

# **Printable View - Lightning**

## **INSTALLATION GUIDE & USER MANUAL**



**HYTECH PROFESSIONALS INDIA PVT. LTD.**

**[www.hytechpro.com](http://www.hytechpro.com)**

**545 Park Road NW,**

**Washington, DC 20010.**

# Printable View - Lightning

## Overview

The Application provides the functionality of Printable View of an object's record in Lightning Experience. Currently, the Printable View functionality is only available in Salesforce Classic and not in Lightning Experience but we have provided this functionality in Salesforce Lightning Experience. Now the user need not to go to Classic View to print the record details..

It gives the detail view of all the items shown on an objects and can give you a print ready view in Lightning Experience.

The screenshot displays the Salesforce Lightning Experience interface for an account record. At the top, the account name 'Burlington Textiles Corp of America' is shown. In the top right corner, a navigation bar contains several buttons: '+ Follow', 'Printable View' (highlighted with a yellow circle), 'New Contact', and 'New Case'. Below the account name, there are fields for Type (Customer - Direct), Phone ((336) 222-7000), Website (www.burlington.com), Account Owner (Salesforce Develop...), Account Site (Burlington Textiles), and Industry (Apparel). The main content area is divided into 'RELATED' and 'DETAILS' sections. Under 'RELATED', there are sections for 'Contacts (2)' and 'Opportunities (2)'. The 'Contacts' section lists Jack Rogers and testing is going on. The 'Opportunities' section lists testing related list and Burlington Textiles Weaving Plant Generator. On the right side, there is an 'ACTIVITY' section with a 'CHATTER' tab. It includes a 'New Task' section with options for Log a Call, New Event, and Email, a 'Subject' input field, a 'Filter Timeline' dropdown, and a 'Past Activity' section showing a test email from dharmendra.singh@hytechpro.com to testing is going on.

Fig.1 Button on an object which gives a print ready view.

## Installation

To install the Lightning application click on “**Get Now**” and select the target org where the application have to be installed.

1. Login into the target org and select the users who need to have access the installed application.

### **Install Printable View - Lightning** By HyTechPro

Install for Admins Only

Install for All Users

Install for Specific Profiles...

App Name	Publisher	Version Name	Version Number
Printable View - Lightning	HyTechPro	V1	1.2
<b>Additional Details</b>	<a href="#">View Components</a>		



# Install Printable View - Lightning

By HyTechPro



Installation Complete!

Done

App Name	Publisher	Version Name	Version Number
Printable View - Lightning	HyTechPro	V1	1.2

- Under the **Installed Packages**, the Printable View - Lightning Application should be listed.

## Installed Packages

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages									
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	
<a href="#">Uninstall</a>	 Printable View - Lightning	HyTechPro	1.3	HTPPV	Free	N/A	N/A	N/A	
<a href="#">Uninstall</a>	Testing Document	HyTechPro	1.0		N/A	N/A	N/A	N/A	

Printable View - Lightning Application has been installed now just configure the app and use it.

## User Manual

### 1.1 For the Lightning Experience

#### Step 1: Add Remote Site Setting.

Since this app uses Salesforce API to retrieve information for some of the listed components, user needs to add his Salesforce instance URL in Remote Site Settings. Follow the below steps to add Remote Site Settings.

1. Goto Setup > in Administer > Security Controls > Remote Site Settings.
2. Add your Salesforce instance URL. For example, if your salesforce instance is “https://ap4.salesforce.com” the Remote Site Setting would be “https://httpv.ap4.visual.force.com” .
3. If you have registered the org with the Domain , then the Remote Site Setting will be different. For example , if the Domain name is “puat2-dev-ed“ , then the Remote Site Setting would be “https://puat2-dev-ed--httpv.ap4.visual.force.com“.

Please note that we do not access or save any information from your organization.

## All Remote Sites

[Help for this Page](#)

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.

View: All Remote Sites [Create New View](#)

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
<a href="#">Edit</a>   <a href="#">Del</a>	PrintableView_RemoteSiteSetting		https://bhavya-jain-dev-ed--httpv.ap2.visual.force.com	<input checked="" type="checkbox"/>	jain, Bhavya	3/27/2017 6:05 AM	jain, Bhavya	5/8/2017 5:35 AM

## Step 2: Create Printable View Button

(For some standard objects we have already provided the buttons with this app so you don't have to create a new button for those objects).

- a. Go to Setup > Platform Tools > Object Manager.
- b. Select the Object on which Button needs to be created.

The screenshot shows the Salesforce Object Manager interface. On the left, a navigation pane lists 'Object Manager' under 'Objects and Fields'. The main area displays a table of buttons for the 'Billing' object. The table has columns for LABEL, NAME, DESCRIPTION, TYPE, CONTENT SOURCE, and OVERRIDDEN. The buttons listed are: Accounts Tab (Standard Salesforce.com Page), Billing (Detail Page Link, URL), Check Clean Status (Standard Salesforce.com Page), Clean (Standard Salesforce.com Page), and Delete (Standard Salesforce.com Page).

LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Accounts Tab	Tab			Standard Salesforce.com Page	<input type="checkbox"/>
Billing	Billing		Detail Page Link	URL	<input type="checkbox"/>
Check Clean Status	XClean			Standard Salesforce.com Page	<input type="checkbox"/>
Clean	ListClean			Standard Salesforce.com Page	<input type="checkbox"/>
Delete	Delete			Standard Salesforce.com Page	<input type="checkbox"/>

- c. Click on **Buttons, Links and Actions** button given on top-right section of the page.
- d. Click on **New Custom Button or Link**.
- e. Give the Label and Name of Button as **Printable View**. Choose Display Type as Detail Page Button, Behavior as Display in a New Window, Content Source as URL.
- f. Add the URL as per syntax given below:  
**`/apex/HPPV__PrintableView?id={!ObjectName.id}`**

For e.g. when we add the account button it's URL will be as follows:

`/apex/HPPV__PrintableView?id={!Account.Id}`

- g. Click on Check Syntax button and verify it. Then click on Save Button.

Edit Account Custom Button or Link

## Printable View (Managed)

 This Custom Button or Link is managed, meaning that you may only edit certain attributes. [Display More Information](#)

**Custom Button or Link Edit** Save Quick Save Preview Cancel

**Label** Printable View

**Name** Printable\_View i

**Namespace Prefix** HPPV

**Installed Package** Printable View - Lightning

**Description**

**Display Type**

Detail Page Link [View example](#)

Detail Page Button [View example](#)

List Button [View example](#)

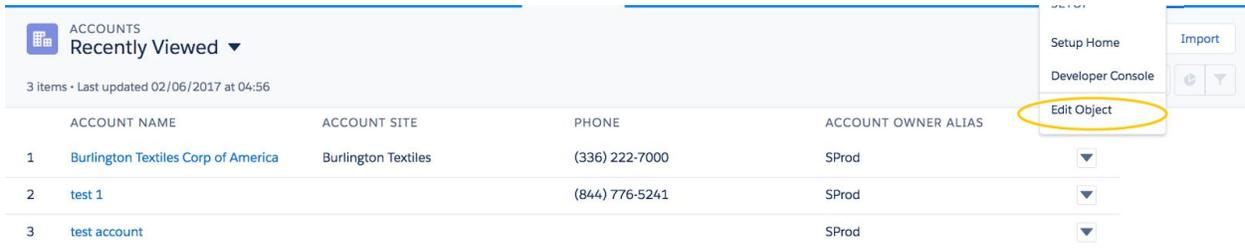
**Behavior** Display in new window View Behavior Options

**Content Source** URL

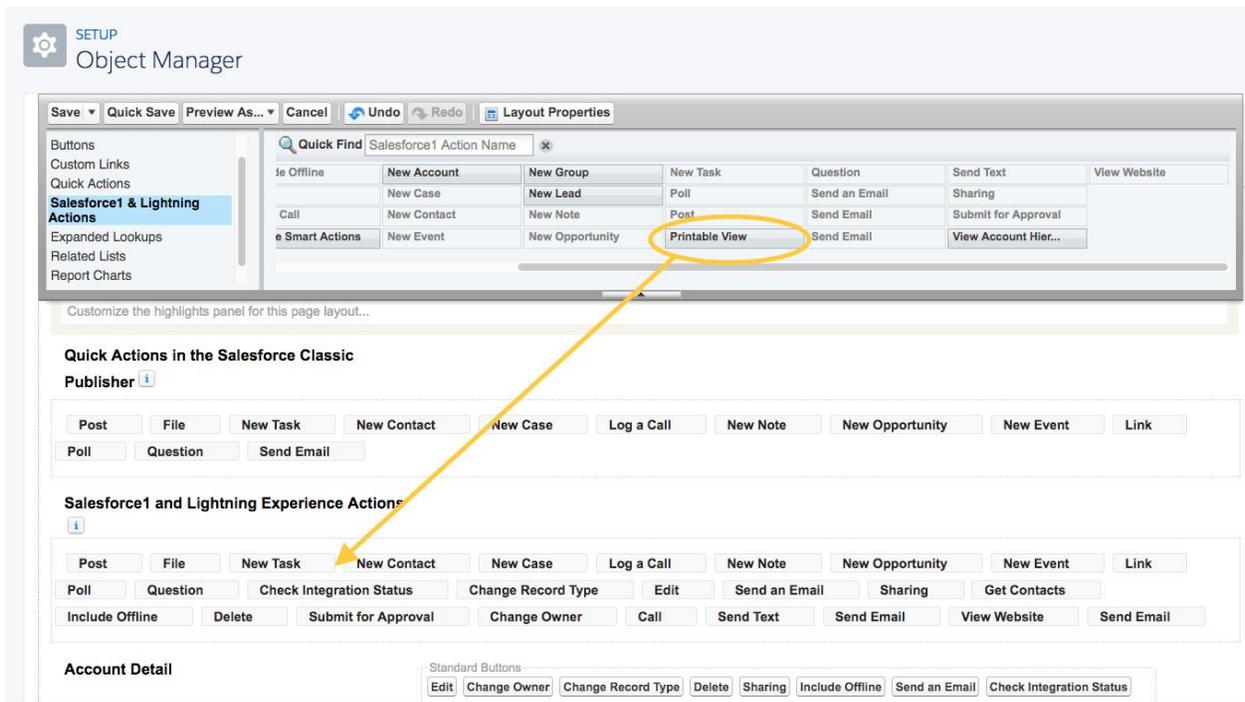
`/apex/HPPV__PrintableView?id={!Account.Id}`

### Step 3: Add Printable View Button on the Page Layout.

- Select the Object on which button needs to be added.
- Go to top right setting symbol and click on **Edit Object**.



- Click on **Page Layouts** button given on top of page. Then click on the page layout on which you want to add the button.
- Drag and Drop the button from **Salesforce1 & Lightning Actions** section to the layout of the Lightning Experience.
- Click on Save.



## Step 4: Getting Printable View in Lightning Experience

- a. Go to record of an Object. Check for Printable View Button that we have recently added in the last (Step 2) from the top right actions shown or by clicking the drop down on right and then clicking on a Printable View Button.
- b. After clicking on the Printable View Button you will be able to see the Printable View of the Object Detail along with related list data.

## 1.2 For the Classic Experience

### Step 1: Add Remote Site Setting.

1. Go to Setup > Administer > Security Controls > Remote Site Settings.
2. Add your Salesforce instance URL. For example, if your salesforce instance is **“https://ap4.salesforce.com”** the Remote Site Setting would be **“https://htppv.ap4.visual.force.com”**.
3. If you have registered the org with the Domain, then the Remote Site Setting will be different. For example, if the Domain name is **“puat2-dev-ed”**, then the Remote Site Setting would be **“https://puat2-dev-ed--htppv.ap4.visual.force.com”**.

## All Remote Sites

[Help for this Page](#)

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.

View: All Remote Sites [Create New View](#)

New Remote Site								
Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
<a href="#">Edit</a>   <a href="#">Del</a>	PrintableView_RemoteSiteSetting		<a href="https://bhavya-jain-dev-ed--htppv.ap2.visual.force.com">https://bhavya-jain-dev-ed--htppv.ap2.visual.force.com</a>	<input checked="" type="checkbox"/>	jain, Bhavya	3/27/2017 6:05 AM	jain, Bhavya	5/8/2017 5:35 AM

## Step 2: Create Printable View Button

(For some standard objects we have already provided the buttons with this app so you don't have to create a new button for those objects).

- For standard object Go to Setup > Build > Customize / For Custom Objects Go to Setup > Build > Create > Object
- Select the Object on which Button needs to be created.
- Scroll down and find **Buttons, Links and Actions** section.
- Click on **New Custom Button or Link**.
- Give the Label and Name of Button as **Printable View**. Choose Display Type as Detail Page Button, Behaviour as Display in a New Window, Content Source as URL.
- Add the URL as per syntax is given below:

**`/apex/HTPPV__PrintableView?id={!ObjectName.id}`**

For e.g. If we are creating the button for Account object the URL will be as follows:

**`/apex/HTPPV__PrintableView?id={!Account.Id}`**

- Click on Check Syntax button and verify it. Then click on Save Button.

Edit Account Custom Button or Link  
**Printable View (Managed)**

 This Custom Button or Link is managed, meaning that you may only edit certain attributes. [Display More Information](#)

**Custom Button or Link Edit** Save Quick Save Preview Cancel

**Label** Printable View

**Name** Printable\_View i

**Namespace Prefix** HTPPV

**Installed Package** Printable View - Lightning

**Description**

**Display Type**

Detail Page Link [View example](#)

Detail Page Button [View example](#)

List Button [View example](#)

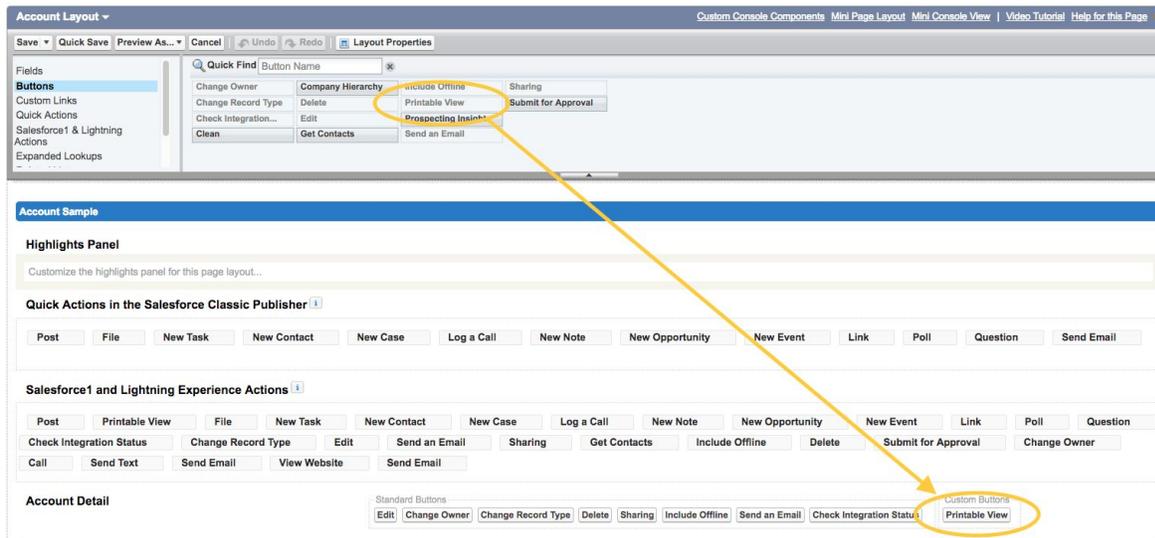
**Behavior** Display in new window View Behavior Options

**Content Source** URL

`/apex/HTPPV__PrintableView?id={!Account.Id}`

## Step 3: Add Printable View Button on the Page Layout.

- For standard object Go to Setup > Build > Customize / For Custom Objects Go to Setup > Build > Create > Object
- Select the Object on which Button needs to be created.
- Scroll down and find Page Layouts section.
- Edit the Layout where you need to add this button.
- Drag and Drop the button from Buttons section to the page layout and save.



#### Step 4: Getting Printable View in Classic Experience

- Go to record of an Object. Check for Printable View Button that we have recently added in the last (Step 2) from the top right actions shown or by clicking the drop down on right and then clicking on a Printable View Button.
- After clicking on the Printable View Button you will be able to see the Printable View of the Object Detail along with related list data.

### 1.3 Additional feature

**(a). Print Related List:** The app also provides user the option to print or not print the related content data of the selected record, there is a checkbox at the upper right corner of the page by which user can select or deselect the related list data to print. User can print a maximum of 200 record for each Related List Object.

**(b). Editable Title :** We have added a new feature in Printable View Application where user can add the title on the printable page by it's own choice, for that he just needs to click on the Edit image on the top and add some text of it's own choice anytime and then print it.

salesforce.com. Print Related List Print Page Close Window

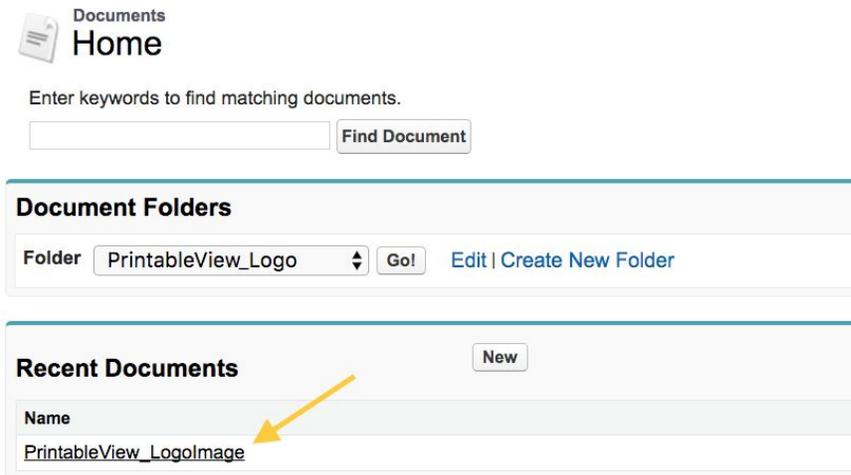
Account Owner	Salesforce Developer	Rating	Warm
Account Name	Burlington Textiles Corp of America	Phone	(336) 222-7000
Parent Account		Fax	(336) 222-8000
Account Number	CD656092	Website	http://www.burlington.com
Account Site	Burlington Textiles	Ticker Symbol	BTXT
Type	Customer - Direct	Ownership	Public
Industry	Apparel	Employees	9,000
Annual Revenue	\$350,000,000	SIC Code	546732
Custom_Object	test1	Billing Street	525 S. Lexington Ave
Billing City	Burlington	Billing State/Province	NC
Billing Zip/Postal Code	27215	Billing Country	USA
Shipping Street	525 S. Lexington Ave	Shipping City	Burlington
Shipping State/Province	NC	Shipping Zip/Postal Code	27215
Shipping Country	USA	Customer Priority	
SLA	Silver	SLA Expiration Date	2/7/2017
SLA Serial Number	5367	Number of Locations	6

**(c). Hide/Show particular Related List Record:** The app also provides user the option to Hide or Show the particular Related List Record. There is a collapsible icon on left side of each related list where user can hide or show the particular Related List record.

>	Files												
>	Assets												
∨	Contact Roles												
∨	<table border="0"> <tr> <td>Contact Name</td> <td><b>Testing Printable View0</b></td> </tr> <tr> <td>Account Name</td> <td><b>Burlington Textiles Corp of America</b></td> </tr> <tr> <td>Email</td> <td></td> </tr> <tr> <td>Phone</td> <td></td> </tr> <tr> <td>Role</td> <td><b>Business User</b></td> </tr> <tr> <td>Primary</td> <td><input type="checkbox"/></td> </tr> </table>	Contact Name	<b>Testing Printable View0</b>	Account Name	<b>Burlington Textiles Corp of America</b>	Email		Phone		Role	<b>Business User</b>	Primary	<input type="checkbox"/>
Contact Name	<b>Testing Printable View0</b>												
Account Name	<b>Burlington Textiles Corp of America</b>												
Email													
Phone													
Role	<b>Business User</b>												
Primary	<input type="checkbox"/>												
>	Contacts												
∨	Opportunities												
	<table border="0"> <tr> <td>Opportunity Name</td> <td><b>Burlington Textiles Weaving Plant Generator</b></td> </tr> <tr> <td>Stage</td> <td><b>Closed Won</b></td> </tr> <tr> <td>Amount</td> <td><b>\$235,000.00</b></td> </tr> <tr> <td>Close Date</td> <td><b>11/15/2016</b></td> </tr> </table>	Opportunity Name	<b>Burlington Textiles Weaving Plant Generator</b>	Stage	<b>Closed Won</b>	Amount	<b>\$235,000.00</b>	Close Date	<b>11/15/2016</b>				
Opportunity Name	<b>Burlington Textiles Weaving Plant Generator</b>												
Stage	<b>Closed Won</b>												
Amount	<b>\$235,000.00</b>												
Close Date	<b>11/15/2016</b>												

**(d). Customise your Logo:** The app provides the user to choose its own logo given at the top left of the Printable page. This can be done by steps given below:-

1. Go to Document Object
2. Select the PrintableView\_Logo folder from the dropdown.
3. Click on “ **PrintableView\_LogoImage** ”.



4. Then click on “ Replace Document ” button.
5. Then choose your image (**Preferable size of Image - 146 x 47** ).
6. Click on “ Replace Document “ button to replace the logo with your own Logo.