

USER GUIDE



DOCS MADE EASY
BY HIC GLOBAL SOLUTIONS

The importance of documents is undeniable, and good documentation makes everything manageable for a business. Docs Made Easy eases down the process of digital documentation in Salesforce so that you can focus more on your business goals and less on the hassle of creating documents. Now Create effective yet efficient documents in Salesforce fuss-free!





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HIC Global Solutions, 2023.

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Preface – An Introduction to the App

Docs Made Easy is a powerful and thoughtful Salesforce document generation tool that brings you a hassle-free way of generating digital documents.

Docs Made Easy eases down the process of maintaining and generating digital documents. It makes your documents effective & personalized so that your team can focus on what matters the most; “Business Goals.”

We brought together the best features of Lightning and Classic with Docs Made Easy. Our app fast-forwards your business with easy document generation. Create beautiful, personalized, and effective documents that work for your business.



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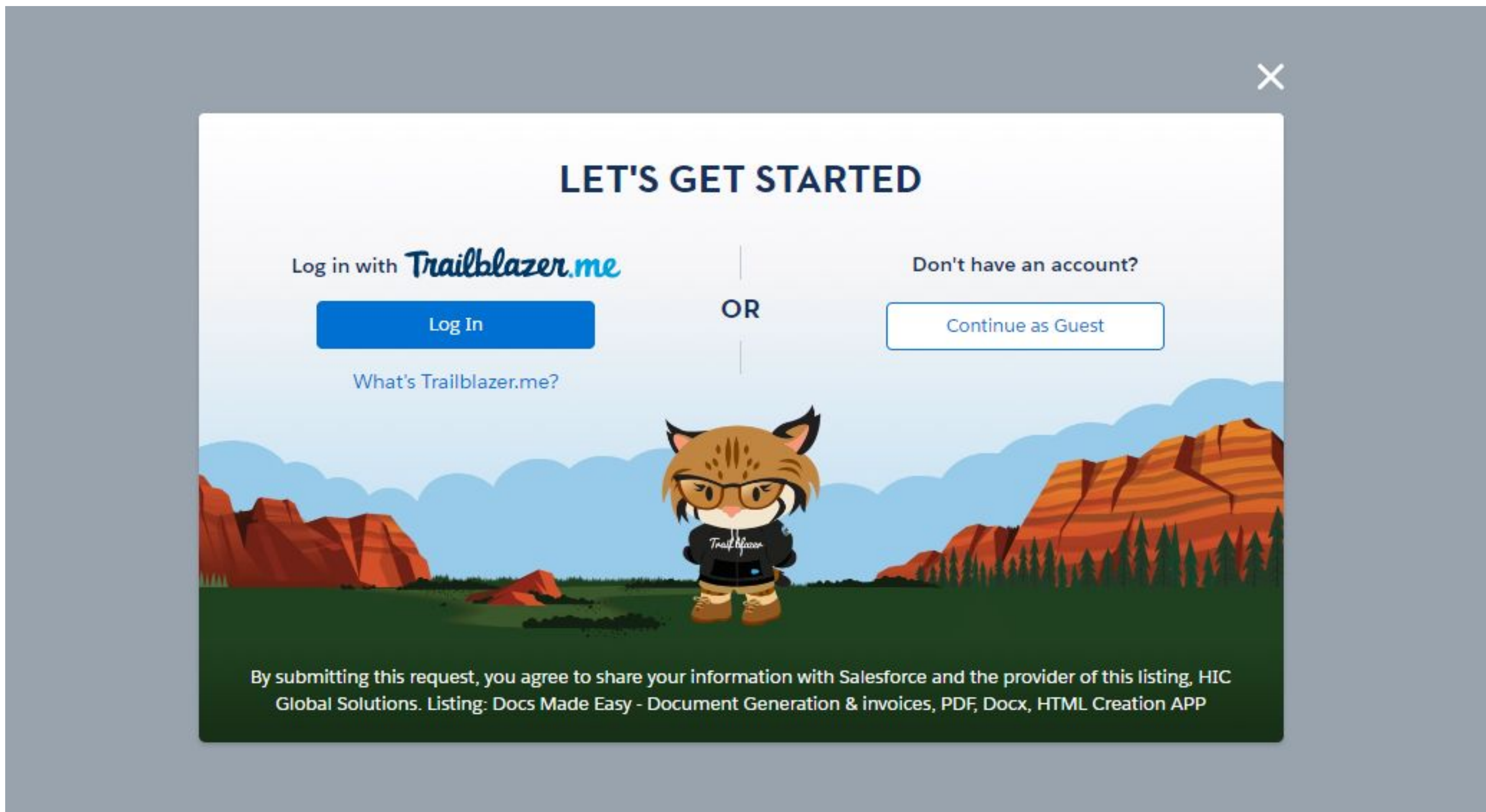
Steps to Install Docs Made Easy

Step 1: Go to **Salesforce AppExchange** and look for **Docs Made Easy** in the search tab. Then, Click on the **'Get It Now'** Button.

Note: You will have to Sign Up or log in from your **Salesforce account** to install the package.

The screenshot displays the Salesforce AppExchange interface. At the top, the 'AppExchange' logo is visible along with navigation links: Home, Solutions by Type, Product Collections, Industry Collections, Consultants, Learn, and Latest Collections. There are 'Sign Up' and 'Log In' buttons in the top right corner. A search bar is present with the placeholder text 'Search AppExchange'. The main content area features the 'Docs Made Easy - Document Generation & invoices, PDF, Docx, HTML Creation APP' listing. It includes the developer name 'By HIC Global Solutions', a description 'Salesforce Document Generation: Quotes, Proposal, Contract, Invoices & more', and a 4.86 average rating based on 80 reviews. A 'Supported Features' section lists 'No Limits', 'Lightning Ready', and 'Person Accounts'. A 'Free' pricing section is also present with a 'Pricing Details' link. The 'Get It Now' button is highlighted with a red border. Below the main content, there are three promotional banners: one with a woman's face and document icons, one with a flowchart titled 'Automate your document generation and create compelling Documents with just a few clicks', and one with the text 'Stuck in the app configuration? Don't worry! You can count on us'.

Figure : 01



Step 2: Once you have logged in, you will see a popup like this. Here, Click on the **Install in Production** button.

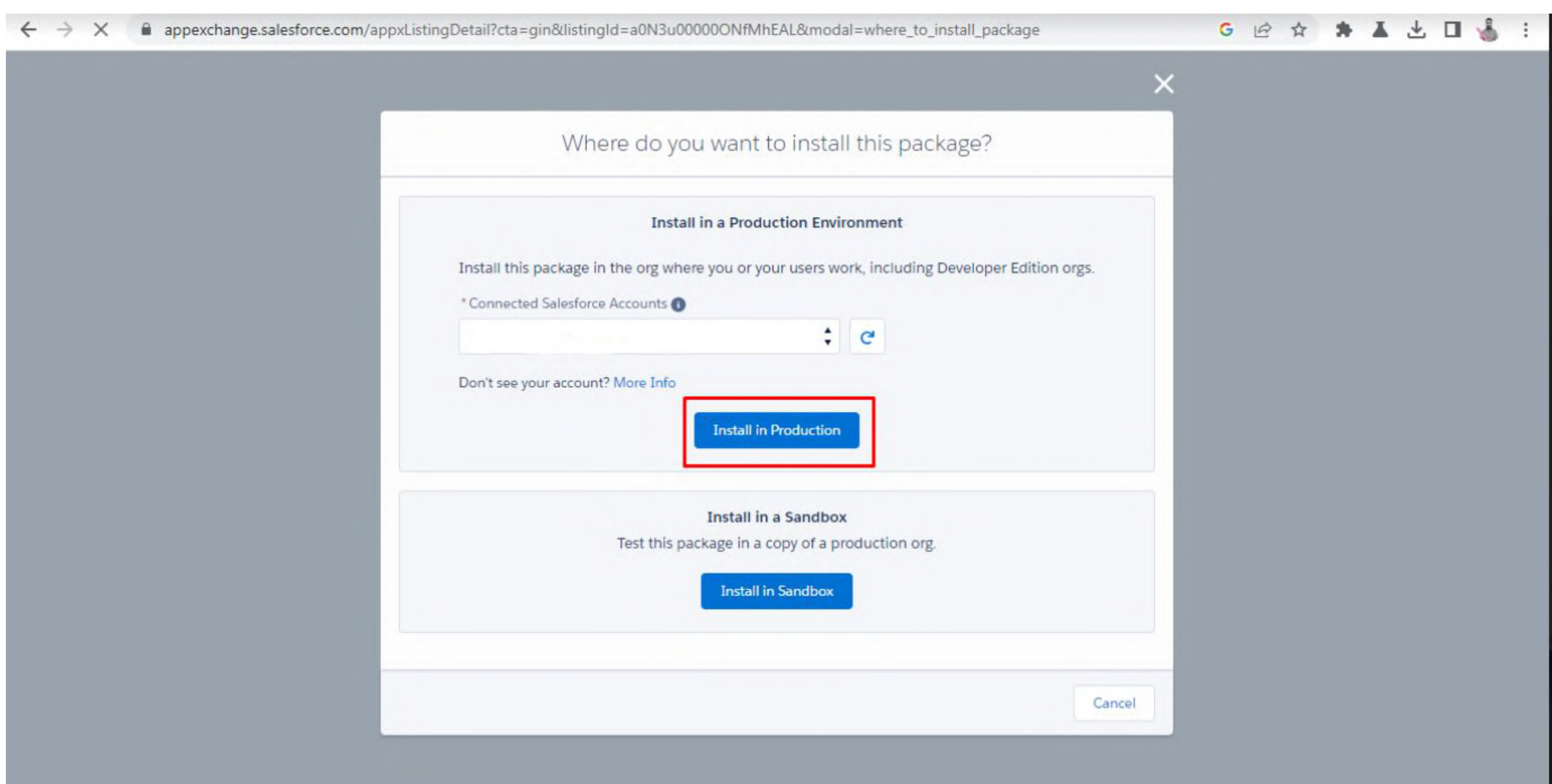


Figure : 02

Step 3: Once you click on the **Install in Production** button, then you will see another pop-up as shown in the figure below. After agreeing to the terms and conditions, you will have to click on the **Confirm and Install** button to install the package.

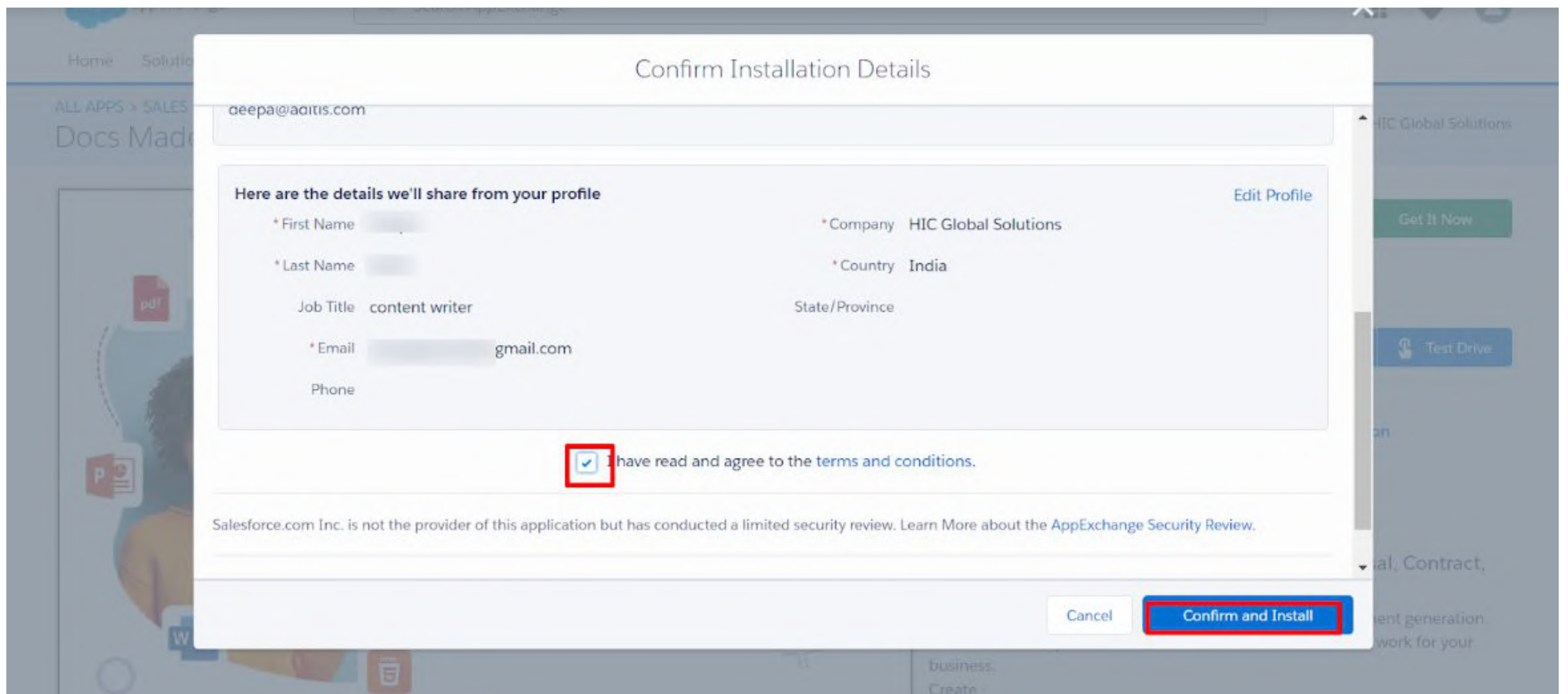


Figure : 03

Step 4: After this step, it will redirect you to the **Salesforce Login Page**. Log in to Salesforce from your account.

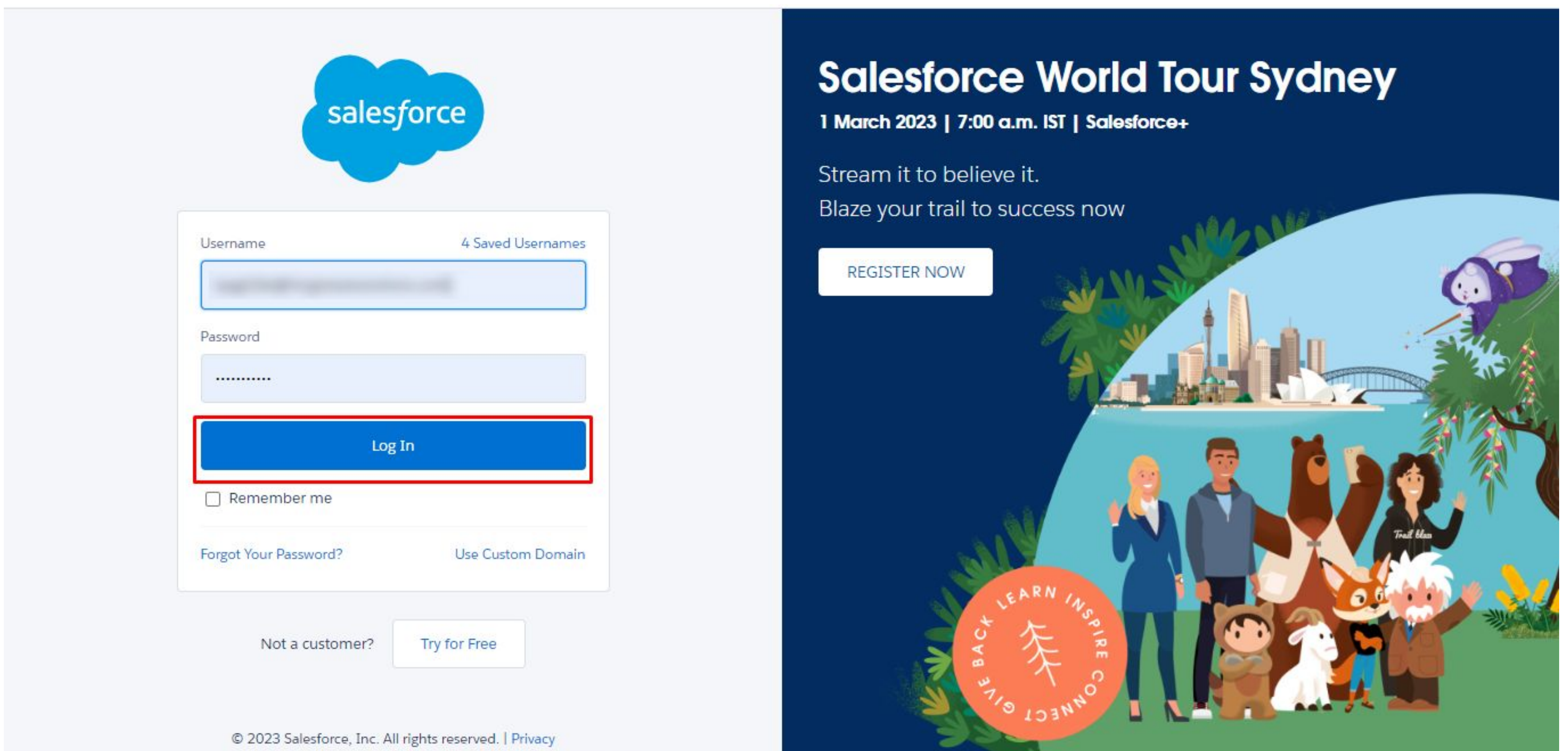


Figure : 04

Step 5: After logging into Salesforce from your account, you will see the installation screen, something like this. Here, click on **Install for All Users**.

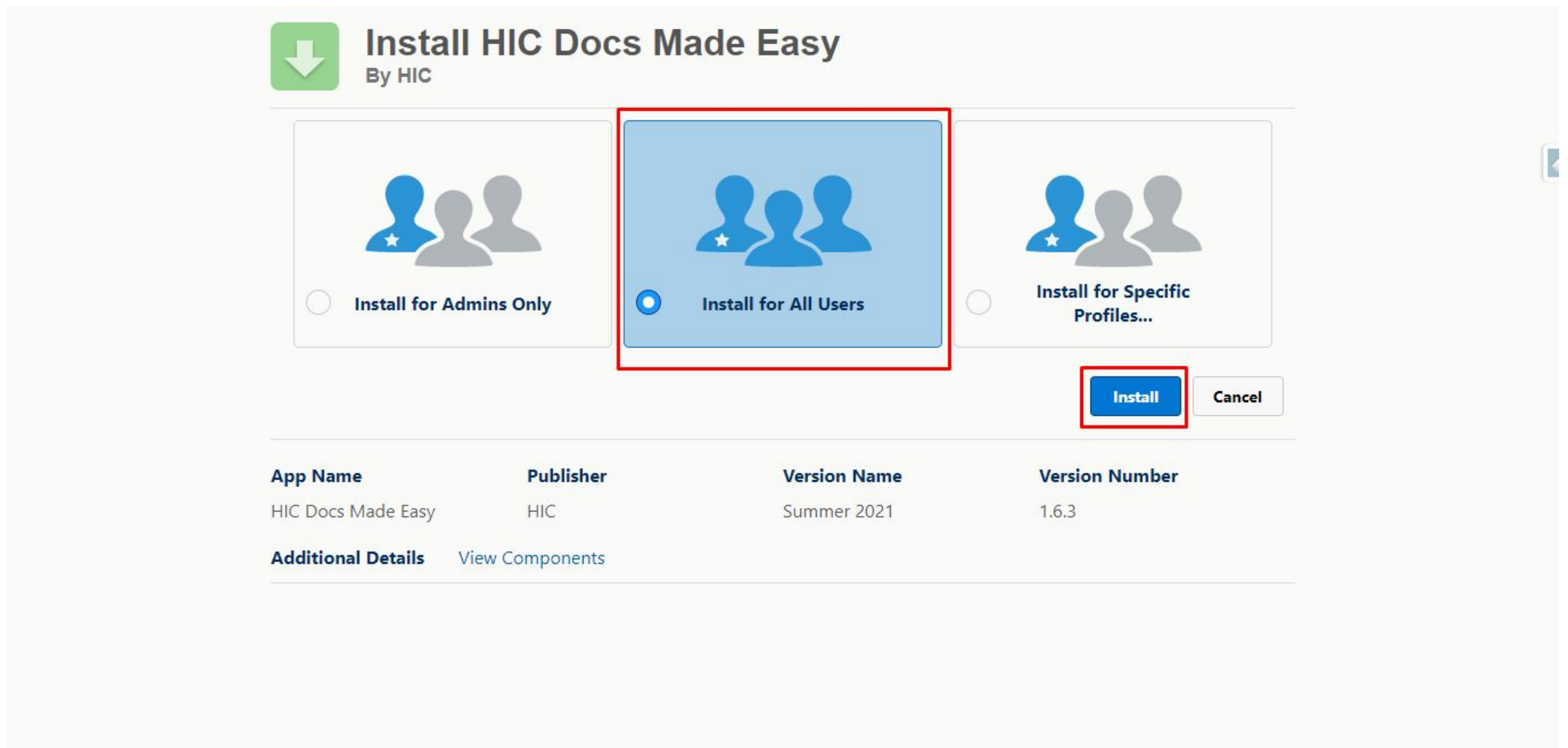


Figure : 05

Step 6: You will now see that the **Docs Made Easy** app is Installing for **All Users**.

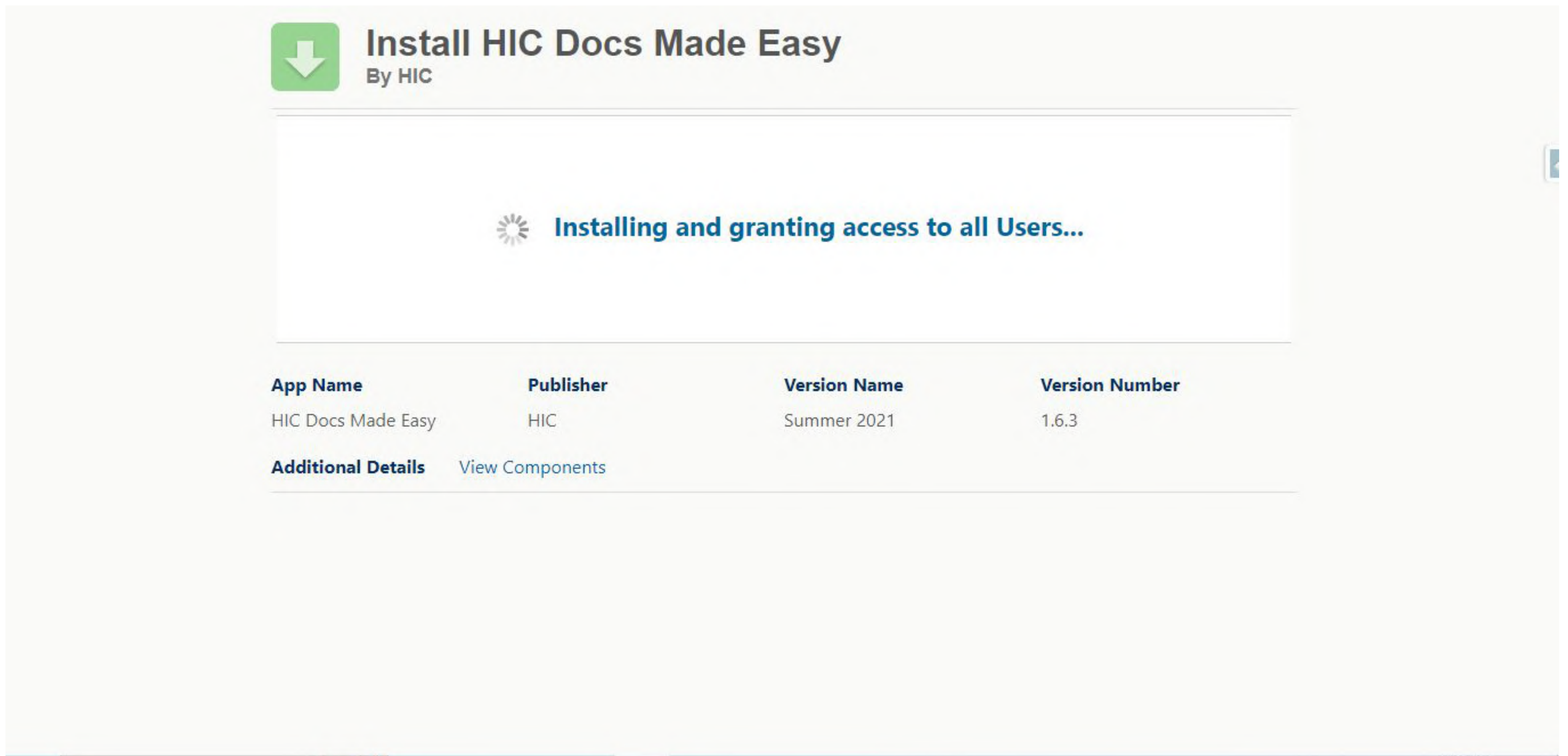


Figure : 06

Step 7: And, after the process is complete, you will see the **Docs Made Easy app installed in Salesforce.**

The screenshot displays the Salesforce Setup interface. The main content area is titled "Installed Packages" and shows a table of installed packages. The "HIC Docs Made Easy" package is highlighted with a red box, indicating it is the focus of the step. The table columns are: Action, Package Name, Publisher, Version Number, Namespace Prefix, Status, Allowed Licenses, Used Licenses, Enabled for Platform Integrations, Expiration Date, Install Date, and Limit.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date	Limit
Uninstall Manage Licenses	HIC Docs Made Easy	HIC	1.6.3	hic_docmerge	Active	Unlimited	0	<input type="checkbox"/>	Does not Expire	28/02/2023, 11:18 am	<input type="checkbox"/>

Below the installed packages table, there is a section for "Uninstalled Packages" which currently shows "No uninstalled package data archives".

Figure : 07

Step 8: Here, when you click on the **Docs Made Easy app package**, you will see a screen as shown below. Here, click on the AppLauncher button and type HIC in the search bar and click on HIC Docs Made Easy from the result thrown.

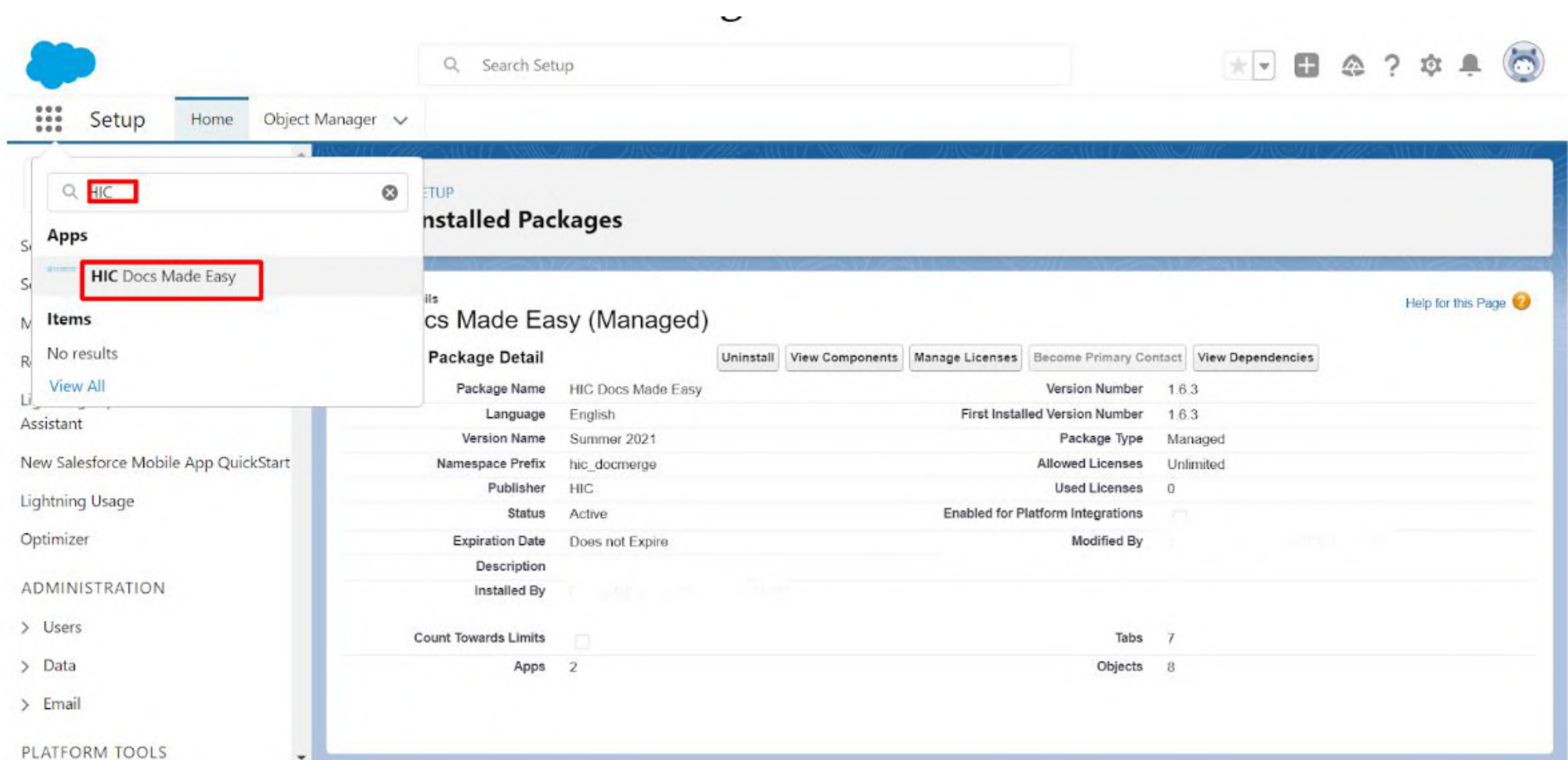


Figure : 08

Generate your first document from Docs Made Easy

Step 8: Here, when you click on the **Docs Made Easy app package**, you will see a screen as shown below. Here, click on the AppLauncher button and type HIC in the search bar and click on HIC Docs Made Easy from the result thrown.

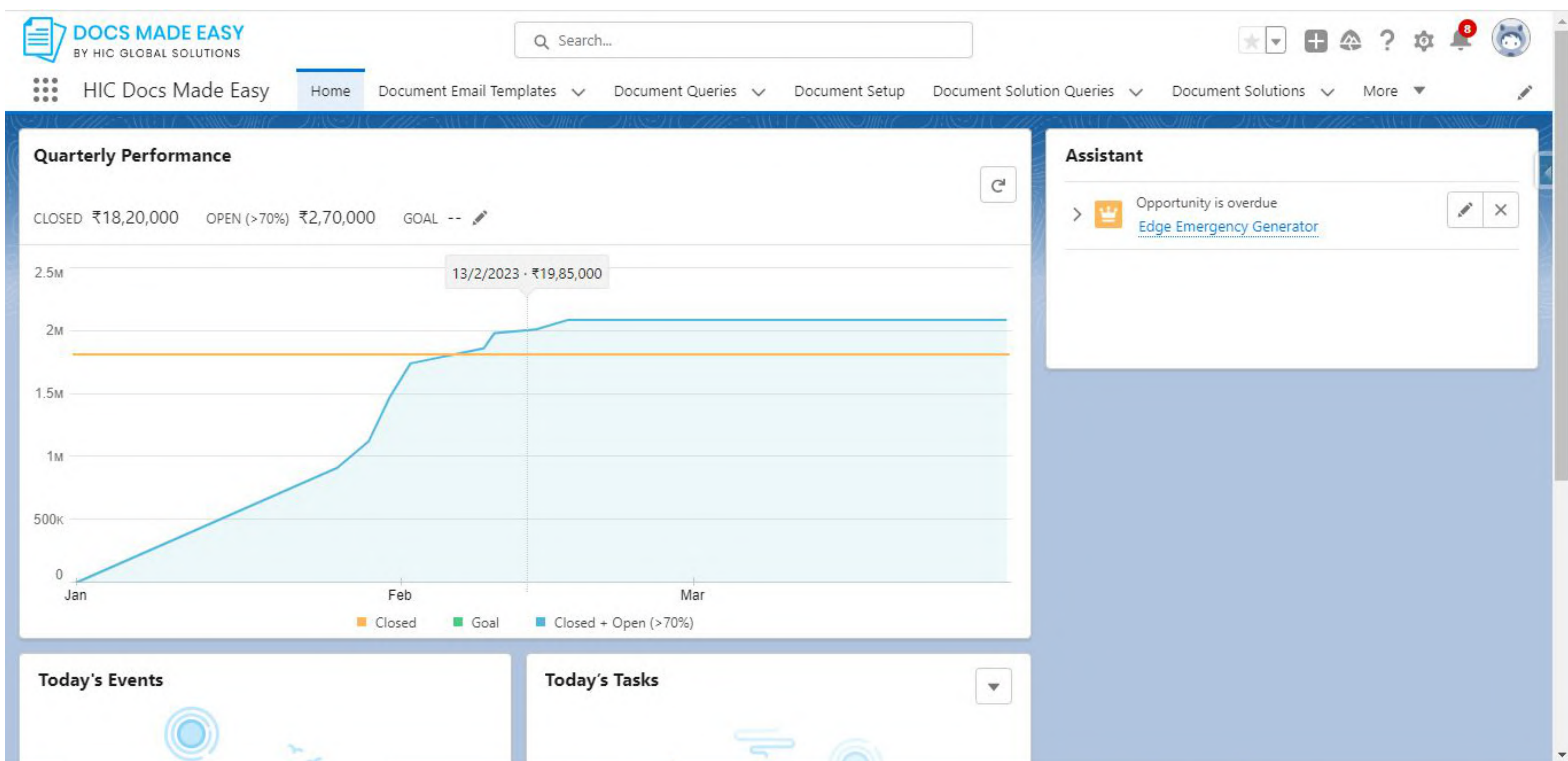


Figure : 09

2.1 Getting Started with our pre-built solutions for your documentation

2.1.1 Creating a Custom Button

First, move to **“Document Setup”** See **Figure 10**.

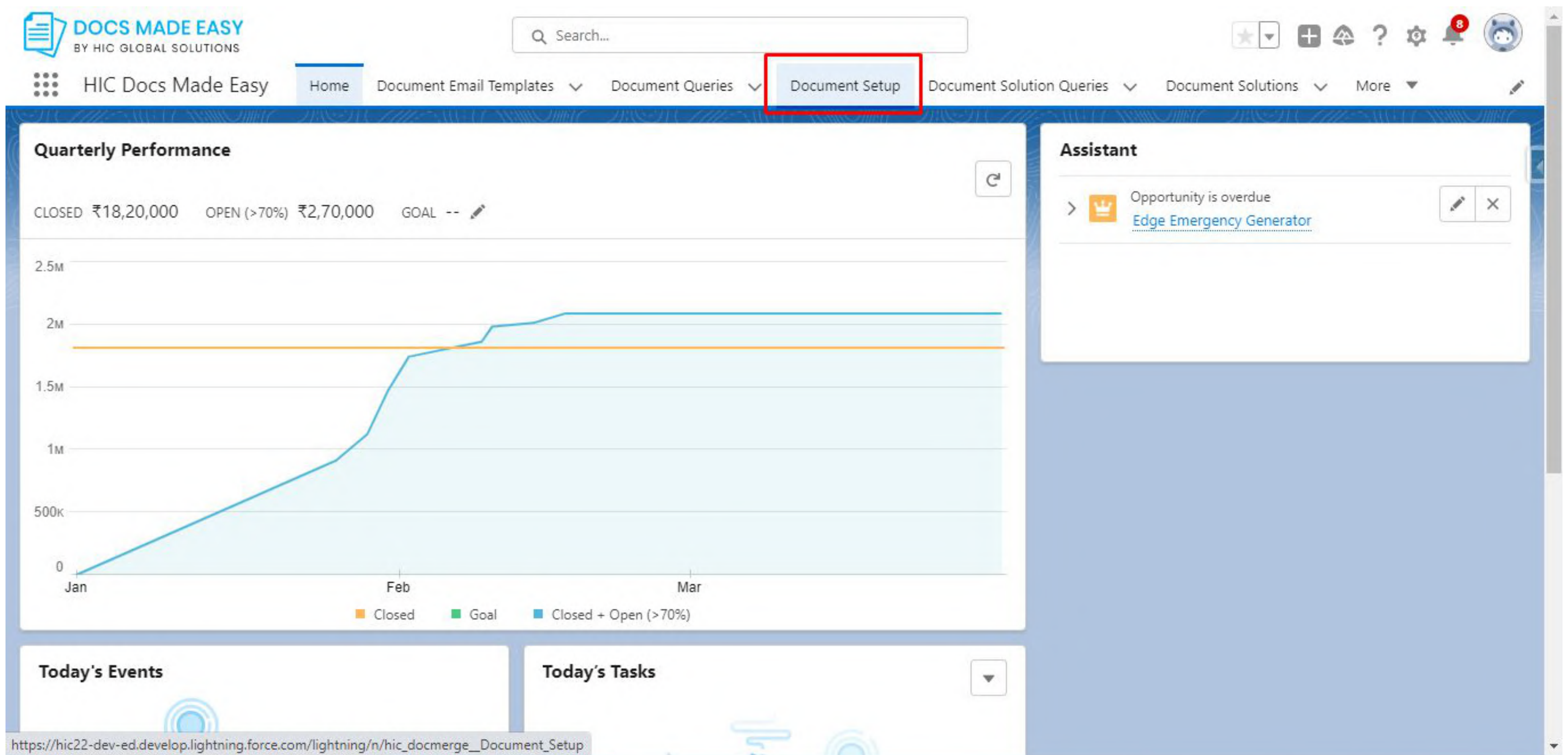


Figure : 10

Once you click on the “**Document Setup**” button, you will see two options, as shown in figure 11. The first one is “Quick Start,” and the second is “Document Automation Wizard.”

Selecting “**Quick Start**” will allow you to use the **documents pre-built on the Docs Made Easy** app. Or, if you wish to create your **own custom document**, click on “**Document Automation Wizard**.”

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Search...

HIC Docs Made Easy Home Document Email Templates Document Queries Document Setup Document Solution Queries Document Solutions More

Welcome!

Docs Made Easy® allows you to create and deliver robust, sophisticated documents with ease. Documents include presentations, reports, and quotes by merging data from any standard or custom object into richly-formatted templates.

Quick Start
Select a pre-built solution best suited for your needs.

Document Automation Wizard
Follow the easy step-by-step process to create your custom solution.

Launch Quick Start

Launch Wizard

SOLUTION NAME	DESCRIPTION	LAST MODIFIED BY
---------------	-------------	------------------

Figure : 11

So, when you click on the **“Launch Quick Start”** option, you should ideally see the three options, as shown in the image given below.

That is:

- 1. Account Brief,**
- 2. Client Letter,**
- 3. And, Sales Proposal**

See Figure 12 for reference

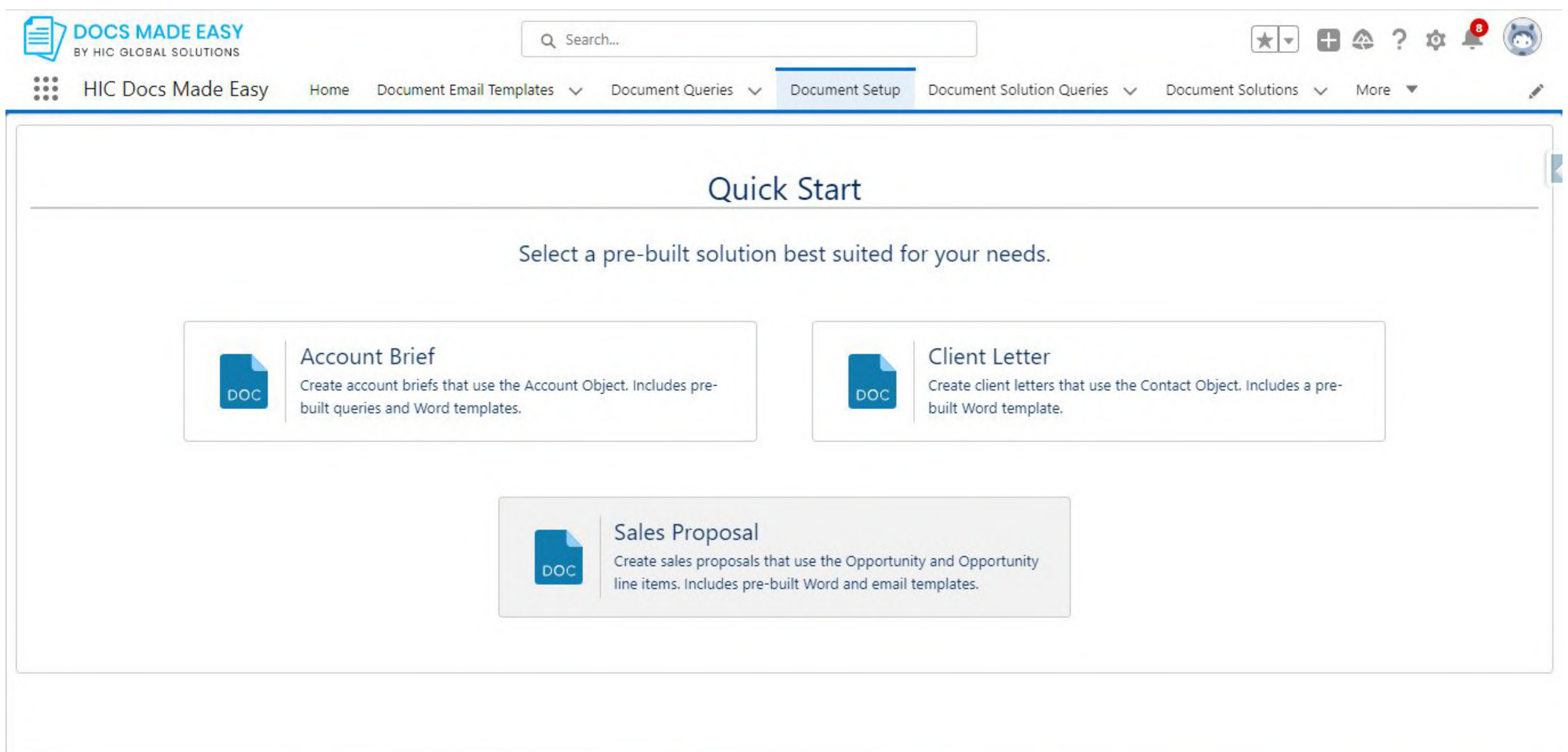


Figure : 12

And, when you click on the first option, Account Brief, it would read as ***“Successfully created custom button Account_brief on account object,”*** **as shown in Figure 13**

Similarly, if you want to add a button for the **Client Letter** or **Sales Proposal**, just click on them, and it will create the button for you. Thus, you can create pre-built documents easily.

Note: To add the newly created button to the page, click on *‘Go to page Layouts*. The steps to adding a button are similar to that of creating Custom solutions and are mentioned in the subsequent sections.

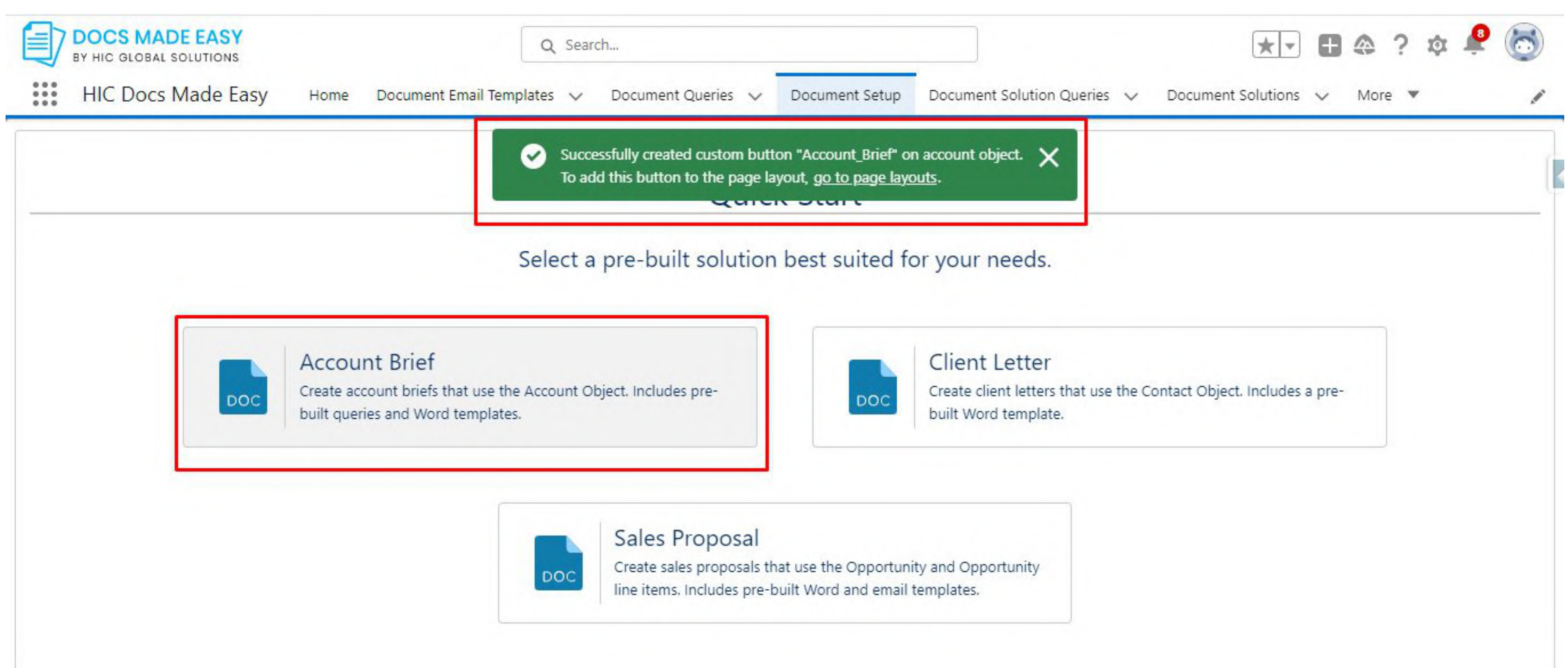
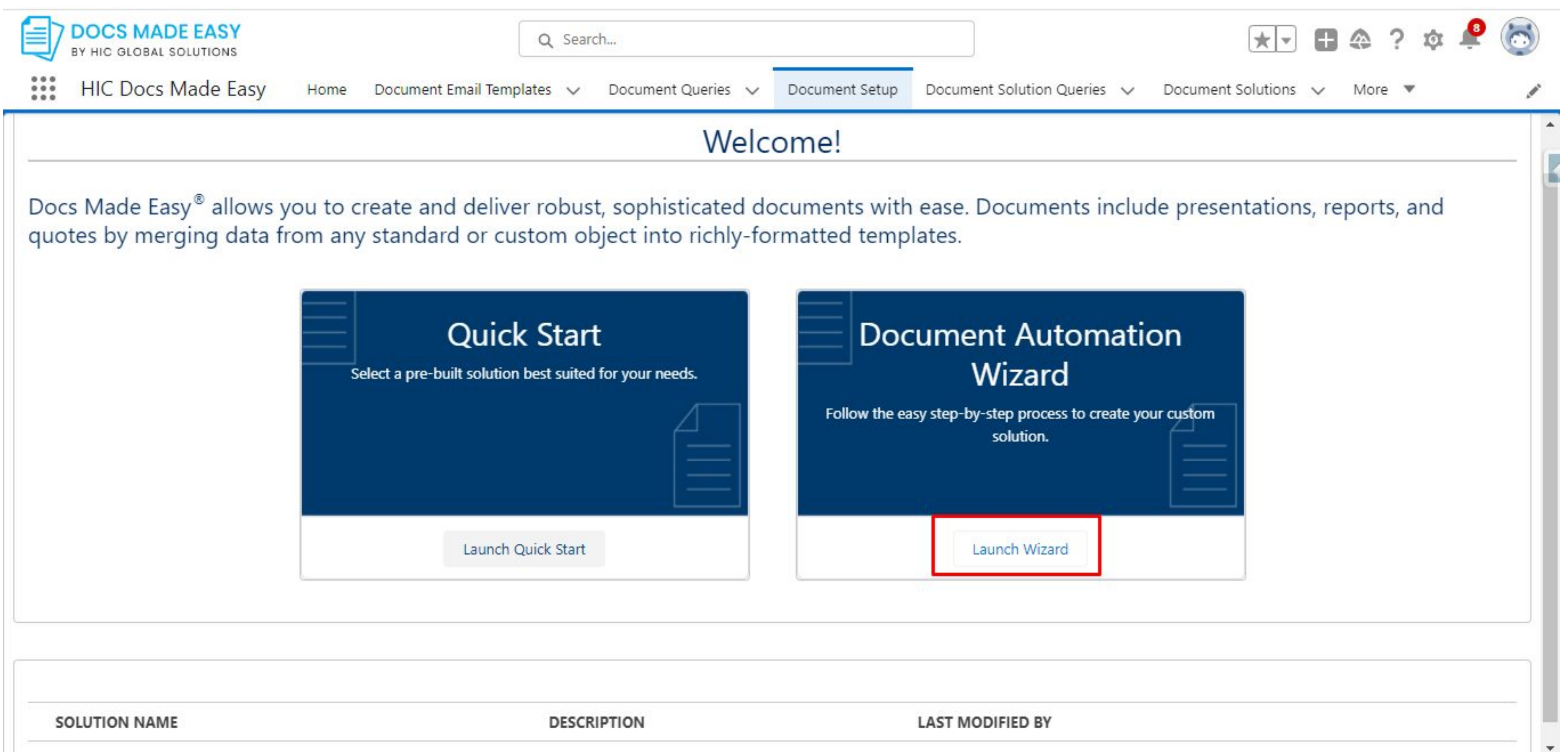


Figure : 13

2.2 Creating your own template with Document Automation Wizard

Click on **“Launch Wizard”** to create a button for your own personalized templates for document generation.

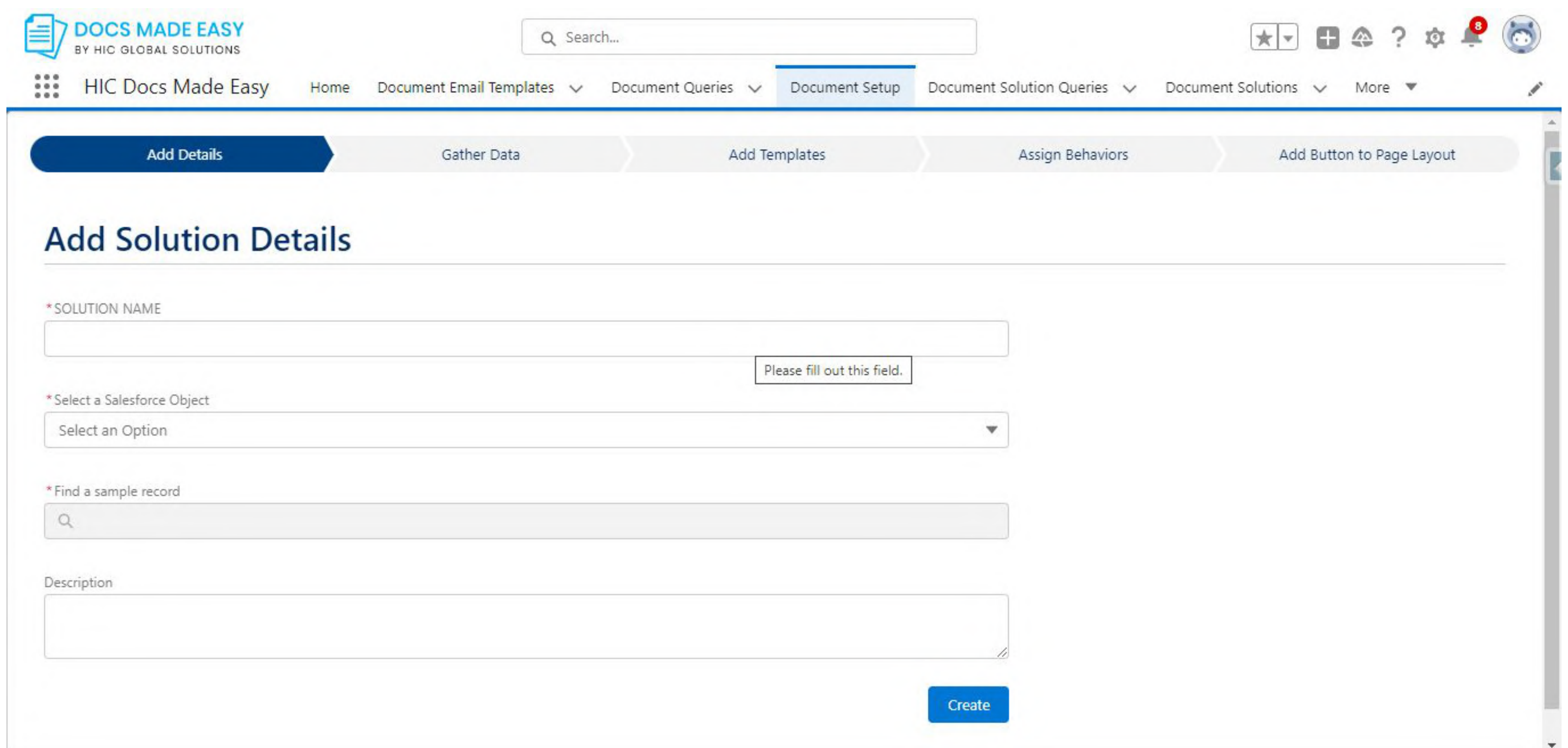


The screenshot displays the 'Docs Made Easy' web application interface. The top navigation bar includes the logo 'DOCS MADE EASY BY HIC GLOBAL SOLUTIONS', a search bar, and several menu items: 'HIC Docs Made Easy', 'Home', 'Document Email Templates', 'Document Queries', 'Document Setup', 'Document Solution Queries', 'Document Solutions', and 'More'. The main content area features a 'Welcome!' heading and a descriptive paragraph: 'Docs Made Easy® allows you to create and deliver robust, sophisticated documents with ease. Documents include presentations, reports, and quotes by merging data from any standard or custom object into richly-formatted templates.' Below this, there are two prominent cards. The left card is titled 'Quick Start' and contains the text 'Select a pre-built solution best suited for your needs.' with a 'Launch Quick Start' button. The right card is titled 'Document Automation Wizard' and contains the text 'Follow the easy step-by-step process to create your custom solution.' with a 'Launch Wizard' button. The 'Launch Wizard' button is highlighted with a red rectangular border. At the bottom of the page, there is a table with three columns: 'SOLUTION NAME', 'DESCRIPTION', and 'LAST MODIFIED BY'.

SOLUTION NAME	DESCRIPTION	LAST MODIFIED BY
---------------	-------------	------------------

Figure : 14

Now, you will see a screen like the one below. Here, you need to **add the Solution details** which are the name of your custom button.



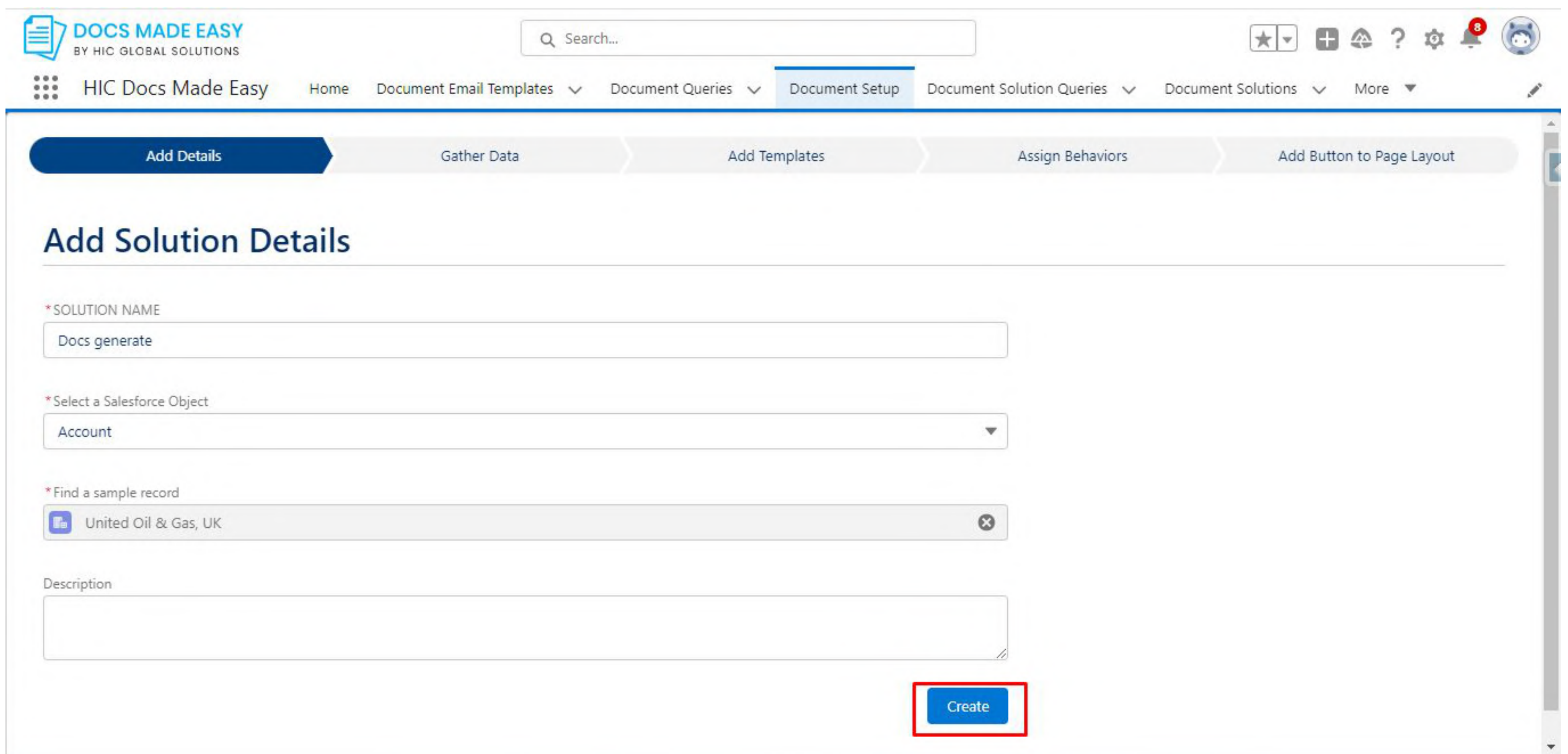
The screenshot shows the 'Add Solution Details' form in the HIC Docs Made Easy application. The form is part of a multi-step process, with 'Add Details' being the first step. The form includes the following fields:

- * SOLUTION NAME**: A text input field with a placeholder 'Please fill out this field.'
- * Select a Salesforce Object**: A dropdown menu with the option 'Select an Option'.
- * Find a sample record**: A search input field with a magnifying glass icon.
- Description**: A text area for providing a description.
- Create**: A blue button to submit the form.

The application header includes the logo 'DOCS MADE EASY BY HIC GLOBAL SOLUTIONS', a search bar, and navigation tabs: 'HIC Docs Made Easy', 'Home', 'Document Email Templates', 'Document Queries', 'Document Setup' (selected), 'Document Solution Queries', 'Document Solutions', and 'More'. The top navigation bar also contains icons for star, plus, home, help, settings, notifications, and user profile.

Figure : 15

Here, we have named our button **“Generate Document.”** And **“Account”** as our Salesforce Object. Click on the **“Create”** button.



The screenshot displays the HIC Docs Made Easy interface. The top navigation bar includes the logo, a search bar, and several menu items: Home, Document Email Templates, Document Queries, Document Setup (highlighted), Document Solution Queries, Document Solutions, and More. Below the navigation bar is a progress bar with five steps: Add Details (active), Gather Data, Add Templates, Assign Behaviors, and Add Button to Page Layout. The main content area is titled 'Add Solution Details' and contains the following fields:

- * SOLUTION NAME: A text input field containing 'Docs generate'.
- * Select a Salesforce Object: A dropdown menu with 'Account' selected.
- * Find a sample record: A search bar containing 'United Oil & Gas, UK'.
- Description: A large text area.

A blue 'Create' button is located at the bottom right of the form, highlighted with a red rectangular box.

Figure : 16

Completing this step will take you to the second step of the Document Setup, “**Gather Data.**”

2.2.1. Create New Query

To create a new query, just click on the “**Create New Query**” button. Or, if you have existing queries, you can use the search option to find them.

The screenshot shows the 'Gather Data' step in the 'Document Setup' process. The interface includes a navigation bar with 'HIC Docs Made Easy' and various menu items. A progress bar at the top indicates the current step. The main content area is titled 'Add Data to a Solution' and contains a 'Create New Query' button, which is highlighted with a red box. Below the button is a search input field. To the right, there is a section for 'SOQL Queries' with a table header and a 'Back' and 'Next' button at the bottom.

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BY HIC GLOBAL SOLUTIONS

HIC Docs Made Easy Home Document Email Templates Document Queries Document Setup Document Solution Queries Document Solutions More

Gather Data Add Templates Assign Behaviors Add Button to Page Layout

Add Data to a Solution

If your solution requires data related to your Account, use this step to create and add SOQL queries to access the related content.

Create New Query

Search

SOQL Queries

SOQL queries listed below are available for your solution. Add an Alias for each option. Aliases must be unique, include 3-20 characters, and cannot contain spaces or special characters.

NAME	ALIAS	DESCRIPTION	LAST MODIFIED
------	-------	-------------	---------------

Back Next

Figure : 17

Clicking on the Create New Query button will take you to a **new tab** from where you can add the details of your query. Add the **Query Name and description**.

Now, select your required fields from the Primary object (Account in this example) by clicking on the arrow. and hit the **Next button below**. See **Figure 18 .1 & Figure 18.2**

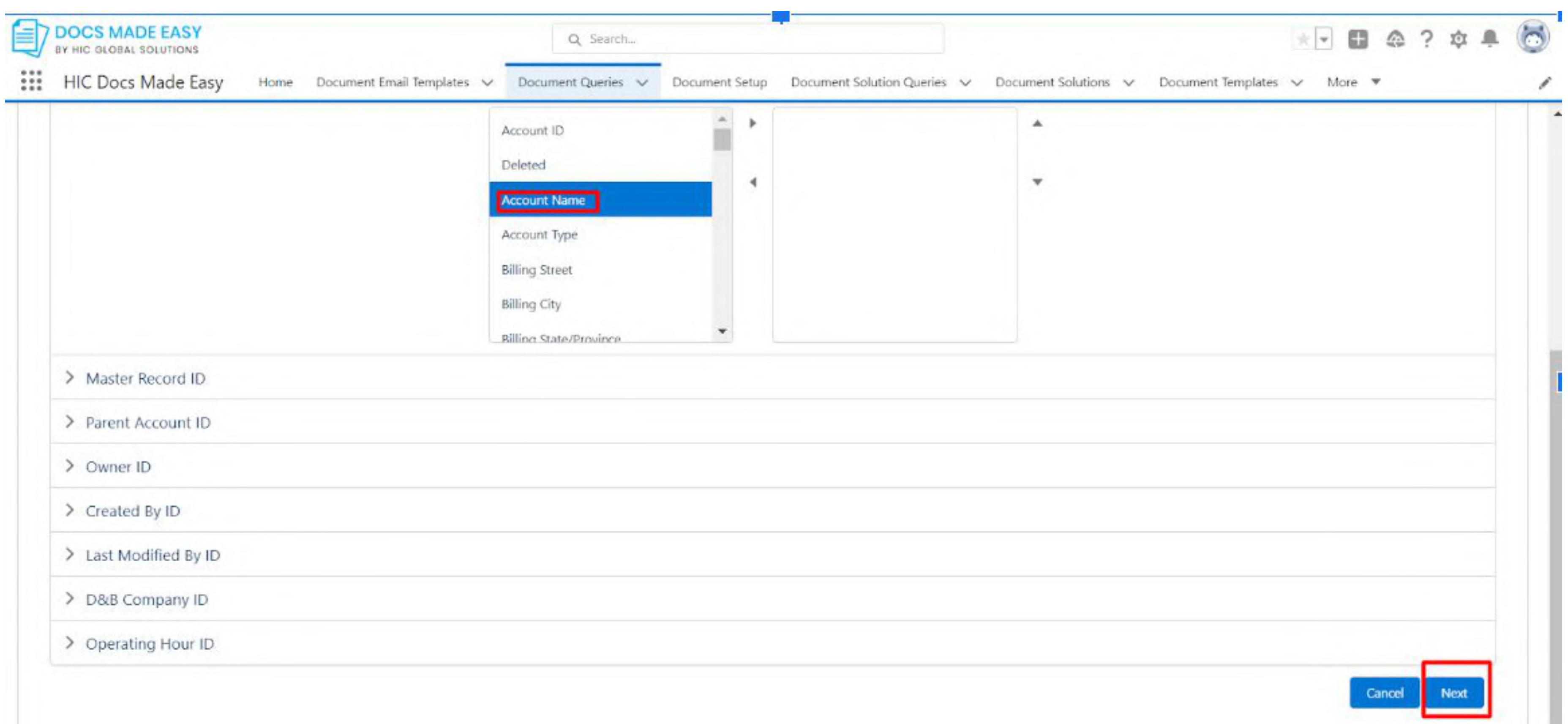


Figure : 18

Here, you can also **Apply a filter, Select an operator, and filter value** as shown in the figure given below.

The screenshot displays the 'Query Builder: Account' interface. At the top, there is a search bar and navigation tabs including 'Home', 'Document Email Templates', 'Document Queries', 'Document Setup', 'Document Solution Queries', 'Document Solutions', and 'More'. The main content area is titled 'Query Builder: Account' and contains a table for configuring filters. The table has three columns: 'Apply filter', 'Select an operator', and 'filter value'. The first row is populated with 'Account Name', 'EQUALS TO', and 'Edge Communications'. The second and third rows are currently empty, with 'None' selected in the 'Apply filter' column. To the right of each row are icons for adding (+), deleting (trash), and editing (pencil). At the bottom of the table are 'Back' and 'Next' buttons.

Apply filter	Select an operator	filter value	
Account Name	EQUALS TO	Edge Communications	+ trash
None	NONE		trash
None	NONE		trash

Back Next

Figure : 19

Now, **save** the information you just added. See the figure given below for reference.

The screenshot displays the 'Query Builder: Account' interface. At the top, there is a search bar and navigation tabs including 'Home', 'Document Email Templates', 'Document Queries', 'Document Setup', 'Document Solution Queries', 'Document Solutions', and 'More'. The main area contains three dropdown menus for 'Order By Field 1', 'Order By Field 2', and 'Order In ASC/DESC'. Below these is a text area for the SQL query: 'SELECT Name, Id, BillingStreet, ShippingStreet, ShippingCity, Phone FROM Account where Name = 'Edge Communications''. At the bottom are three buttons: 'Back', 'Preview Data', and 'Save'.

Figure : 20

Now, you will see that your **Query has been created**. You will see the **query details** as shown in the figure given below.

The screenshot shows the 'Document Query' details page in the 'DOCS MADE EASY' application. The page is titled 'Document Query abc' and has 'Delete' and 'Edit' buttons. The 'Details' tab is active, showing the following information:

Document Query Name	abc	Owner	[User Avatar]
Query String	SELECT Id, Type, BillingState FROM Account where IsDeleted != 'cc test'		
Description	doc query		
Created By	[User Avatar]	Last Modified By	[User Avatar]
	3/10/2023, 4:07 AM		3/10/2023, 4:07 AM

Figure : 21

Now, Go back to the Gather Data tab and type the name of the newly created query in the search box. Your new query will appear just below the search option as shown below.

The screenshot shows the 'Gather Data' tab in the 'HIC Docs Made Easy' application. The search box contains the text 'ABC' and is highlighted with a red box. Below the search box, two search results are displayed: 'abc doc query' and 'ABC DOC JNDJ'. The 'SOQL Queries' table is empty, and the 'Back' and 'Next' buttons are visible at the bottom.

SOQL Queries

SOQL queries listed below are available for your solution. Add an Alias for each option. Aliases must be unique, include 3-20 characters, and cannot contain spaces or special characters.

NAME	ALIAS	DESCRIPTION	LAST MODIFIED
------	-------	-------------	---------------

Buttons: Back, Next

Figure : 22

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Search...

HIC Docs Made Easy Home Document Email Templates Document Queries Document Setup Document Solution Queries Document Solutions More

Gather Data Add Templates Assign Behaviors Add Button to Page Layout

Add Data to a Solution

If your solution requires data related to your Account, use this step to create and add SOQL queries to access the related content.

Create New Query

Search

SOQL Queries

SOQL queries listed below are available for your solution. Add an Alias for each option. Aliases must be unique, include 3-20 characters, and cannot contain spaces or special characters.

NAME	ALIAS	DESCRIPTION	LAST MODIFIED
Primary object	PQUERY		

Back Next

Figure : 23

2.3. Adding Templates

Now, you are at Step 3 of the Document Setup sequence. Here, you will see three options; **Create New Document Template**, **Create New Document Email Template**, and the search button by which you can use the **existing email templates** that you created.

The screenshot displays the 'Add Templates' step in the HIC Docs Made Easy interface. The top navigation bar includes the logo 'DOCS MADE EASY BY HIC GLOBAL SOLUTIONS', a search bar, and various utility icons. The main navigation menu shows 'HIC Docs Made Easy', 'Home', 'Document Email Templates', 'Document Queries', 'Document Setup' (selected), 'Document Solution Queries', 'Document Solutions', and 'More'. A progress bar at the top indicates the current step: 'Add Templates' (active), 'Assign Behaviors', and 'Add Button to Page Layout'.

The main content area is titled 'Add Templates to a Solution'. It contains the following elements:

- A text box: 'Select the templates you want added to your solution. You can create or upload your own template. You can add up to 10 templates only.'
- Three buttons: 'Create New Document Template' (highlighted with a red box), 'Create New Document Email Template', and a search box.
- A table titled 'Templates' with the following structure:

NAME	DESCRIPTION	LAST MODIFIED
Drag and drop templates to order them.		
- Two buttons at the bottom: 'Back' and 'Next'.

The footer of the page contains the text 'javascriptvoid(0);'.

Figure : 24

2.3.1. Create New Document Template

Once you click on the **“Create New Document Template”** button, you will see a screen as shown below.

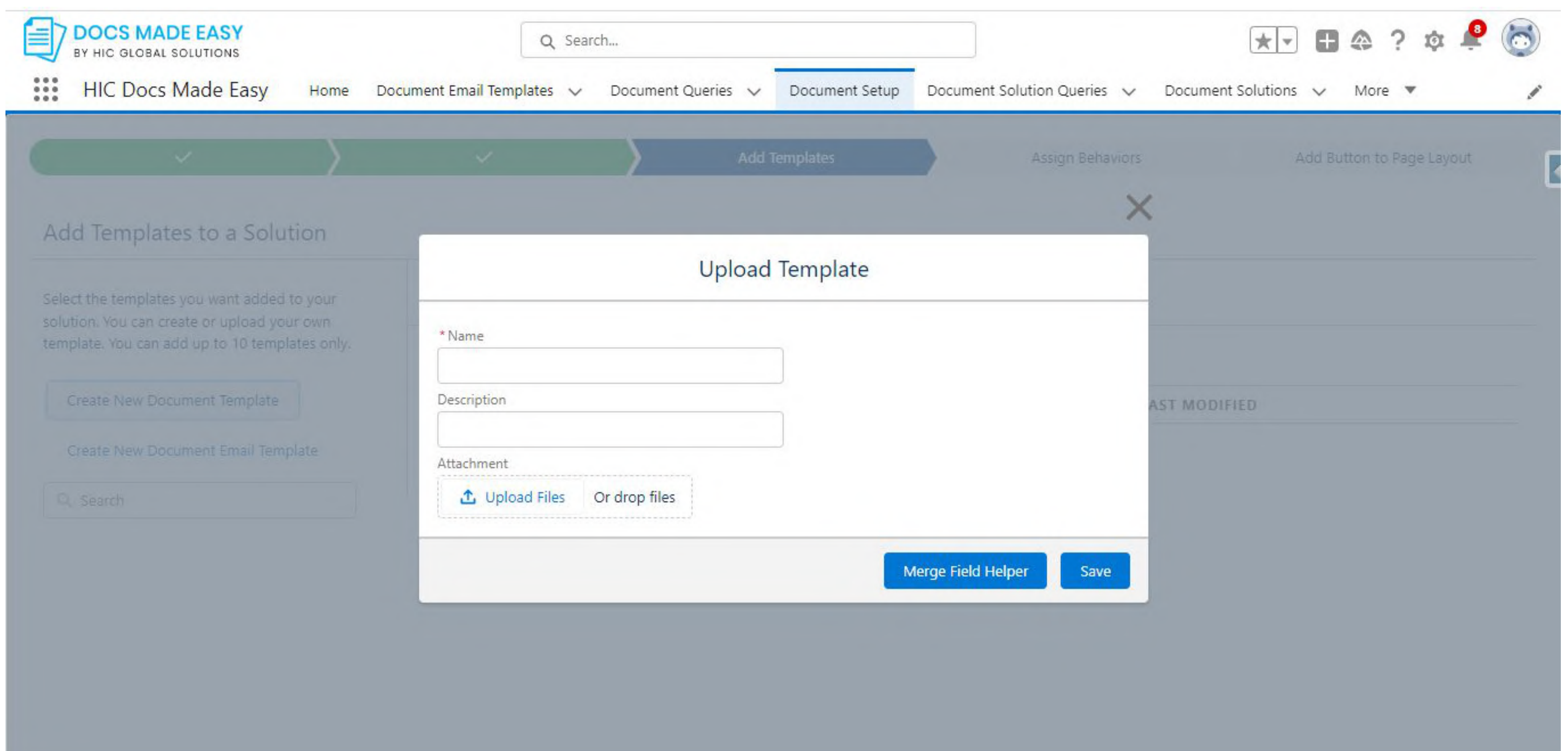


Figure : 25

Now, just add the required fields like Name and upload your file. Now, you should see the “**Merge Field Helper**,” button which will allow you to merge fields. Next, we will hit the **Save** button.

After this step, you will see that your template has been created.

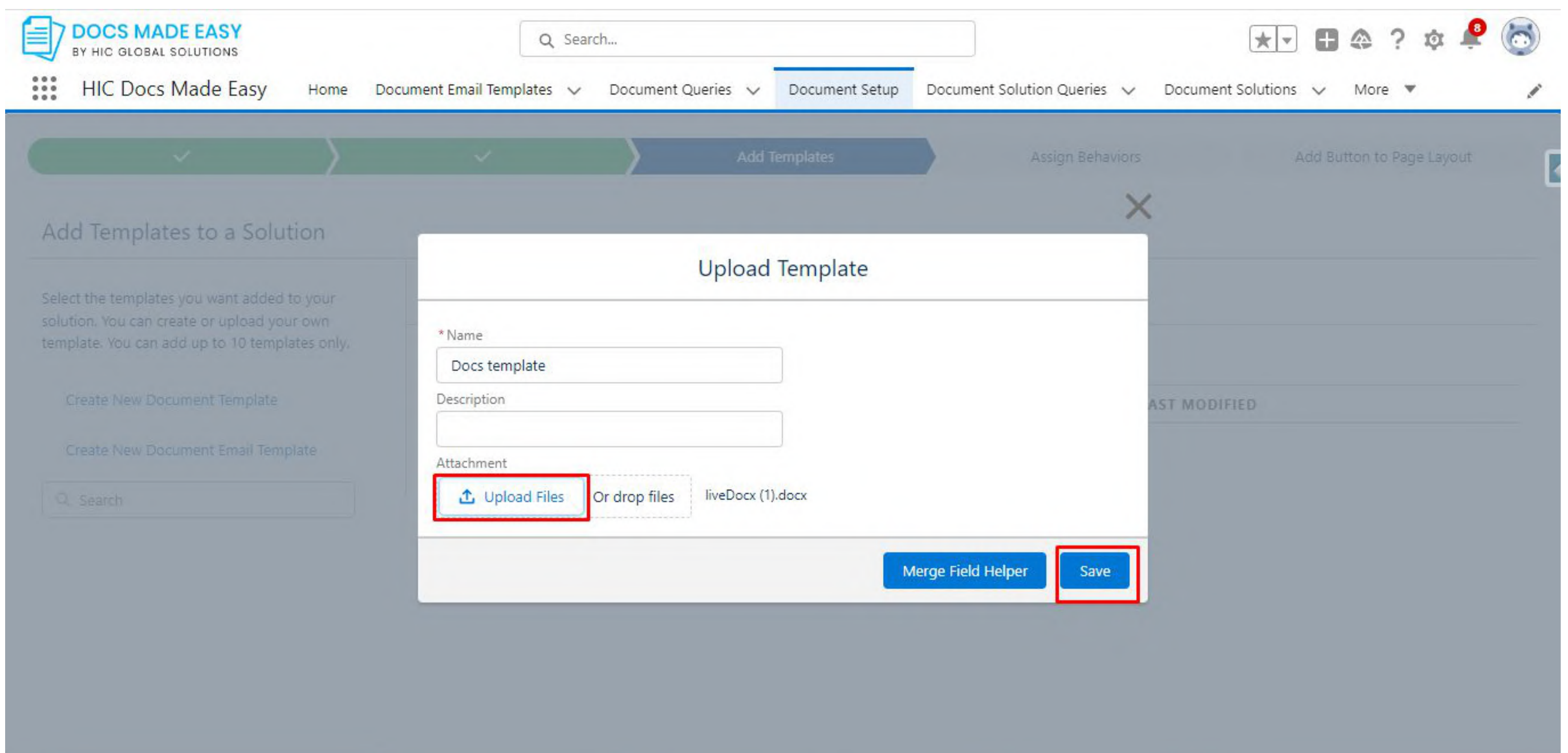
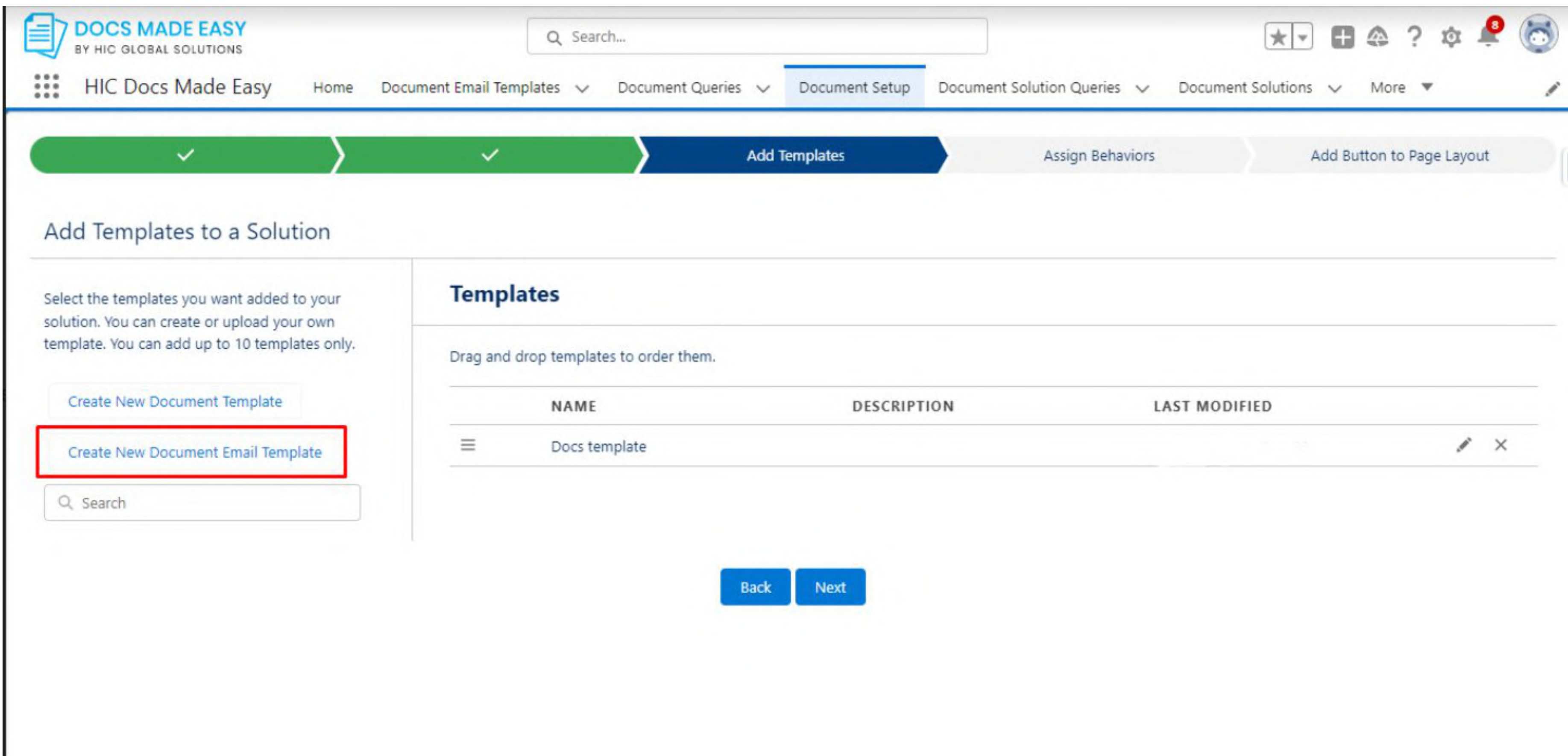


Figure : 26

2.3.2. Create New Document Email Template

To **create a new document email template**, just click on the button as shown in the left section of your screen in Figure 27



The screenshot shows the 'HIC Docs Made Easy' interface. The top navigation bar includes a search bar and several menu items: Home, Document Email Templates, Document Queries, Document Setup (active), Document Solution Queries, Document Solutions, and More. A progress bar at the top indicates the current step is 'Add Templates', with previous steps marked as complete. The main content area is titled 'Add Templates to a Solution' and contains instructions: 'Select the templates you want added to your solution. You can create or upload your own template. You can add up to 10 templates only.' Below the instructions are two buttons: 'Create New Document Template' and 'Create New Document Email Template', with the latter highlighted by a red rectangular box. A search bar is also present below the buttons. On the right side, there is a 'Templates' section with a table listing existing templates. The table has columns for 'NAME', 'DESCRIPTION', and 'LAST MODIFIED'. One template is listed with the name 'Docs template'. At the bottom of the page, there are 'Back' and 'Next' buttons.

NAME	DESCRIPTION	LAST MODIFIED
Docs template		

Figure : 27

Then, add the name that you want to give to your template and add a sample record. After this, click on the **Create** button.

The screenshot shows the 'Email Template Details' form in the 'DOCS MADE EASY' application. The form is titled 'Email Template Details' and has a progress bar at the top with 'Add Details' and 'Email Builder' stages. The form contains the following fields:

- * TEMPLATE NAME: A text input field containing 'Email Docs temp'.
- * Select a Salesforce Object: A dropdown menu with 'Account' selected.
- * Find a sample record: A search input field containing 'GenePoint'.
- Description: A text area for providing a description.

At the bottom right of the form, there are two buttons: 'Cancel' and 'Create'. The 'Create' button is highlighted with a red box, indicating it is the next step in the process.

Figure : 28

Here in the email builder section, click on Choose Actions button to create your desired content and add fields from the Email Builder option as shown in the below images. Figure 29, 30 &

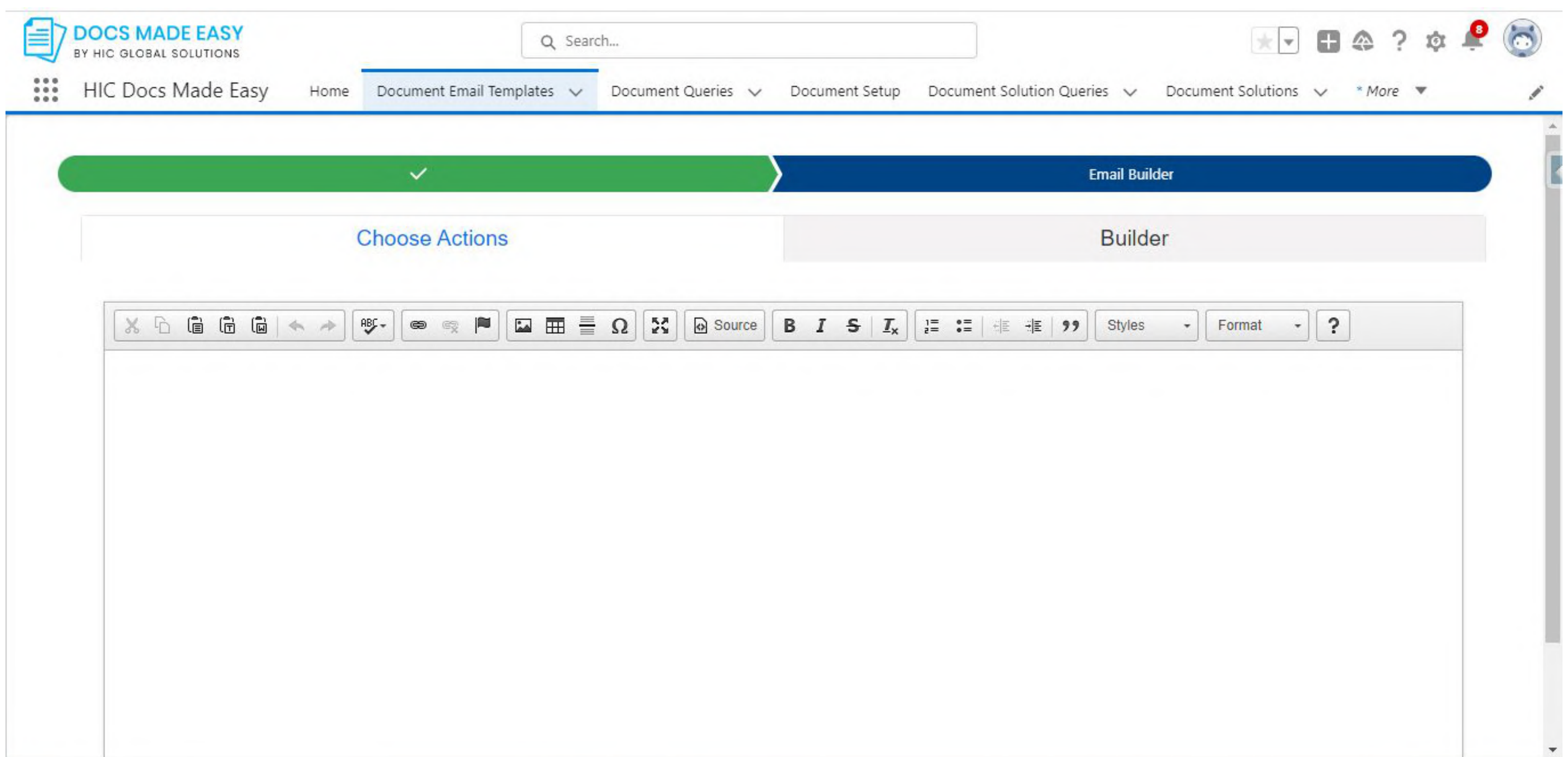


Figure : 29

✓ Email Builder

Choose Actions

Builder

Account ▾		
Name	Value	Copy To Clipboard
Account ID	0012w00001LcuoHAAR	▾
Deleted	false	▾
Account Name	GenePoint	▾
Account Type	Customer - Channel	▾
⊕ Parent Account ID		▾
Billing Street	345 Shoreline Park Mountain View, CA 94043 USA	▾
Billing City	Mountain View	▾
Billing State/Province	CA	▾
Billing Zip/Postal Code		▾

Figure : 30

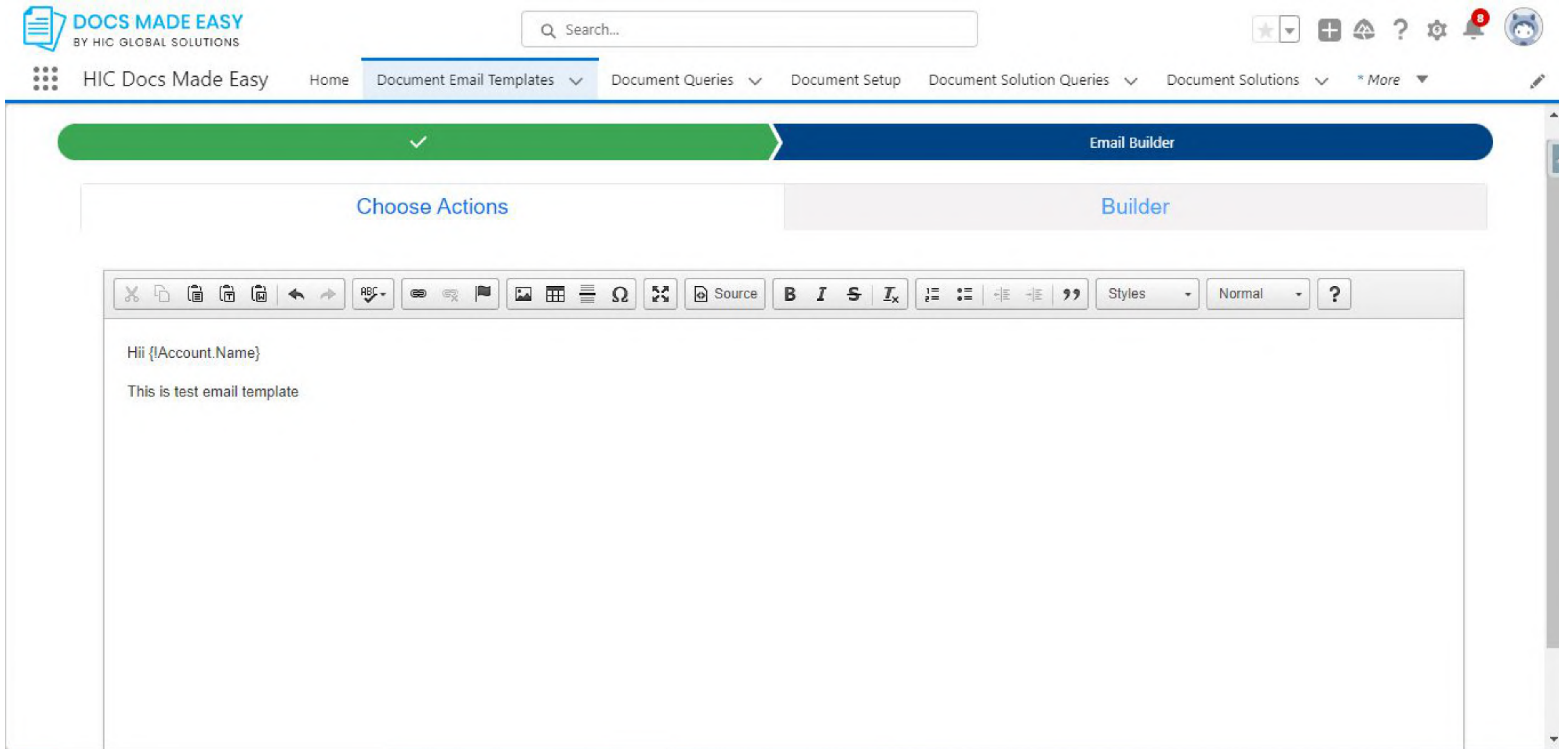


Figure : 31

Once you do this, hit the **Save** button.

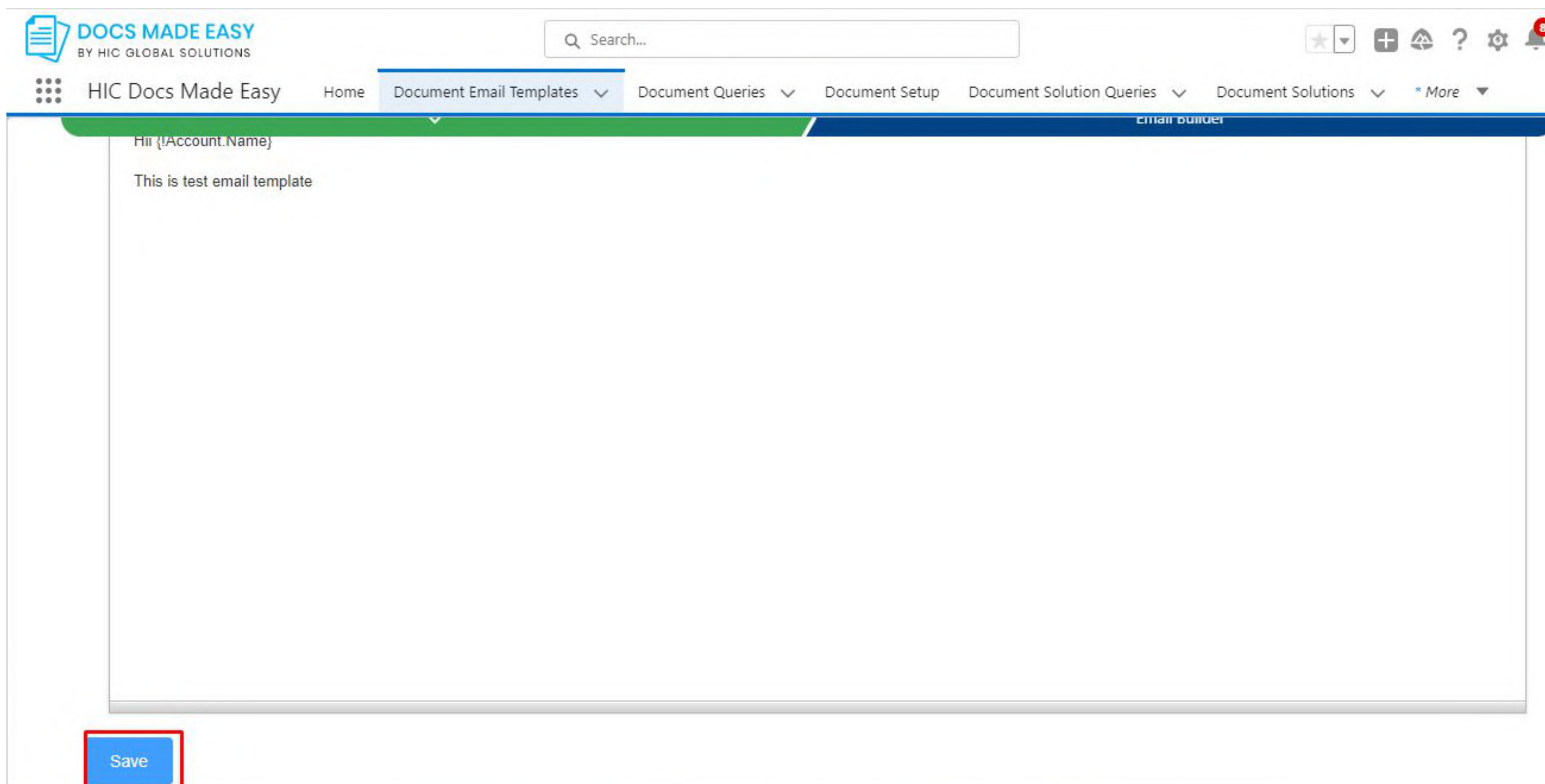


Figure : 32

Your Document Email Template has been successfully created and would reflect on the **Add Template page**. Now, click on the **Next** button.

The screenshot displays the 'Add Templates to a Solution' interface. At the top, there is a navigation bar with the logo 'DOCS MADE EASY BY HIC GLOBAL SOLUTIONS' and a search bar. Below the navigation bar, a progress bar indicates the current step is 'Add Templates'. The main content area is divided into two sections: 'Add Templates to a Solution' on the left and 'Templates' on the right. The left section contains instructions, two buttons ('Create New Document Template' and 'Create New Document Email Template'), and a search bar. The right section, titled 'Templates', includes a drag-and-drop instruction and a table with columns for 'NAME', 'DESCRIPTION', and 'LAST MODIFIED'. The table contains one entry: 'Docs template'. At the bottom of the page, there are two buttons: 'Back' and 'Next', with the 'Next' button highlighted by a red box.

NAME	DESCRIPTION	LAST MODIFIED
Docs template		

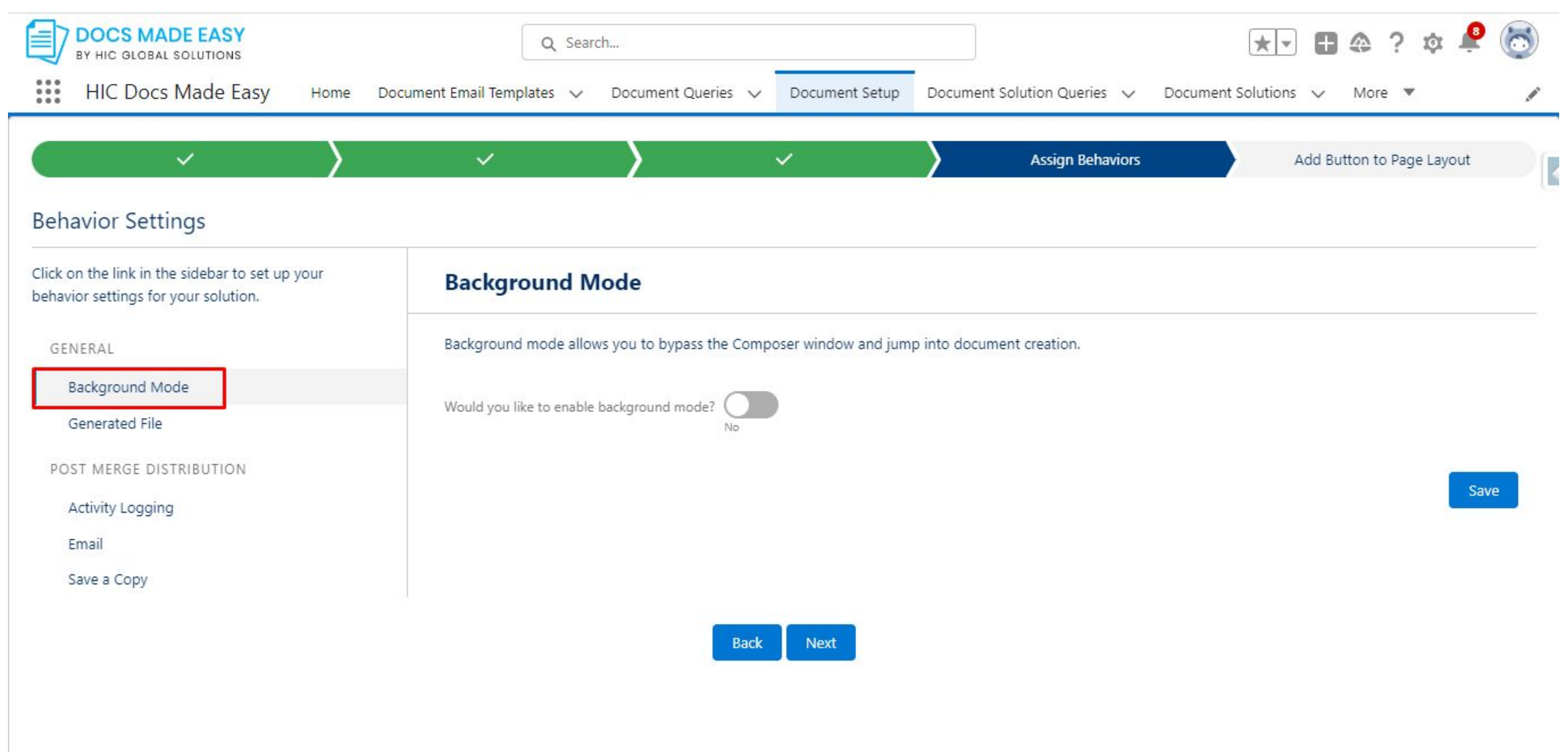
Figure : 33

2.4. Assign Behaviors

In this section, you can choose to assign behaviors as per your need and preference.

2.4.1. Background Mode

Here, you will see the Background Mode option that will allow you to bypass the composer window and jump straight to document creation.



The screenshot shows the 'Assign Behaviors' configuration page in the HIC Docs Made Easy application. The page is part of a multi-step process, with 'Assign Behaviors' being the current step. The 'Background Mode' section is highlighted in the sidebar and contains the following content:

- Behavior Settings**
- Click on the link in the sidebar to set up your behavior settings for your solution.
- GENERAL**
- Background Mode** (highlighted with a red box)
- Generated File
- POST MERGE DISTRIBUTION**
- Activity Logging
- Email
- Save a Copy

The main content area for 'Background Mode' includes:

- Background Mode**
- Background mode allows you to bypass the Composer window and jump into document creation.
- Would you like to enable background mode? No
- Save** button
- Back** and **Next** navigation buttons

Figure : 34

You can turn the **Background Mode** On by clicking on the toggle button next to it. And then click on Save. See the figure given below for reference.

The screenshot shows the 'Background Mode' configuration page in the HIC Docs Made Easy application. The page is part of the 'Document Setup' section, as indicated by the breadcrumb navigation. A progress bar at the top shows the current step is 'Assign Behaviors'. The main content area is titled 'Background Mode' and includes a description: 'Background mode allows you to bypass the Composer window and jump into document creation.' Below this, there is a question 'Would you like to enable background mode?' with a checked toggle switch and the label 'Yes'. To the right of the toggle is a dropdown menu with the selected option 'Attach to Notes & Attachments (DS7=1)'. A 'Save' button is located at the bottom right of the settings area. At the very bottom of the page, there are 'Back' and 'Next' navigation buttons. The left sidebar contains a list of settings categories: 'GENERAL' (with 'Background Mode' and 'Generated File' listed) and 'POST MERGE DISTRIBUTION' (with 'Activity Logging', 'Email', and 'Save a Copy' listed).

Figure : 35

DOCS MADE EASY
BY HIC GLOBAL SOLUTIONS

Search...

HIC Docs Made Easy Home Document Email Templates Document Queries Document Setup Document Solution Queries Document Solutions More

Solution parameter updated successfully!

Behavior Settings

Click on the link in the sidebar to set up your behavior settings for your solution.

GENERAL

- Background Mode
- Generated File

POST MERGE DISTRIBUTION

- Activity Logging
- Email
- Save a Copy

Background Mode

Background mode allows you to bypass the Composer window and jump into document creation.

Would you like to enable background mode? Yes

* Select background mode option

Attach to Notes & Attachments (DS7=1)

Save

Back Next

Figure : 36

2.4.2. Generated File

On the same Assign Behaviour Page, Go to the Generated File button, right below the background Mode button.

Here You can turn the toggle on to convert your document into a PDF each time on its own. Click Save. See Figure 37 for reference

The screenshot shows the 'Generated File' settings page in the HIC Docs Made Easy application. The page is part of the 'Document Setup' section, which is highlighted in the breadcrumb navigation. The 'Assign Behaviors' step is currently active, as indicated by the blue arrow in the progress bar. The 'Generated File' option is selected in the sidebar, highlighted with a red box. The main content area contains the following settings:

- Convert to PDF?** A toggle switch is turned on (Yes).
- Is This Mandatory?** A toggle switch is turned off (No).
- Filename:** An empty text input field.

Below the input field, there is a note: "Filenames can include letters, numbers, dashes, underscores, and periods. Exclamation points and braces can be used with dynamic text only." A 'Save' button is located at the bottom right of the settings area. At the bottom of the page, there are 'Back' and 'Next' buttons.

Figure : 37

The screenshot displays the 'Behavior Settings' interface for 'DOCS MADE EASY'. At the top, there is a navigation bar with a search box and various utility icons. Below the navigation, a green notification banner states 'Solution parameter added successfully!'. The main content area is titled 'Behavior Settings' and includes a sidebar on the left with options like 'Background Mode', 'Generated File', 'Activity Logging', 'Email', and 'Save a Copy'. The 'Generated File' section is active, showing a 'Convert to PDF?' toggle set to 'Yes' and an 'Is This Mandatory?' toggle set to 'No'. A 'Filename' input field is present, with a note that filenames can include letters, numbers, dashes, underscores, and periods. A 'Save' button is located at the bottom right of the settings area, and 'Back' and 'Next' buttons are centered below it.

Figure : 38

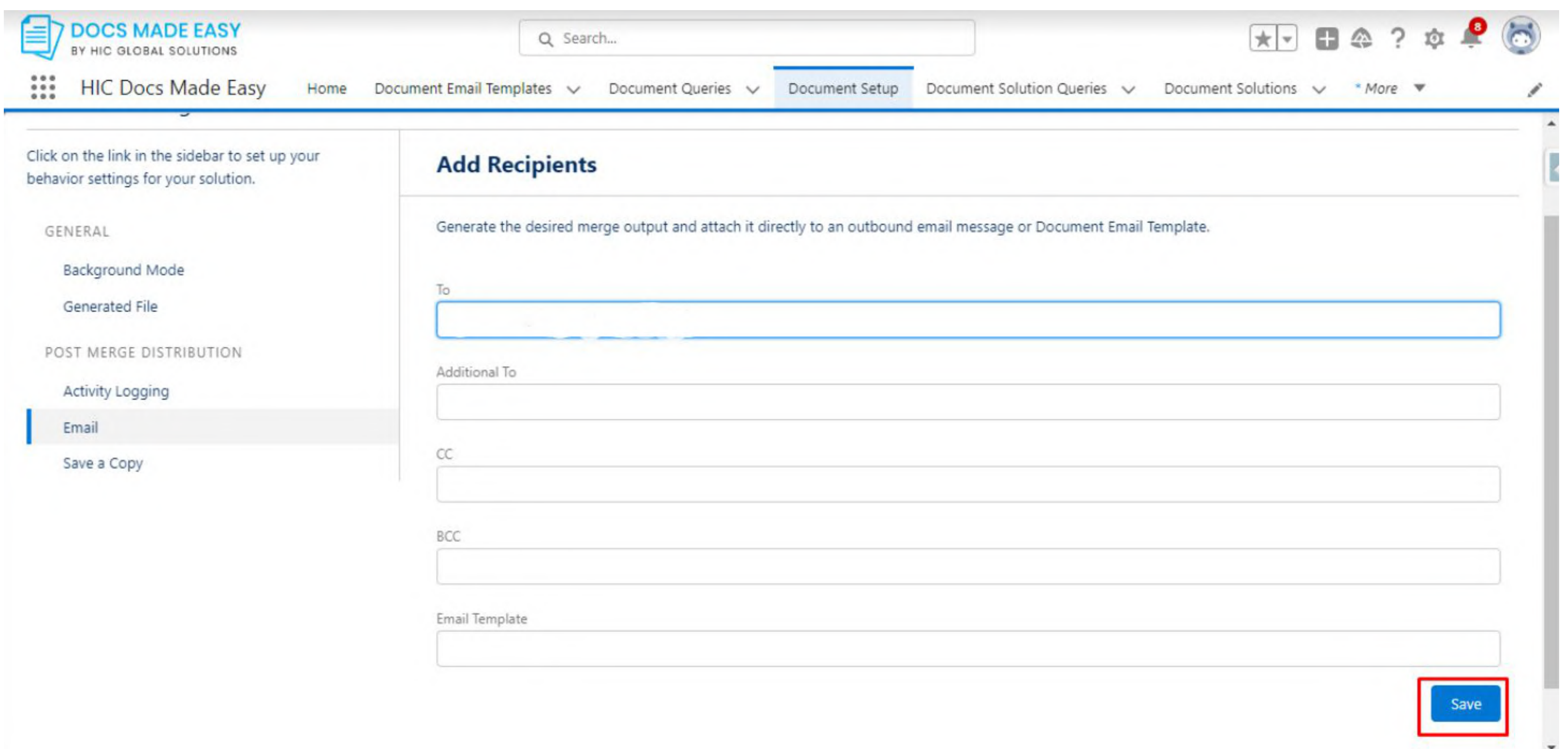
You can also enable Activity Logging to log an event, a task, or an email you sent on the record you launched that was created with Composer. Turn on the toggle and click Save.

The screenshot displays the 'Behavior Settings' interface for 'HIC Docs Made Easy'. The top navigation bar includes a search bar and various menu items like 'Home', 'Document Email Templates', 'Document Queries', 'Document Setup', 'Document Solution Queries', 'Document Solutions', and 'More'. A progress indicator shows four steps, with the fourth step, 'Assign Behaviors', currently active. The main content area is titled 'Behavior Settings' and contains a sidebar with options: 'GENERAL' (Background Mode, Generated File), 'POST MERGE DISTRIBUTION' (Activity Logging, Email, Save a Copy), and 'Activity Logging' (highlighted with a red box). The 'Activity Logging' section includes a description: 'Log an event, a task, or an email you sent on the record you launched that was created with Composer.' Below this is a toggle switch for 'Log an activity after merging?' which is turned on. There are also input fields for '*Subject' and 'Days to Follow-Up', and a 'Save' button at the bottom right. Navigation buttons 'Back' and 'Next' are located at the bottom center.

Figure : 39

2.4.3. Add Recipients

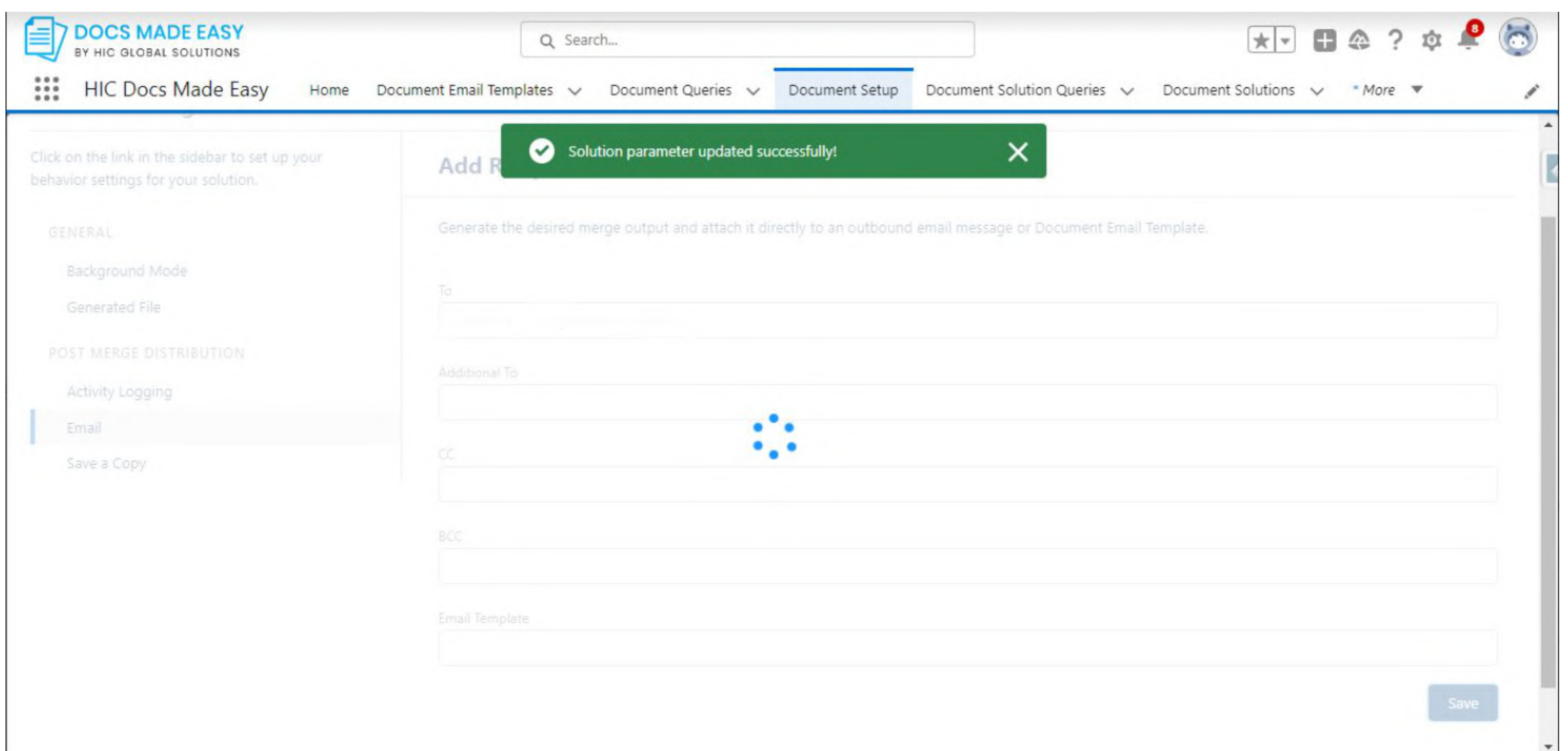
Now on the Email button, fill in the recipient details such as the email addresses to generate the desired merge output and attach it directly to an outbound email message or Document Email Template. Hit the **Save** button now.



The screenshot shows the 'Add Recipients' form in the HIC Docs Made Easy application. The form is titled 'Add Recipients' and includes a sub-header: 'Generate the desired merge output and attach it directly to an outbound email message or Document Email Template.' The form contains several input fields: 'To', 'Additional To', 'CC', 'BCC', and 'Email Template'. A 'Save' button is located at the bottom right of the form, highlighted with a red box. The application interface includes a top navigation bar with the logo 'DOCS MADE EASY BY HIC GLOBAL SOLUTIONS', a search bar, and a menu with options like 'Home', 'Document Email Templates', 'Document Queries', 'Document Setup', 'Document Solution Queries', and 'Document Solutions'. A sidebar on the left contains a list of settings: 'GENERAL' (Background Mode, Generated File) and 'POST MERGE DISTRIBUTION' (Activity Logging, Email, Save a Copy). The 'Email' option is currently selected.

Figure : 40

Your screen should now read “Solution Parameter Updated Successfully,” as shown below. Now, hit the **Next** button.



The screenshot displays the HIC Docs Made Easy web application interface. At the top, the logo "DOCS MADE EASY BY HIC GLOBAL SOLUTIONS" is visible on the left, and a search bar is in the center. The navigation menu includes "Home", "Document Email Templates", "Document Queries", "Document Setup" (which is highlighted), "Document Solution Queries", "Document Solutions", and "More".

A green notification banner at the top of the main content area reads "Solution parameter updated successfully!". Below this, the "Add Recipient" form is displayed. The form includes a heading "Add Recipient" and a sub-heading "Generate the desired merge output and attach it directly to an outbound email message or Document Email Template." The form contains several input fields: "To", "Additional To", "CC", "BCC", and "Email Template". A "Save" button is located at the bottom right of the form. A loading spinner is visible in the center of the form area.

Figure : 41

Lastly, Click on the Save a copy Button and slide the toggle to yes to save a copy of this file. See Figure 42

The screenshot shows the 'DOCS MADE EASY' application interface. The top navigation bar includes a search bar and several menu items: 'HIC Docs Made Easy', 'Home', 'Document Email Templates', 'Document Queries', 'Document Setup' (highlighted), 'Document Solution Queries', 'Document Solutions', and 'More'. A progress bar at the top indicates the current step is 'Assign Behaviors'. The main content area is titled 'Behavior Settings' and contains a sidebar with categories: 'GENERAL' (Background Mode, Generated File), 'POST MERGE DISTRIBUTION' (Activity Logging, Email), and 'Save a Copy' (highlighted with a red box). The 'Save a Copy' section has a toggle switch labeled 'Would you like to save a copy of the file?' which is currently turned on (Yes). Below this is a dropdown menu labeled '* Select a location where you want to save the copied file' with 'Documents' selected. At the bottom of the section are 'Back' and 'Next' buttons, and a 'Save' button is located on the right side.

Figure : 42

Lastly, Click on the Save a copy Button and slide the toggle to yes to save a copy of this file. See Figure 42

The screenshot displays the 'Behavior Settings' interface for 'Docs Made Easy'. The 'Save a Copy' section is active, showing a toggle switch for 'Would you like to save a copy of the file?' set to 'Yes'. Below this, a dropdown menu is open, allowing selection of a location to save the copied file. The 'Documents' option is selected. A 'Save' button is located on the right side of the page.

Behavior Settings

Click on the link in the sidebar to set up your behavior settings for your solution.

GENERAL

- Background Mode
- Generated File

POST MERGE DISTRIBUTION

- Activity Logging
- Email
- Save a Copy**

Save a Copy

Would you like to save a copy of the file? Yes

* Select a location where you want to save the copied file

Documents

- Chatter
- Content
- Documents
- Notes & Attachments
- Salesforce Files

Save

Figure : 43

Now, Select the location of the file where you want to save the copied file bu clicking on the drop-down menu. Then Click Save. See Figure 43 for reference.

Now Click on Next.

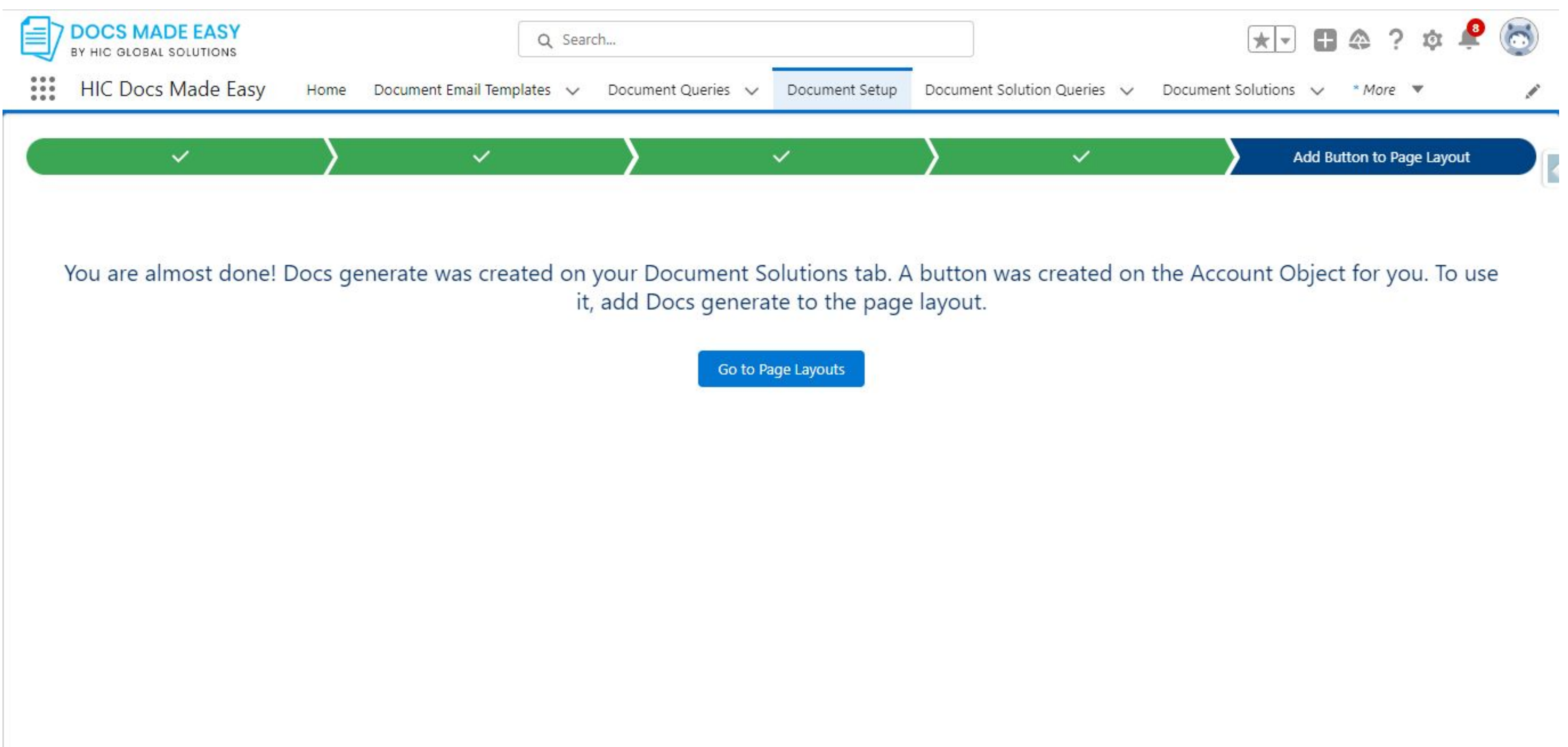


Figure : 44

2.5. Add Button to Page Layout

This should now take you to the final step, which is Add Button to Page Layout. Now, move as directed and click on the Go to Page Layouts button.

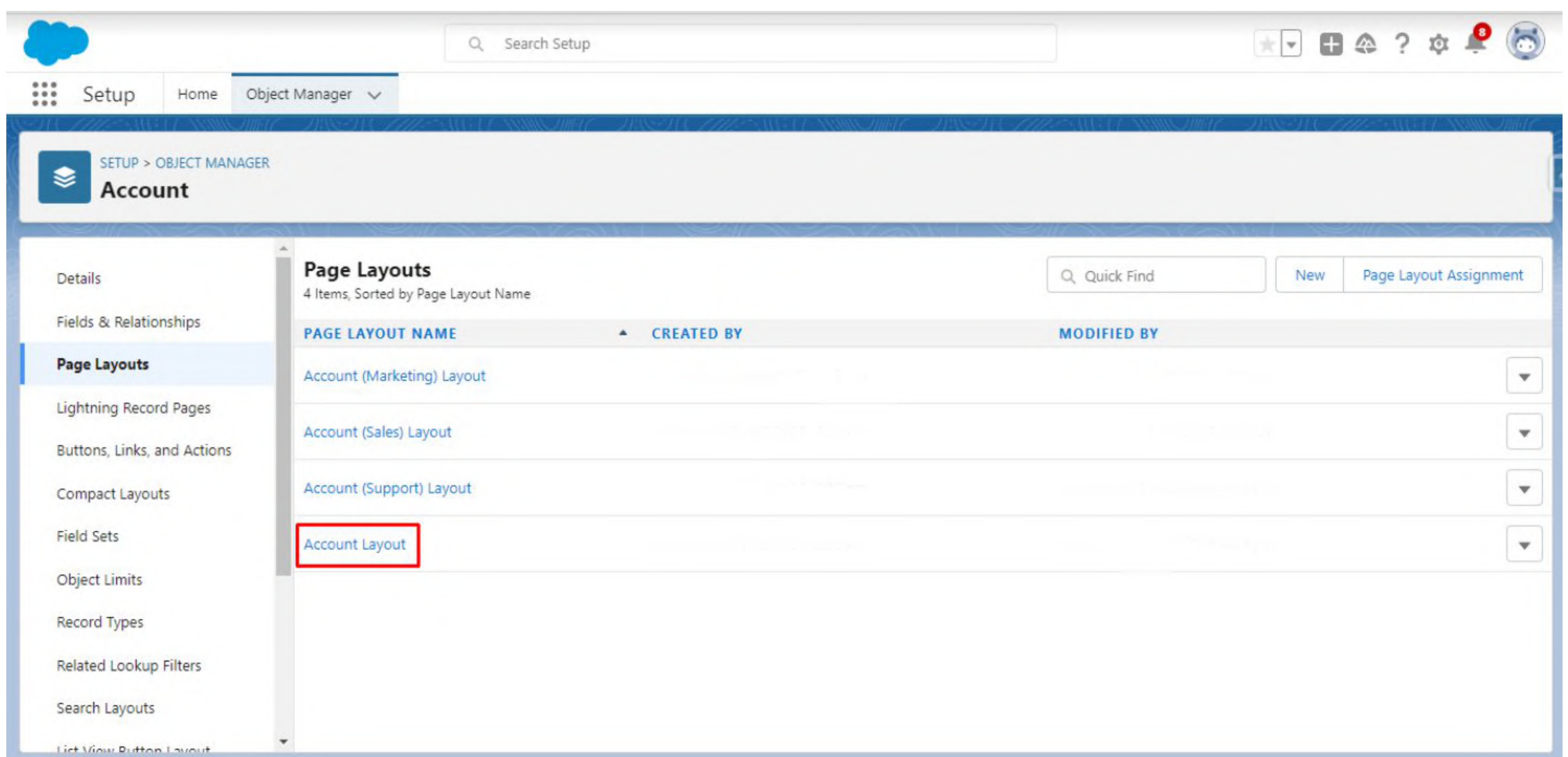


Figure : 45

It will now take you to the **Account Layout page**, as shown below. Here, click on the **Mobile & Lightning Actions** button, and find the button you just created.

The screenshot shows the Salesforce Setup interface for editing an Account Layout. The left sidebar contains a navigation menu with 'Mobile & Lightning Actions' highlighted. The main content area is titled 'Account Layout' and includes a table of fields and a section for quick actions.

Field Name	Field Name	Field Name	Field Name	Field Name	Field Name	Field Name
Section	Account Owner	Annual Revenue	Customer Priority	D-U-N-S Number	Industry	Number of Locations
Blank Space	Account Site	Billing Address	D&B Company	Einstein Account ...	Last Modified By	Operating Hours
Account Name	Account Source	Clean Status	Data.com Key	Employees	NAICS Code	Ownership
Account Number	Active	Created By	Description	Fax	NAICS Description	Parent Account

Below the table, there is a section titled 'Quick Actions in the Salesforce Classic' with a 'Publisher' dropdown and a row of buttons: Post, File, New Task, New Contact, New Case, Log a Call, New Note, New Opportunity, New Event, and Link.

Figure : 46

After that, you need to just **drag and drop that button** beside **“Post”** in Salesforce Mobile and Lightning Experiences Actions.

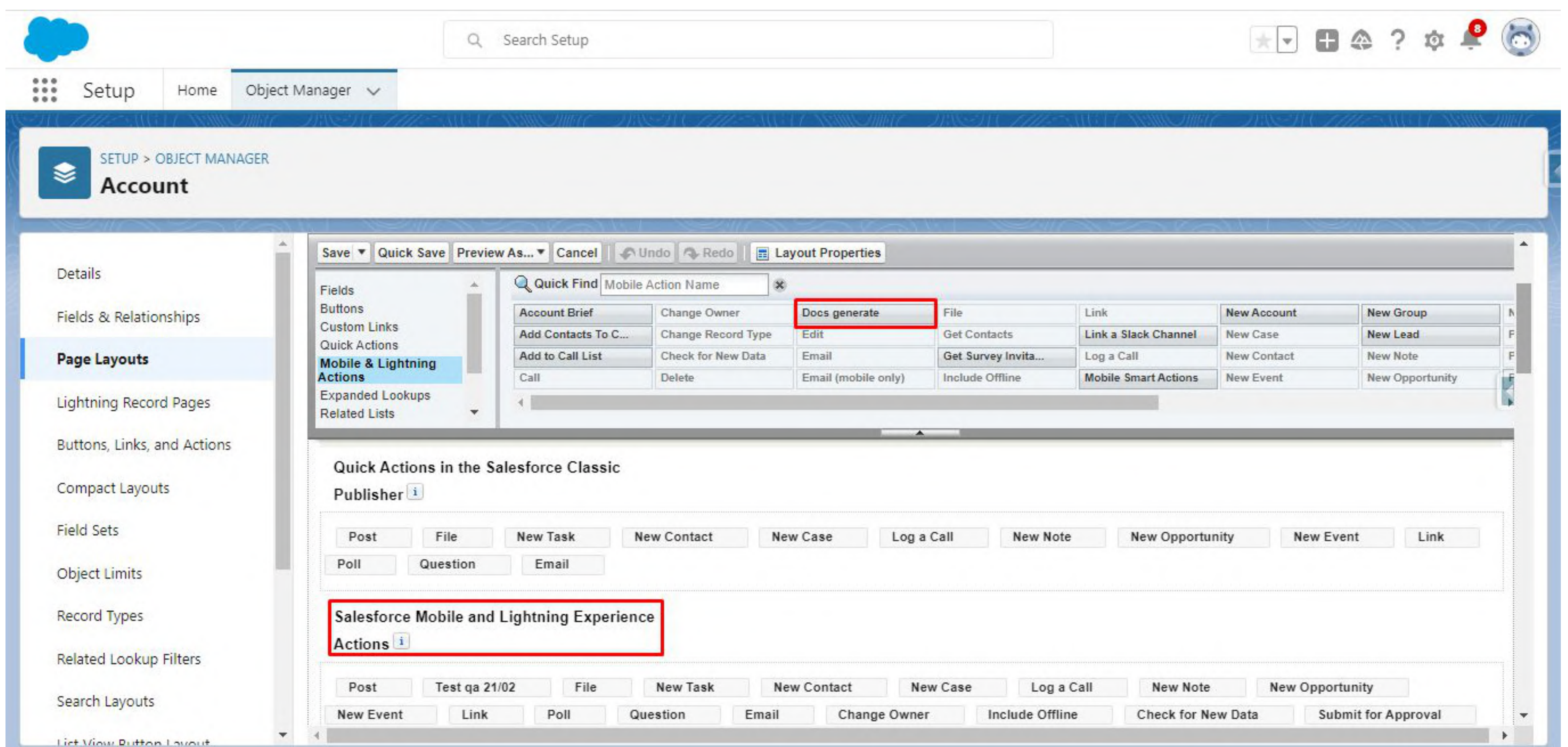


Figure : 47

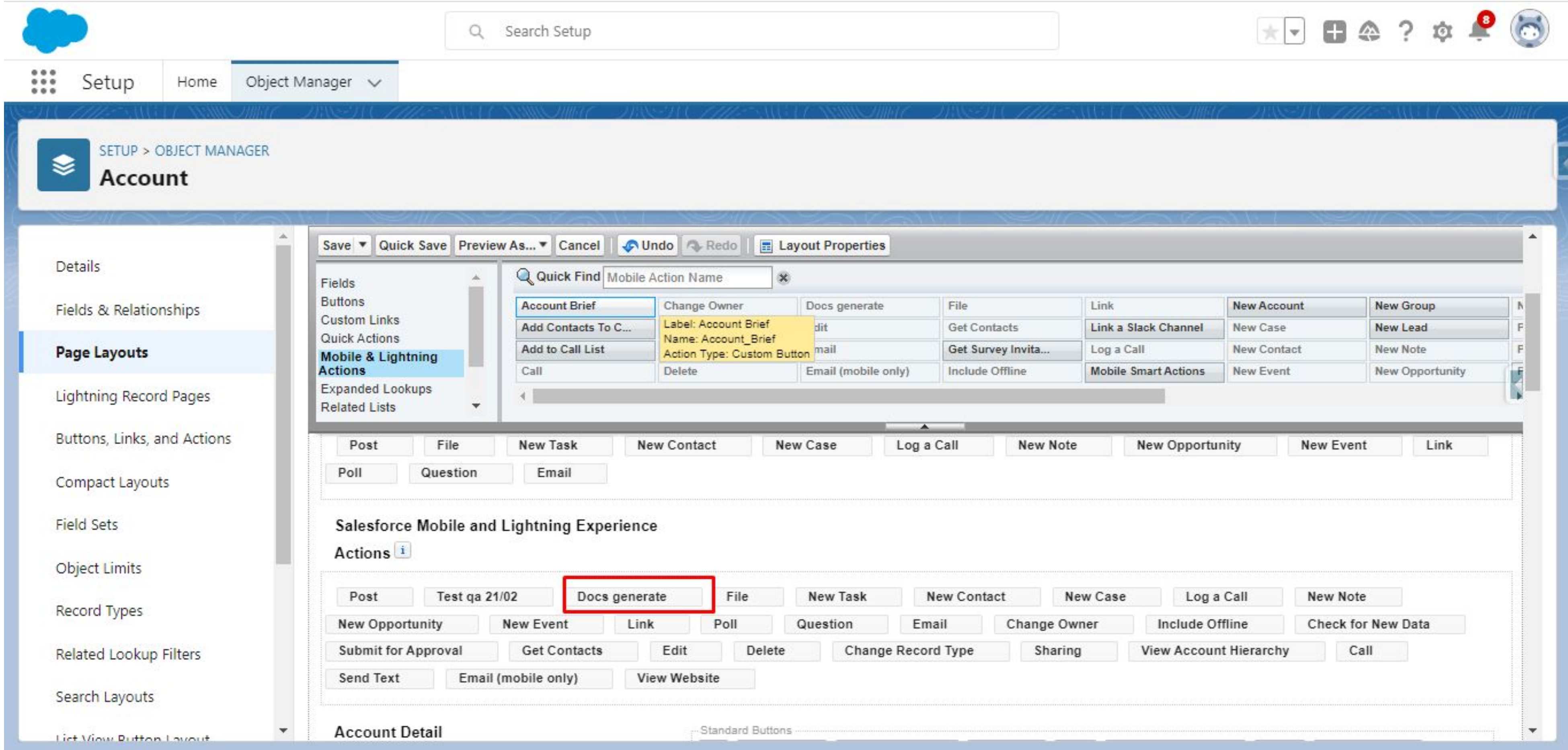


Figure : 48

Now, Hit the Save button.

The screenshot displays the Salesforce Setup interface for the 'Account' object. The 'Save' button in the top toolbar is highlighted with a red box. The interface includes a search bar, navigation tabs (Setup, Home, Object Manager), and a sidebar with various configuration options. The main content area shows a 'Quick Find' search bar and a grid of actions, including 'Account Brief', 'Change Owner', 'Docs generate', 'File', 'Link', 'New Account', 'New Group', 'Add Contacts To C...', 'Change Record Type', 'Edit', 'Get Contacts', 'Link a Slack Channel', 'New Case', 'New Lead', 'Add to Call List', 'Check for New Data', 'Email', 'Get Survey Invita...', 'Log a Call', 'New Contact', 'New Note', 'Call', 'Delete', 'Email (mobile only)', 'Include Offline', 'Mobile Smart Actions', 'New Event', and 'New Opportunity'. Below the grid, there are sections for 'Salesforce Mobile and Lightning Experience' and 'Account Detail'.

Figure : 49

You will now see that the button is added to the **“Page Layouts”** section.

Now, You will be redirected back to the Accounts page. From that page, Go to the app Launcher and type **Accounts in the search box**

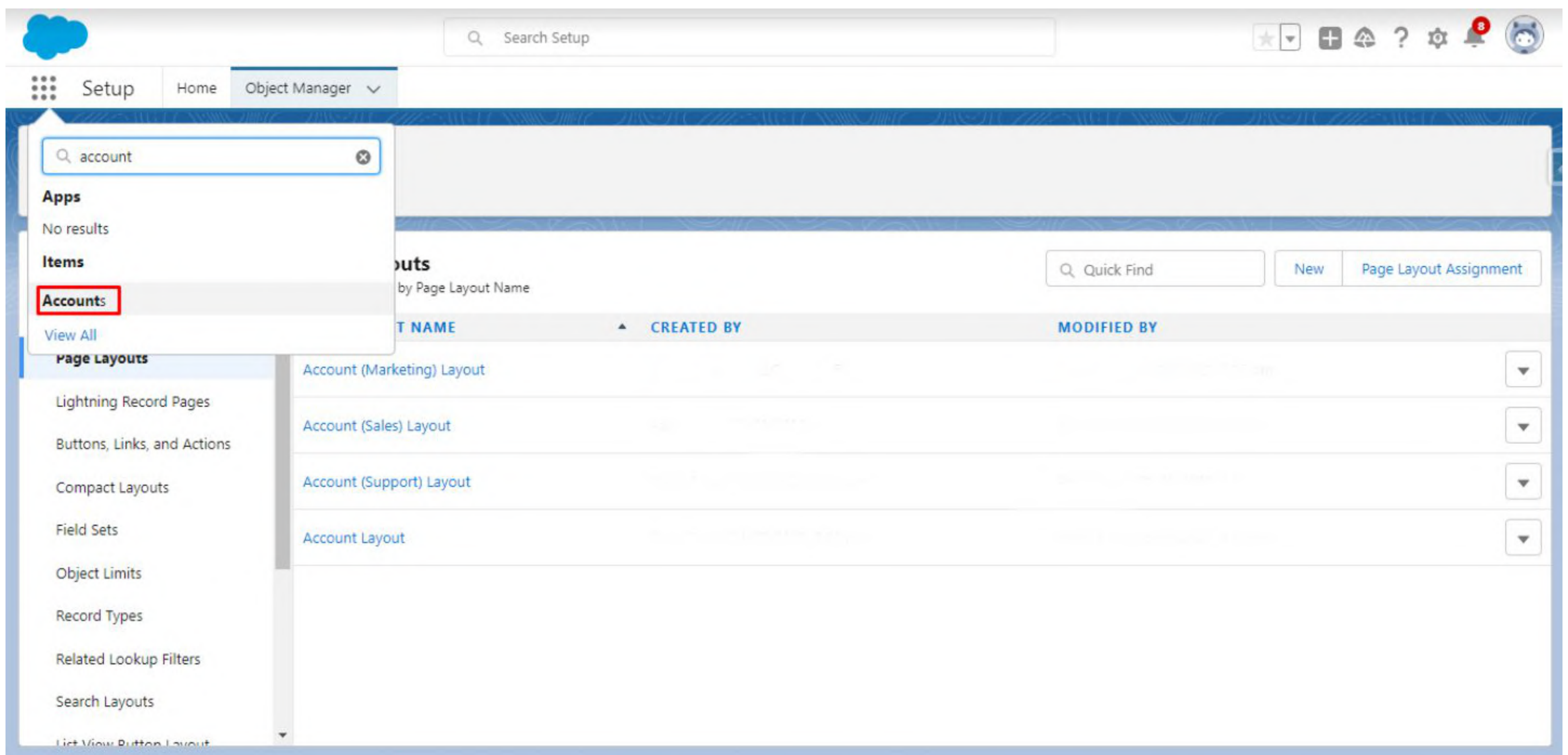


Figure : 50

Here, open the account that you want to create documents for.

The screenshot displays the 'DOCS MADE EASY' web application interface. The top navigation bar includes the logo, a search bar, and several menu items: 'HIC Docs Made Easy', 'Home', 'Document Email Templates', 'Document Queries', 'Document Setup', 'Document Solution Queries', and a tab for '* New This Week | Accounts'. Below the navigation bar, the 'Accounts' section is visible, showing a list of accounts. The list is titled 'New This Week' and contains one item, 'Docs test', which is highlighted with a red box. The list columns are 'Account Name', 'Account Site', 'Billing State/Province', 'Phone', 'Type', and 'Account Owner Alias'. The 'Docs test' account is the only one listed.

	Account Name ↑	Account Site	Billing State/Province	Phone	Type	Account Owner Alias
1	Docs test					

Figure : 51

After opening the account, click on Generate Document as shown in Figure 51

The screenshot displays the 'Docs Made Easy' web application interface. The top navigation bar includes the logo 'DOCS MADE EASY BY HIC GLOBAL SOLUTIONS', a search bar, and several menu items: 'HIC Docs Made Easy', 'Home', 'Document Email Templates', 'Document Queries', 'Document Setup', 'Document Solution Queries', and a tab for '* Docs test'. The main content area shows an account page for 'Docs test' with a '+ Follow' button, a 'Test qa 21/02' button, and a 'Docs generate' button highlighted with a red box. Below the account name, there are tabs for 'Details' and 'News'. The 'Details' tab is active, showing a list of account fields such as 'Account Owner', 'Account Name', 'Parent Account', 'Account Number', 'Account Site', 'Type', 'Industry', 'Rating', 'Phone', 'Fax', 'Website', 'Ticker Symbol', 'Ownership', and 'Employees'. The 'Activity' section on the right shows 'Upcoming & Overdue' activities, with a message: 'No activities to show. Get started by sending an email, scheduling a task, and more. No past activity. Past meetings and tasks marked as done show up here.'

Figure : 52

At this step, you should be on the Composer Page. Here You will see the template that you created. Hit the **Merge Document button** to download the document.

The document will be in the same format as the template as we have selected the **“Same as Template”** option.

The screenshot displays the Docs Made Easy web application interface. The top navigation bar includes the logo, a search bar, and various utility icons. The main content area is divided into two columns. The left column, titled 'Document Template List', contains a 'CHOOSE TEMPLATE' section with radio buttons for 'Docs template' and 'Account_Brief'. The right column, titled 'Document Email Template list', contains an 'OUTPUT FORMAT AND CHANNEL' section. In this section, the 'Format' dropdown menu is set to 'Same as Template' and is highlighted with a red box. Other options include 'File', 'Notes and Attachment', 'Document', and 'Chatter File'. Below this, there is an 'Action' dropdown set to 'Download' and an 'ACTIVITY LOGGING' section with a toggle switch and a 'Subject' input field.

Figure : 53

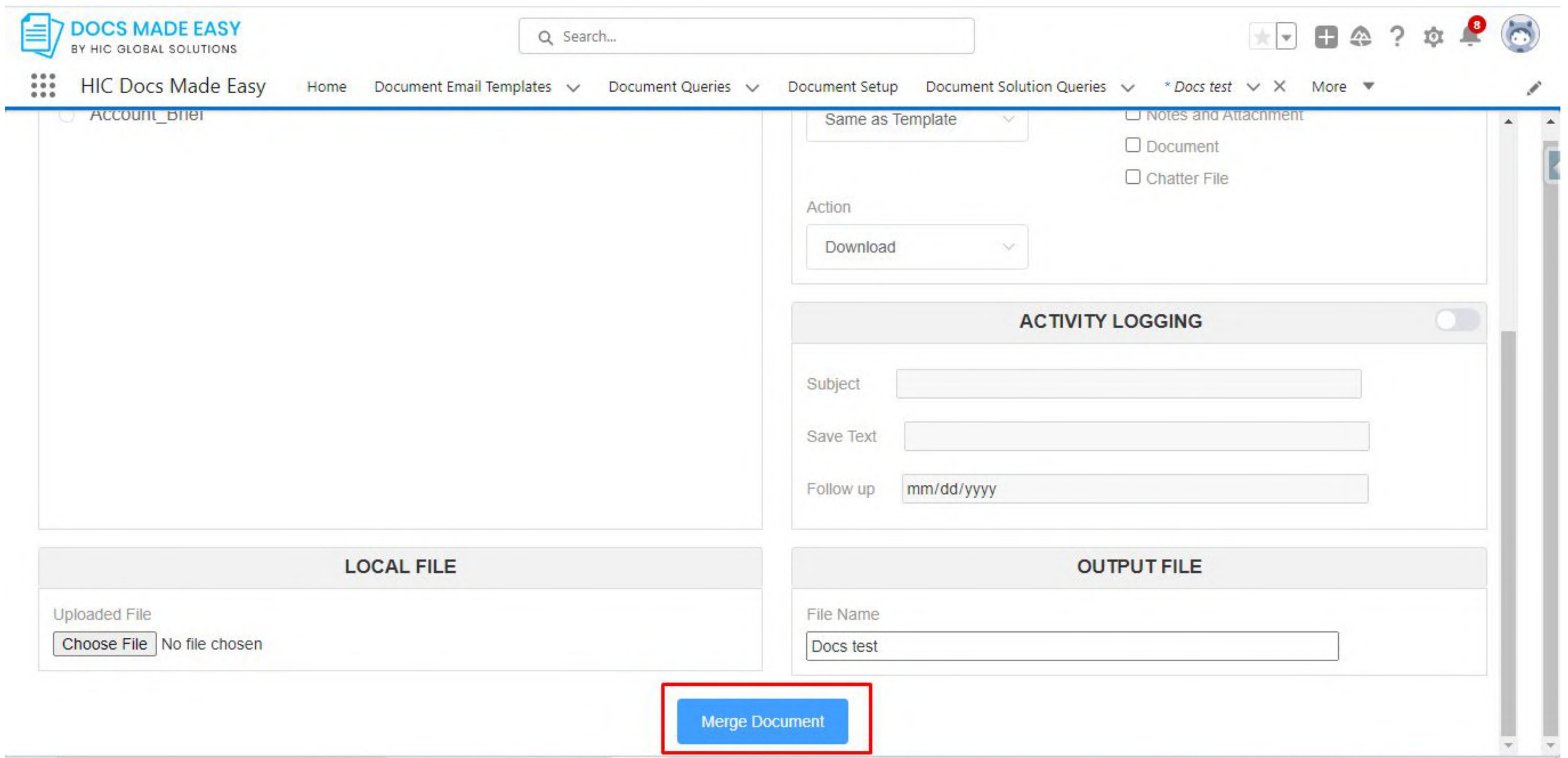
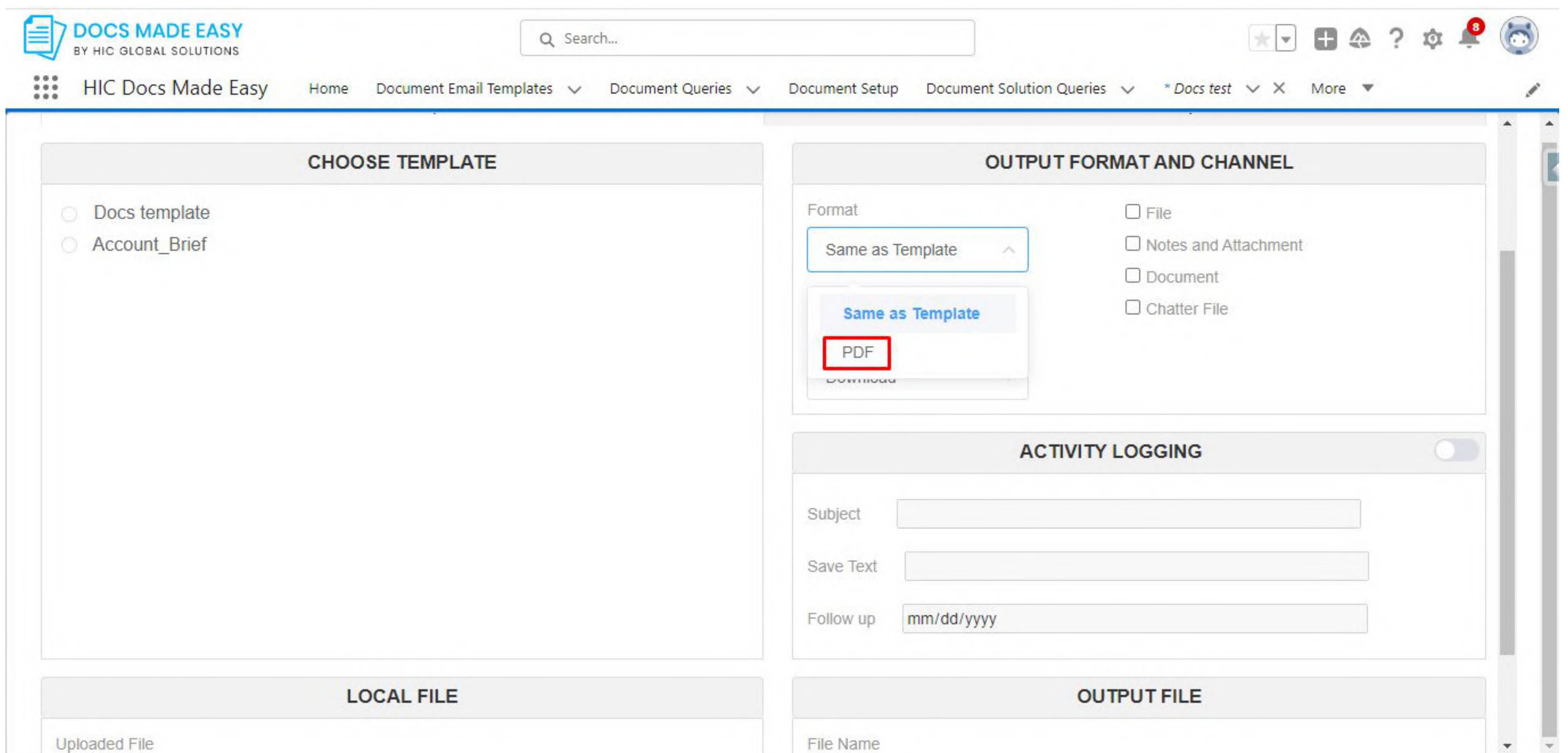


Figure : 54

Now, if you wish to download the document in PDF format, select the **PDF** option in Format.



The screenshot displays the HIC Docs Made Easy web application interface. The top navigation bar includes the logo "DOCS MADE EASY BY HIC GLOBAL SOLUTIONS", a search bar, and various utility icons. The main content area is divided into several sections:

- CHOOSE TEMPLATE:** Contains radio buttons for "Docs template" and "Account_Brief".
- OUTPUT FORMAT AND CHANNEL:** Features a "Format" dropdown menu with "Same as Template" selected. A secondary dropdown menu is open, showing "Same as Template" and "PDF" (highlighted with a red box). To the right, there are checkboxes for "File", "Notes and Attachment", "Document", and "Chatter File".
- ACTIVITY LOGGING:** Includes a toggle switch and input fields for "Subject", "Save Text", and "Follow up" (with a date format "mm/dd/yyyy").
- LOCAL FILE:** Shows an "Uploaded File" section.
- OUTPUT FILE:** Shows a "File Name" section.

Figure : 55

Hit the **Merge Document button** to download your PDF document.

DOCS MADE EASY
BY HIC GLOBAL SOLUTIONS

Search...

HIC Docs Made Easy Home Document Email Templates Document Queries Document Setup Document Solution Queries * Docs test X More

Account_Brief

Same as Template

Same as Template
PDF
Download

Notes and Attachment
 Notes and Attachment
 Document
 Chatter File

ACTIVITY LOGGING

Subject

Save Text

Follow up mm/dd/yyyy

LOCAL FILE

OUTPUT FILE

Uploaded File
Choose File No file chosen

File Name
Docs test

Merge Document

Your PDF document is now ready to be downloaded.



Thank You!

