eSign and Document Generation Solutions for Salesforce

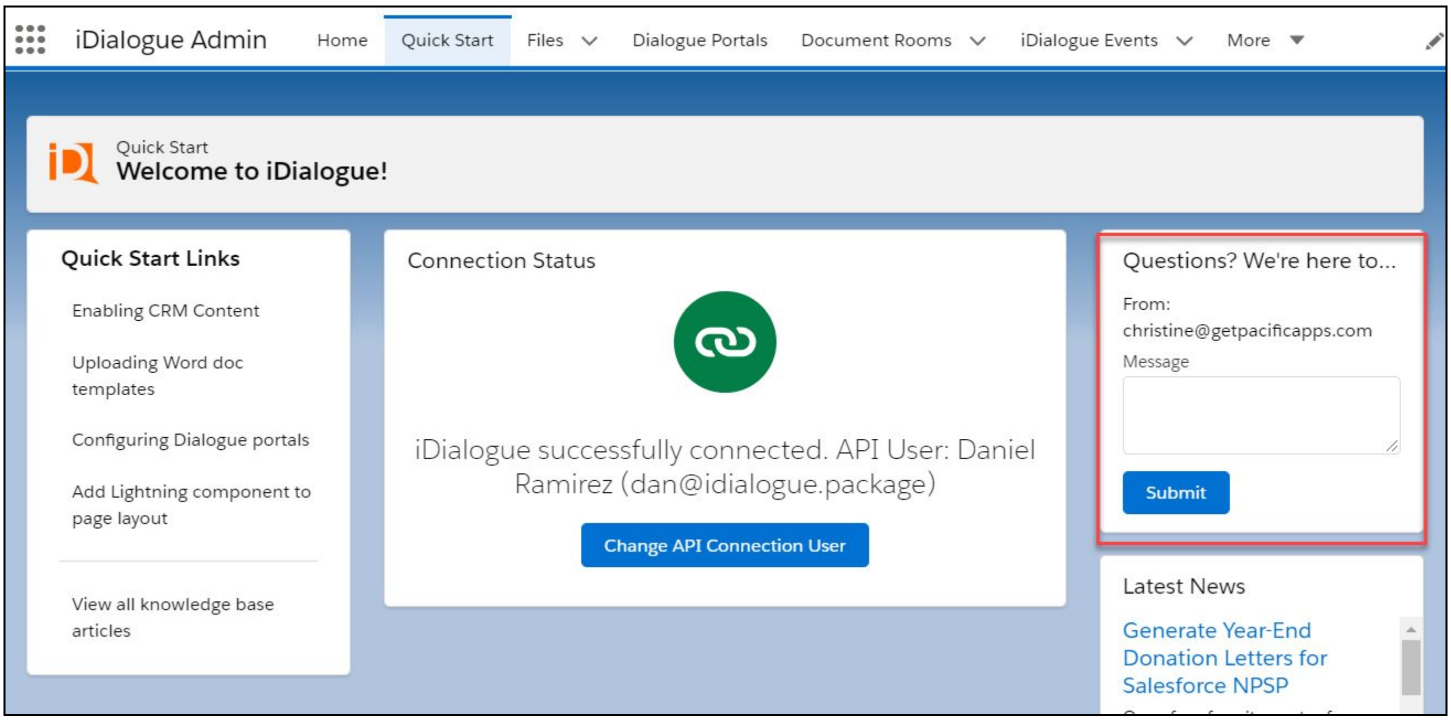
Admin Quick Start Guide

Last updated April 2020

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



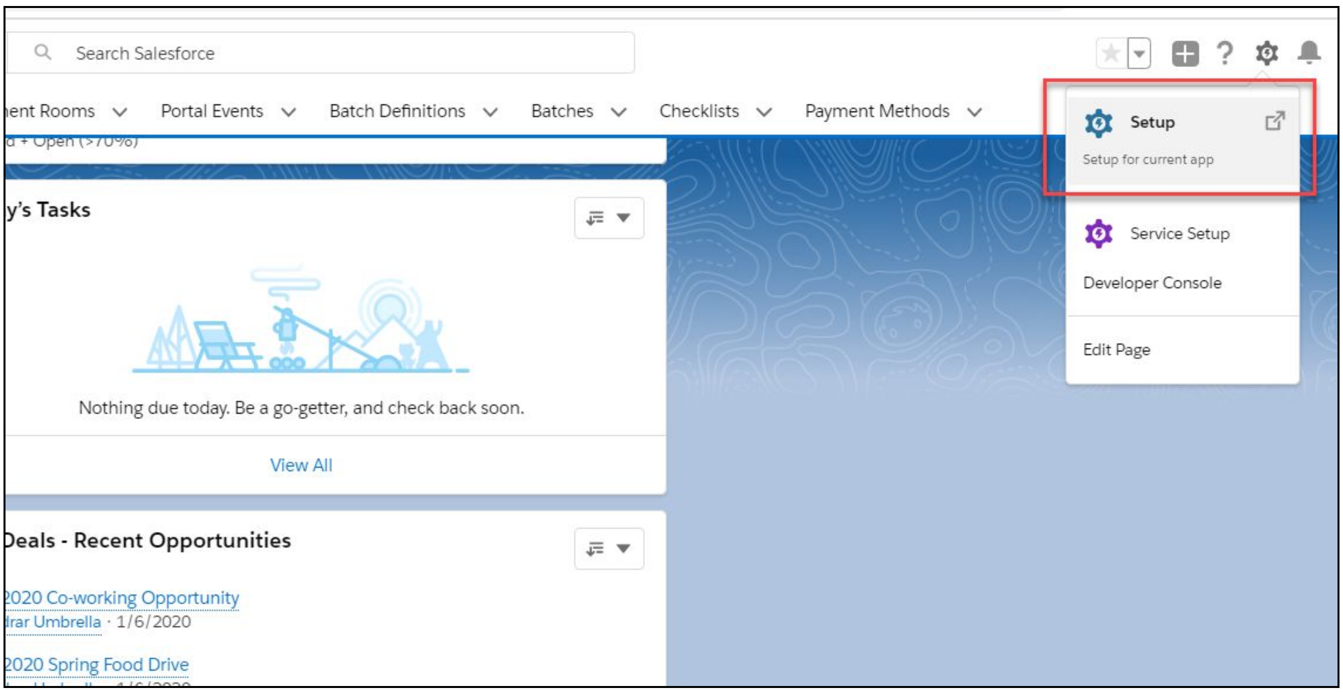
Pre-Requisites

Audience

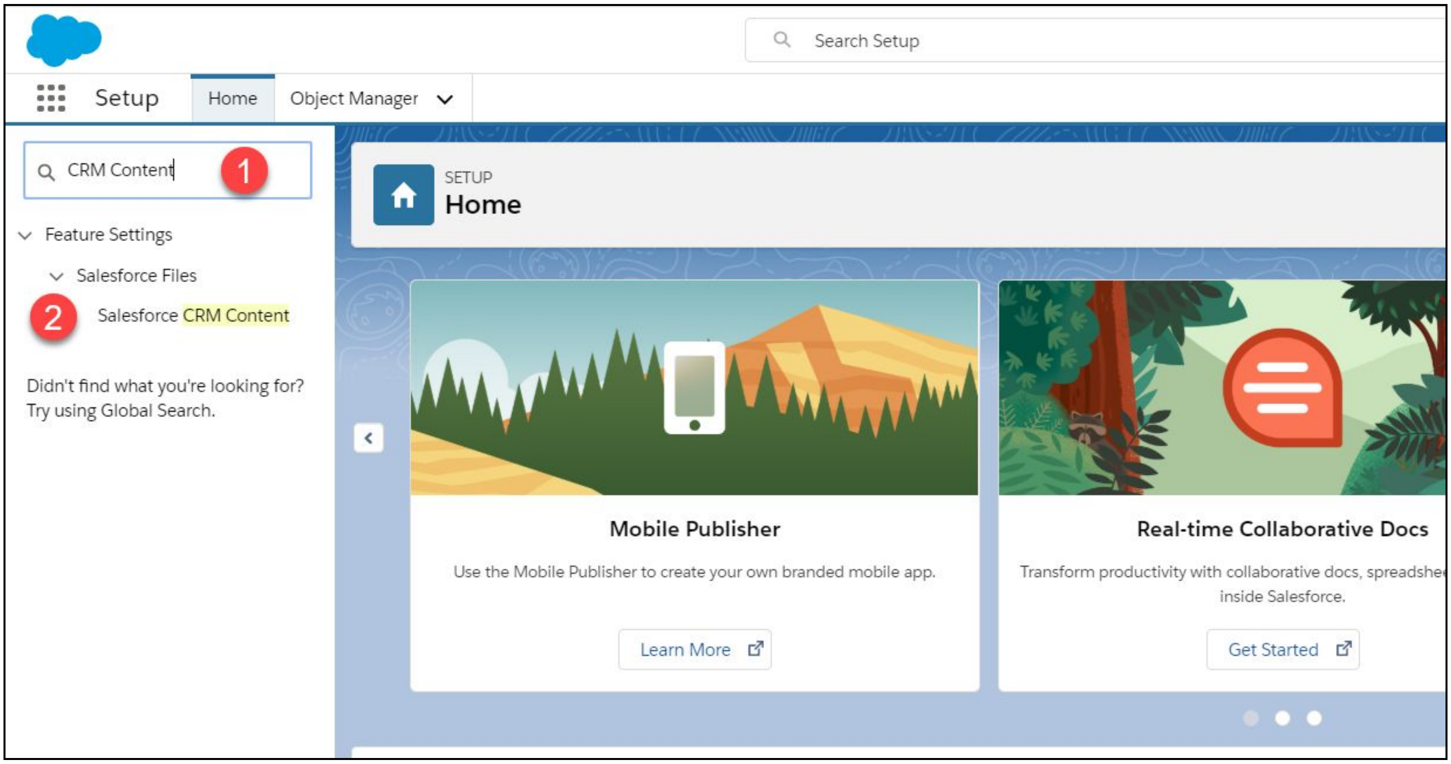
This guide assumes a System Administrator or Salesforce user with permissions to install AppExchange applications.

CRM Content

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

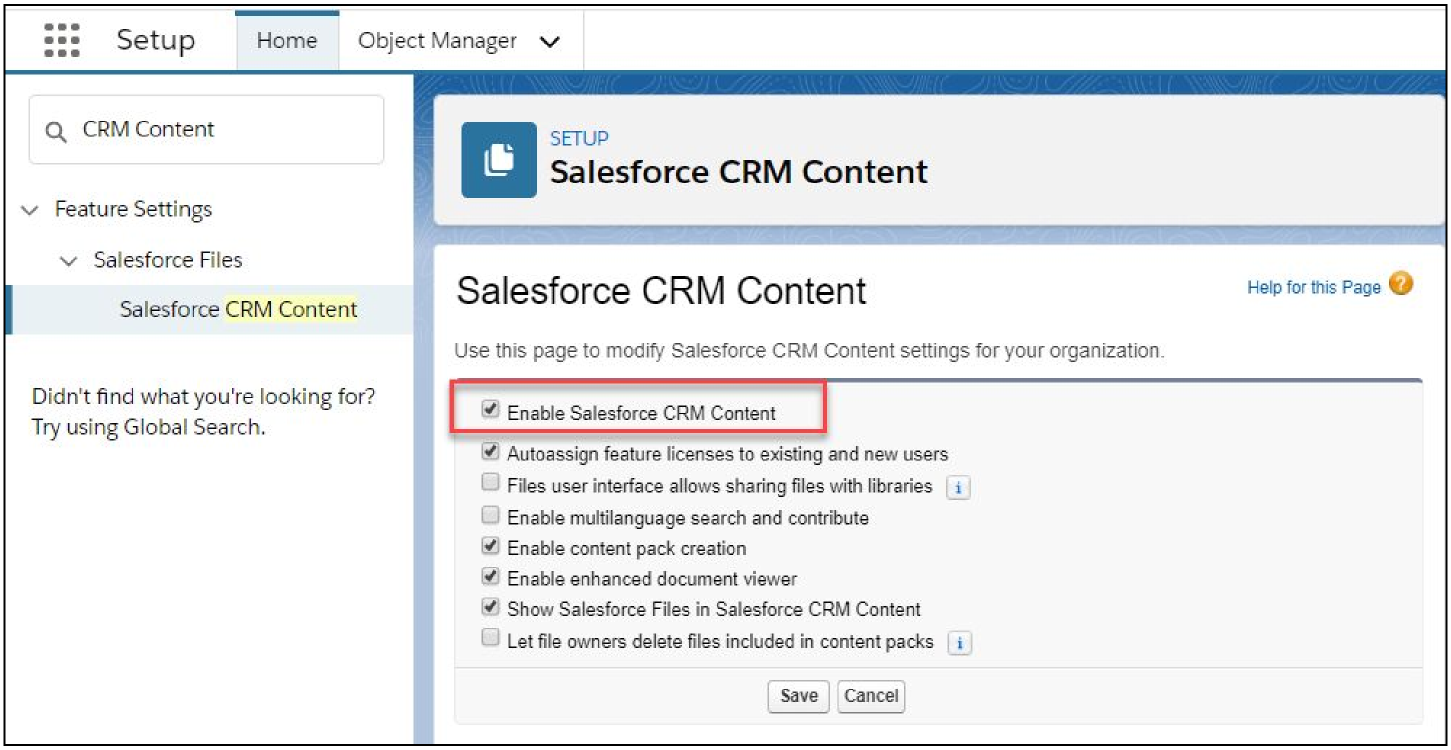


Locate the “Salesforce CRM Content” settings from the Search field, and choose Salesforce CRM Content.



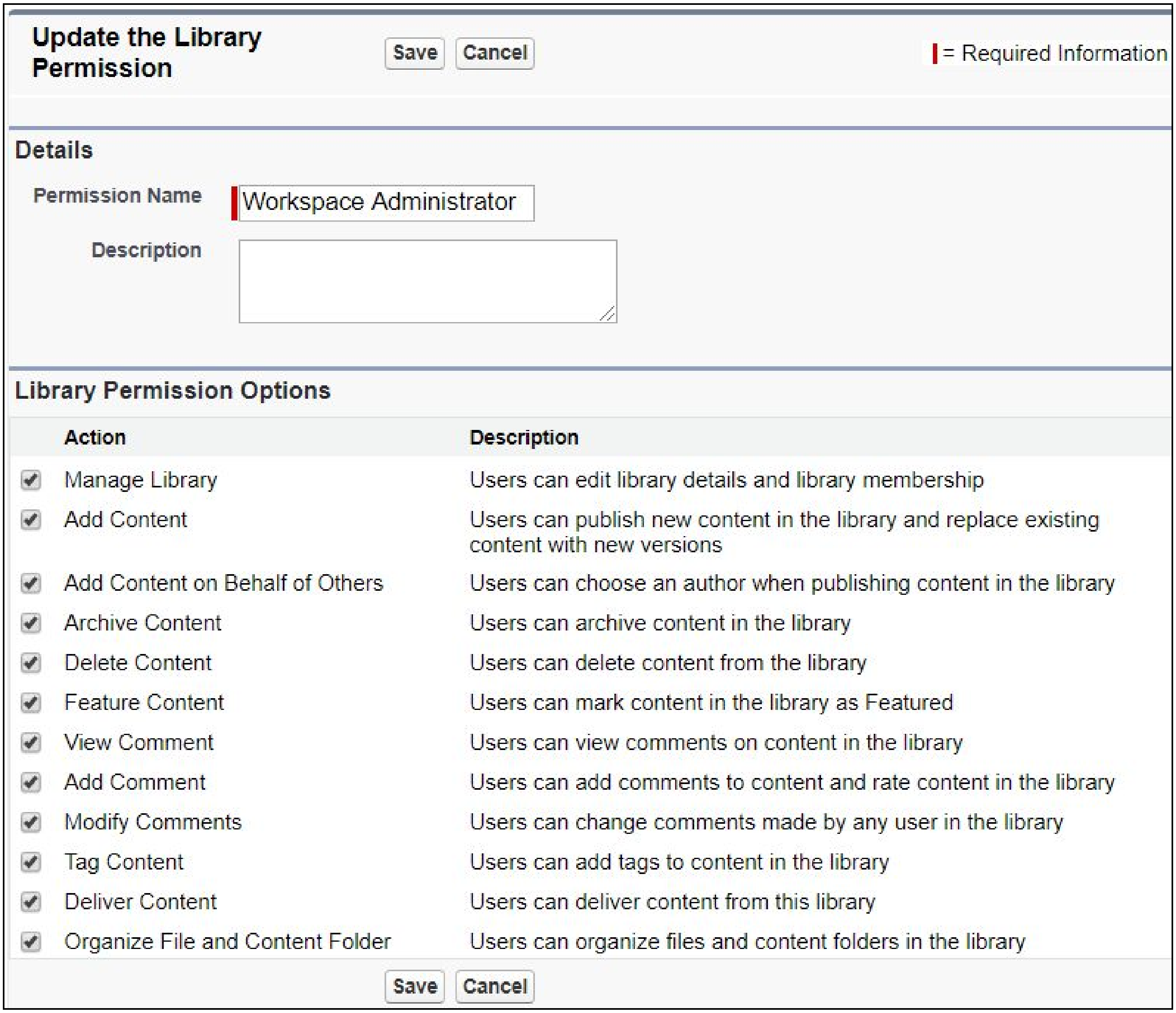
Enable the checkbox option for “Enable Salesforce CRM Content” and hit “Save”.

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



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.

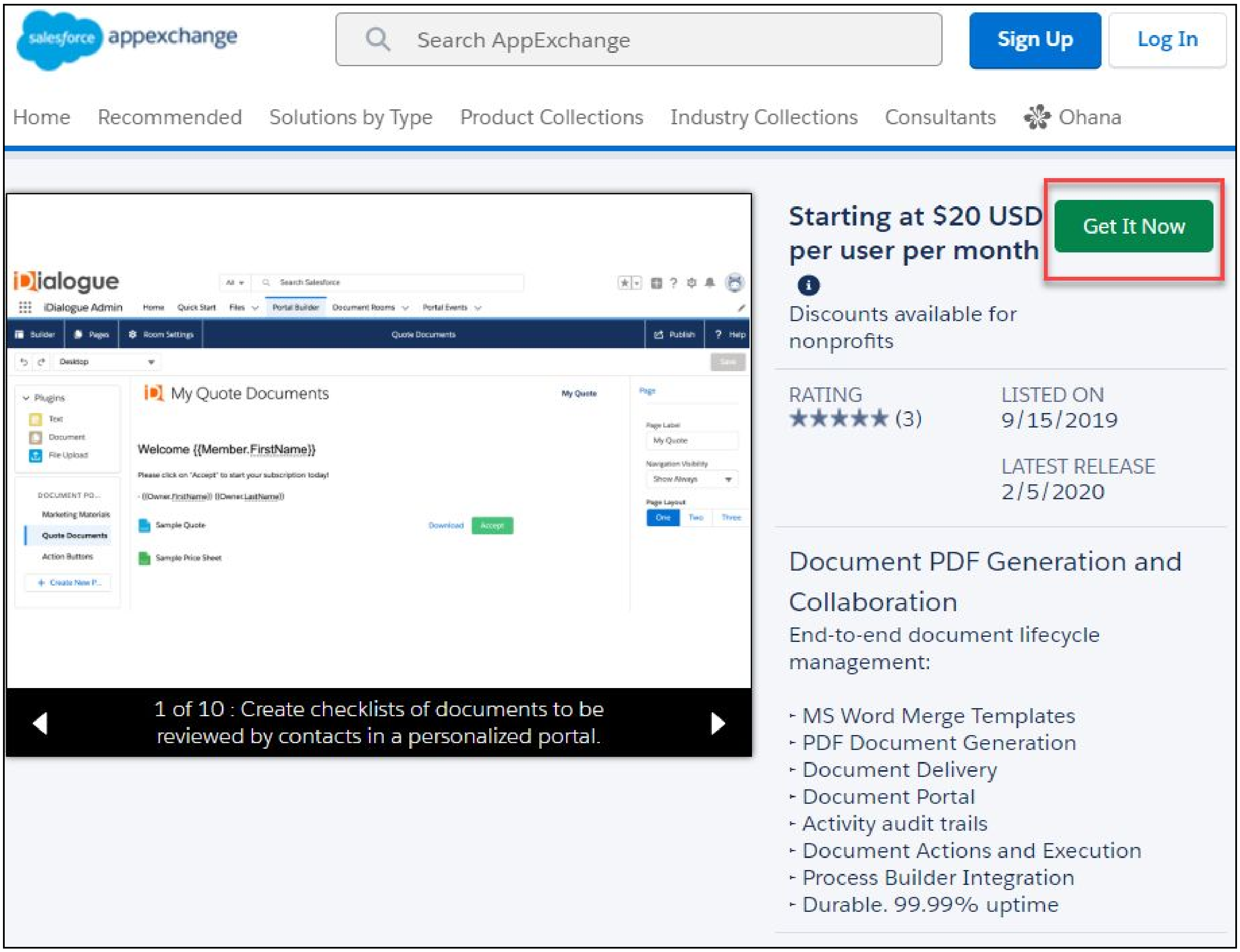


Library permissions may require Salesforce Classic to enable.

Installation

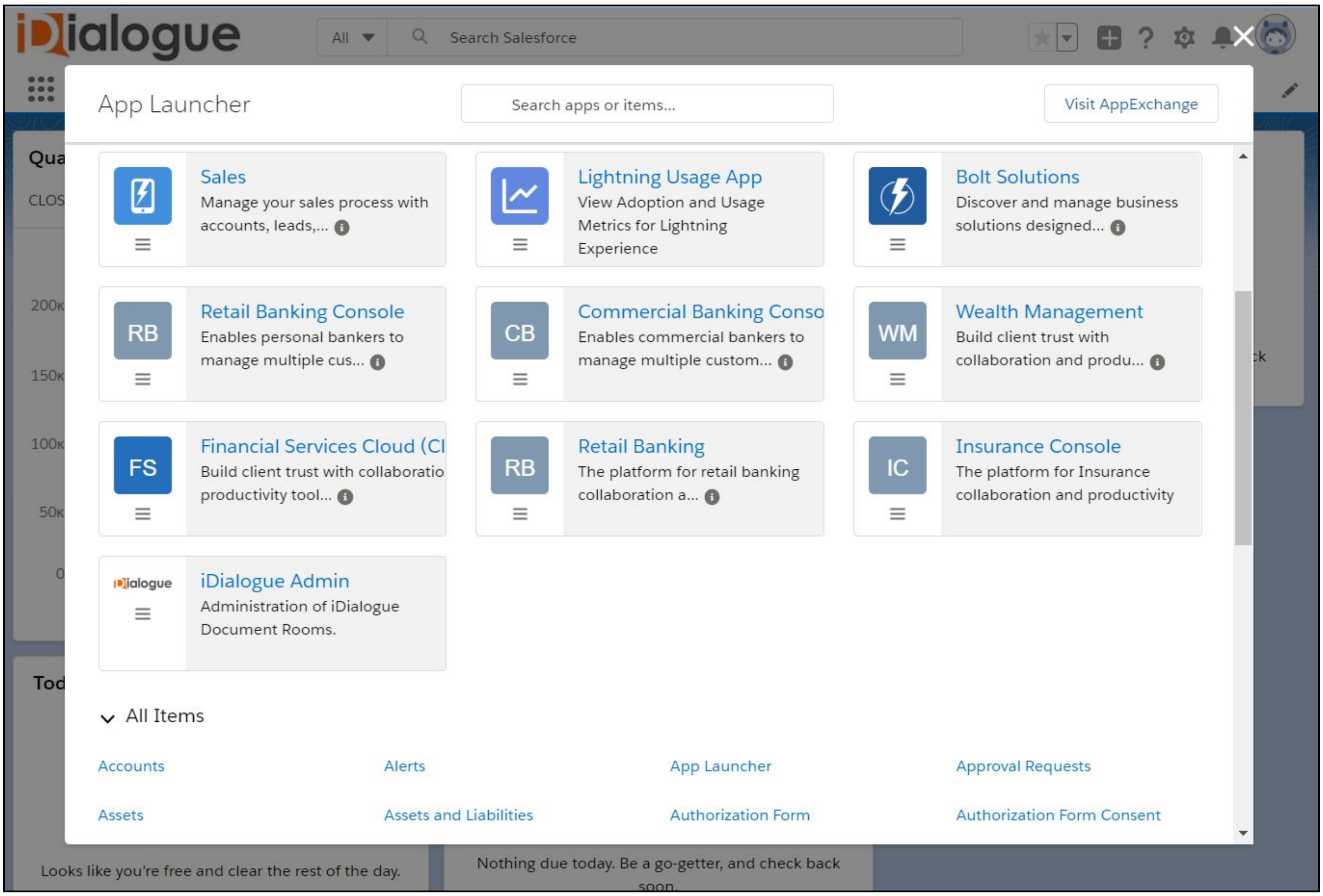
Install iDialogue from the AppExchange by clicking on the “Get It Now” button.

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



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).

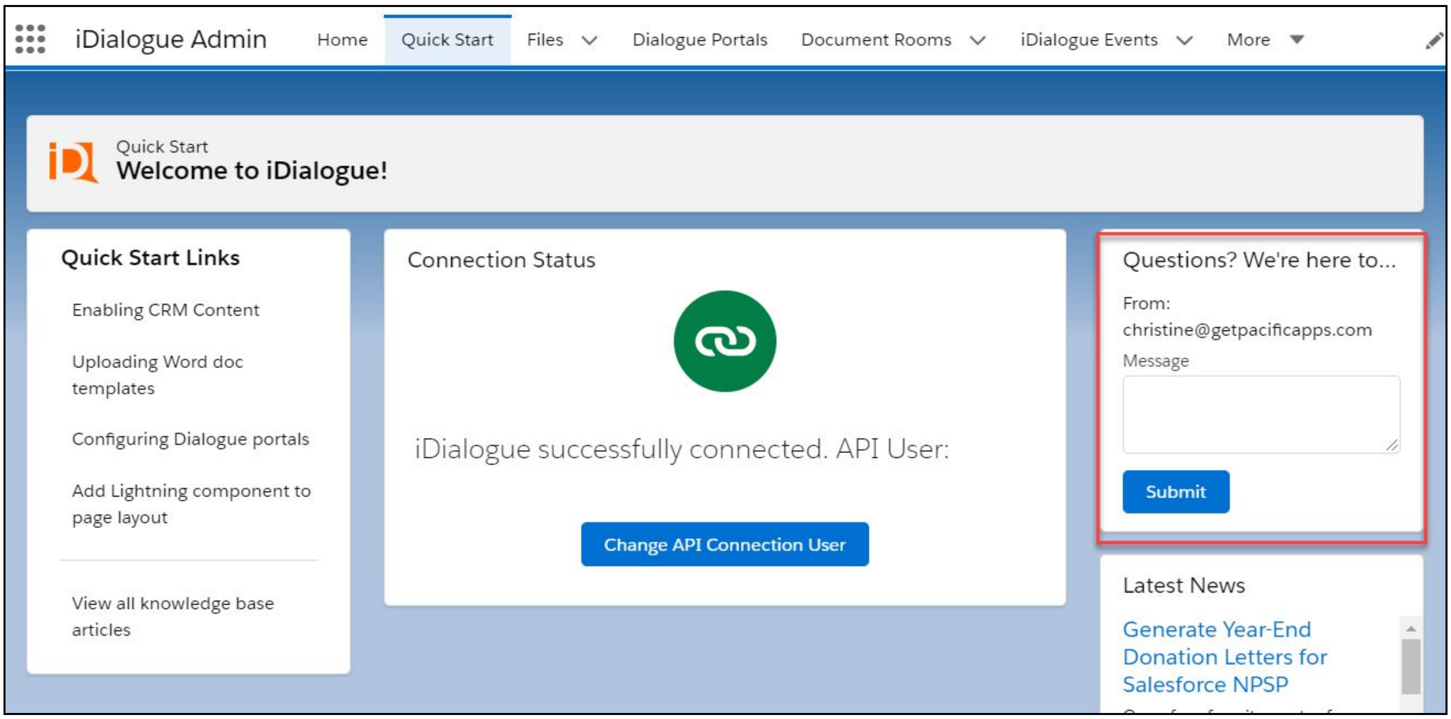


Connect

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.



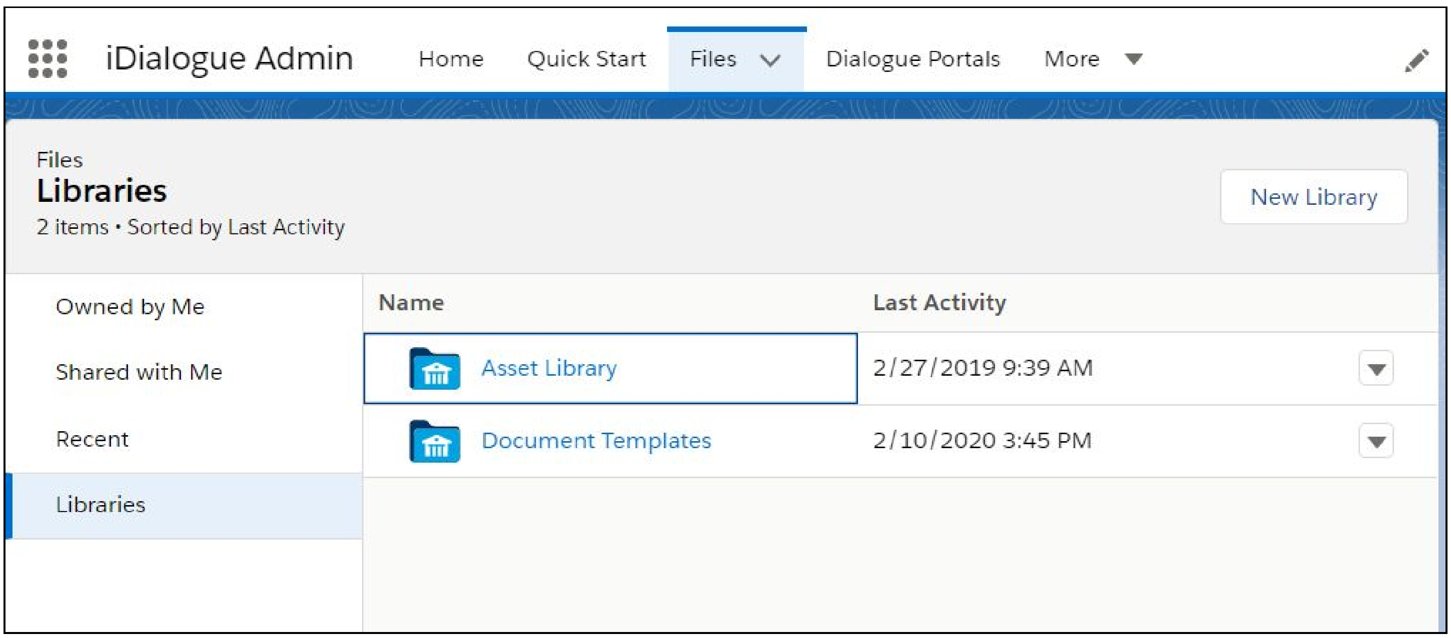
Content Library

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

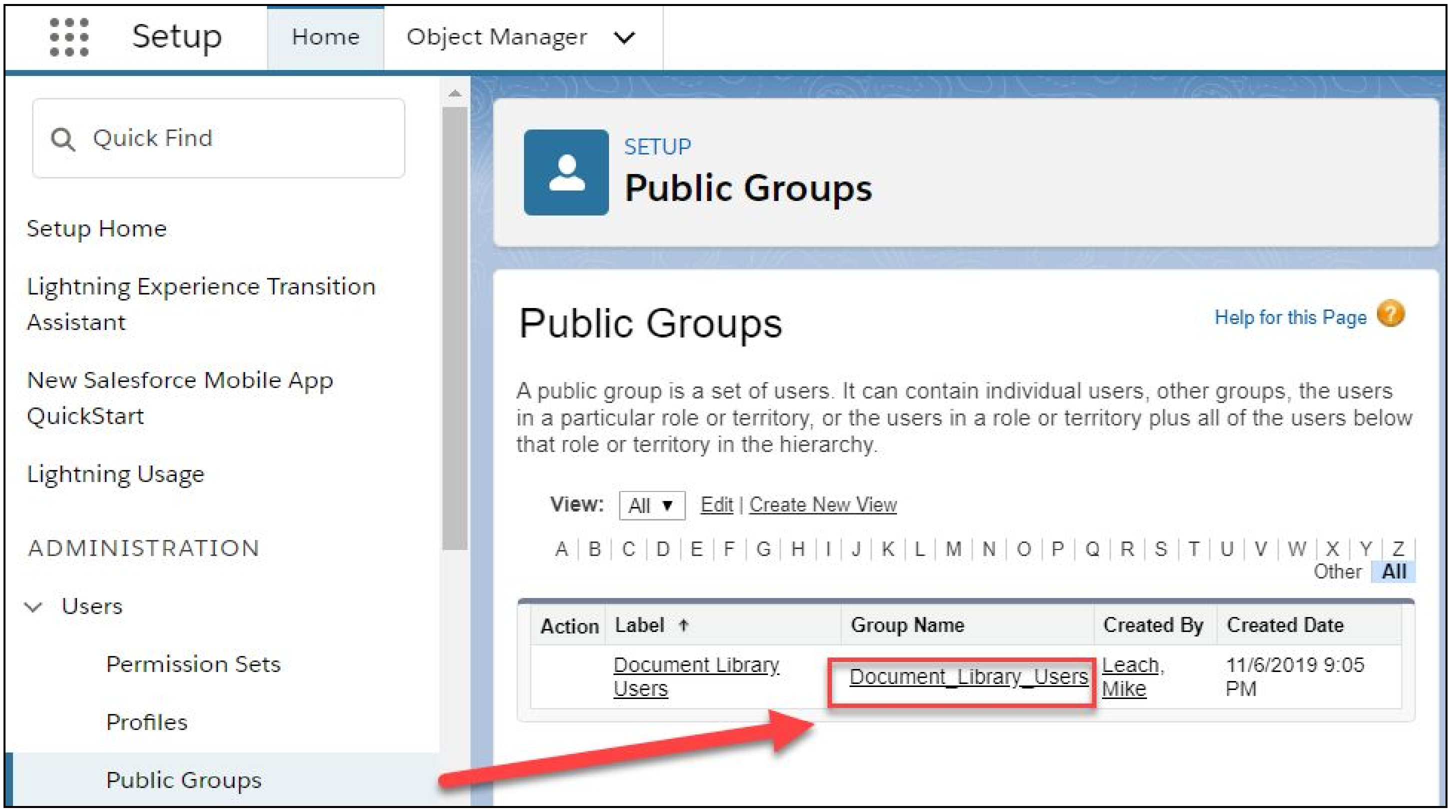
It's recommended to create a top-level library named "Document Templates" with sub-library folders for each portal room, depending on the number of portal rooms to be deployed.

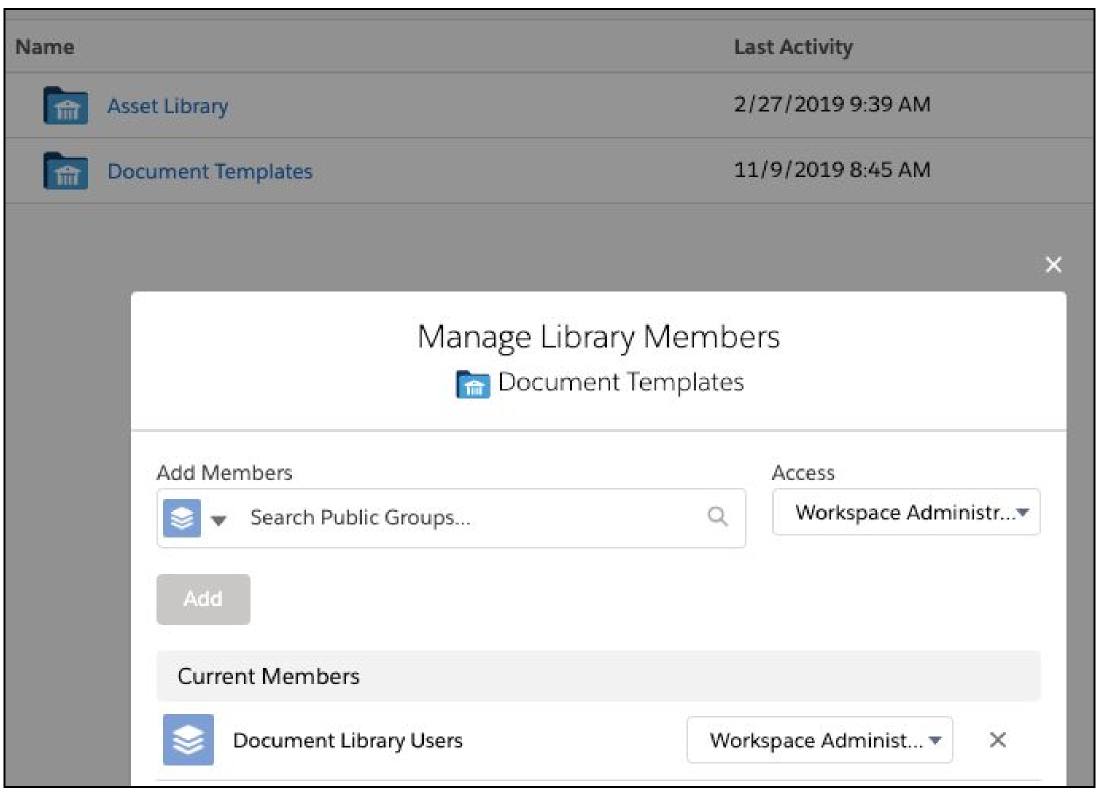


Library Access

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.

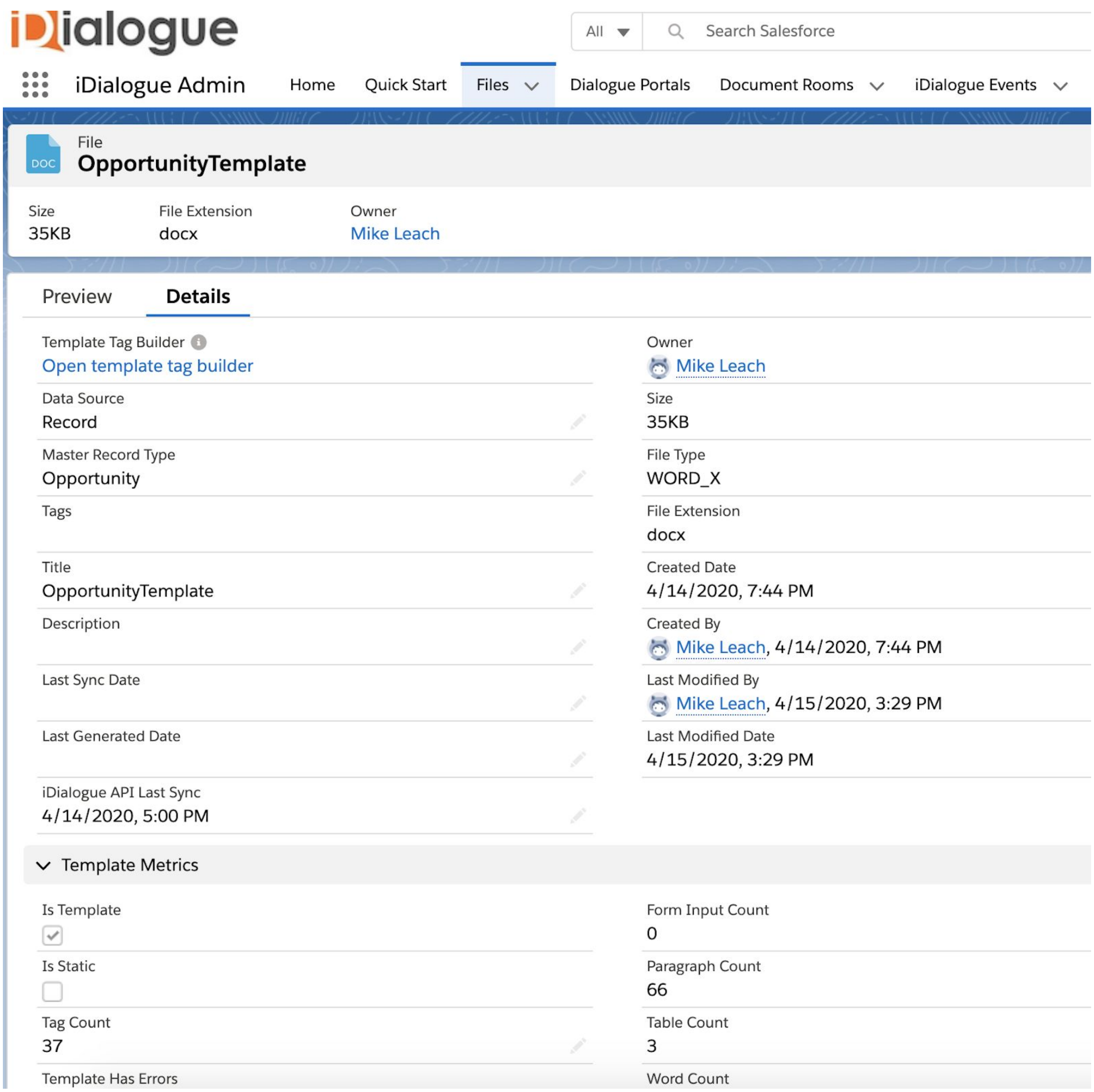
To generate documents from templates requires at least "Viewer" role access to the library.


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 Administ...

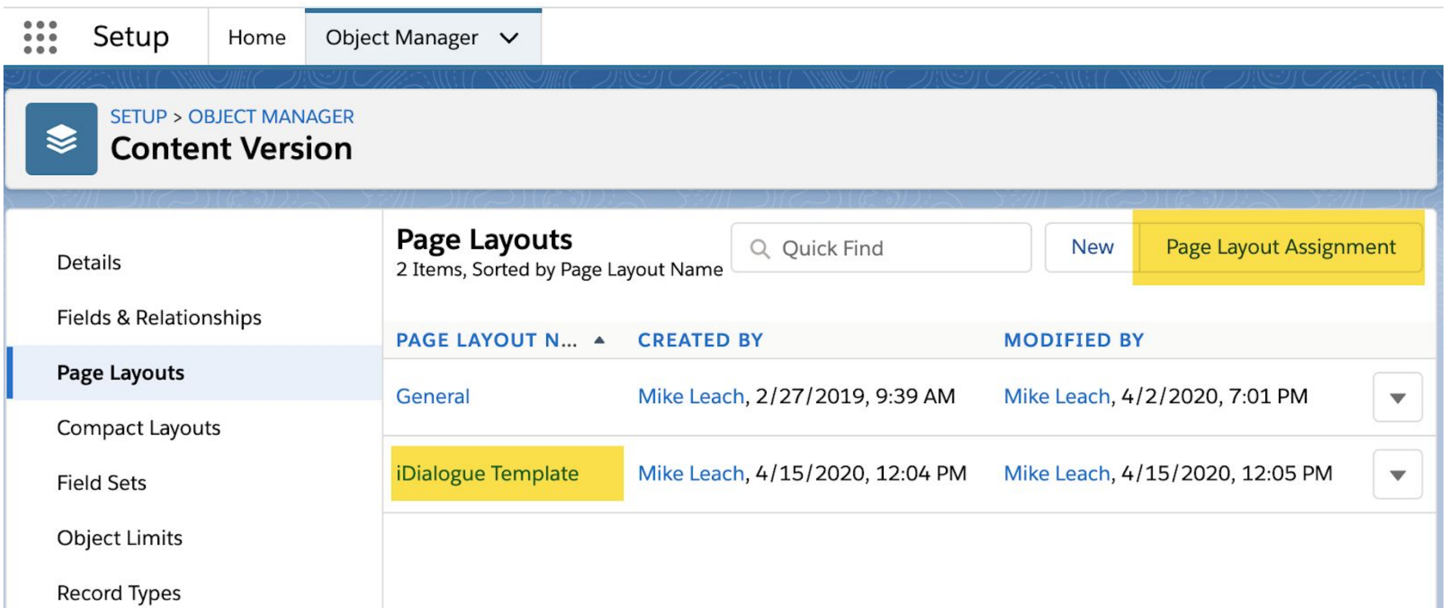
Content Version Page Layout

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.



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.



Page Layout Assignment

Content Version

Help for this Page

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

Edit Assignment

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

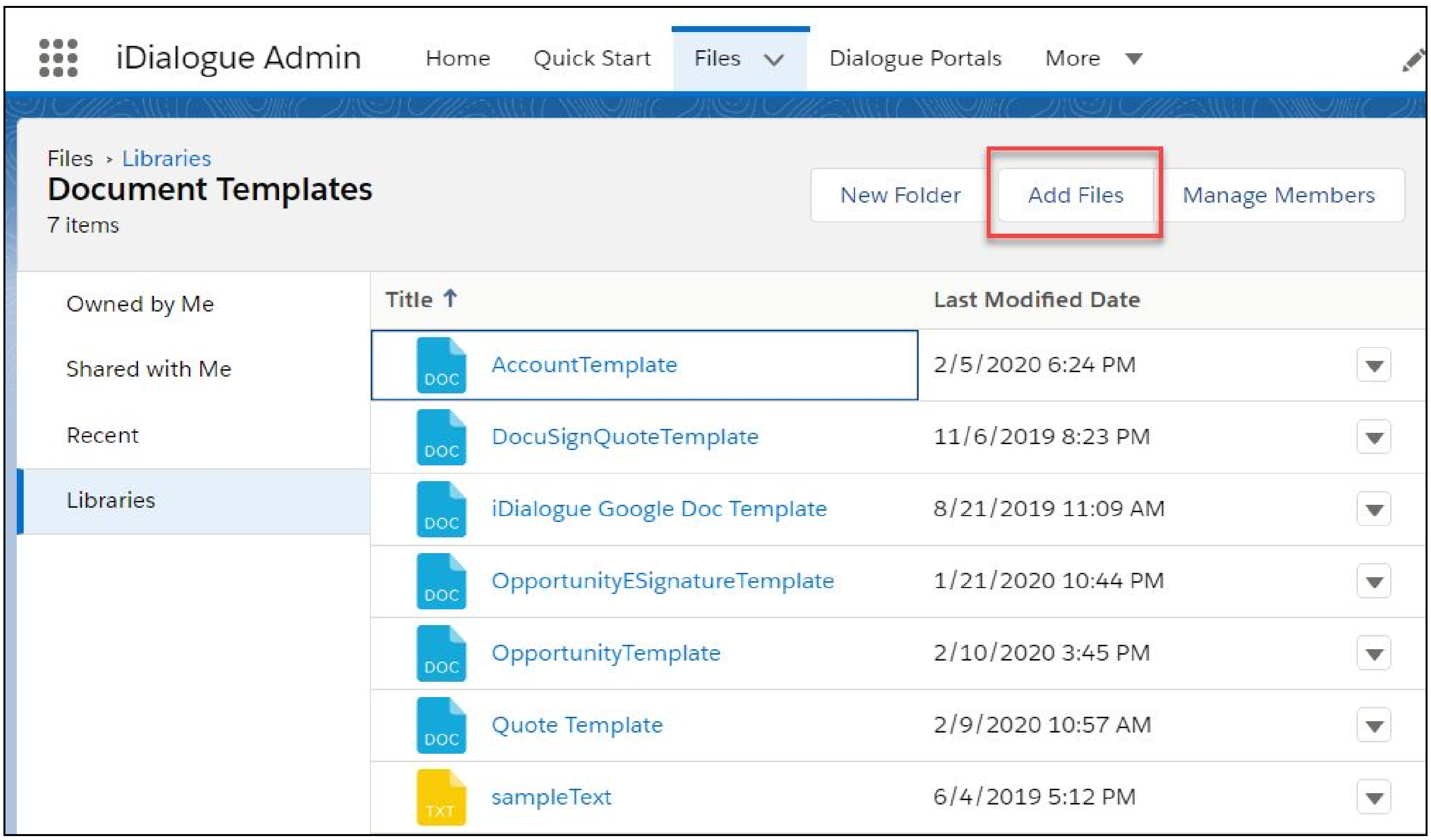
Edit Assignment

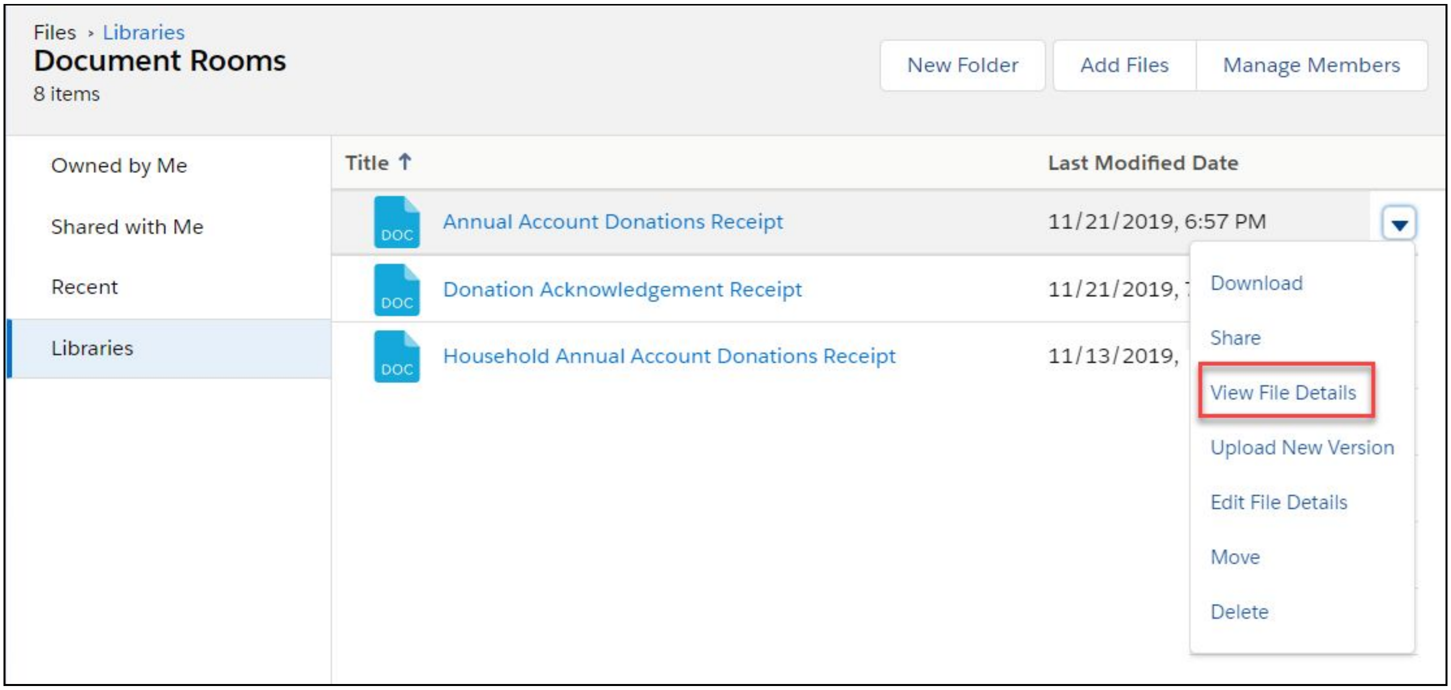
Document Template Configuration

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

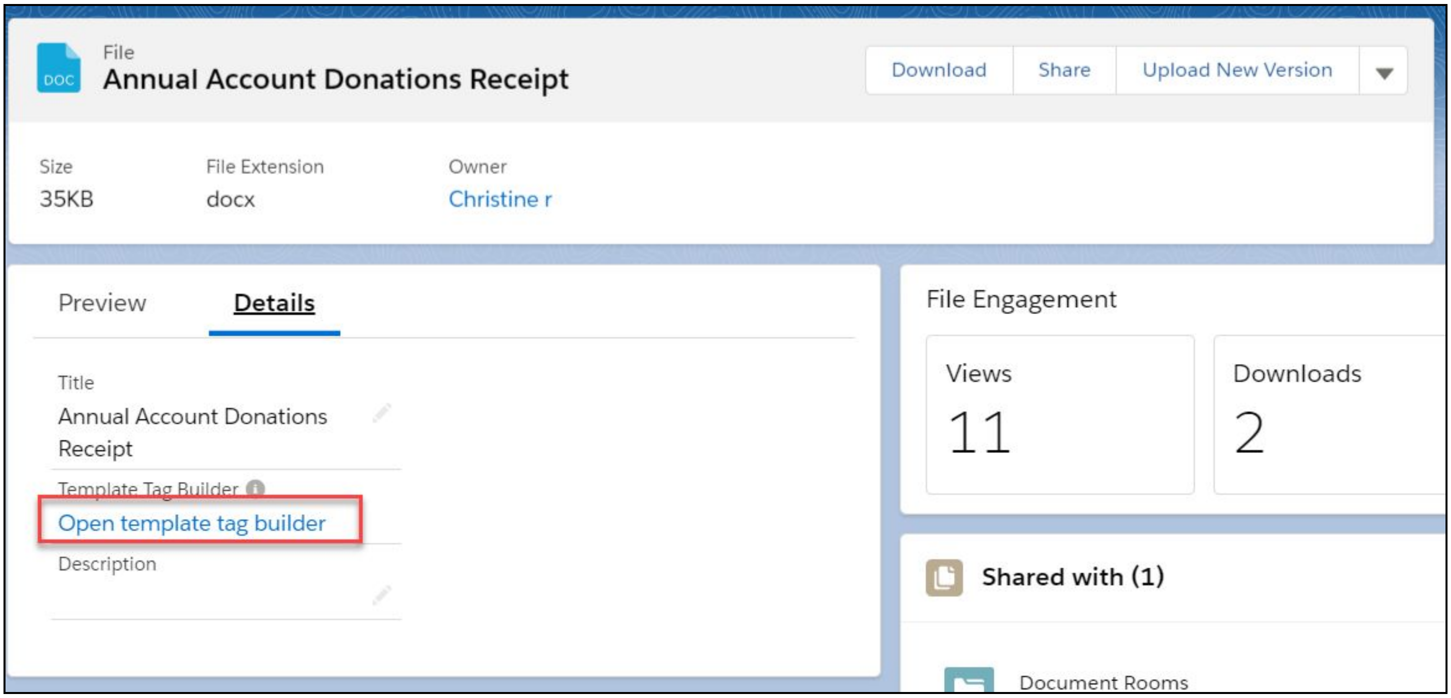
iDialogue supports Microsoft Word DOCX files as templates. Optionally, Google Documents exported to Word DOCX format are also supported.

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.





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



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

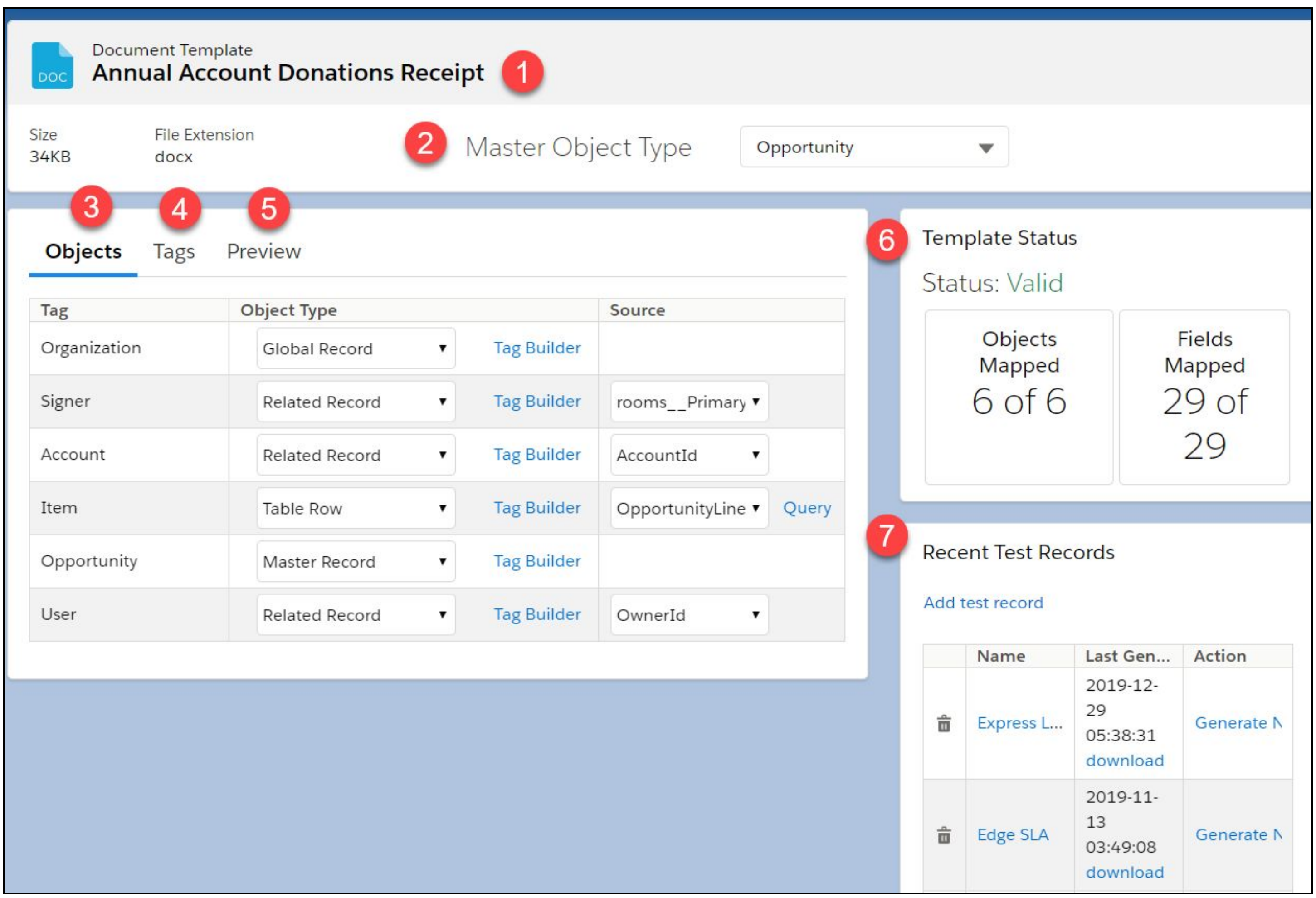
Template Preview Console

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



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.

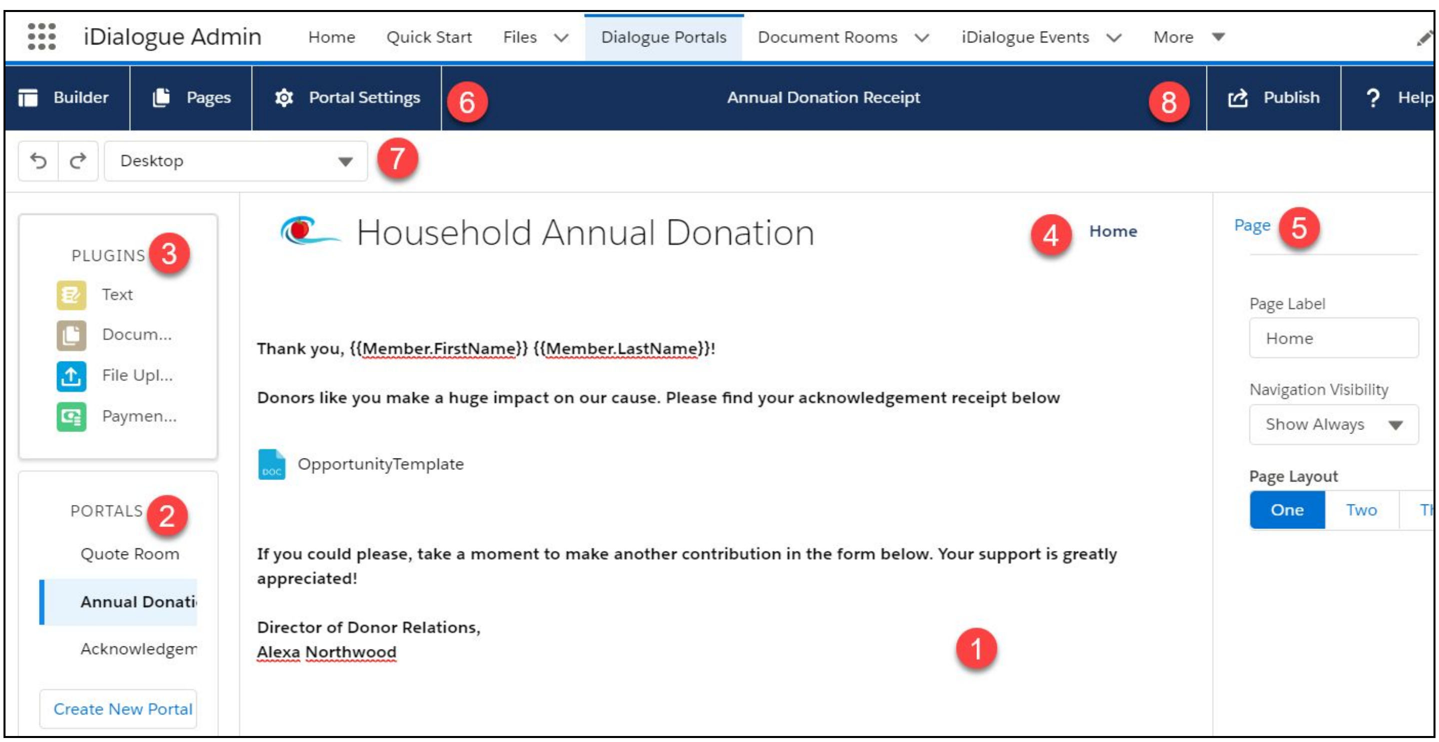
The Salesforce User experience is a “one-click” action to select the portal template. An example portal template is provided with the managed package.

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

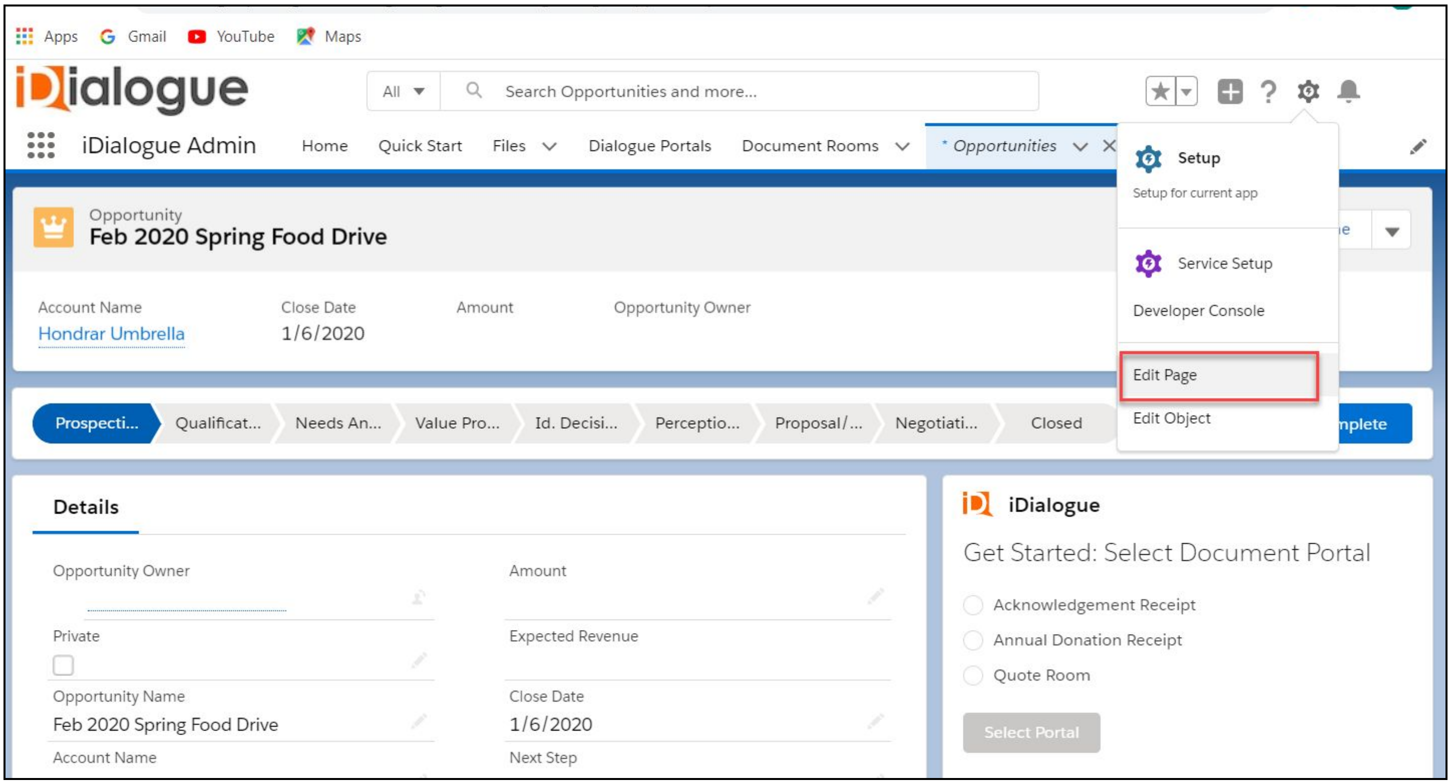
Updates to portal template page layouts are automatically saved as drafts. To publish the room template, click the “Publish” button in the upper right corner.

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.

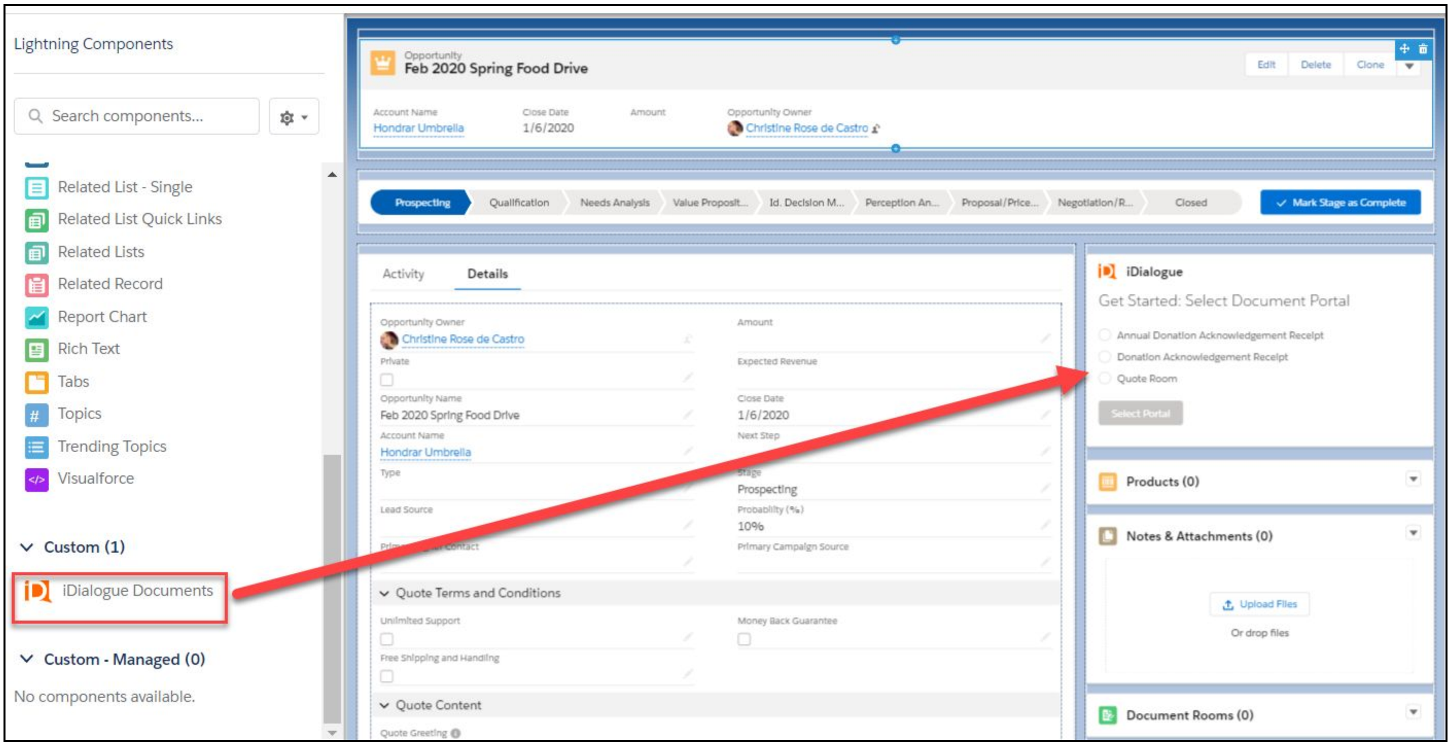
Lightning Component

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.



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.