



eSign and Document Generation Solutions for Salesforce

Admin Quick Start Guide

Last updated April 2020

Overview	2
Pre-Requisites	3
Audience	3
CRM Content	3
Installation	7
Application	8
Connect	9
Content Library	10
Setup Libraries	10
Library Access	10
Content Version Page Layout	12
Document Template Configuration	15
Template Preview Console	18
Master Record Type	19
Template Objects	19
Dialogue Portals	20
Portal Plugins	21
Publishing	21
Lightning Component	22
Resources	23

Overview

Welcome to iDialogue for Salesforce! Estimated time to complete a basic installation and setup is less than 30 minutes. Unlimited support is included with your 15 day trial, so please contact support@getpacificapps.com or use the in-app Quick Start support component to ask us questions anytime. Document template design and workflow automations may require more effort and are documented separately in the following guides:

iDialogue Document Designers Guide

iDialogue Document Workflow and Automation Guide

The screenshot displays the iDialogue Admin interface. The top navigation bar includes links for Home, Quick Start (active), Files, Dialogue Portals, Document Rooms, iDialogue Events, and More. The main content area features a 'Quick Start' header with the iDialogue logo and the text 'Welcome to iDialogue!'. Below this, there are three main sections: 'Quick Start Links' on the left, 'Connection Status' in the center, and a support form on the right. The 'Quick Start Links' section lists tasks such as 'Enabling CRM Content', 'Uploading Word doc templates', 'Configuring Dialogue portals', and 'Add Lightning component to page layout'. The 'Connection Status' section shows a green circular icon with a white 'iD' logo and the text 'iDialogue successfully connected. API User: Daniel Ramirez (dan@idialogue.package)', with a 'Change API Connection User' button below. The support form on the right, titled 'Questions? We're here to...', includes a 'From:' field with 'christine@getpacificapps.com', a 'Message' input field, and a 'Submit' button. A 'Latest News' section at the bottom right mentions 'Generate Year-End Donation Letters for Salesforce NPSP'.

iDialogue Admin

Home Quick Start Files Dialogue Portals Document Rooms iDialogue Events More

Quick Start
Welcome to iDialogue!

Quick Start Links

- Enabling CRM Content
- Uploading Word doc templates
- Configuring Dialogue portals
- Add Lightning component to page layout
- View all knowledge base articles

Connection Status

iDialogue successfully connected. API User: Daniel Ramirez (dan@idialogue.package)

[Change API Connection User](#)

Questions? We're here to...

From: christine@getpacificapps.com

Message

[Submit](#)

Latest News

[Generate Year-End Donation Letters for Salesforce NPSP](#)

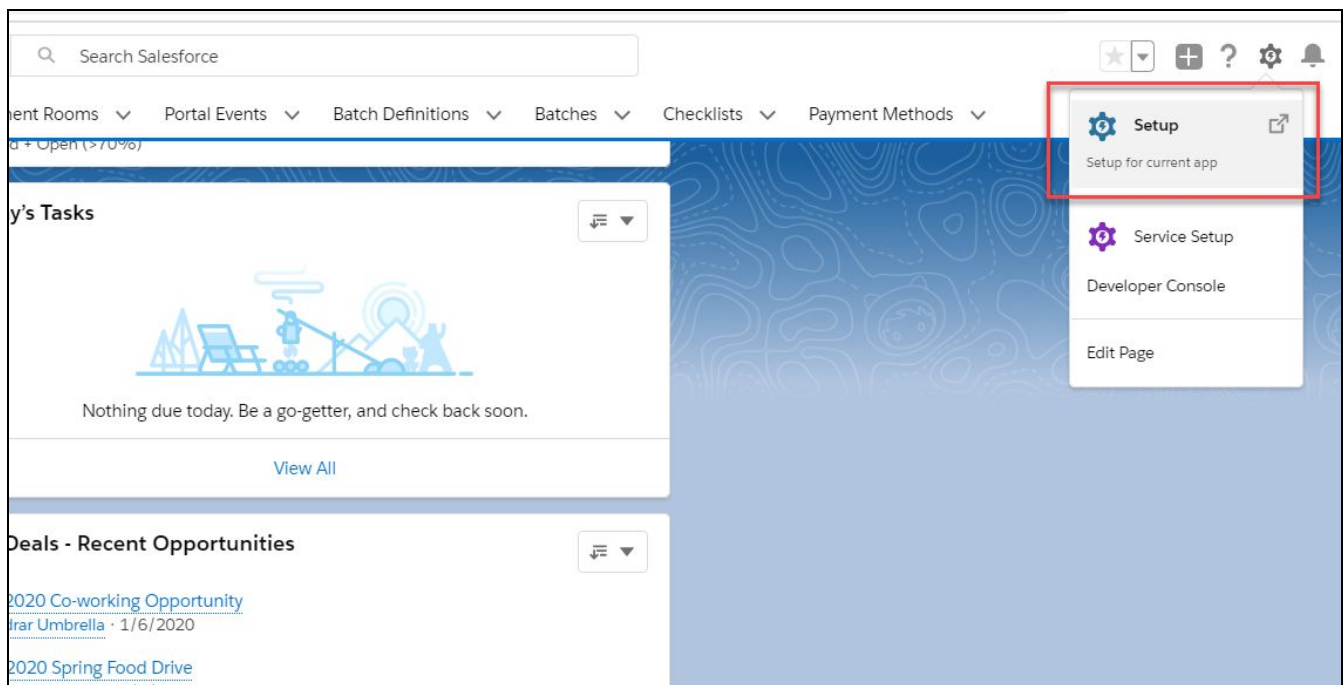
Pre-Requisites

Audience

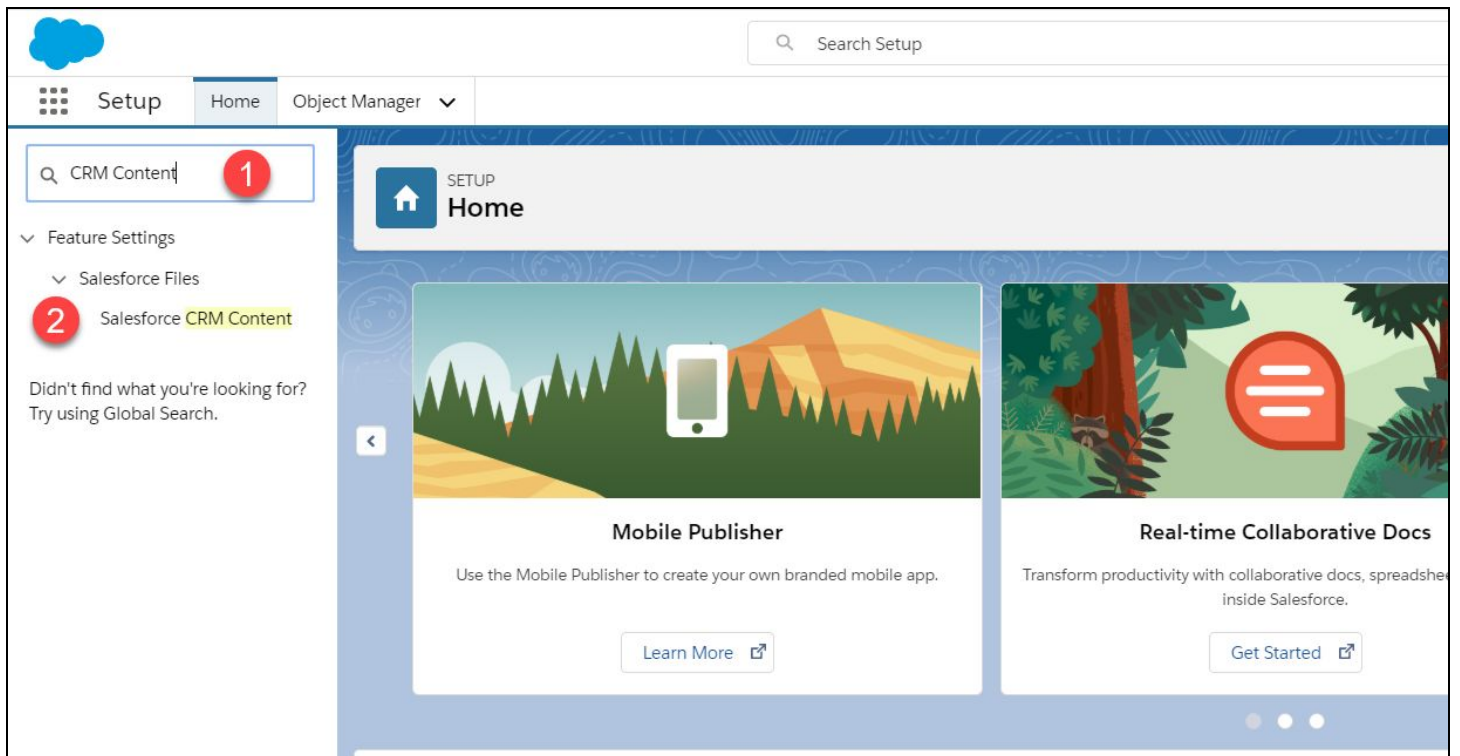
This guide assumes a System Administrator or Salesforce user with permissions to install AppExchange applications.

CRM Content

CRM Content must be enabled prior to package installation.
To enable CRM content, enter Salesforce Setup...

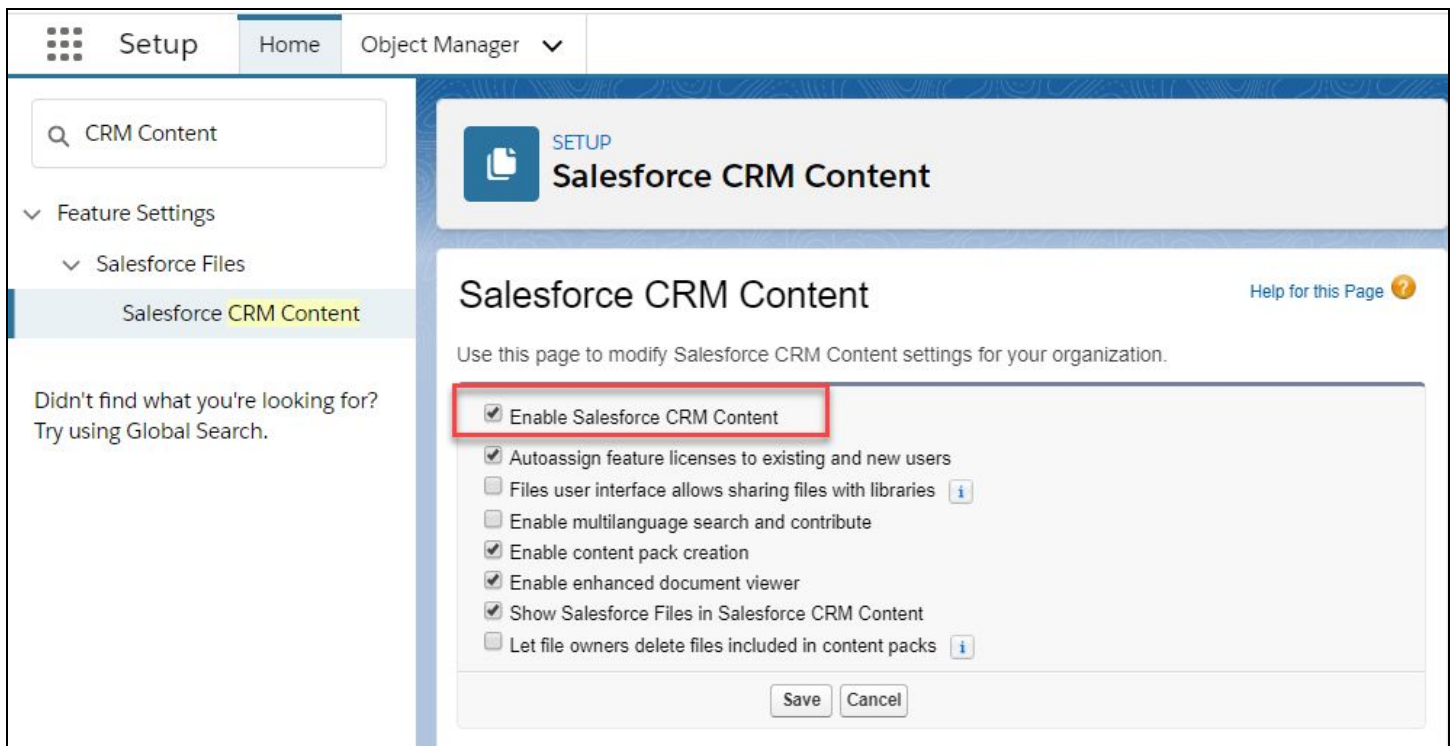


Locate the “Salesforce CRM Content” settings from the Search field, and choose Salesforce CRM Content.



Enable the checkbox option for “Enable Salesforce CRM Content” and hit “Save”.

All other checkboxes are optional. It’s recommended to also enable the “Enhanced Document Viewer”



The screenshot shows the Salesforce Setup interface. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. A search bar on the left contains the text 'CRM Content'. Below the search bar, a sidebar lists 'Feature Settings' and 'Salesforce Files', with 'Salesforce CRM Content' highlighted. The main content area is titled 'Salesforce CRM Content' and includes a 'Help for this Page' link. Below the title, a message states: 'Use this page to modify Salesforce CRM Content settings for your organization.' A list of settings follows, with the first option, 'Enable Salesforce CRM Content', highlighted by a red rectangle. Other settings include 'Autoassign feature licenses to existing and new users', 'Files user interface allows sharing files with libraries', 'Enable multilanguage search and contribute', 'Enable content pack creation', 'Enable enhanced document viewer', 'Show Salesforce Files in Salesforce CRM Content', and 'Let file owners delete files included in content packs'. At the bottom of the settings list are 'Save' and 'Cancel' buttons.

Setup Home Object Manager

CRM Content

Feature Settings

Salesforce Files

Salesforce CRM Content

Didn't find what you're looking for? Try using Global Search.

SETUP

Salesforce CRM Content

[Help for this Page](#)

Use this page to modify Salesforce CRM Content settings for your organization.

- ☒ Enable Salesforce CRM Content
- ☒ Autoassign feature licenses to existing and new users
- ☐ Files user interface allows sharing files with libraries [i](#)
- ☐ Enable multilanguage search and contribute
- ☒ Enable content pack creation
- ☒ Enable enhanced document viewer
- ☒ Show Salesforce Files in Salesforce CRM Content
- ☐ Let file owners delete files included in content packs [i](#)

Save Cancel

Advanced Library permissions may also be enabled, but are not required.

From Salesforce Classic Settings , search Content Permissions.

Click on Permission Name e.g. Workspace Administrator, and then select Library permission options.

Update the Library Permission

Save

Cancel

= Required Information

Details

Permission Name

Workspace Administrator

Description

Library Permission Options

Action	Description
☒ Manage Library	Users can edit library details and library membership
☒ Add Content	Users can publish new content in the library and replace existing content with new versions
☒ Add Content on Behalf of Others	Users can choose an author when publishing content in the library
☒ Archive Content	Users can archive content in the library
☒ Delete Content	Users can delete content from the library
☒ Feature Content	Users can mark content in the library as Featured
☒ View Comment	Users can view comments on content in the library
☒ Add Comment	Users can add comments to content and rate content in the library
☒ Modify Comments	Users can change comments made by any user in the library
☒ Tag Content	Users can add tags to content in the library
☒ Deliver Content	Users can deliver content from this library
☒ Organize File and Content Folder	Users can organize files and content folders in the library

Save

Cancel

Library permissions may require Salesforce Classic to enable.

Installation

Install iDialogue from the AppExchange by clicking on the “Get It Now” button.

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FvKpvUAF>

Starting at \$20 USD per user per month

Get It Now

Discounts available for nonprofits

RATING
★★★★★ (3)

LISTED ON
9/15/2019

LATEST RELEASE
2/5/2020

Document PDF Generation and Collaboration

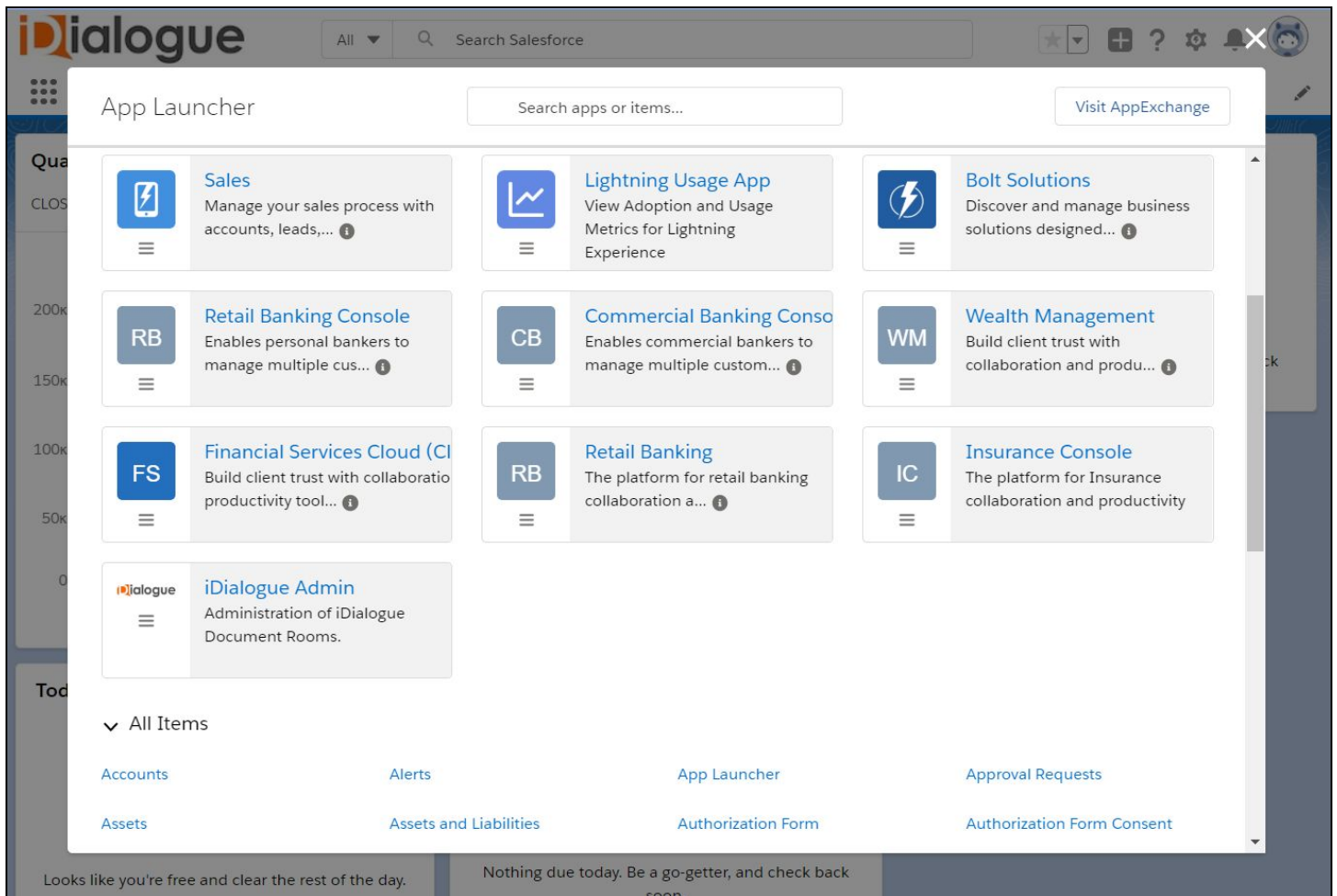
End-to-end document lifecycle management:

- MS Word Merge Templates
- PDF Document Generation
- Document Delivery
- Document Portal
- Activity audit trails
- Document Actions and Execution
- Process Builder Integration
- Durable. 99.99% uptime

1 of 10 : Create checklists of documents to be reviewed by contacts in a personalized portal.

Application

From the lightning app launcher, select the “iDialogue Admin” application. This application is intended for System Administrators and Document Template Authors only. There is also a connected app included with the managed package that may be removed from the app launcher (Salesforce users login to iDialogue portals using the connected app and their OAuth credentials).



Connect

iDialogue connects to Salesforce using the OAuth credentials of an API connection user. This is typically a System Administrator with access to the records being used to generate documents and execute transactions.

While logged in as a Sys Admin user, click on the “Connect API User” link in the Quick Start and follow the authentication steps.

You can revisit the connection tab anytime and click on “Change API Connection User” to update the connection credentials.

The screenshot displays the iDialogue Admin interface. The top navigation bar includes links for Home, Quick Start (active), Files, Dialogue Portals, Document Rooms, iDialogue Events, and More. The main content area features a 'Quick Start' header with the iDialogue logo and the text 'Welcome to iDialogue!'. On the left, a 'Quick Start Links' sidebar lists: 'Enabling CRM Content', 'Uploading Word doc templates', 'Configuring Dialogue portals', 'Add Lightning component to page layout', and 'View all knowledge base articles'. The central 'Connection Status' section shows a green circular icon with a white refresh symbol and the message 'iDialogue successfully connected. API User:', with a 'Change API Connection User' button below. On the right, a 'Questions? We're here to...' contact form is highlighted with a red border; it includes a 'From:' field with 'christine@getpacificapps.com', a 'Message' text area, and a 'Submit' button. Below this is a 'Latest News' section with a link to 'Generate Year-End Donation Letters for Salesforce NPSP'.

Content Library

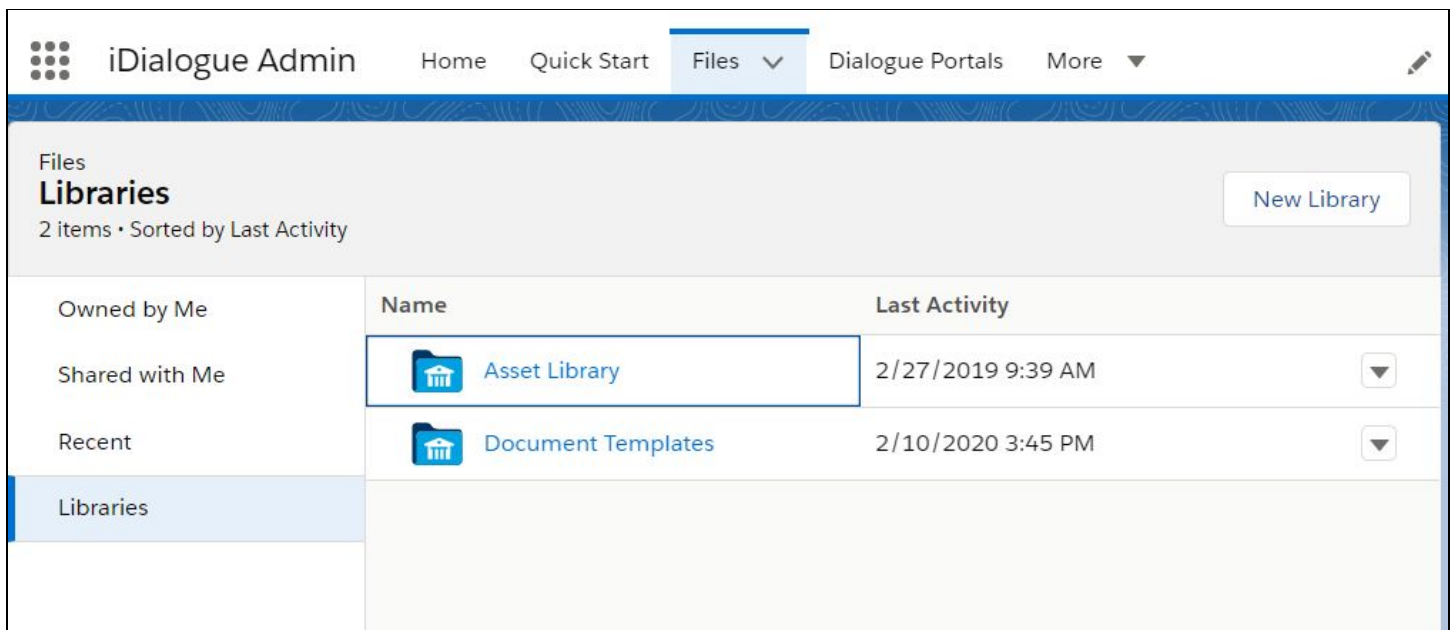
iDialogue templates use Microsoft® Word documents (.docx) uploaded to Salesforce CRM public content libraries.

Enable Salesforce CRM Content

Note: CRM Content must be enabled prior to package installation. See **page 2** for setup requirements.

Setup Libraries

It's recommended to create a top-level library named "Document Templates" with sub-library folders for each portal room, depending on the number of portal rooms to be deployed.



	Name	Last Activity
Owned by Me		
Shared with Me	 Asset Library	2/27/2019 9:39 AM
Recent	 Document Templates	2/10/2020 3:45 PM
Libraries		

Library Access

All users who will generate or share documents must have access to the library templates. Either invite users individually to the library, or create a public group named "Document Library Users" for managing who has access to document library templates.

To generate documents from templates requires at least "Viewer" role access to the library.

Setup

Home

Object Manager

Quick Find

Setup Home

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

ADMINISTRATION

Users

Permission Sets

Profiles

Public Groups

SETUP

Public Groups

Public Groups

Help for this Page

A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.

View: All

Edit

Create New View

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

Action	Label	Group Name	Created By	Created Date
	Document Library Users	Document_Library_Users	Leach, Mike	11/6/2019 9:05 PM

Name

Last Activity

Asset Library

2/27/2019 9:39 AM

Document Templates

11/9/2019 8:45 AM

Manage Library Members

Document Templates

Add Members

Access

Search Public Groups...

Workspace Administr...

Add

Current Members

Document Library Users

Workspace Administr...

Content Version Page Layout

A page layout for the Content Version object is provided with the iDialogue package. This page layout is required to access features like the “Template Tag Builder” and view eSign metrics and statistics.



All ▾

 iDialogue Admin

Home

Quick Start

Files ▾

Dialogue Portals

Document Rooms ▾

iDialogue Events ▾

 File

OpportunityTemplate

Size
35KB

File Extension
docx

Owner
[Mike Leach](#)

Preview

Details

Template Tag Builder ⓘ
[Open template tag builder](#)

Data Source
Record

Master Record Type
Opportunity

Tags

Title
OpportunityTemplate

Description

Last Sync Date

Last Generated Date

iDialogue API Last Sync
4/14/2020, 5:00 PM

Owner
 [Mike Leach](#)

Size
35KB

File Type
WORD_X

File Extension
docx

Created Date
4/14/2020, 7:44 PM

Created By
 [Mike Leach](#), 4/14/2020, 7:44 PM

Last Modified By
 [Mike Leach](#), 4/15/2020, 3:29 PM

Last Modified Date
4/15/2020, 3:29 PM

▼ Template Metrics

Is Template
☒

Is Static
☐

Tag Count
37

Template Has Errors

Form Input Count
0

Paragraph Count
66

Table Count
3

Word Count

Use the “Page Layout Assignment” feature in Salesforce to enable this layout for profiles.

- 1) Go to Setup -> Object Manager
- 2) Quick find search for “Content Version”
- 3) Select “Page Layouts”
- 4) Click on the “Page Layout Assignment” button
- 5) Click “Edit Assignment” and associate the “iDialogue Template” page layout with all profiles requiring template access.

The screenshot shows the Salesforce interface for the 'Content Version' object in the Object Manager. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts (highlighted), Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Page Layouts' and shows '2 Items, Sorted by Page Layout Name'. A 'Quick Find' search bar is present. At the top right of the main area are buttons for 'New' and 'Page Layout Assignment' (highlighted in yellow). Below this is a table with columns: PAGE LAYOUT N..., CREATED BY, and MODIFIED BY. The table lists two page layouts: 'General' and 'iDialogue Template' (highlighted in yellow). The 'iDialogue Template' row shows it was created and modified by 'Mike Leach' on 4/15/2020 at 12:04 PM and 12:05 PM respectively. A dropdown arrow is visible at the end of each row.

PAGE LAYOUT N...	CREATED BY	MODIFIED BY
General	Mike Leach, 2/27/2019, 9:39 AM	Mike Leach, 4/2/2020, 7:01 PM
iDialogue Template	Mike Leach, 4/15/2020, 12:04 PM	Mike Leach, 4/15/2020, 12:05 PM

Content Version

The table below shows the page layout assignments for different profiles.

Edit Assignment	
Profiles	Page Layout
<u>Analytics Cloud Integration User</u>	<u>iDialogue Template</u>
<u>Analytics Cloud Security User</u>	<u>iDialogue Template</u>
<u>Authenticated Website</u>	<u>iDialogue Template</u>
<u>Authenticated Website</u>	<u>iDialogue Template</u>
<u>Chatter External User</u>	<u>iDialogue Template</u>
<u>Chatter Free User</u>	<u>iDialogue Template</u>
<u>Chatter Moderator User</u>	<u>iDialogue Template</u>
<u>Chatter Only User</u>	<u>iDialogue Template</u>
<u>Company Communities User</u>	<u>iDialogue Template</u>
<u>Contract Manager</u>	<u>iDialogue Template</u>
<u>Cross Org Data Proxy User</u>	<u>iDialogue Template</u>
<u>Custom: Marketing Profile</u>	<u>iDialogue Template</u>
<u>Custom: Sales Profile</u>	<u>iDialogue Template</u>
<u>Custom: Support Profile</u>	<u>iDialogue Template</u>
<u>Customer Community Login User</u>	<u>iDialogue Template</u>
<u>Customer Community Plus Login User</u>	<u>iDialogue Template</u>
<u>Customer Community Plus User</u>	<u>iDialogue Template</u>
<u>Customer Community User</u>	<u>iDialogue Template</u>
<u>Customer Portal Manager</u>	<u>iDialogue Template</u>
<u>Customer Portal Manager Custom</u>	<u>iDialogue Template</u>
<u>Customer Portal Manager Standard</u>	<u>iDialogue Template</u>
<u>Developer</u>	<u>iDialogue Template</u>
<u>External Identity User</u>	<u>iDialogue Template</u>
<u>Force.com - Free User</u>	<u>iDialogue Template</u>
<u>Gold Partner User</u>	<u>iDialogue Template</u>
<u>High Volume Customer Portal</u>	<u>iDialogue Template</u>
<u>High Volume Customer Portal User</u>	<u>iDialogue Template</u>
Edit Assignment	

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.

 iDialogue Admin

HomeQuick StartFiles ▾Dialogue PortalsMore ▾

Files > Libraries

Document Templates

7 items

New FolderAdd FilesManage Members

	Title ↑	Last Modified Date	
Owned by Me	 AccountTemplate	2/5/2020 6:24 PM	▾
Shared with Me	 DocuSignQuoteTemplate	11/6/2019 8:23 PM	▾
Recent	 iDialogue Google Doc Template	8/21/2019 11:09 AM	▾
Libraries	 OpportunityESignatureTemplate	1/21/2020 10:44 PM	▾
	 OpportunityTemplate	2/10/2020 3:45 PM	▾
	 Quote Template	2/9/2020 10:57 AM	▾
	 sampleText	6/4/2019 5:12 PM	▾

Files > Libraries

Document Rooms

8 items

New Folder Add Files Manage Members

	Title ↑	Last Modified Date	
Owned by Me	 Annual Account Donations Receipt	11/21/2019, 6:57 PM	▼
Shared with Me	 Donation Acknowledgement Receipt	11/21/2019, 7:00 PM	
Recent	 Household Annual Account Donations Receipt	11/13/2019, 11:13 AM	
Libraries			

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

Click on “View File Details” to access the template builder tag.

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 (personal “My Documents” are not supported). 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 Object type
3. Template Object Entities list
4. Template tags
5. Template Preview (HTML)
6. Template Status
7. Manage Test records

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	rooms__Primary
Account	Related Record	AccountId
Item	Table Row	OpportunityLine
Opportunity	Master Record	
User	Related Record	OwnerId

Template Status

Status: Valid

Objects Mapped
6 of 6

Fields Mapped
29 of 29

Recent Test Records

Add test record

	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

See the “iDialogue Template Designer Guide” for details on using the tag builder.

Master Record Type

All Documents are generated within the context of a Salesforce record, referred to as the Master Record Type.

Upon uploading a document template, iDialogue automatically determines which object labels are referenced in the template. Any label may be used. For example, templates can use the label “Customer”, as in {{Customer.FirstName}}, then in the tag builder tool, map the label “Customer” to the Salesforce “Contact” record.

If a tag appears without an object name, then it’s assumed to be a field mapped to the master record type.. For example, when “Opportunity” is selected as the Master record type, then all field-only tags in the document, such as {{Amount}}, refer to Opportunity fields.

A master record type must be selected before continuing to the next step.

Template Objects

Examples of tags include:

{{**Organization**.Name}}
{{**Account**.BillingStreet}}
{{**Account**.BillingState}}
{{**Contact**.FirstName}}
{{**Contact**.LastName}}

The portion of the tag highlighted in **BLUE** is the tag “object”. The **RED** portion is the tag “field”.

The “Objects” tab is a listing of all objects identified in the document template. An object may refer to:

- Master Record
- A Related Record
- Table Rows (Child Record)
- Global / System record, such as Organization.

Dialogue Portals

When provisioning portals (also referred to as “rooms” in this guide) for records, users are prompted to select a portal. These are references to templates managed in the “Dialogue Portals”. From the iDialogue Admin app select the “Dialogue Portals” tab.

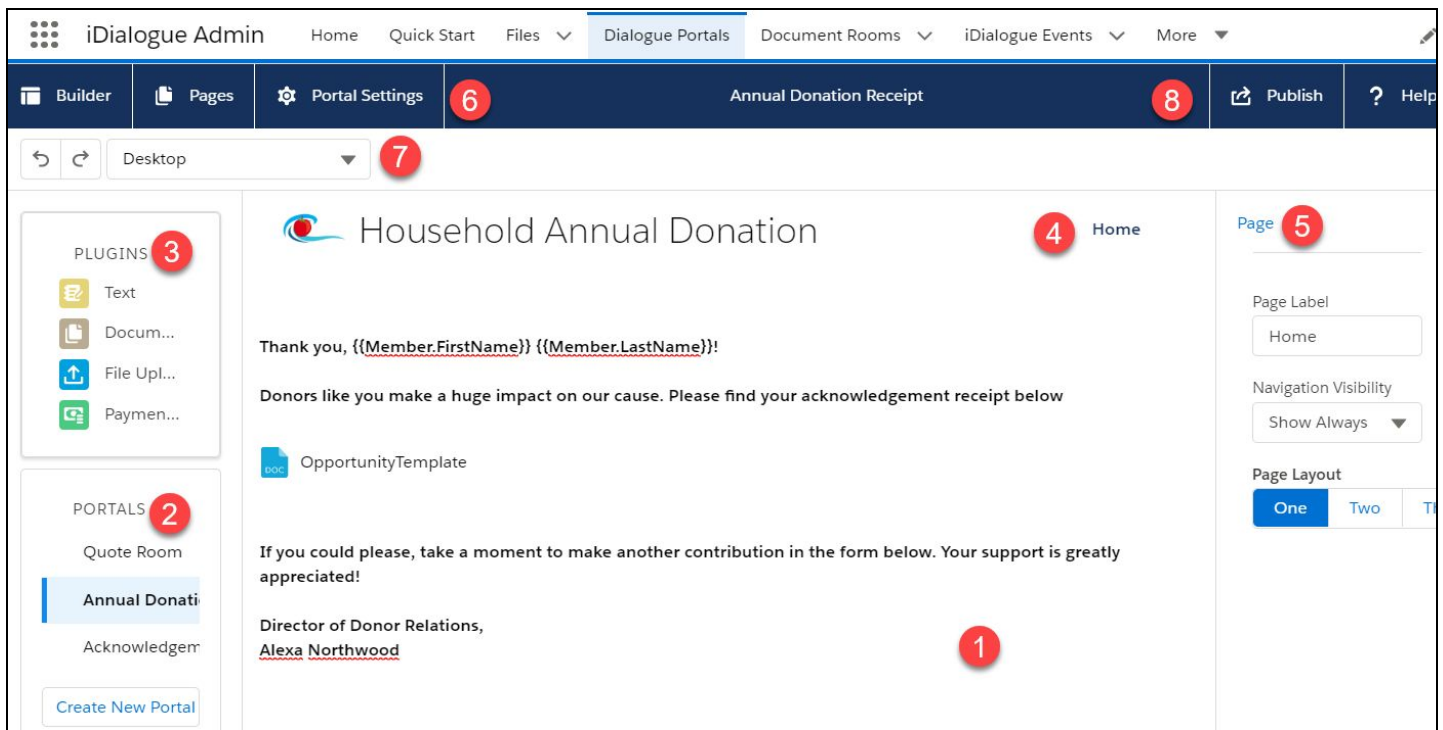
The Salesforce User experience is a “one-click” action to select the portal template. An example portal template is provided with the managed package.

The Dialogue Portals tool provides a simple to use, drag-and-drop, Admin experience for creating transactional sites and portal.

Components of the Dialogue Portals:

1. Page layout workspace
2. Portals
3. Plugins: Text, Document, File Upload, Payment Method, Document Checklist and Webform
4. Page navigation header
5. Page and Plugin Settings
6. Builder, Pages, and Room Settings
7. Layout view: Desktop or Mobile
8. Publish

Customize an existing portal template or click on “Create New Portal” to define a new layout.



Portal Plugins

The Dialogue Portals include several pre-built transactional lightning components.

- Text
- Document
- File Upload
- Payment Method
- Document Checklist
- Webform.

Arrange the plugins on the page, adjust page layout columns, modify fonts, and select documents to be displayed in rooms.

Publishing

Updates to portal template page layouts are automatically saved as drafts. To publish the room template, click the “Publish” button in the upper right corner.

All in-flight rooms will continue to use the same text, document plugins and content versions from the previous portal layout. All new rooms will inherit the new published changes.

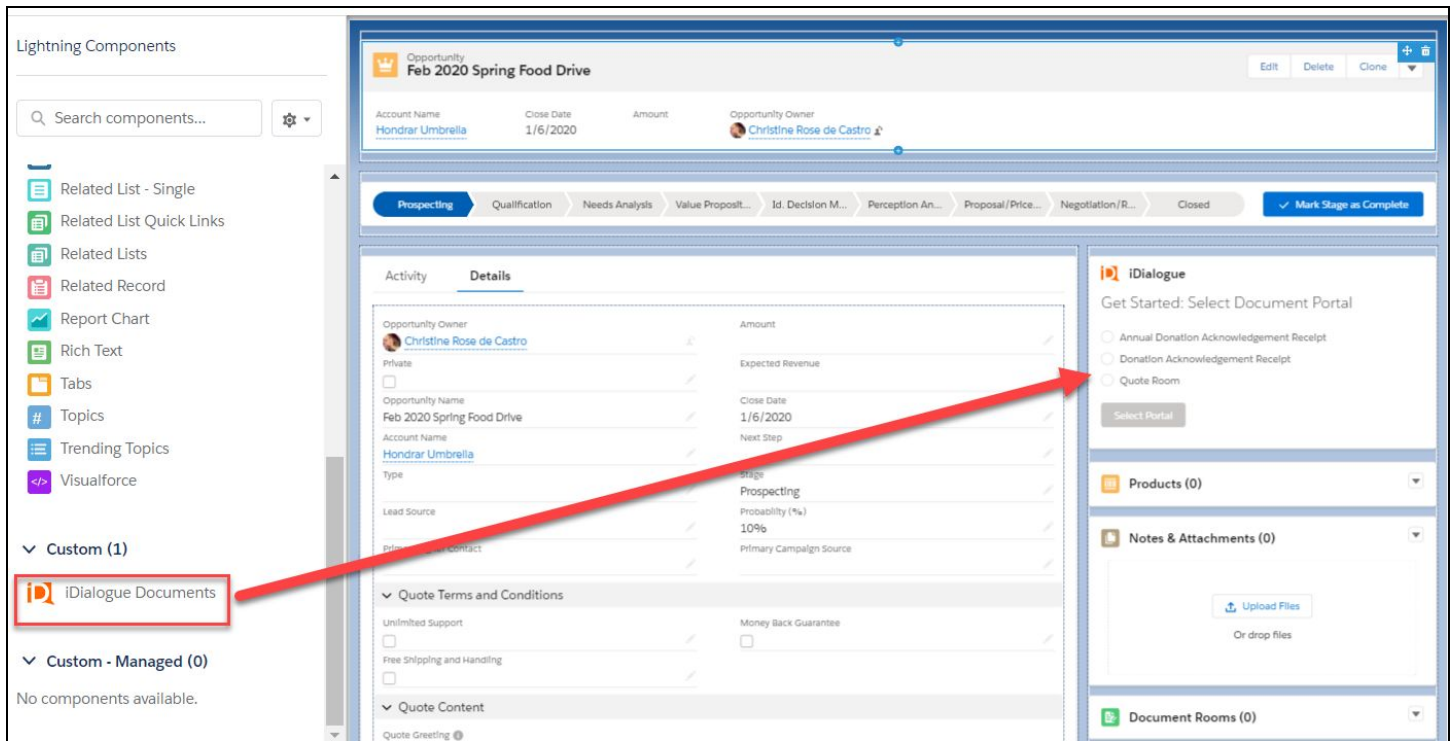
Lightning Component

To provision document rooms, add the “Document Rooms” lightning component to any record layout.

For example, to add the document rooms component to Opportunity page layout, open an Opportunity record and click on “Edit Page” from the Setup gears icon.

The screenshot displays the iDialogue Admin interface. At the top, there's a navigation bar with links to Apps, Gmail, YouTube, and Maps. Below this is the iDialogue logo and a search bar. The main navigation menu includes Home, Quick Start, Files, Dialogue Portals, Document Rooms, and Opportunities. The Opportunities tab is selected, showing a list of opportunities. The first opportunity is 'Feb 2020 Spring Food Drive' by 'Hondrar Umbrella'. Below the list is a progress bar with stages: Prospecti..., Qualificat..., Needs An..., Value Pro..., Id. Decisi..., Perceptio..., Proposal/..., Negotiati..., and Closed. The 'Details' section for the selected opportunity shows fields for Opportunity Owner, Amount, Private (checkbox), Opportunity Name, Close Date, and Account Name. On the right, there's a 'Get Started: Select Document Portal' section with radio buttons for Acknowledgement Receipt, Annual Donation Receipt, and Quote Room, and a 'Select Portal' button. A Setup menu is open, showing options: Setup, Service Setup, Developer Console, Edit Page (highlighted with a red box), and Edit Object.

Drag and drop the “Document Rooms” custom component onto the page layout.



Set any relevant display filtering rules as needed and activate the page layout for intended users and record types.

Resources

For more information and support visit <https://docs.i-dialogue.com>

For free templates to download and use in eSign and document generation solutions, visit <https://www.getpacificapps.com/templates.html>

1 hour of free support is included with your trial! Contact support@getpacificapps.com to schedule a meeting.