.235-0700
"yyyy-MM-dd'T'HH:mm:ss.SSSXXX"	2001-07-04T12:08:56.235-07:00
"YYYY-'W'ww-u"	2001-W27-3

Dynamic Tags / Formula Fields

iDialogue supports the embedding of dynamic content using Salesforce formula fields.

Example: “If Shipping Country equals US, then append a contract clause about US Shipping”.

In iDialogue templates, Salesforce is the system of record of “what” content gets injected into a template. And Word documents are the system of record of “where” the content rendered.

To inject a US shipping clause into a document, select the master record type. In this case the “Opportunity” record.

Create a custom formula field of type Text.

Create a macro

IF(ShippingCountry = ‘US’, ‘Text to display’, ‘Else alternative text’)

NOTE: The maximum number of displayed characters after an evaluation of a formula expression is 1,300.

Name the custom field: “Contract_US_Shipping_Clause__c”

Insert a tag into the Word document where the clause should appear.

{{Opportunity.Contract_US_Shipping_Clause__c}}

Upload, validate, and generate a PDF from a test record to validate text formula.

iDialogue Merge Tags (Email and Portals)

Emails and portal web pages rendered by iDialogue can be personalized using merge tags in both outbound email and inbound portal pages.

The template syntax is based on the Salesforce Lightning Handlebars Merge Language (HML).

https://help.salesforce.com/articleView?id=handlebars_template_language.htm

Example:

```
Hello {{Member.Name}},  
  
Welcome to your personalized document room!  
  
Click here to access your documents: {{Room.URL}}  
  
Regards,  
  
{{Owner.Name}}
```

The HML syntax consists of two open curly braces, followed by the object name, a period, the field name, and two closing curly braces.

Member Object

The “Member” object name provides a generic abstraction to the various User, Contact, and Person Account contexts.

When inviting an Industry Solution contact, such as a Health Cloud Patient, then `{{Member.FieldName}}` will automatically render using the source Person Account record.

Similarly, `{{Person.FieldName}}` will render from a User record when inviting other Users to a room.

HML Tag	Renders
<code>{{Member.Name}}</code>	Full name: First + Last name
<code>{{Member.FirstName}}</code>	First name
<code>{{Member.LastName}}</code>	Last name
<code>{{Member.Email}}</code>	Email address

Custom fields:

If custom fields are referenced in email templates, such as `{{Member.CustomFieldName__c}}` then the rendering engine will attempt to render and merge the field using the database record in context.

Room Object

HML Tag	Renders
<code>{{Room.Name}}</code>	The document room name defined in portal builder.
<code>{{Room.URL}}</code>	
<code>{{Room.MemberLink}}</code>	Embeds an anchor <code><a/></code> tag with link to document room including a unique “id” parameter with Person-specific token.

Contact and Support

Unlimited support is provided during your 15 day trial. Ongoing Concierge support is available to organizations with 10 or more seats.

Please email support@getpacificapps.com with any questions related to templates.

We are here to help!