HIC GLOBAL SOLUTIONS
Your CRM Success Partners

LIST OF PARAMETERS

DOCS MADE EASY
BY HIC GLOBAL SOLUTIONS

DOCS MADE EASY

1. Default PDF

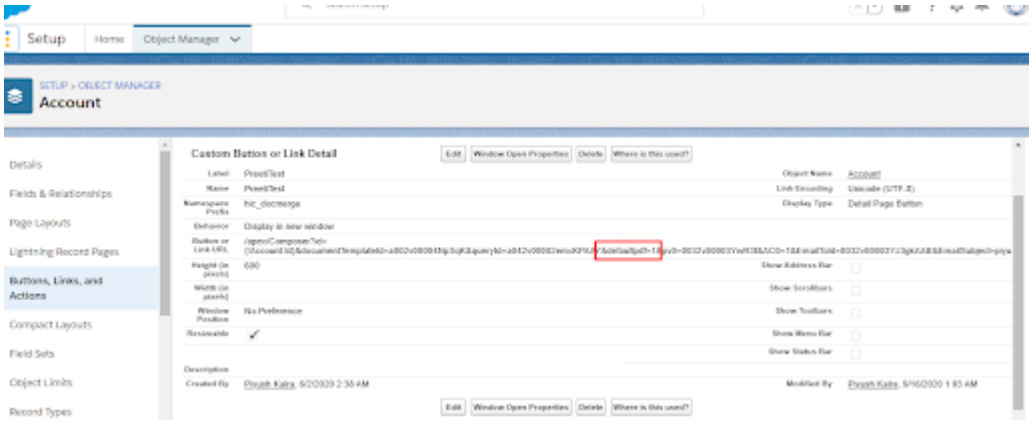
Parameter Name: Default PDF

Parameter Value: 0 or 1

Parameter Requirements: None

Parameter Description: The defaultPDF parameter in the Docs Made Easy app sets the default output type to Adobe Acrobat.

Example: &DefaultPDF=1



2. Email Template Parameter

2.1. EmailAdditionalTo

Parameter Name: EmailAdditionalTo

Parameter Value: Email Address

Parameter Requirements: None

Parameter Description: The EmailAdditionalTo parameter in the Docs Made Easy app sets the value of the Additional To field.

Example: &EmailAdditionalTo= support@docmadeeasy.com

2.2. EmailBCC

Parameter Name: EmailBCC

Parameter Value: Email Address

Parameter Requirements: None

Parameter Description: The EmailBCC (Blind Carbon Copy) parameter in the Docs Made Easy app sets the value of the BCC field.

Example: &EmailBCC=support@docmadeeasy.com

2.3. EmailCC

Parameter Name: EmailCC

Parameter Value: Email Address

Parameter Requirements: None

Parameter Description: The EmailCC (Carbon Copy) parameter in the Docs Made Easy app sets the value of the CC field.

Example: &EmailCC=support@docmadeeasy.com

2.4. EmailFromID

Parameter Name: EmailFromId

Parameter Value: Email Address

Parameter Requirements: None

Parameter Description: EmailFromId in the Docs Made Easy app specifies an Organization-Wide Address as the From identity of the email.

Example: &EmailFromID= 0F25400000003K1

2.5. EmailRelatedToId

Parameter Name: EmailRelatedToId

Parameter Value: Email Address

Parameter Requirements: None

Parameter Description: EmailRelatedToId in the Docs Made Easy app sets the value of the Related To field.

Example: &EmailRelatedToId={!SalesforceObject.Id}

2.6. EmailReplyToId

Parameter Name: EmailReplyToId

Parameter Value: Salesforce User ID

Parameter Requirements: None

Parameter Description: EmailReplyToId in the Docs Made Easy app changes the apparent sender of an email by setting the message ReplyTo and DisplayName properties to those of the specified user.

Example: &EmailReplyToId={!Owner.ID}

2.7. EmailSubject

Parameter Name: EmailSubject

Parameter Value: text

Parameter Requirements: None

Parameter Description: EmailSubject in the Docs Made Easy app sets the value of the Subject field.

Example: &EmailSubject=Thank+You

2.8. EmailTemplateAttachments

Parameter Name: EmailTemplateAttachments

Parameter Value: 0 or 1

Parameter Requirements: &EmailTemplateId

Parameter Description: EmailTemplateAttachments in the Docs Made Easy app help you preserve Salesforce files or attachments with the Salesforce email template.

Example:
&EmailTemplateId=a012w00000mXISV
&EmailTemplateAttachments=1

2.9. EmailTemplateId

Parameter Name: EmailTemplateId

Parameter Value: Salesforce Template Id

Parameter Requirements: &EmailTemplateId

Parameter Description: EmailTemplateId in the Docs Made Easy app loads the subject and body fields from the Salesforce email template.

Example: &EmailTemplateId=a012w00000mXISV

2.10 EmailToId

Parameter Name: EmailToId

Parameter Value: Contact or Lead ID

Parameter Requirements: None

Parameter Description: EmailToId in the Docs Made Easy app helps you set the value of the To field.

Example: &EmailToId={!Contact.Id}

3. Activity Logging Parameters

3.1. AC0

Parameter Name: AC0

Parameter Value: 0 or 1

Parameter Requirements: None

Parameter Description: AC0 provides the Automatic Activity Logging.
This parameter specifies whether to automatically log an activity after merging.

- &AC0=1, Automatic Logging is enabled.
- &AC0=0, Automatic Logging is disabled.

Example: &AC0=0

3.2. AC1

Parameter Name: AC1

Parameter Value: text

Parameter Requirements: &AC0=1

Parameter Description: AC1 sets the activity logging subject.

Example: &AC0=1

3.3. AC2

Parameter Name: AC2

Parameter Value: 0 or 1

Parameter Requirements: &AC0=1

Parameter Description: AC2 in the Docs Made Easy app helps you save the text of a merged document to the body of an Activity (Task).

Example: &AC0=1
&AC2=1

4. Template ID Parameter

Parameter Name: TemplateId

Parameter Value: Template record ID

Parameter Requirements: None

Parameter Description: The Template parameter in the Docs Made Easy app pre-selects the template specified in the Template List box.

Example: &TemplateId = Template Record id

5. Automation-Background Mode Parameter

5.1 DS0

Parameter Name: DS0

Parameter Value: 0 or 1

Parameter Requirements: None

Parameter Description: Disables controls within the Docs Made Easy dialog box.

Example: &DS0=1

5.2 DS1

Parameter Name: DS1

Parameter Value: 0 or 1

Parameter Requirements: None

Parameter Description: The DS1 parameter in the Docs Made Easy app helps you disable Merge & Download Button. Enable or Disable the Download button.

- &DS1=1, The Merge & Download Button is disabled. The document will still merge but will not download for the running user.
- &DS1=0, The Merge & Download Button is enabled. (default)

Example: &DS1=1

5.3 DS2

Parameter Name: DS2

Parameter Value: 0 or 1

Parameter Requirements: None

Parameter Description: The DS2 parameter in the Docs Made Easy app helps you enable or disable the Email Action option in Output Options.

- &DS2=1, The Email Action option is disabled.
- &DS2=0, The Email Action option is enabled. (default)

Example: &DS2=1

5.4 DS3

Parameter Name: DS3

Parameter Value: 0 or 1

Parameter Requirements: None

Parameter Description: The DS2 parameter in the Docs Made Easy app helps you enable or disable the Activity Logging area.

- &DS3=1, Activity Logging options are disabled.
- &DS3=0, Activity Logging options are enabled. (default)

Example: &DS3=1

5.5 DS4

Parameter Name: DS4

Parameter Value: 0, 1, or 2

Parameter Requirements: &TemplateId

Parameter Description: The DS4 parameter in the Docs Made Easy app locks the list of template choices to prevent end-users from selecting a different template.

- &DS4=1, The selected template choice is locked.
- &DS4=0, The list of template choices is not locked (default).
- &DS4=2, The selected template choice is locked, and users can also select additional templates to merge.
- Using DS4=2 requires the SelectTemplates parameter.

Example: &DS4=1

5.6 DS5

Parameter Name: DS5

Parameter Value: 0 or 1

Parameter Requirements: None

Parameter Description: The DS5 parameter in the Docs Made Easy app helps you disable view data.

- &DS5=1, View Data is disabled.
- &DS5=0, View Data is enabled. (default)

Example: &DS5=1

5.7 DS6

Parameter Name: DS6

Parameter Value: 0 or 1

Parameter Requirements: None

Parameter Description: The DS5 parameter in the Docs Made Easy app helps you view Template options include both the ability to open (download) the template file and to open the template record in Salesforce

- &DS6=1, View Template is disabled.
- &DS6=0, View Template is enabled. (default)

Example: &DS6=1

5.8 DS7

Parameter Name: DS7

Parameter Value: Value

Parameter Requirements: None

Parameter Description: The DS5 parameter in the Docs Made Easy app helps you enable Background Mode. This parameter enables merge operations to occur in the background.

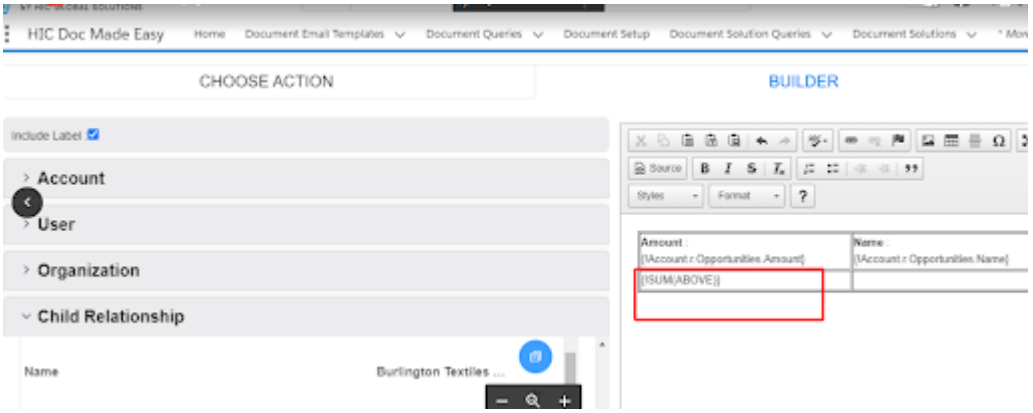
Example: &DS7=1

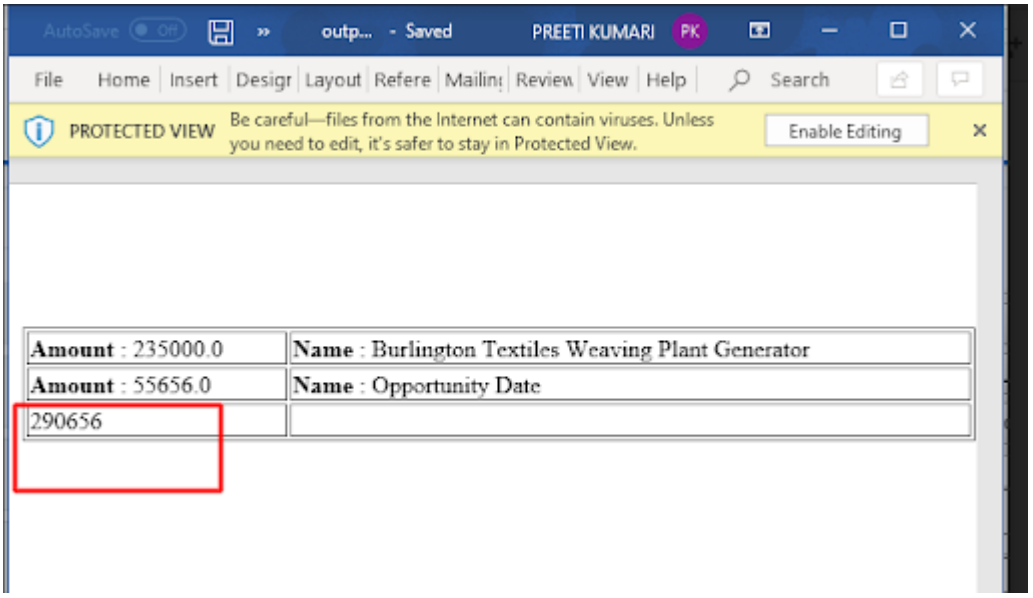
6. Sum (above)

Parameter Name: Sum (Above) Parameter

Parameter Requirements: {!Sum(Above)}

Parameter Description: The Sum (Above) Parameter in the Docs Made Easy app allows you to calculate the total of a numeric column.



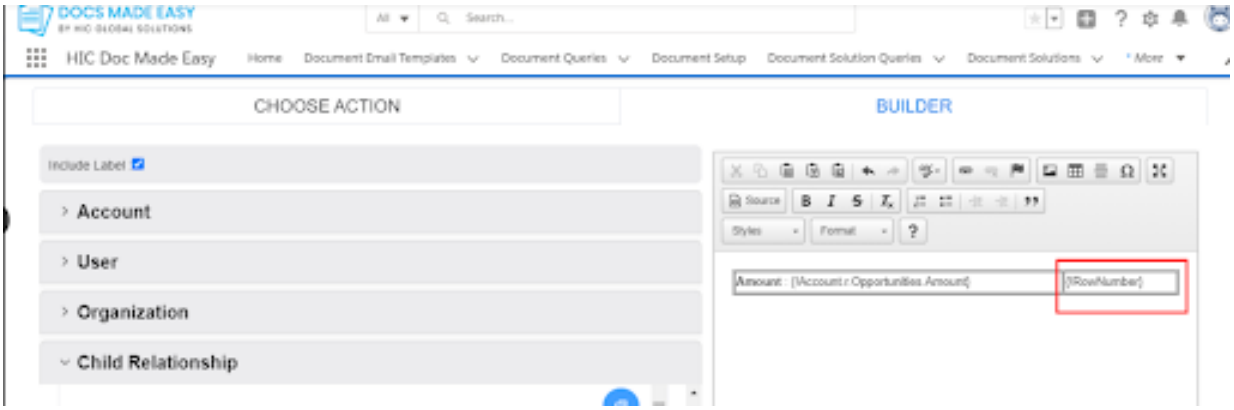


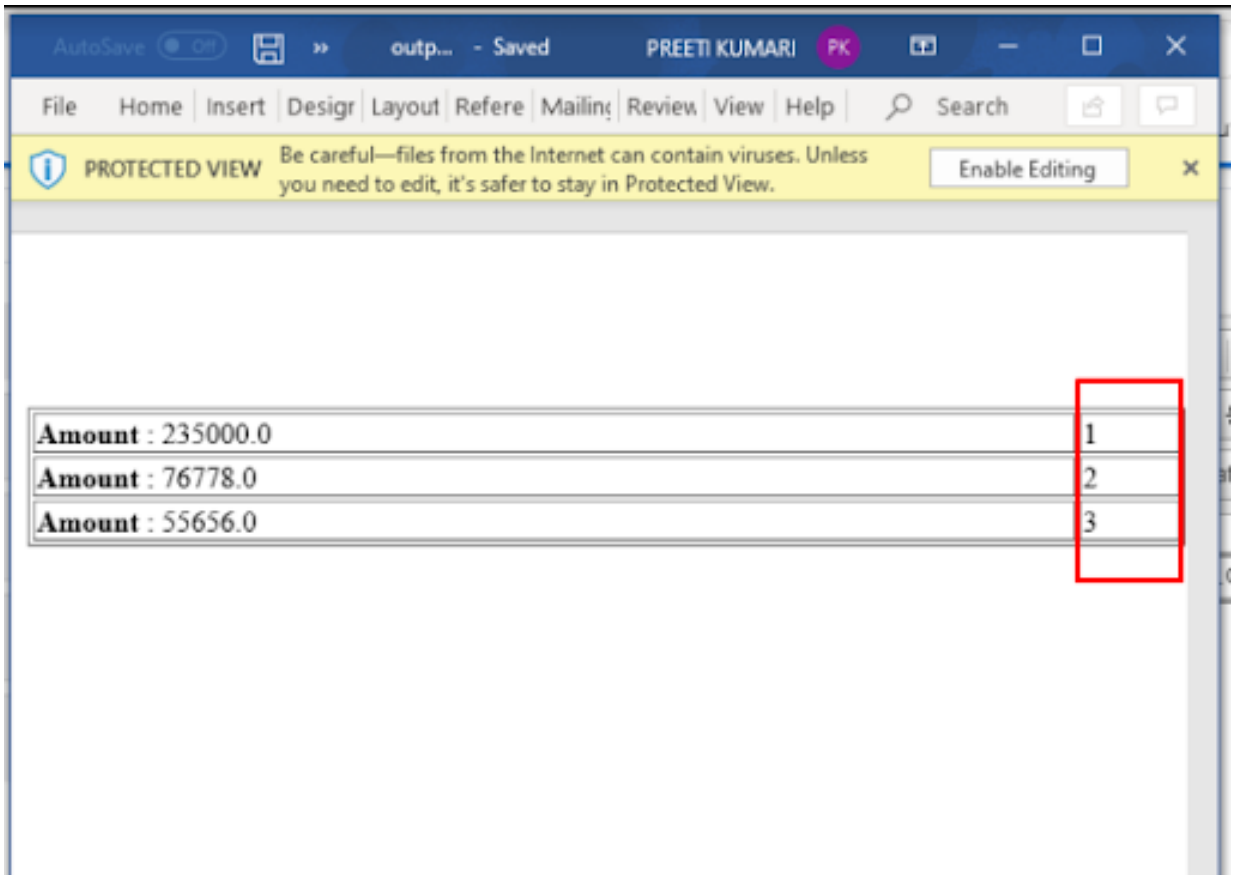
7. Row Number

Parameter Name: Row Number Parameter

Parameter Required: {!RowNumber}

Parameter Description: The Row Number Parameter in the Docs Made Easy app allows you to automatically number rows in a table. This might be helpful if you have a large number of rows and detailed data.


DOCS MADE EASY
HIC Doc Made Easy
Home
Document Email Templates
Document Queries
Document Setup
Document Solution Queries
Document Solutions
More
CHOOSE ACTION
BUILDER
Include Label
Account
User
Organization
Child Relationship
Amount : {!Account.r Opportunities.Amount}
{!RowNumber}

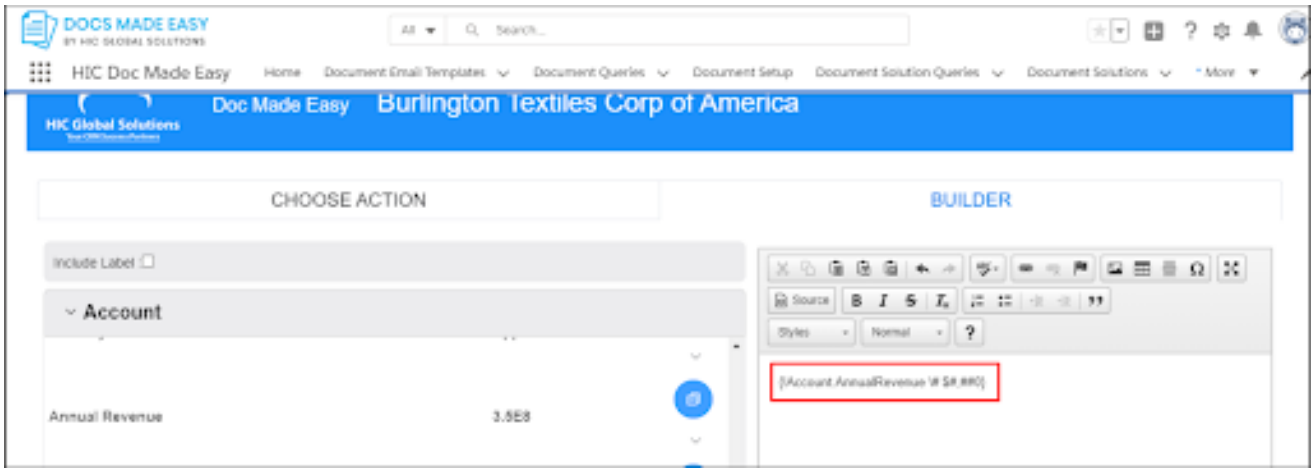

outp... - Saved
PREETI KUMARI
File
Home
Insert
Design
Layout
References
Mailings
Review
View
Help
Search
PROTECTED VIEW
Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View.
Enable Editing
Amount : 235000.0
1
Amount : 76778.0
2
Amount : 55656.0
3

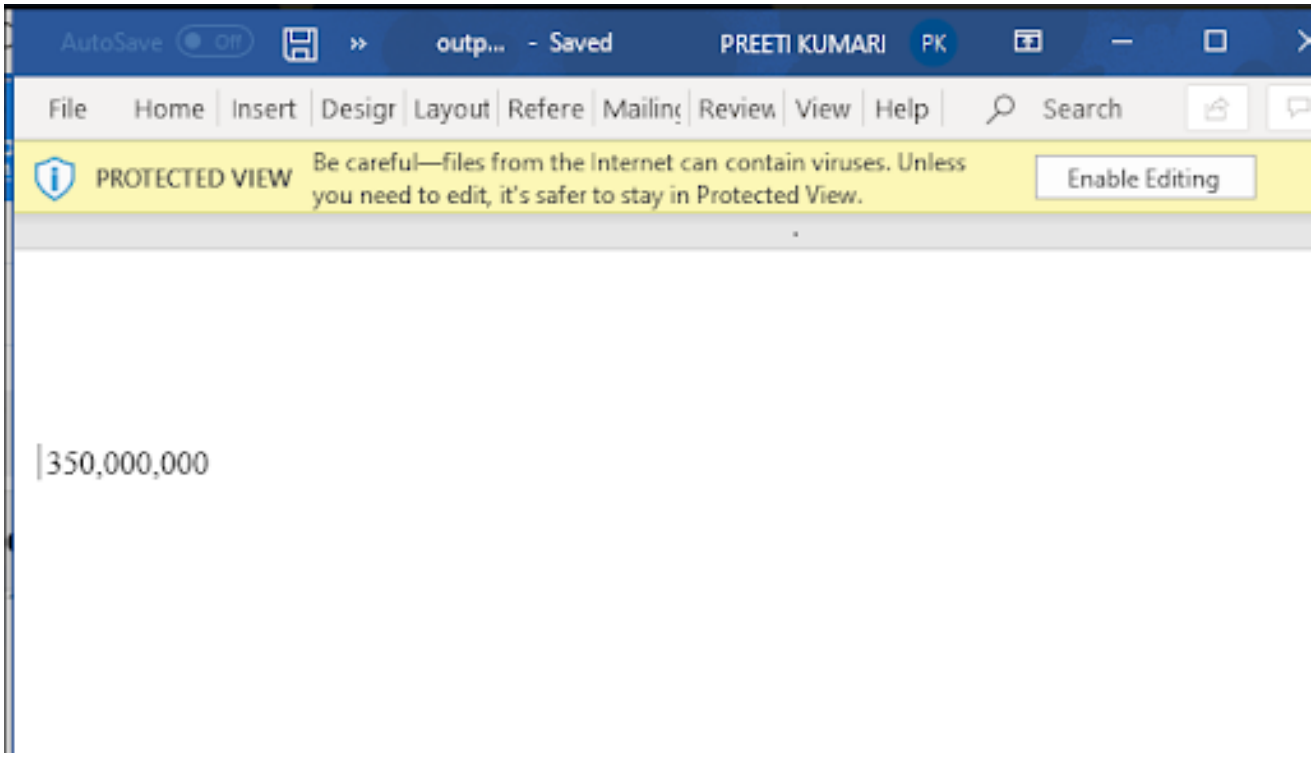
8. Currency Feature

Parameter Name: Currency Feature

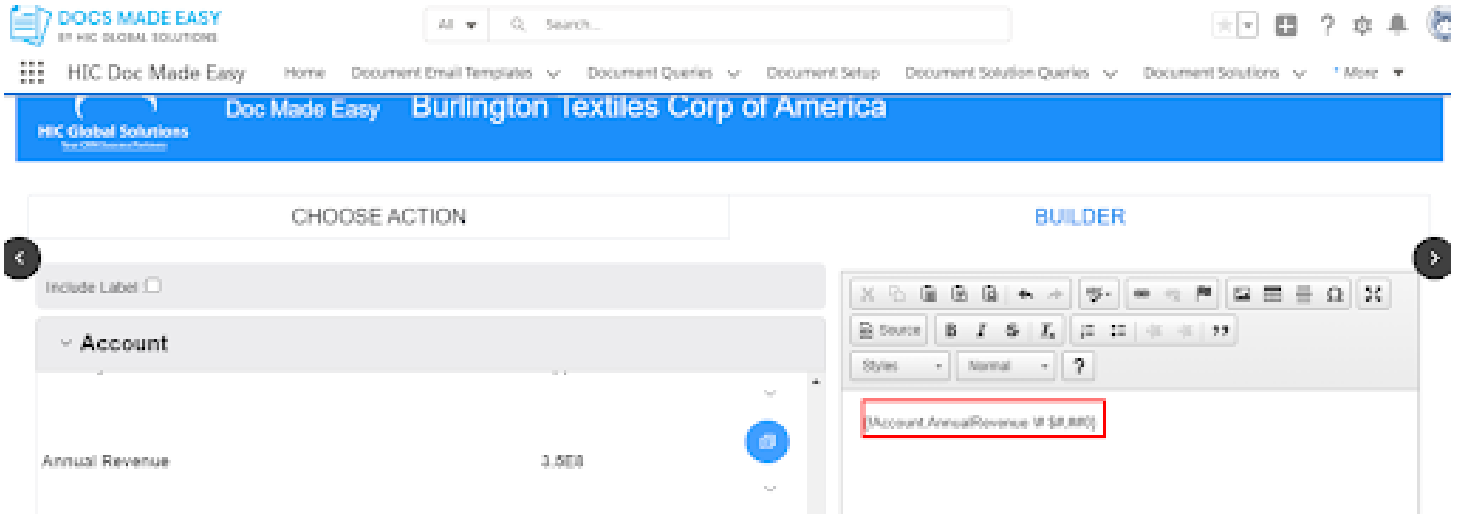
Parameter Description: The Currency Feature Parameter in the Docs Made Easy app allows you to add currency to your documents. See the screenshots below.

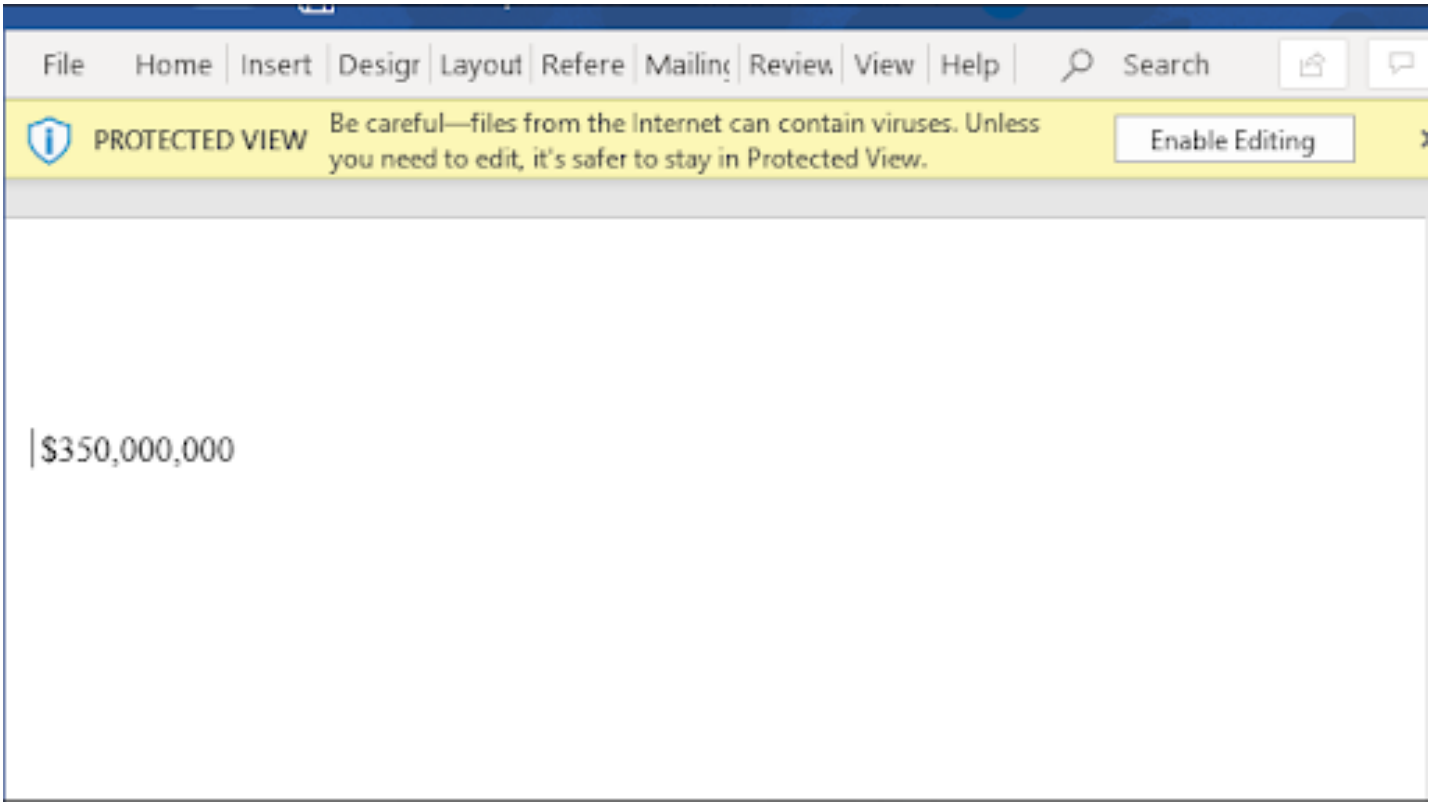
8.1 Parameter Required: {!Account.AnnualRevenue \# #,##0}



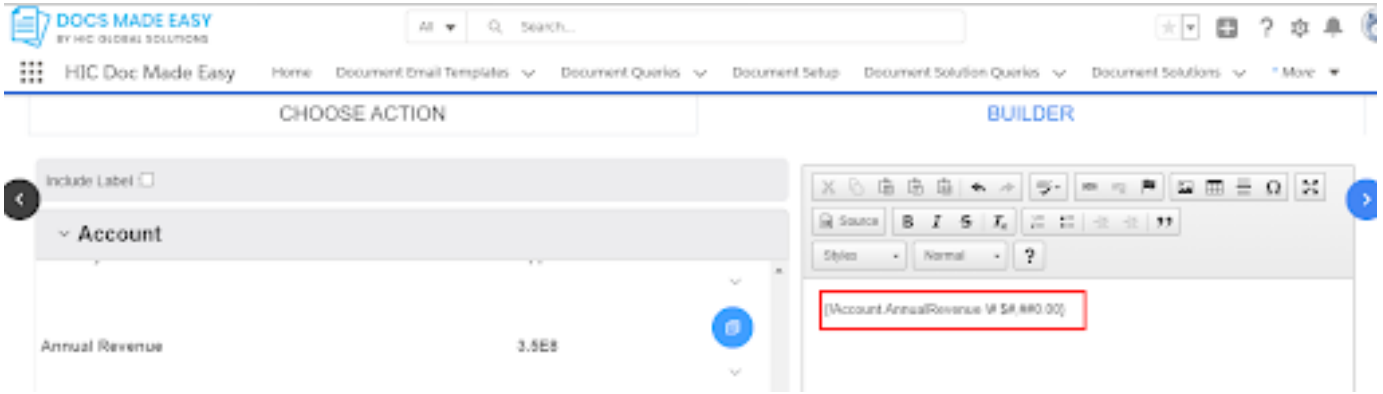


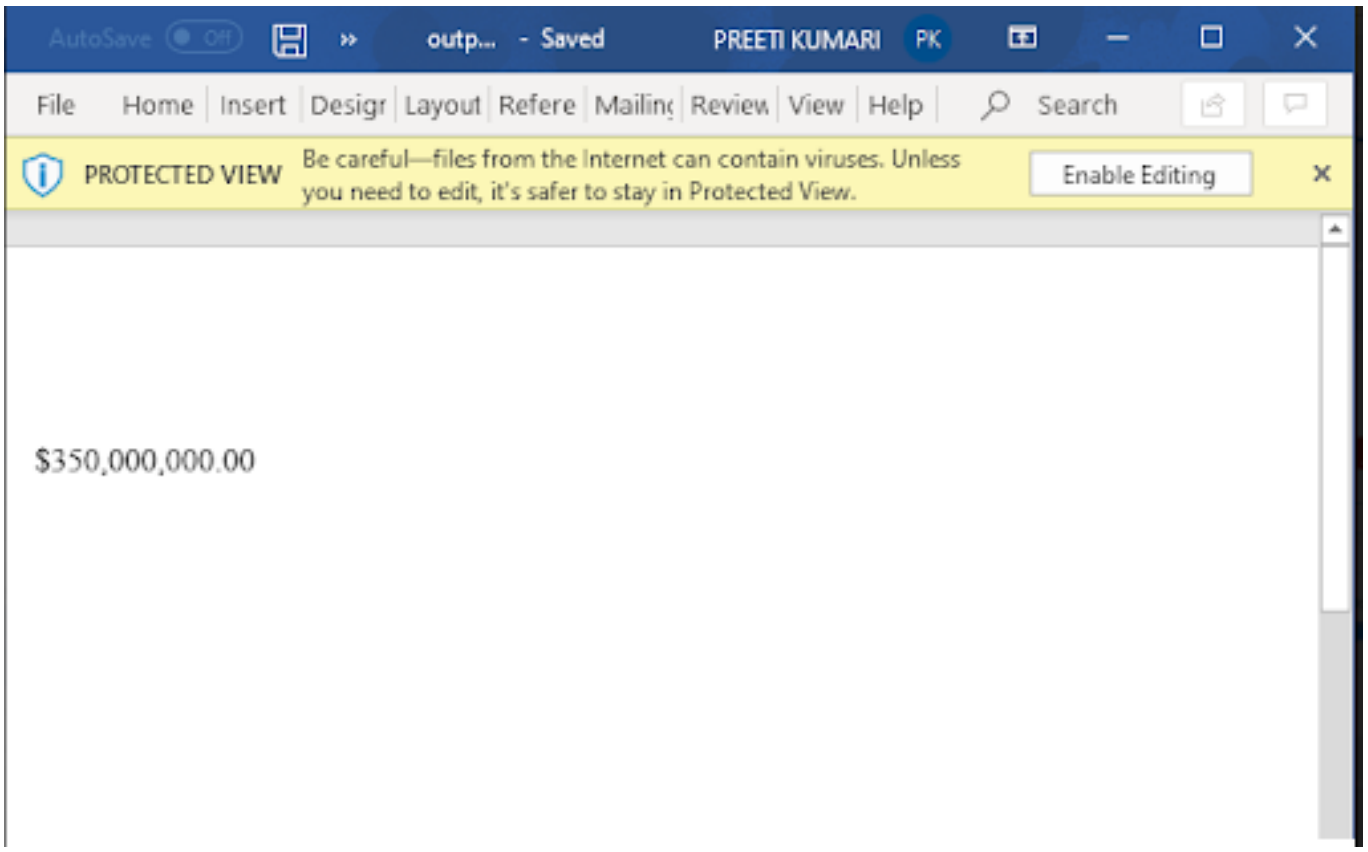
8.2 Parameter Required: {!Account.AnnualRevenue \# $#,##0}



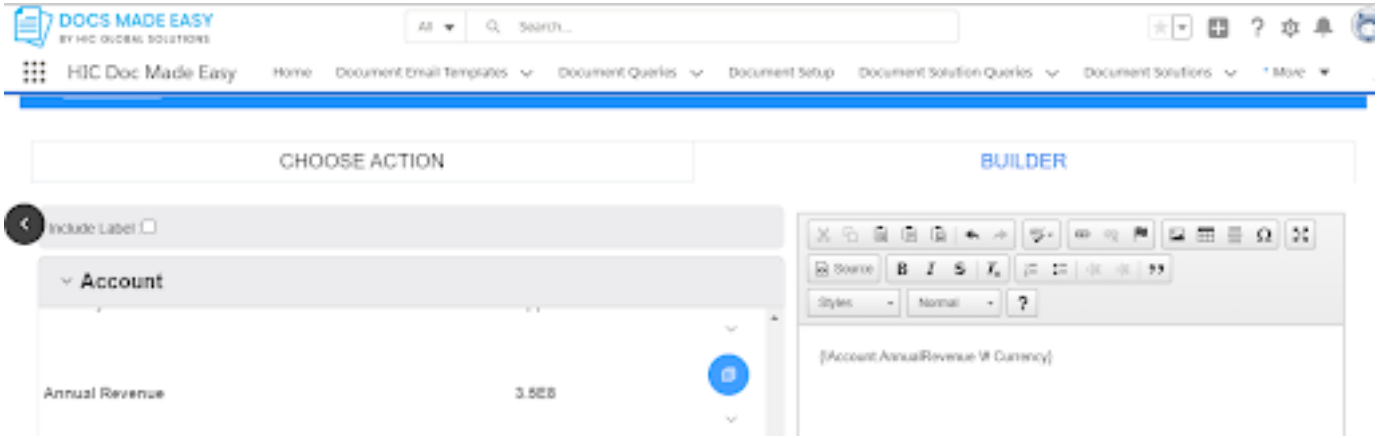


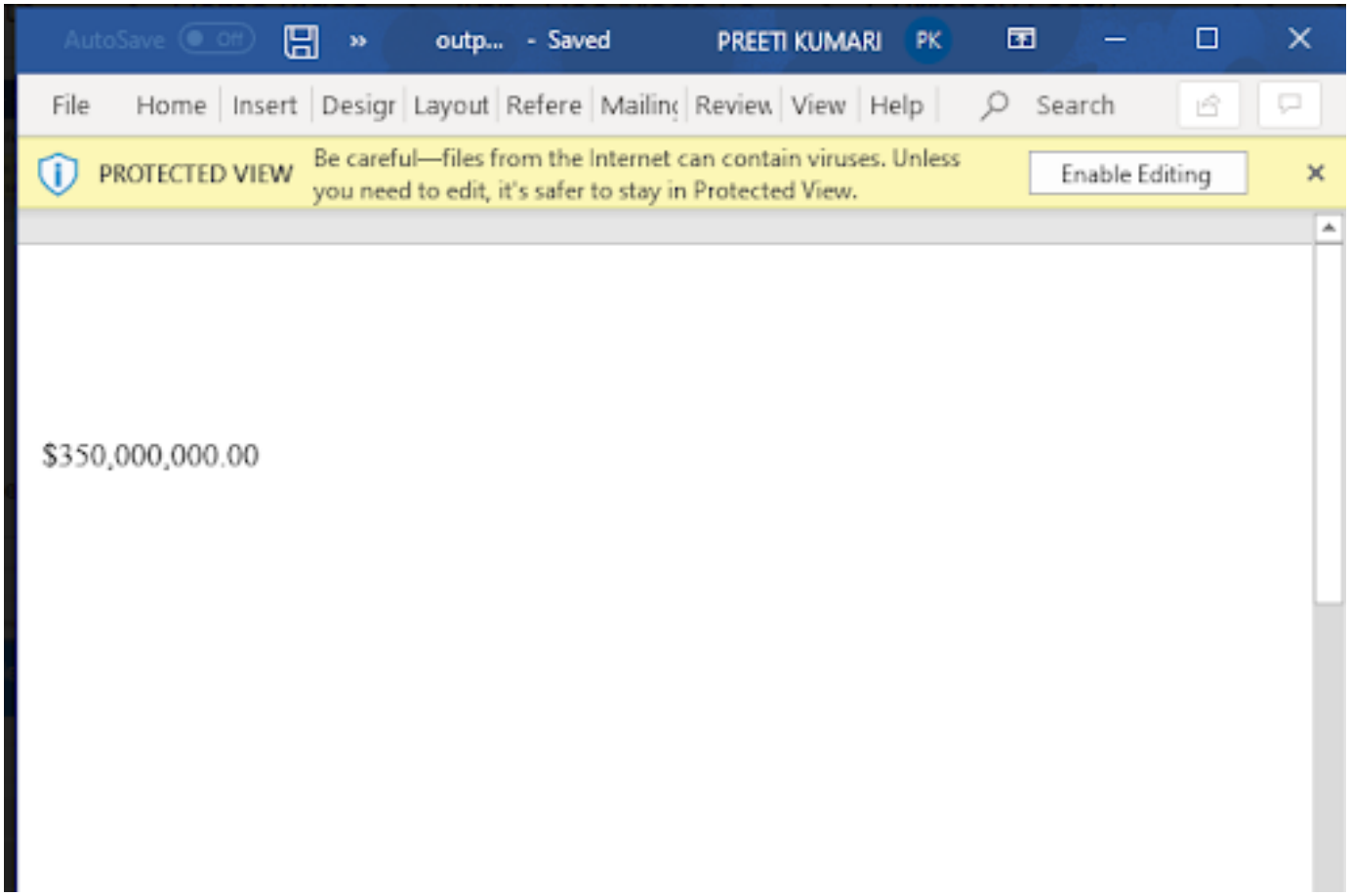
8.3 Parameter Required: {!Account.AnnualRevenue \# $#,##0.00}





8.4 Parameter Required: {!Account.AnnualRevenue \# Currency}





9. Date Format

Parameter Name: Date Format

Parameter Description: The Date Format Parameter in the Docs Made Easy app allows you to display the dates in your documents in several formats. You can either use MM/DD/YYYY, which means 06/21/1997, DD/MM/YYYY for 21/06/1997, MMM DD, YYYY for JUN 21,1997, or MMMM D, YYYY for JUNE 21, 1997.

Parameter Required:

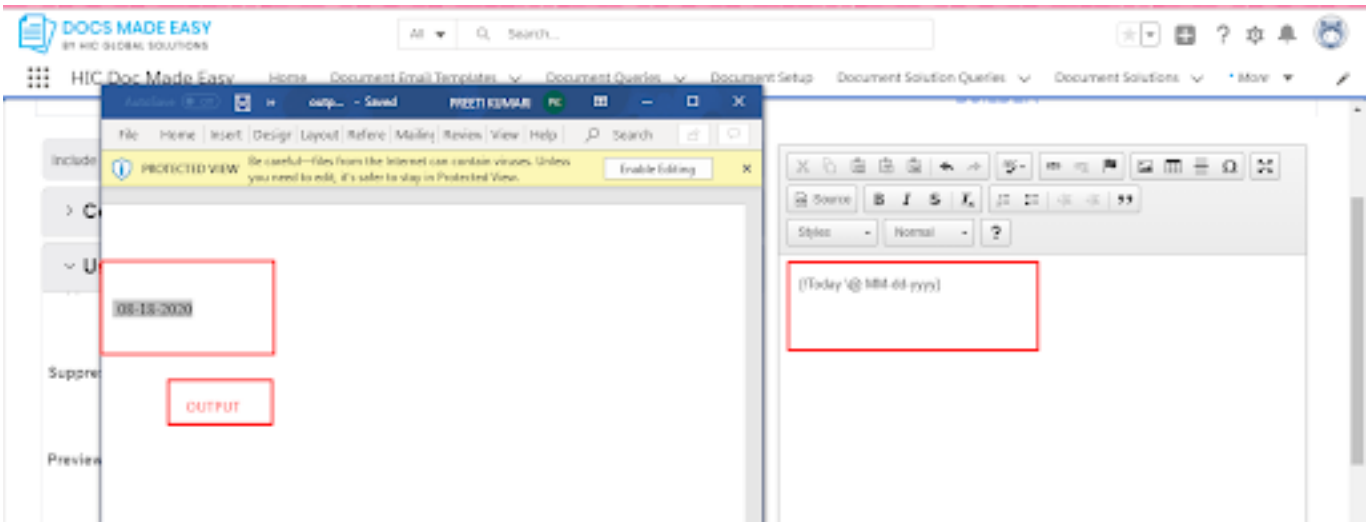
- {!Account.CreatedDate \@ MM-dd-yyyy}
- {!Account.CreatedDate \@ dd/MM/yyyy}
- {!Account.CreatedDate \@ "MMM dd, yyyy"}
- {!Account.CreatedDate \@ "MMMM d, yyyy"}

10. Today Date

Parameter Name: Today Date

Parameter Description: The Today Date parameter in the Docs Made Easy app allows you to insert today's date into your documents.

Parameter Required: {!Today \@ MM-dd-yyyy}

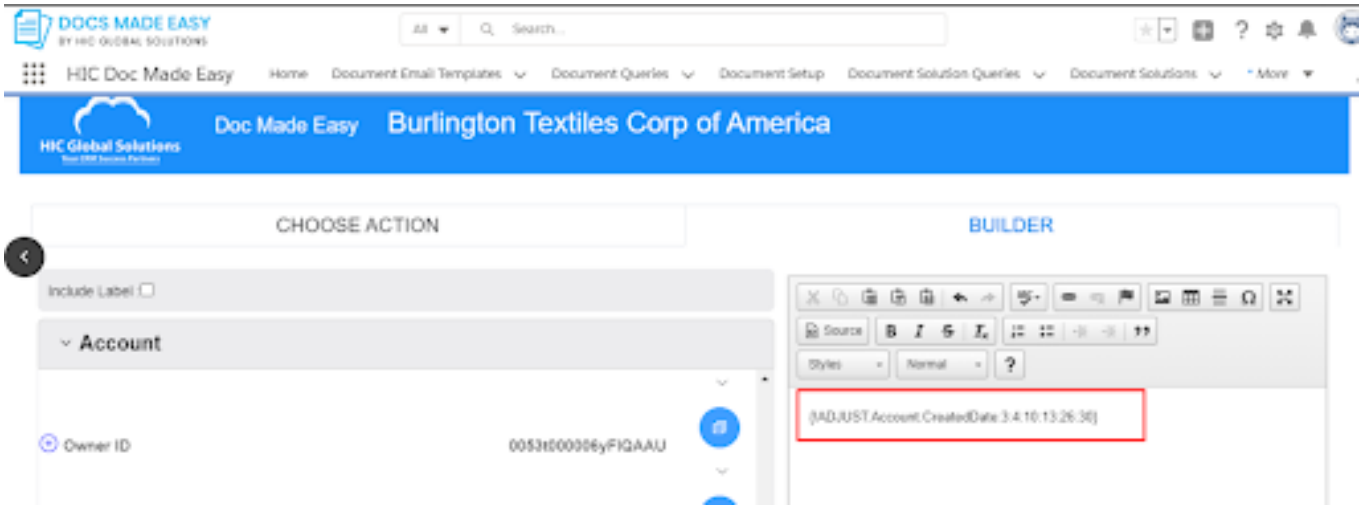


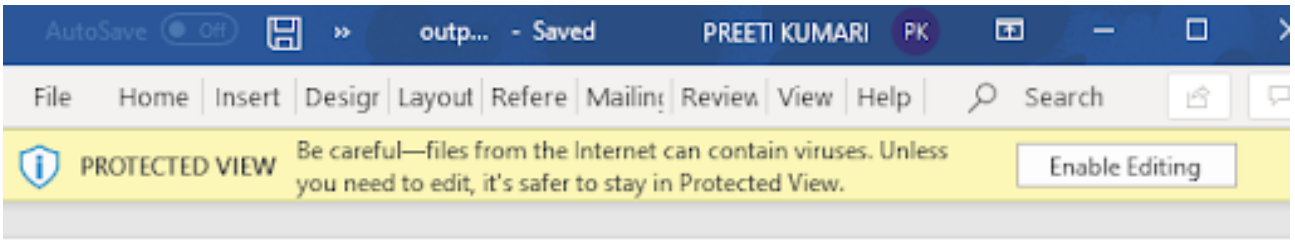
11. Adjust (Dynamic Date)

Parameter Name: Adjust (Dynamic Date)

Parameter Description: The Adjust (Dynamic Date) parameter in the Docs Made Easy app allows you to adjust a date merge field by simply inserting the prefix: ADJUST. This enables you to add a date in your document, let's say 30-days past an Opportunity Close Date.

Parameter Required: { !ADJUST: MyDateField:Year:Month:Day:Hour:Minute:Second }





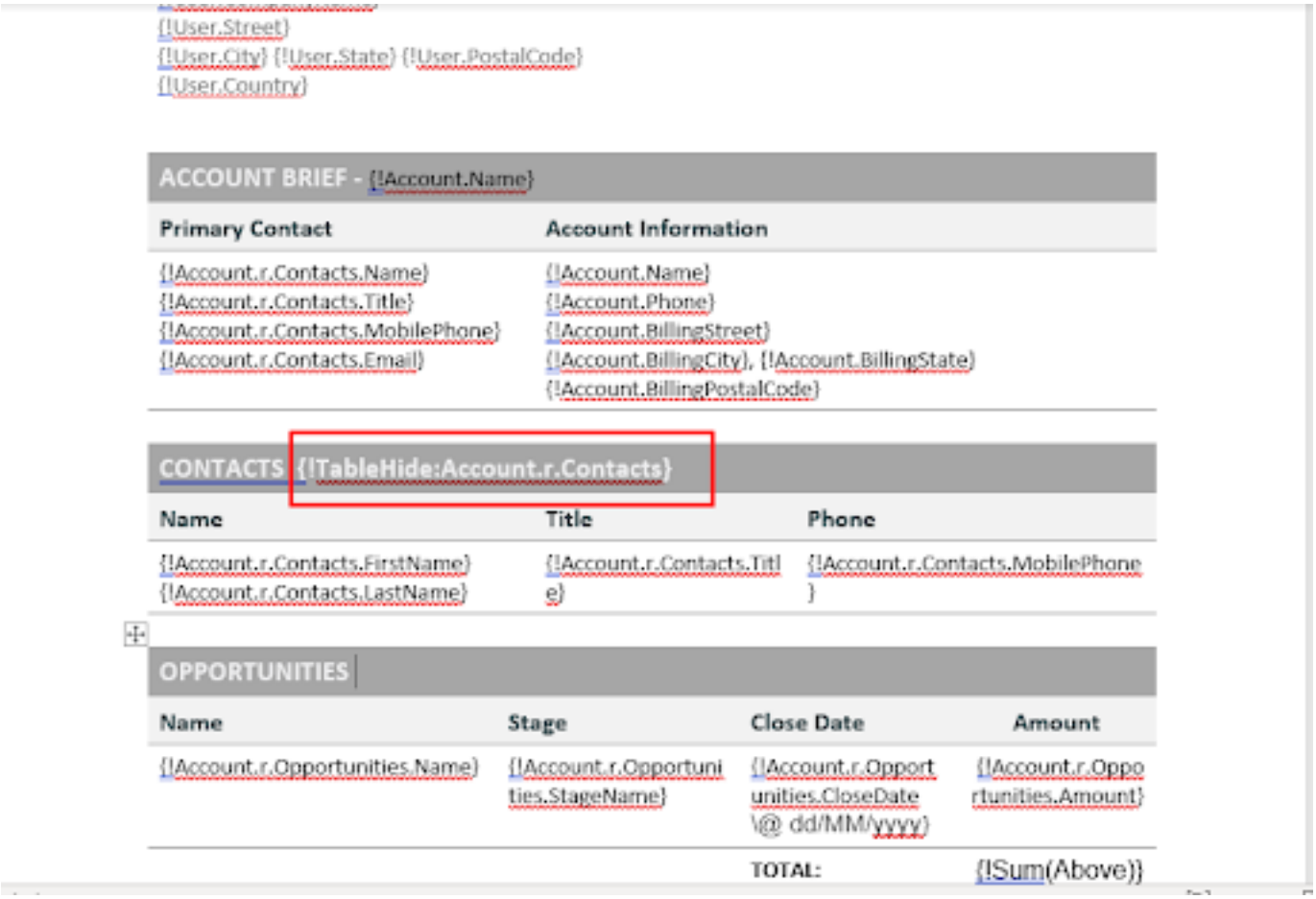
11/25/2023 17:34:20

12. Table Hide

Parameter Name: Table Hide

Parameter Description: The Table Hide parameter in the Docs Made Easy app allows you to hide the table within the document.

Parameter Required: {!TableHide:Account.r.Contacts}



{!User.Street}
{!User.City} {!User.State} {!User.PostalCode}
{!User.Country}

ACCOUNT BRIEF - {!Account.Name}	
Primary Contact	**Account Information**
{!Account.r.Contacts.Name} {!Account.r.Contacts.Title} {!Account.r.Contacts.MobilePhone} {!Account.r.Contacts.Email}	{!Account.Name} {!Account.Phone} {!Account.BillingStreet} {!Account.BillingCity}, {!Account.BillingState} {!Account.BillingPostalCode}

CONTACTS {!TableHide:Account.r.Contacts}		
Name	**Title**	**Phone**
{!Account.r.Contacts.FirstName} {!Account.r.Contacts.LastName}	{!Account.r.Contacts.Title}	{!Account.r.Contacts.MobilePhone}

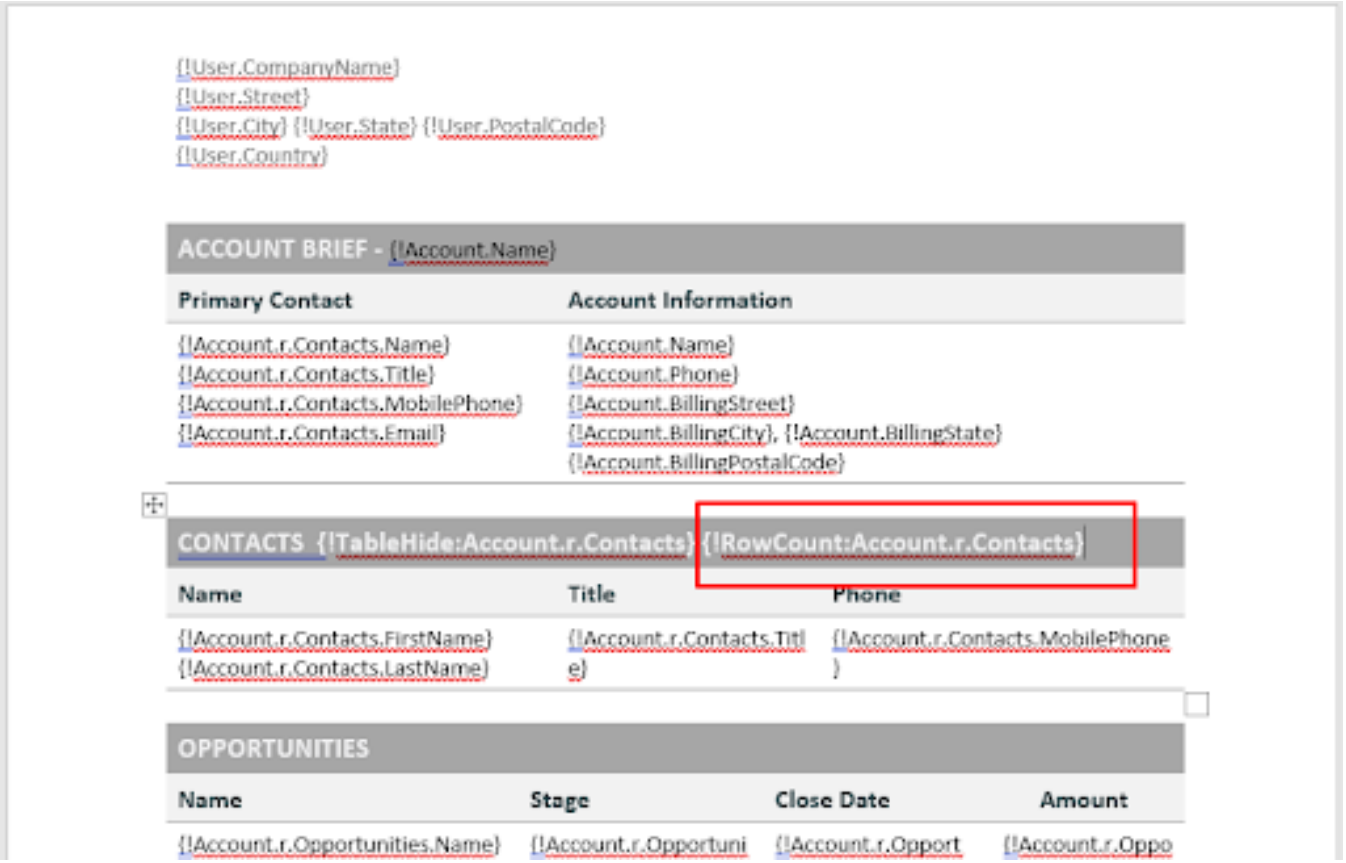
OPPORTUNITIES			
Name	**Stage**	**Close Date**	**Amount**
{!Account.r.Opportunities.Name}	{!Account.r.Opportunities.StageName}	{!Account.r.Opportunities.CloseDate \@ dd/MM/yyyy}	{!Account.r.Opportunities.Amount}
		TOTAL:	{!Sum(Above)}

13. Row Count

Parameter Name: Row Count

Parameter Description: The Row Count parameter in the Docs Made Easy app allows you to display the number of rows in your document.

Parameter Required: {!RowCount:Account.r.Contacts}



{!User.CompanyName}
{!User.Street}
{!User.City} {!User.State} {!User.PostalCode}
{!User.Country}

ACCOUNT BRIEF - {!Account.Name}	
Primary Contact	**Account Information**
{!Account.r.Contacts.Name} {!Account.r.Contacts.Title} {!Account.r.Contacts.MobilePhone} {!Account.r.Contacts.Email}	{!Account.Name} {!Account.Phone} {!Account.BillingStreet} {!Account.BillingCity}, {!Account.BillingState} {!Account.BillingPostalCode}

CONTACTS {!TableHide:Account.r.Contacts} {!RowCount:Account.r.Contacts}		
Name	**Title**	**Phone**
{!Account.r.Contacts.FirstName} {!Account.r.Contacts.LastName}	{!Account.r.Contacts.Titl e}	{!Account.r.Contacts.MobilePhone }

OPPORTUNITIES			
Name	**Stage**	**Close Date**	**Amount**
{!Account.r.Opportunities.Name}	{!Account.r.Opportuni	{!Account.r.Opport	{!Account.r.Oppo

ACCOUNT BRIEF - Burlington Textiles Corp of America

Primary Contact	Account Information
Jack Rogers VP, Facilities jrogers@burlington.com	Burlington Textiles Corp of America (336) 222-7000 525 S. Lexington Ave Burlington, NC 27215
Test Contact preetik@hicglobalsolutions.com	Burlington Textiles Corp of America (336) 222-7000 525 S. Lexington Ave Burlington, NC 27215

CONTACTS 2

Name	Title	Phone
Jack Rogers	VP, Facilities	
Test Contact		

OPPORTUNITIES

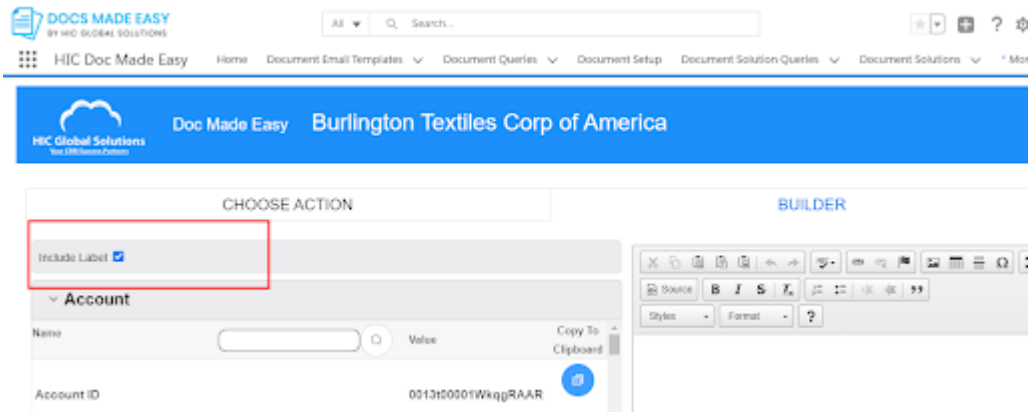
Name	Stage	Close Date	Amount
Burlington Textiles Weaving Plant Generator	Closed Won	2018-06-25	255000.0
Test Opportunity3	Qualification	2020-08-12	76778.0

14. Include Label

Parameter Name: Include Label

Parameter Description: The Include Label parameter in the Docs Made Easy app allows you to include a label in your document with just a click.

Parameter Required: Click on the Checkbox.

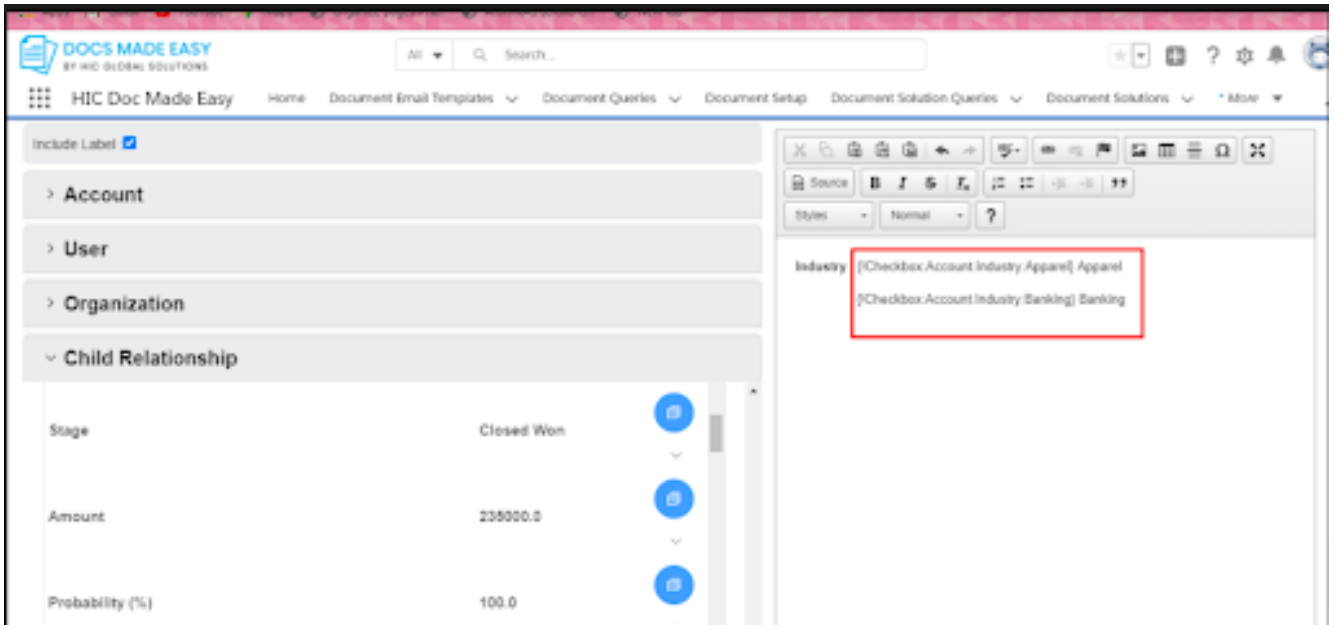


15. Multiple Picklist Value

Parameter Name: Multiple Picklist Value

Parameter Description: The Multiple Picklist Value parameter in the Docs Made Easy app allows you to select multiple picklist values in a document.

Parameter Required: {!Checkbox:Account.Industry:Apparel} Apparel.



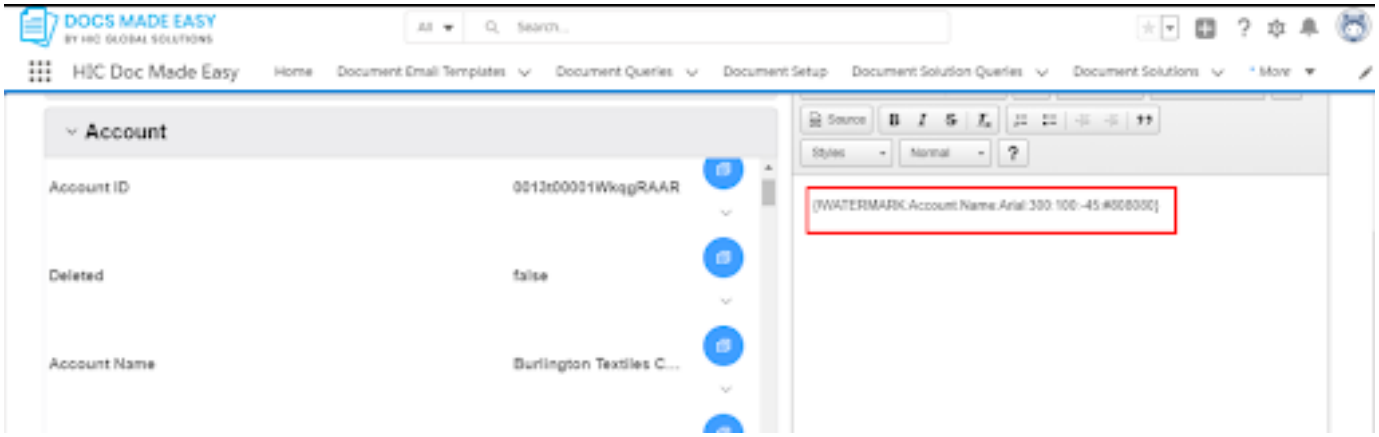
16. Watermark

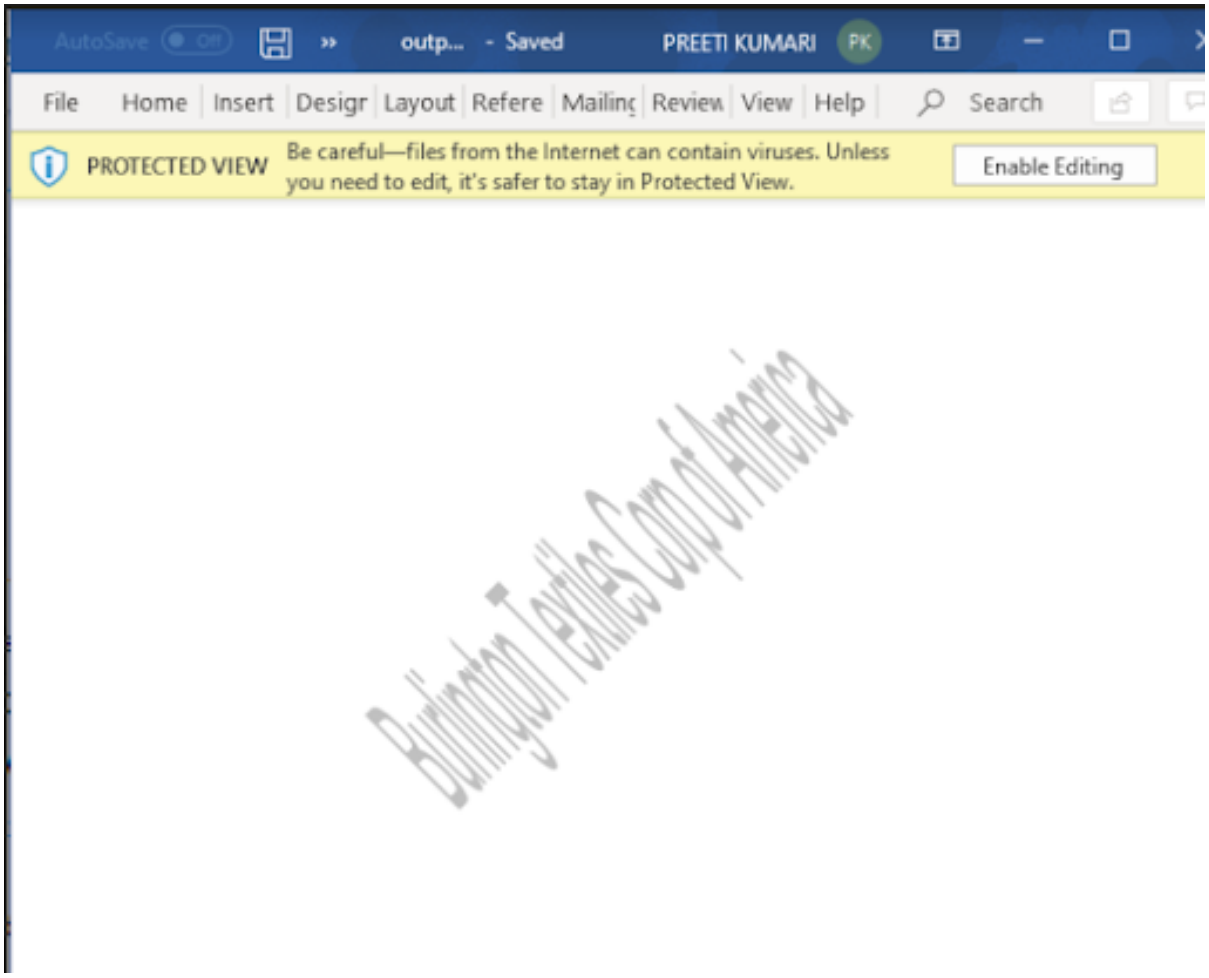
Parameter Name: Watermark

Parameter Description: The Watermark parameter in the Docs Made Easy app allows you to apply watermark to your Word document by using the prefix Watermark.

Parameter Required:

{!WATERMARK:FieldName:Font:Width:Height:Rotation:ColorCode}.


DOCS MADE EASY
HIC Doc Made Easy
Home
Document Email Templates
Document Queries
Document Setup
Document Solution Queries
Document Solutions
More
Account
Account ID
0013t00001WkqgRAAR
Deleted
false
Account Name
Burlington Textiles C...
{WATERMARK:Account Name:Arial:300:100:-45:#808080}

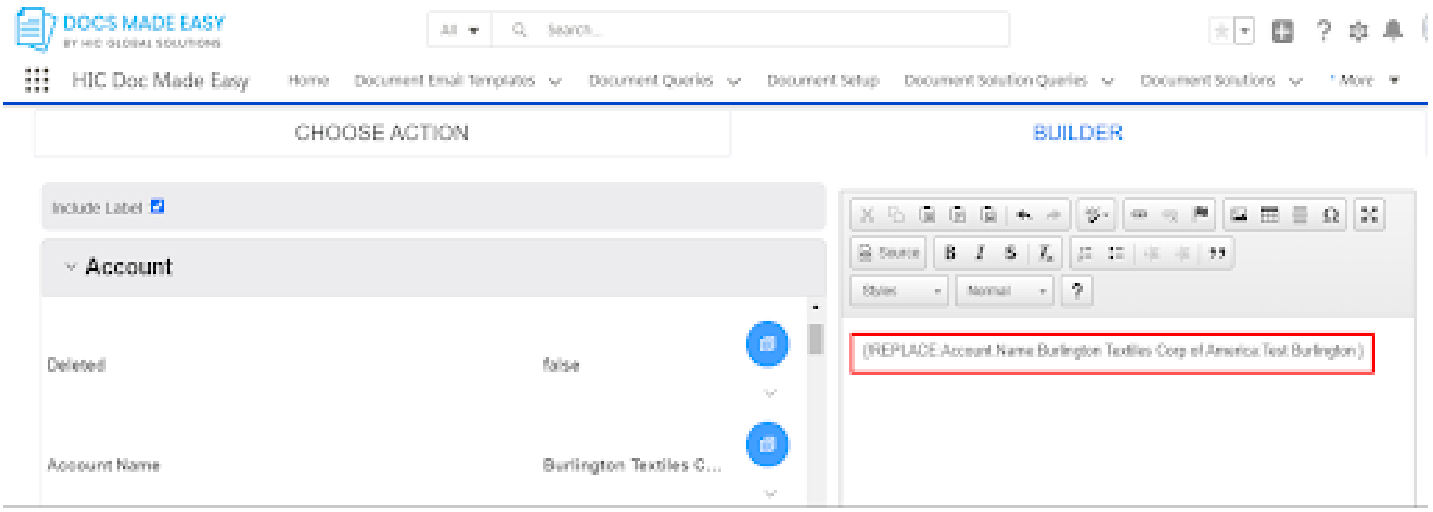

AutoSave
outp... - Saved
PREETI KUMARI
File
Home
Insert
Design
Layout
References
Mailings
Review
View
Help
Search
PROTECTED VIEW
Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View.
Enable Editing
Burlington Textiles Corp of America

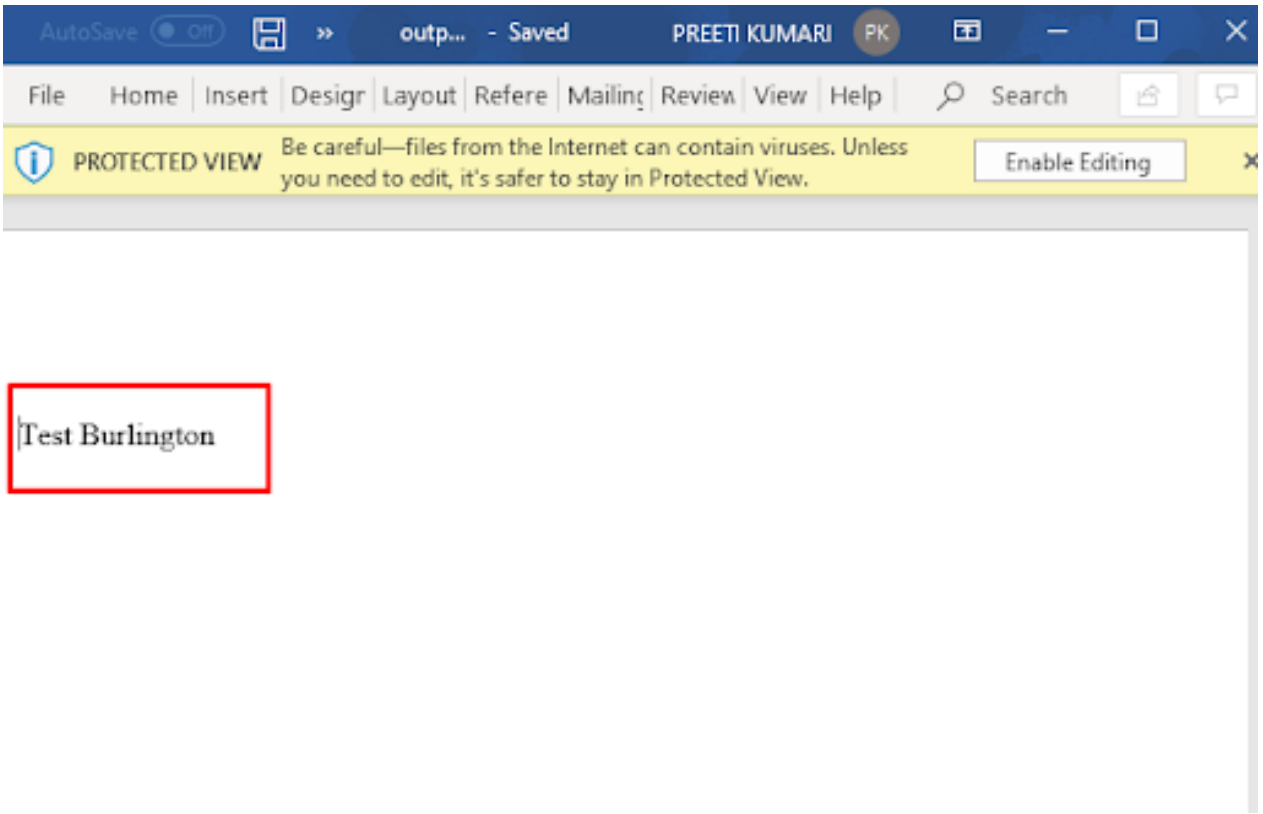
17. Replace

Parameter Name: Replace

Parameter Description: The Replace parameter in the Docs Made Easy app allows you to replace one value for another in your documents.

Parameter Required: {!REPLACE:FieldName:FromValue:ToValue }





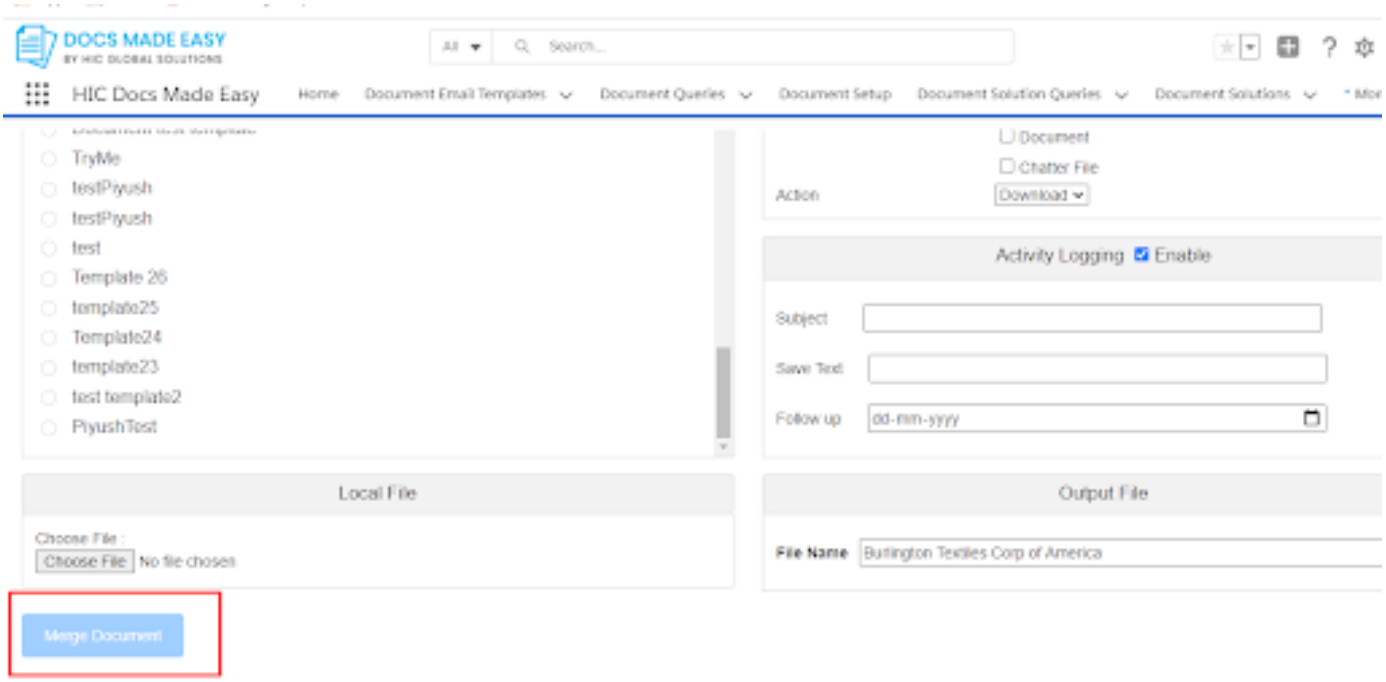
18. BGM Parameter

Parameter Name: BGM Parameter

Parameter Description: The BGM Parameter in the Docs Made Easy app allows you to disable the merge button.

Parameter Required:

- bgm=1, background mode, and file will be appended to file and will be downloaded as well
- bgm=2, background mode, and file will be appended to attachment and will be downloaded as well
- bgm=3, background mode and file will be appended to chatter and will be downloaded as well



19. Skip Download

Parameter Name: Skip Download
Parameter Description: The Skip Download parameter in the Docs Made Easy app allows you to skip downloading the document if you don't want it to be downloaded, just attach it to Sf as per the bgm parameter.
Parameter Required: SkipDownload=1

20. RedirectToUrl

Parameter Name: RedirectToUrl
Parameter Description: The RedirectToUrl in the Docs Made Easy app allows you to redirect on the page that you were already on.
Parameter Required: &redirecttourl=/{!Account.Id}, {!Account.Id} - insert any object name here.

21. Image Parameter

Parameter Name: Image Parameter
Parameter Description: The Image Parameter in the Docs Made Easy app allows you to insert an image in your document.
Parameter Required: {!Image:Account.PhotoUrl}