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!

DOCS MADE EASY
BY HIC GLOBAL SOLUTIONS

HIC GLOBAL SOLUTIONS
Your CRM Success Partners

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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 easies 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.

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.

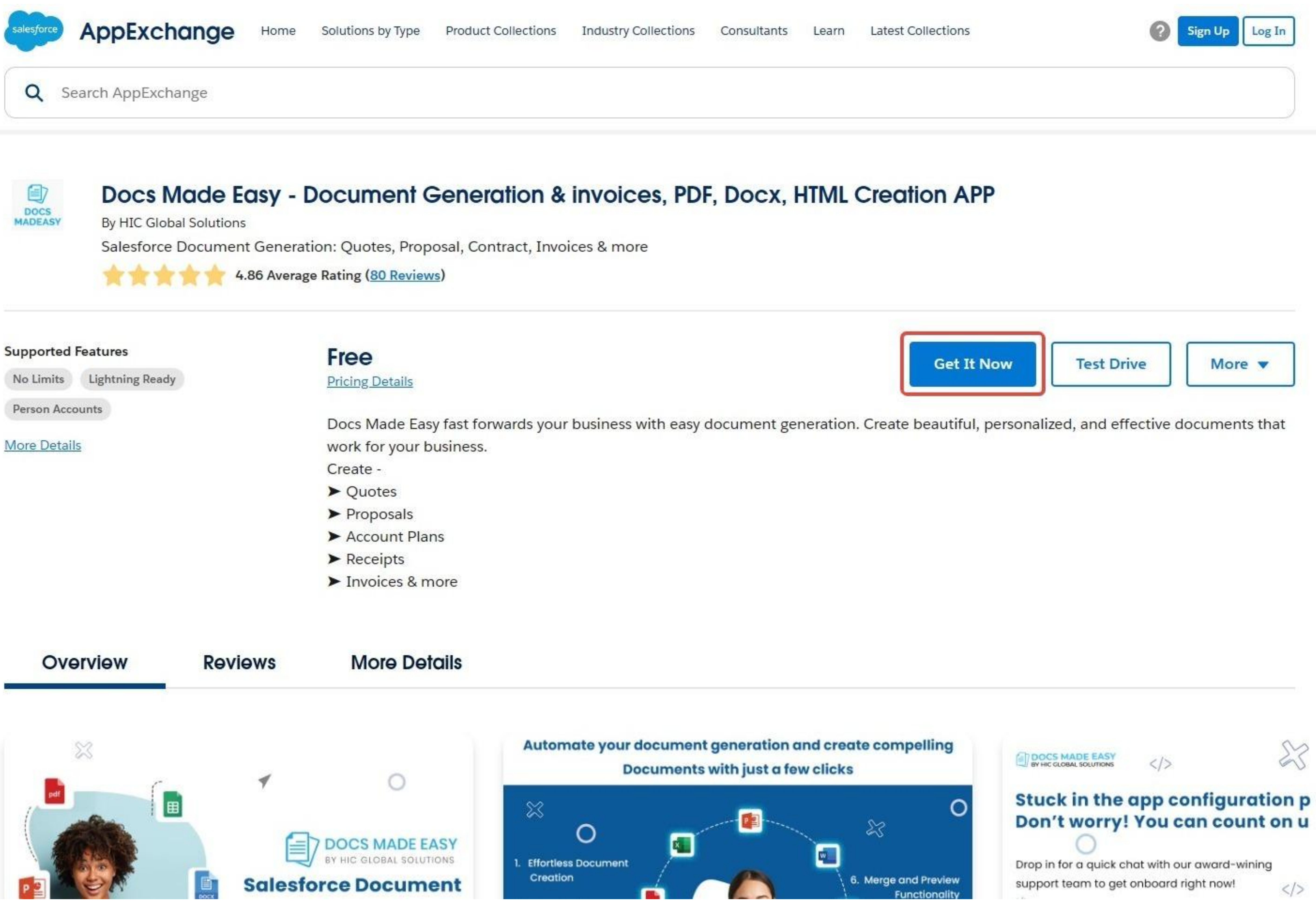
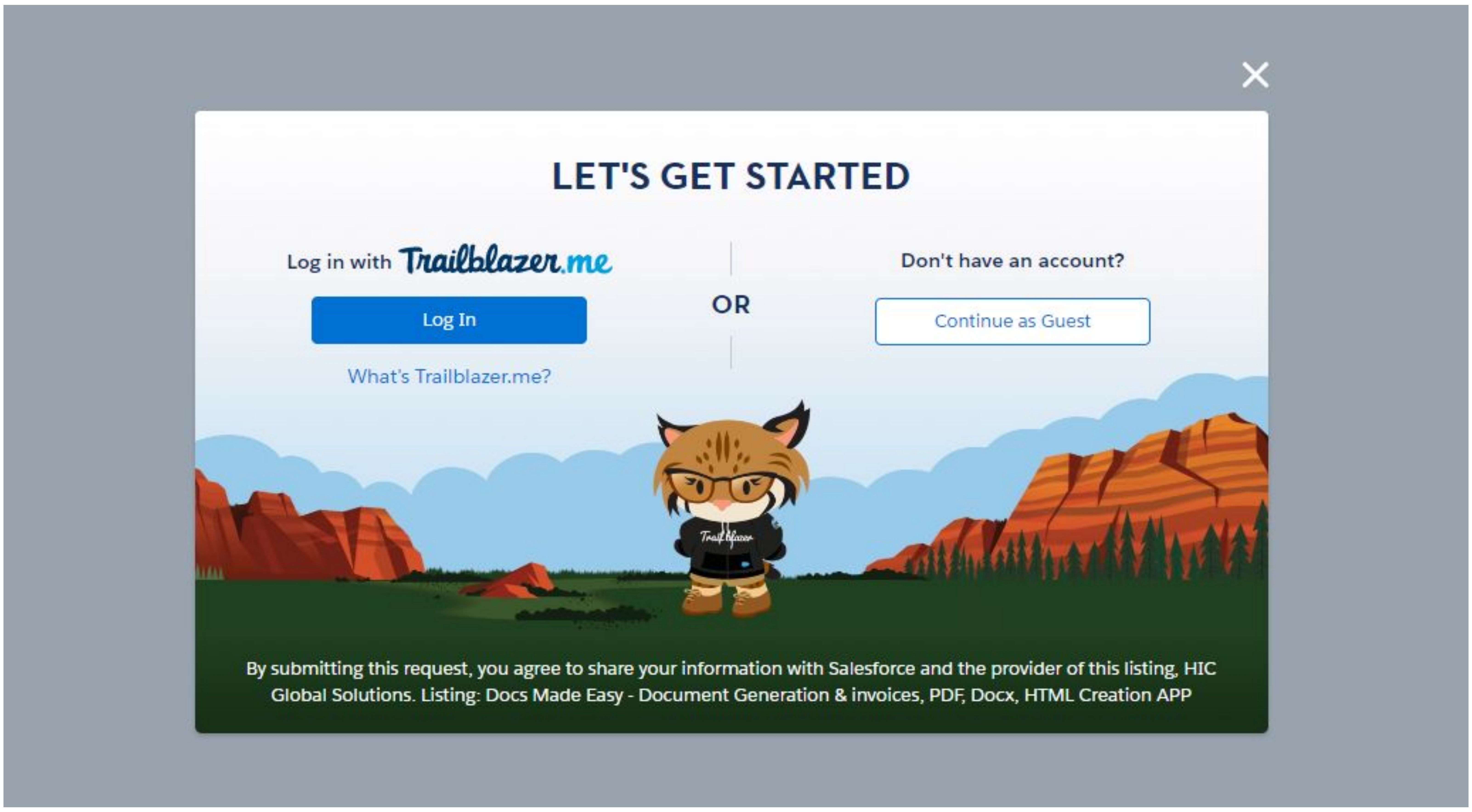


Figure : 01



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

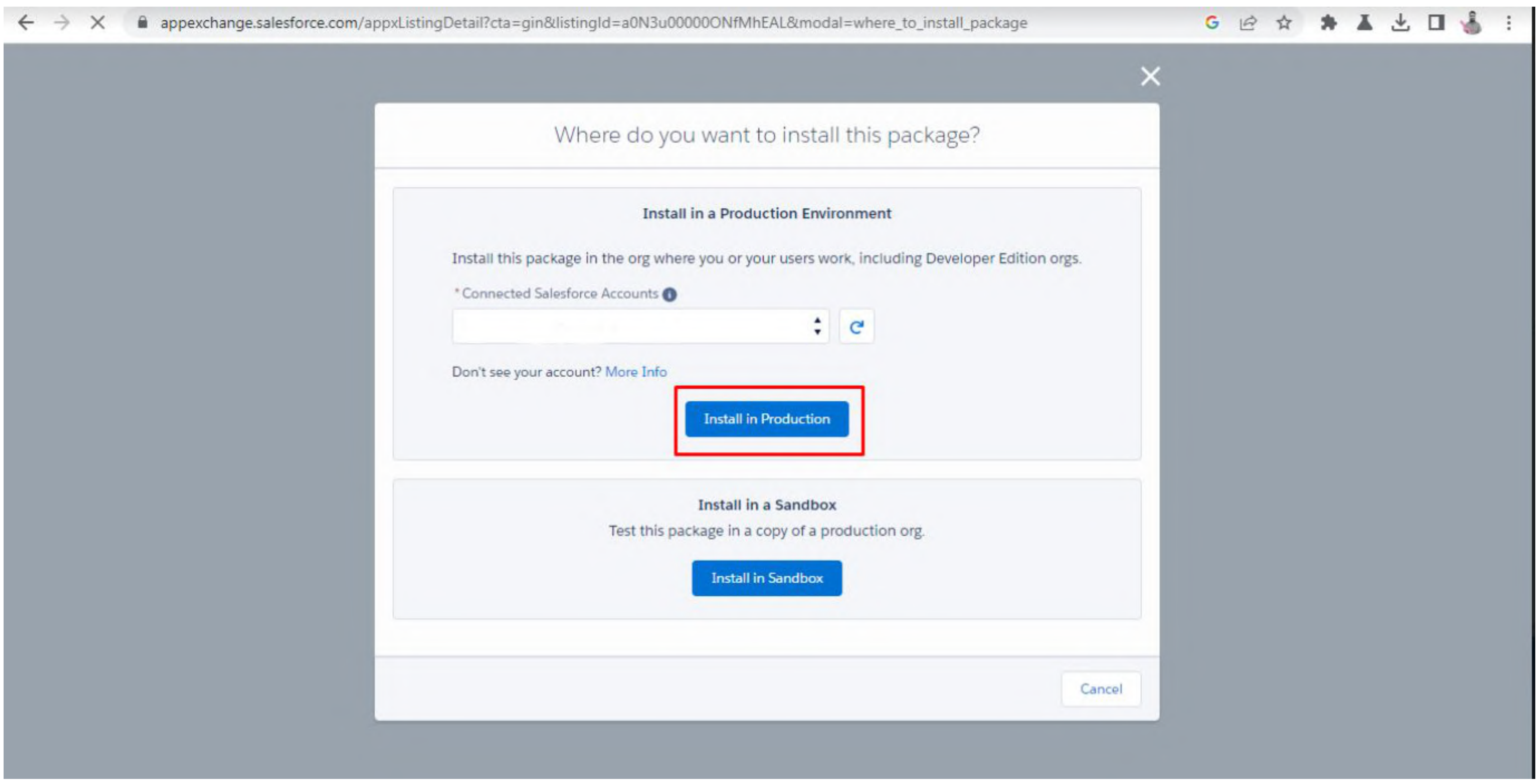


Figure : 02

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.

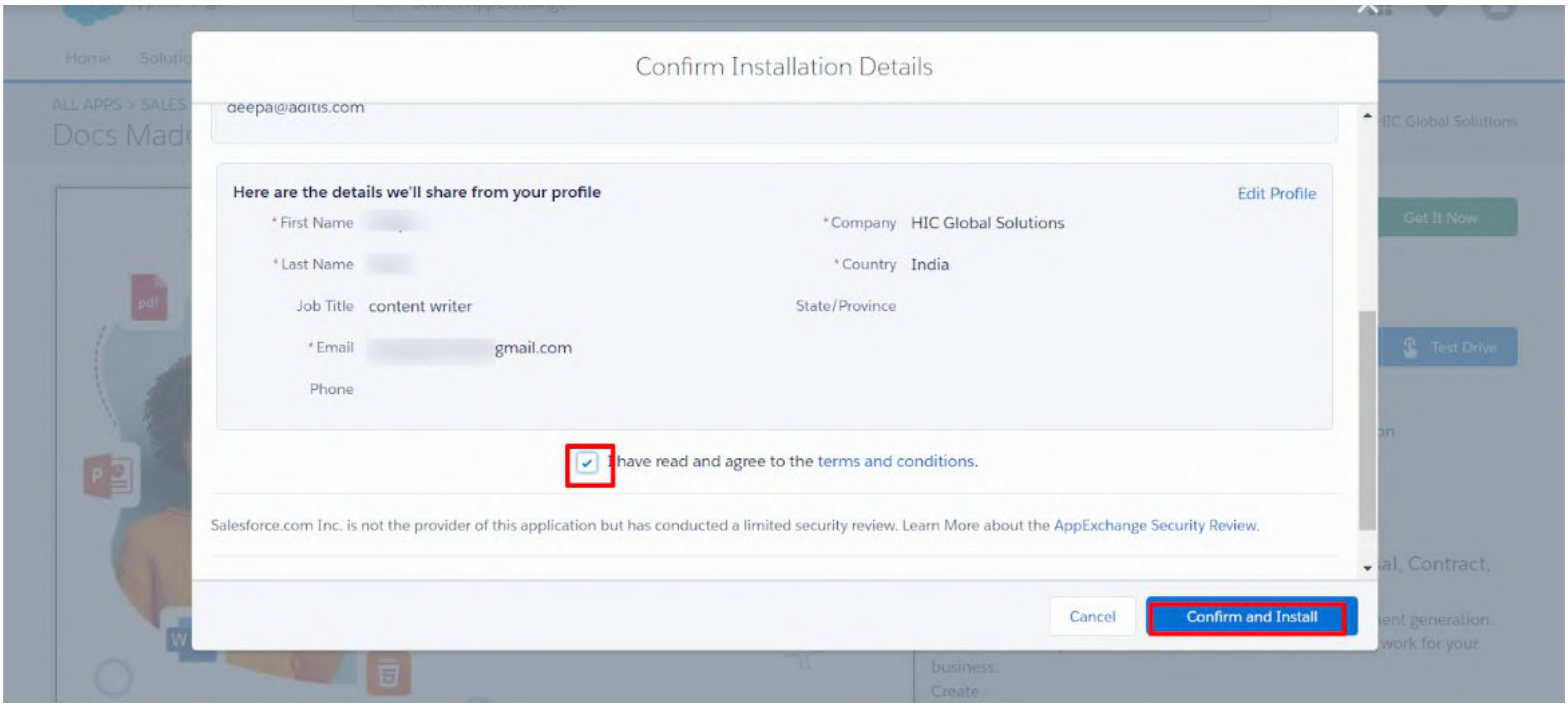


Figure : 03

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

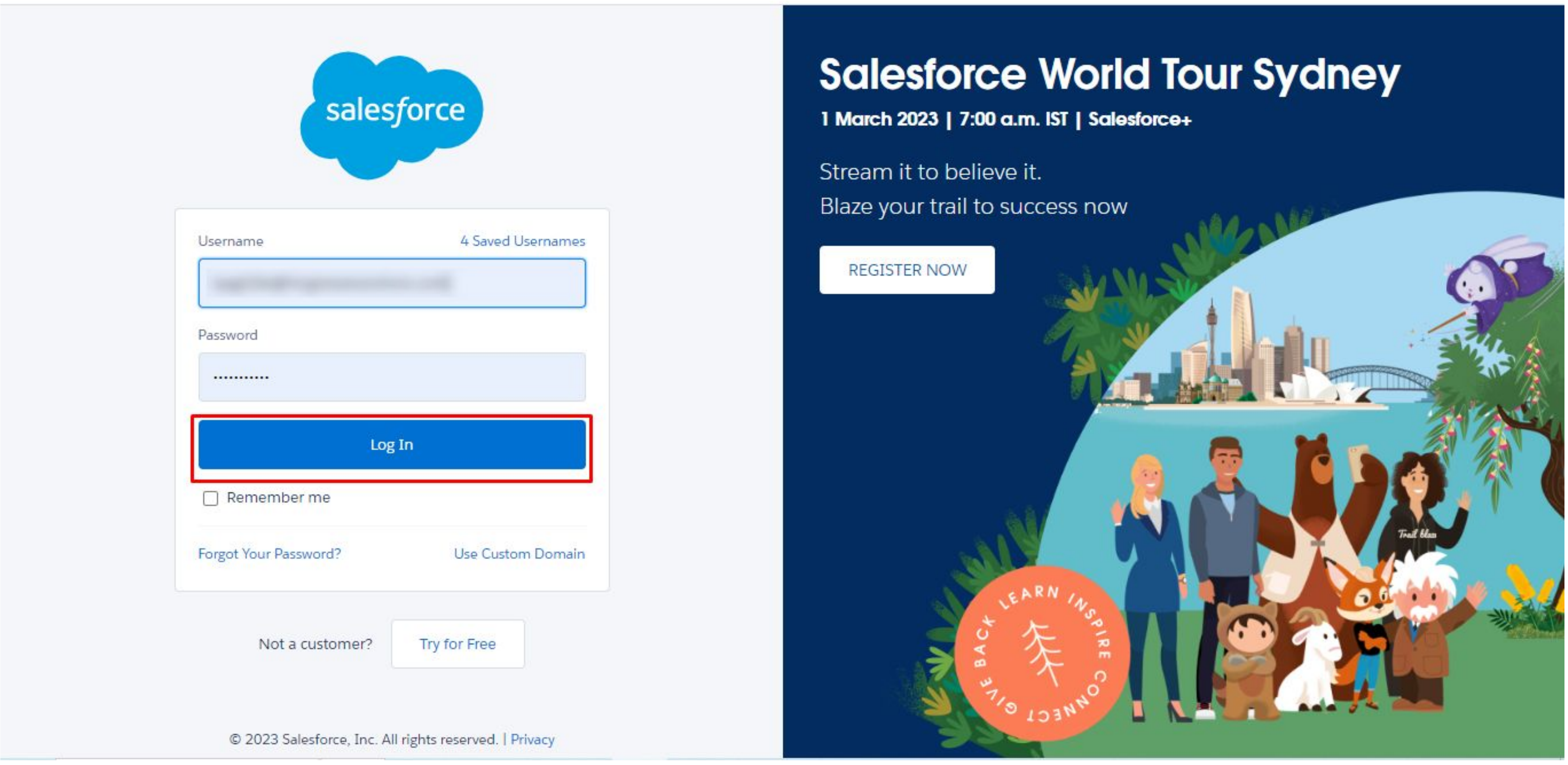


Figure : 04

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.**

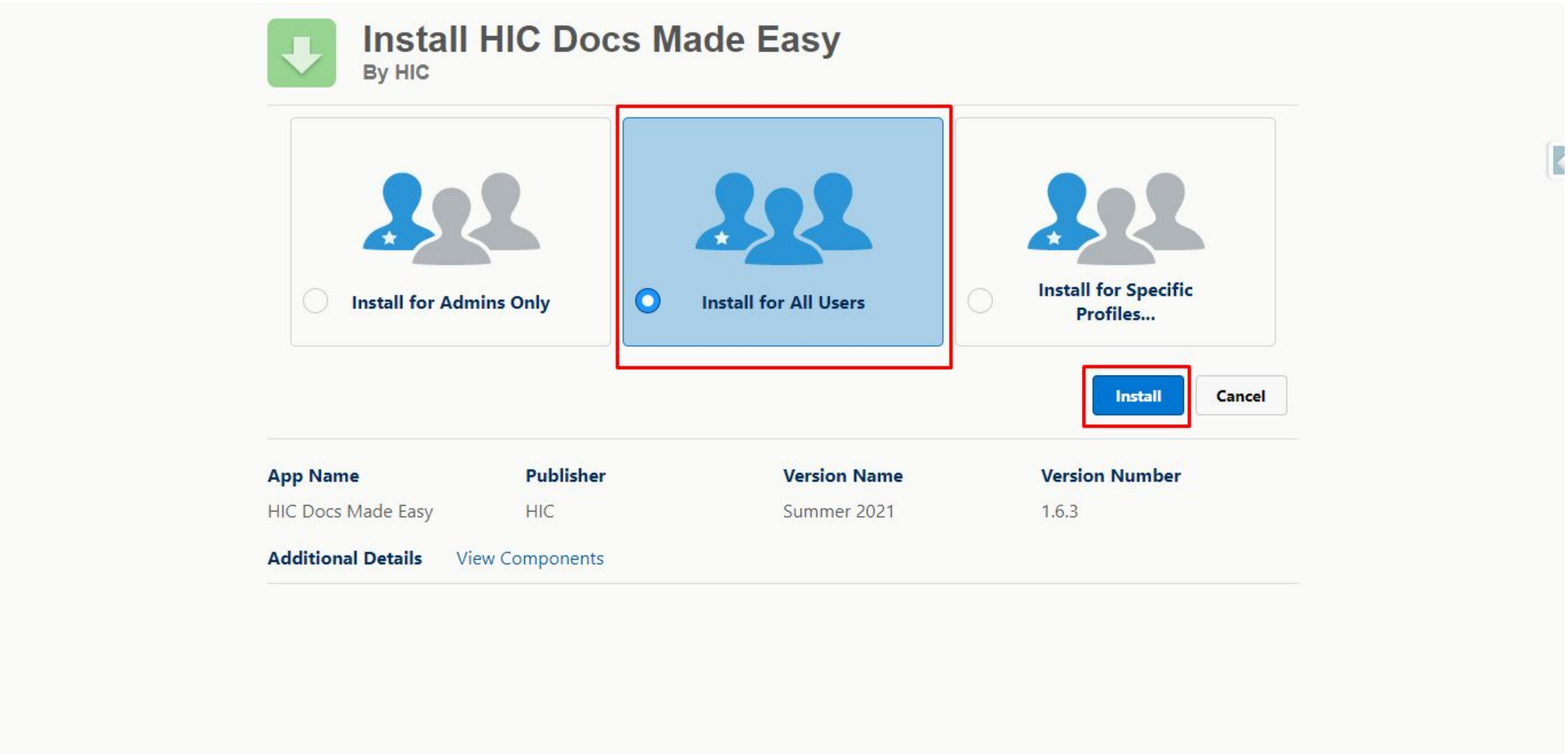


Figure : 05

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

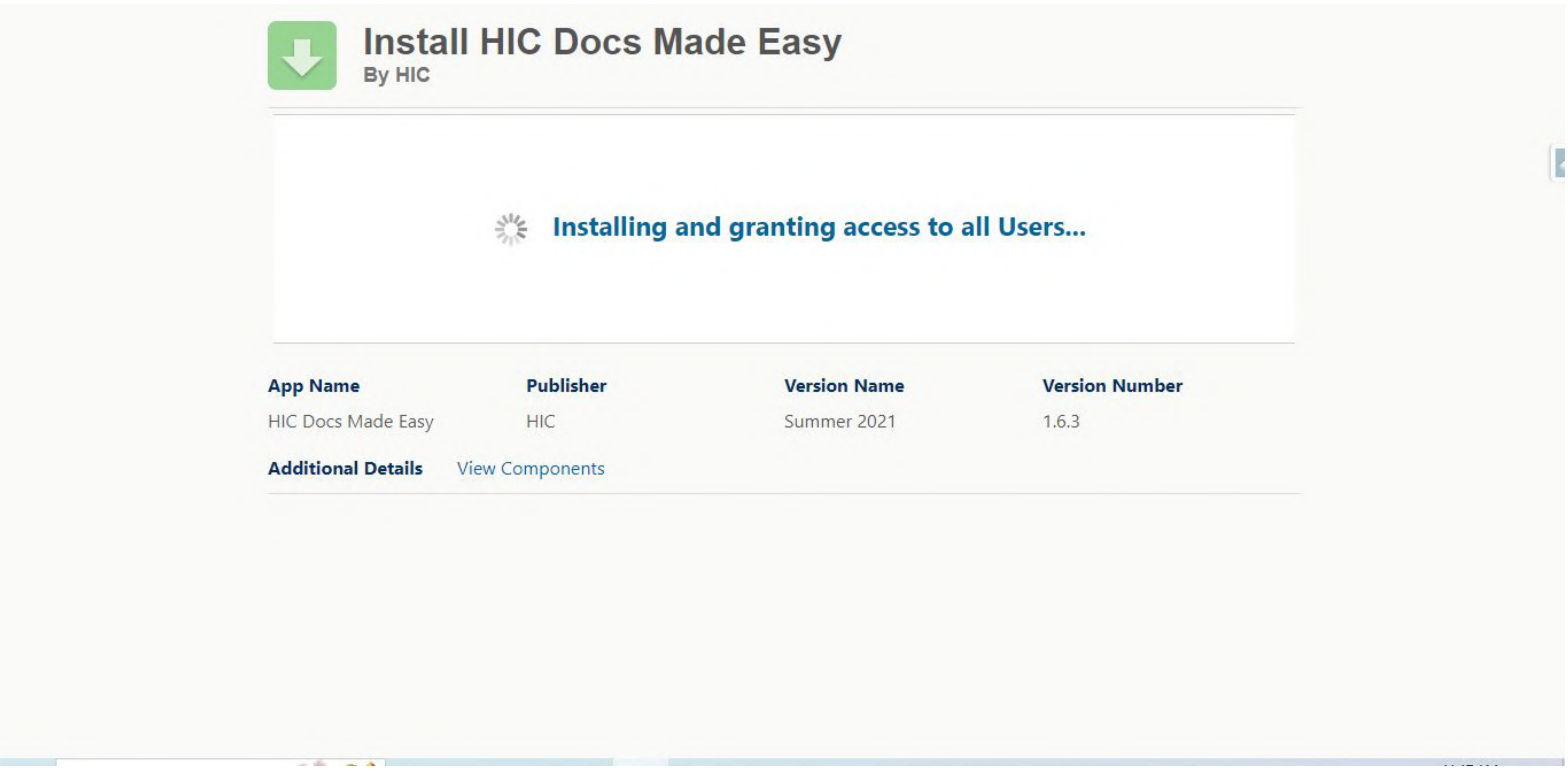


Figure : 06

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

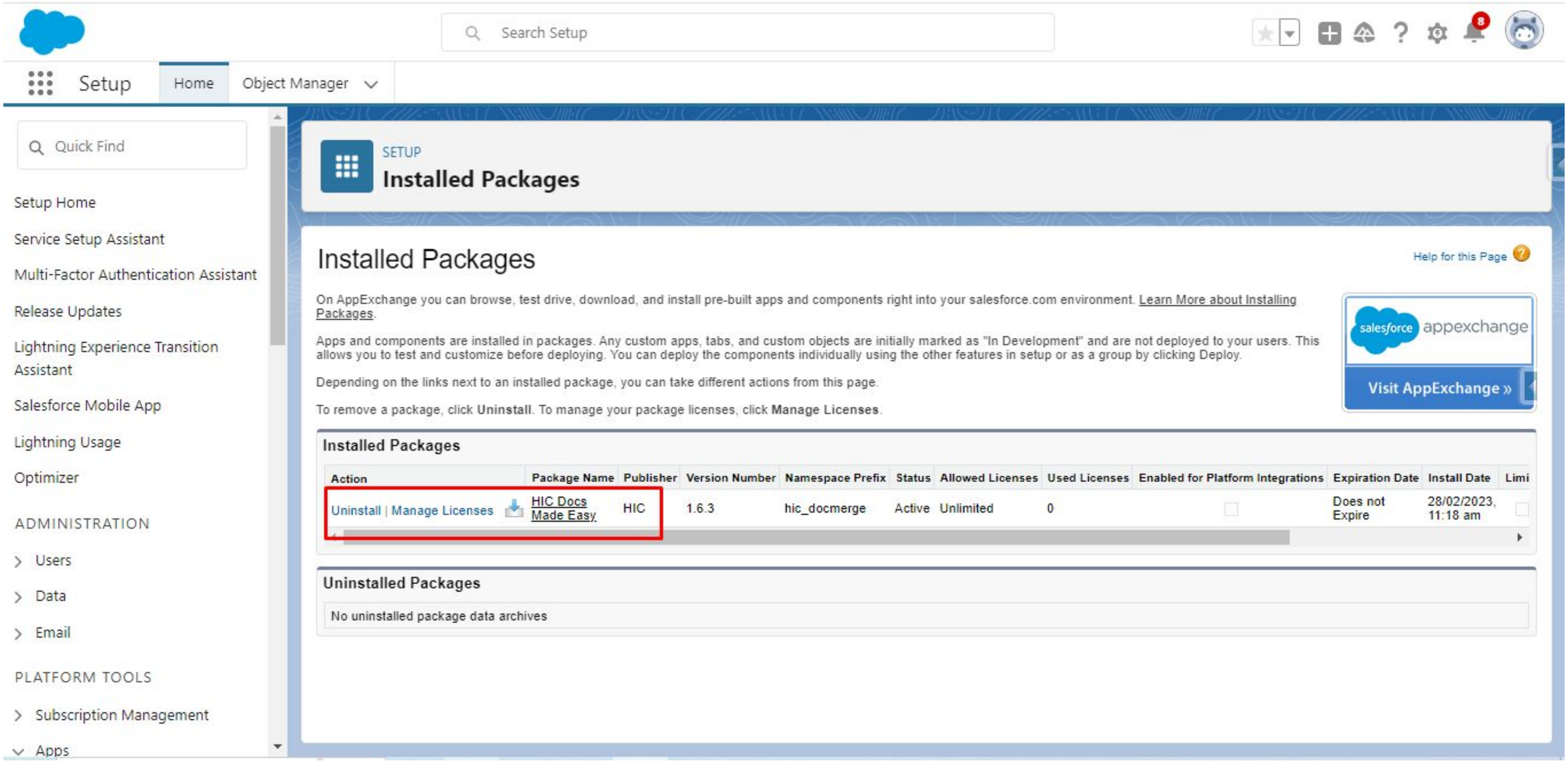


Figure : 07

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.

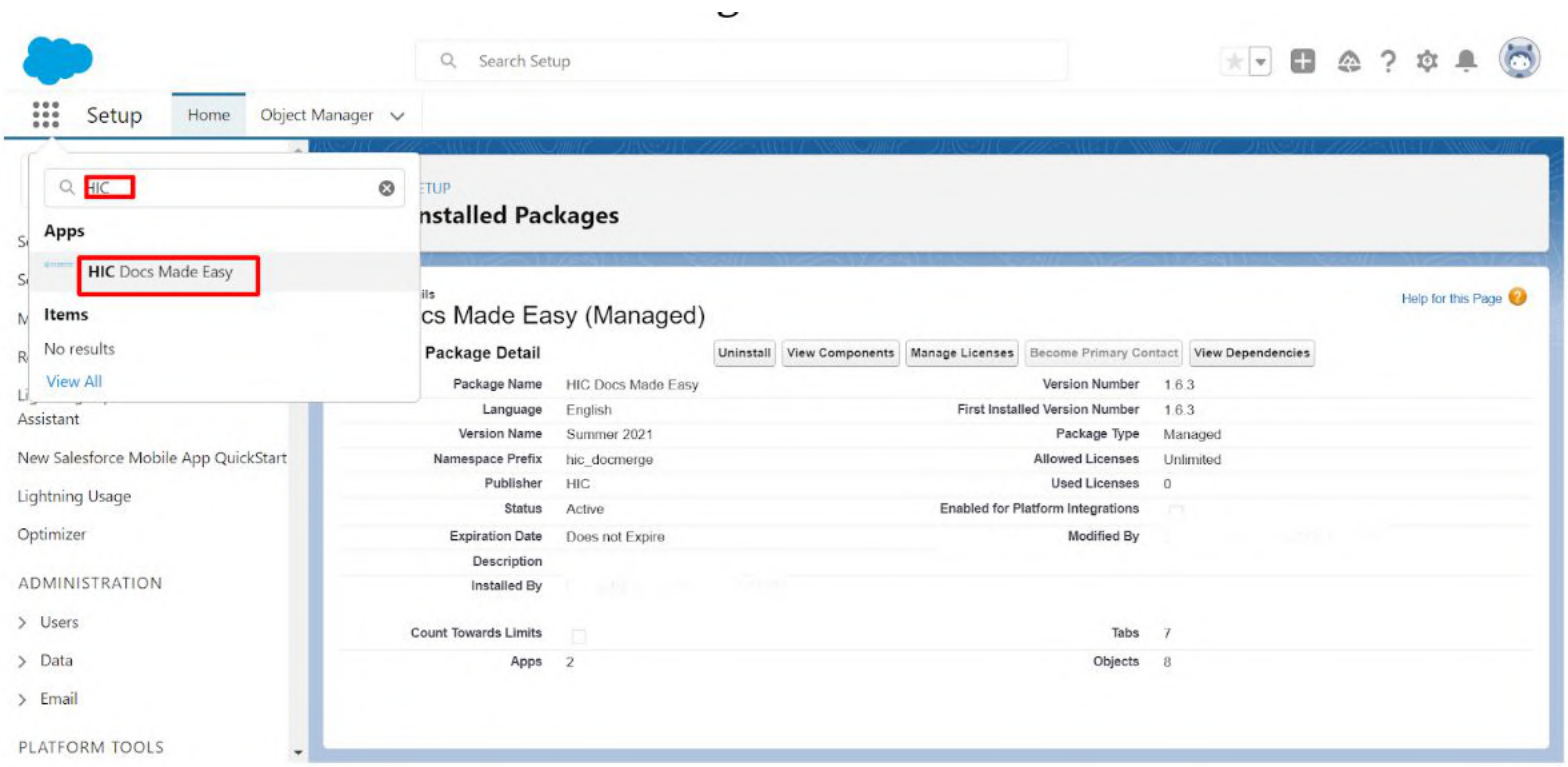


Figure : 08

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.

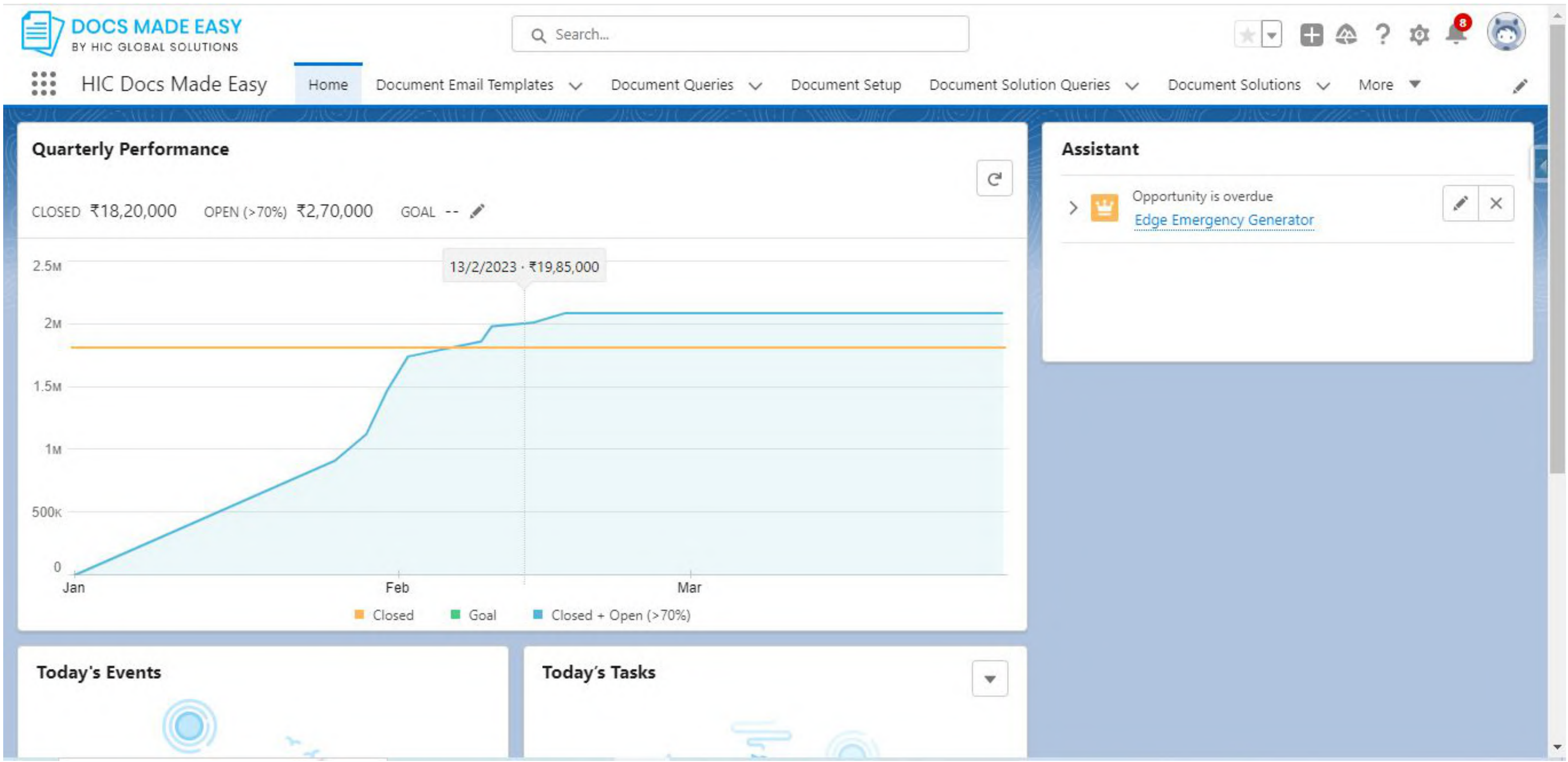


Figure : 09

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.**

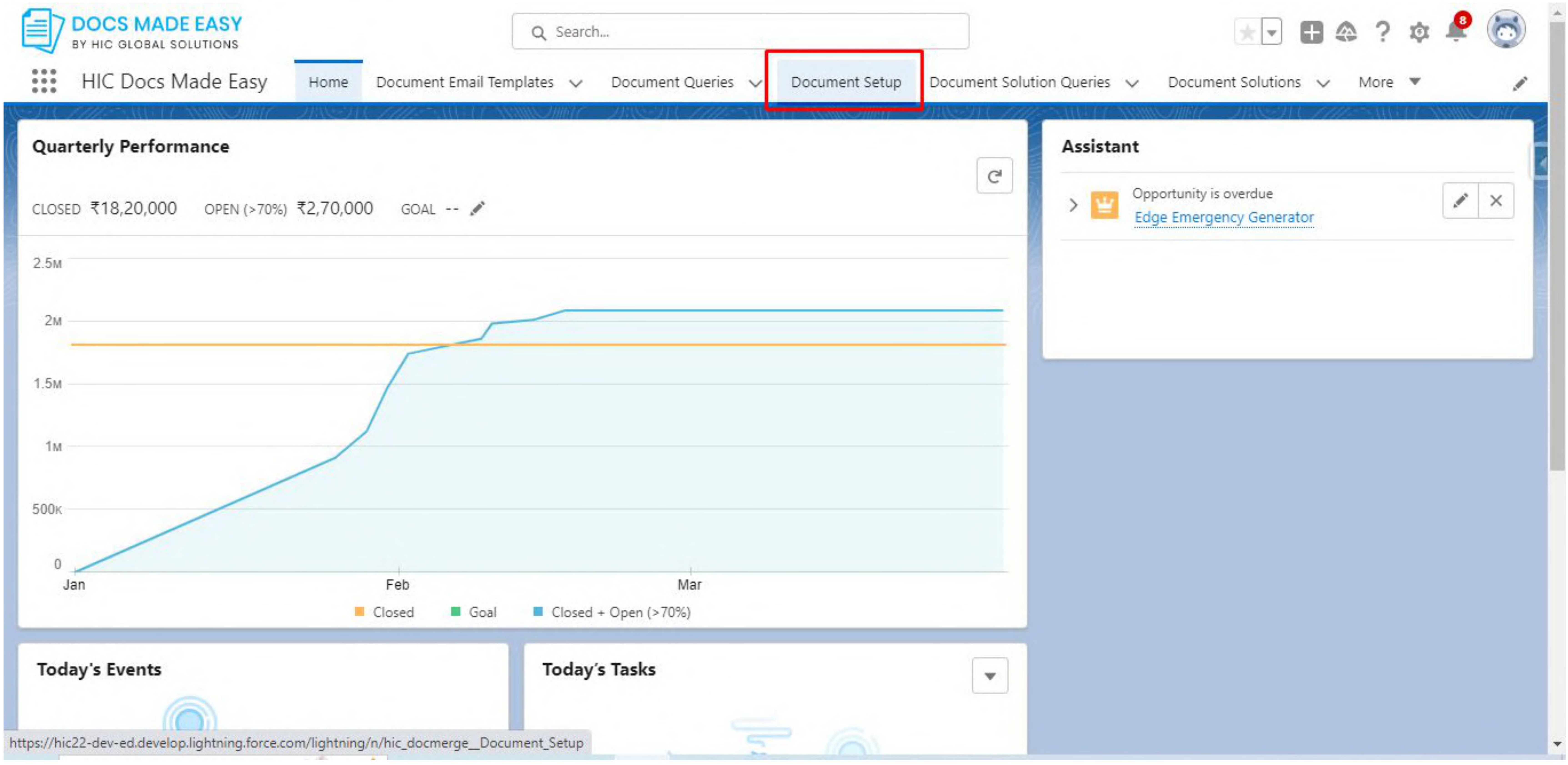


Figure : 10

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."**

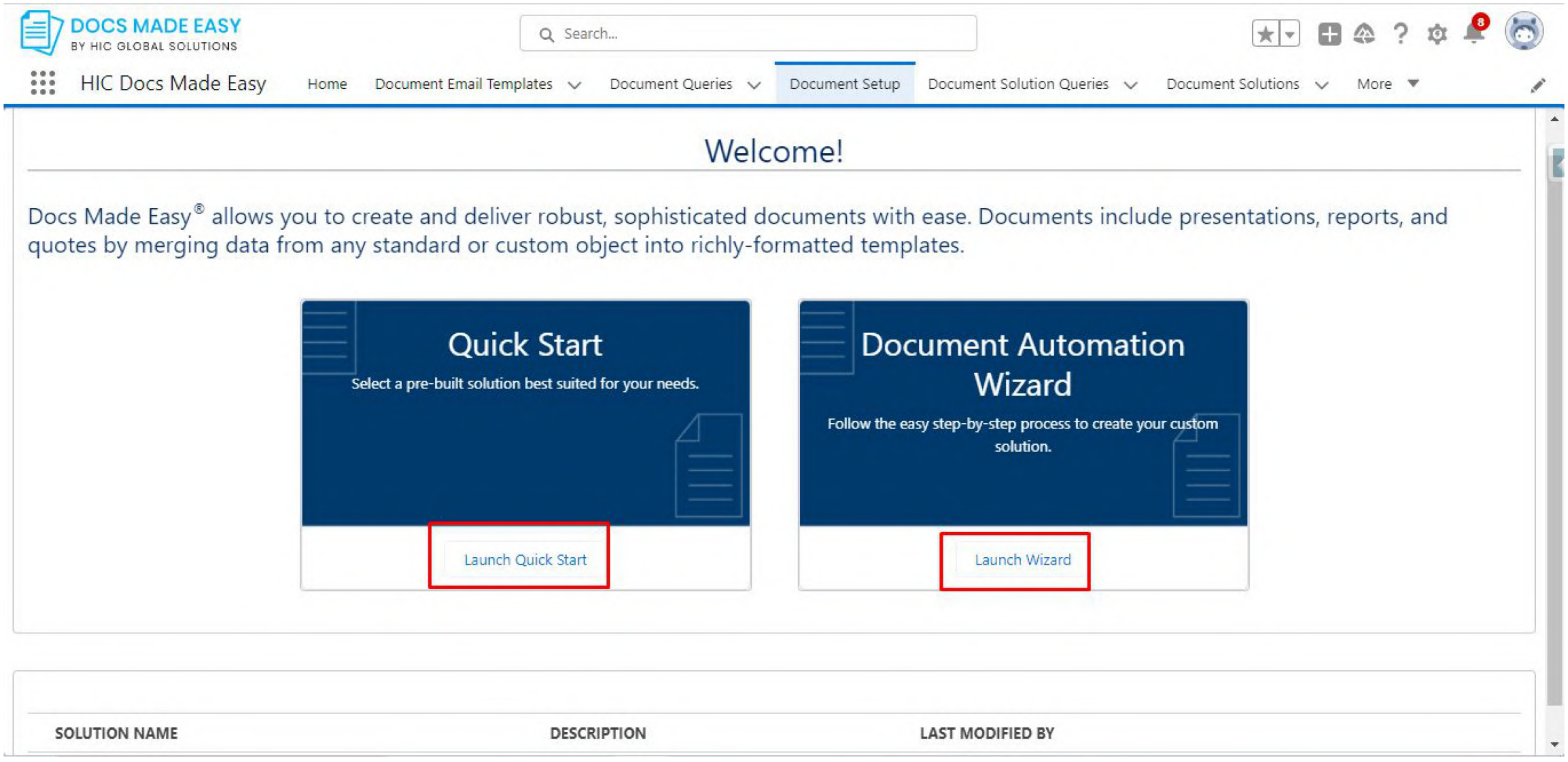


Figure : 11

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

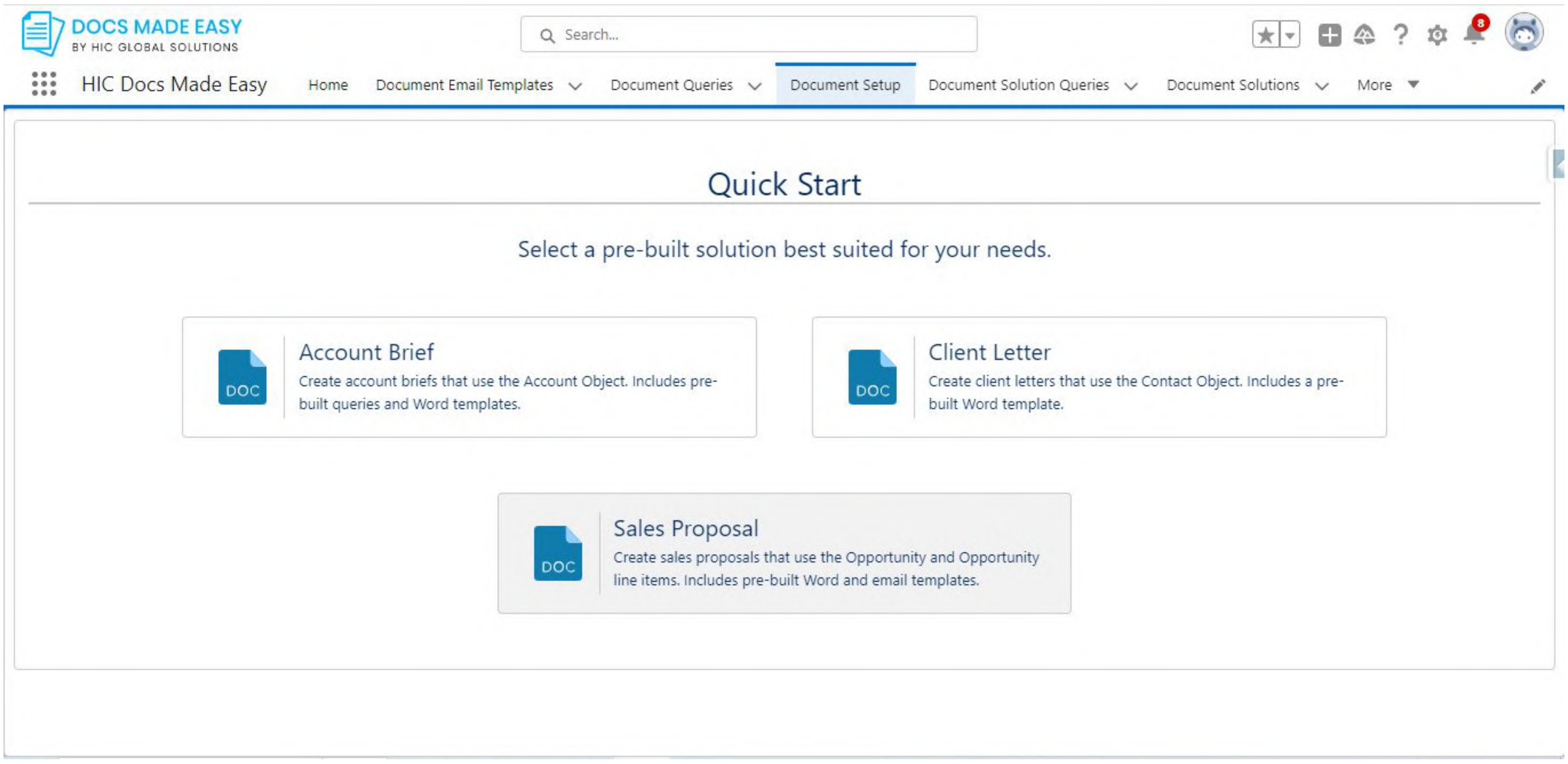


Figure : 12

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.*

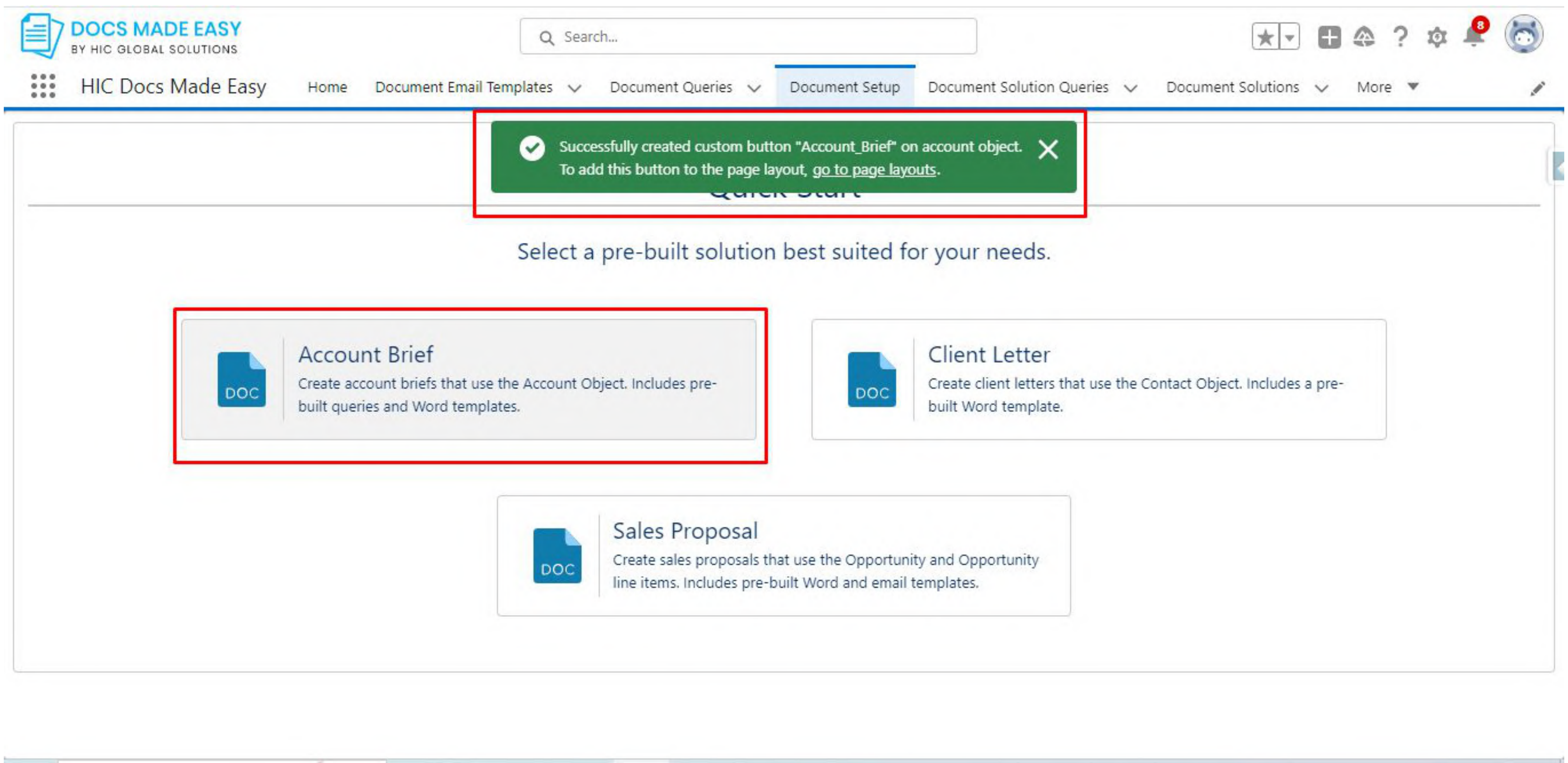


Figure : 13

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.

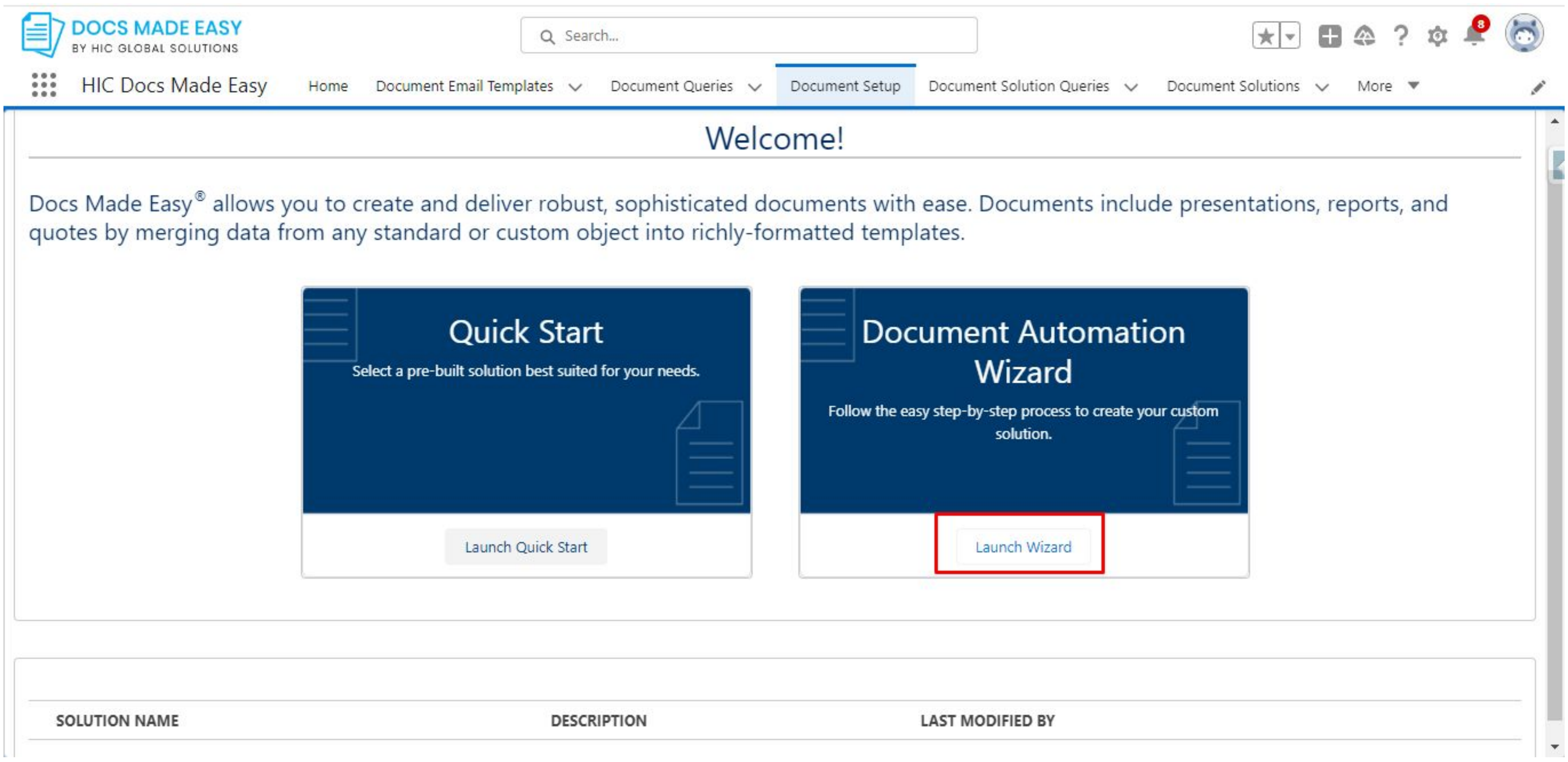


Figure : 14

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.

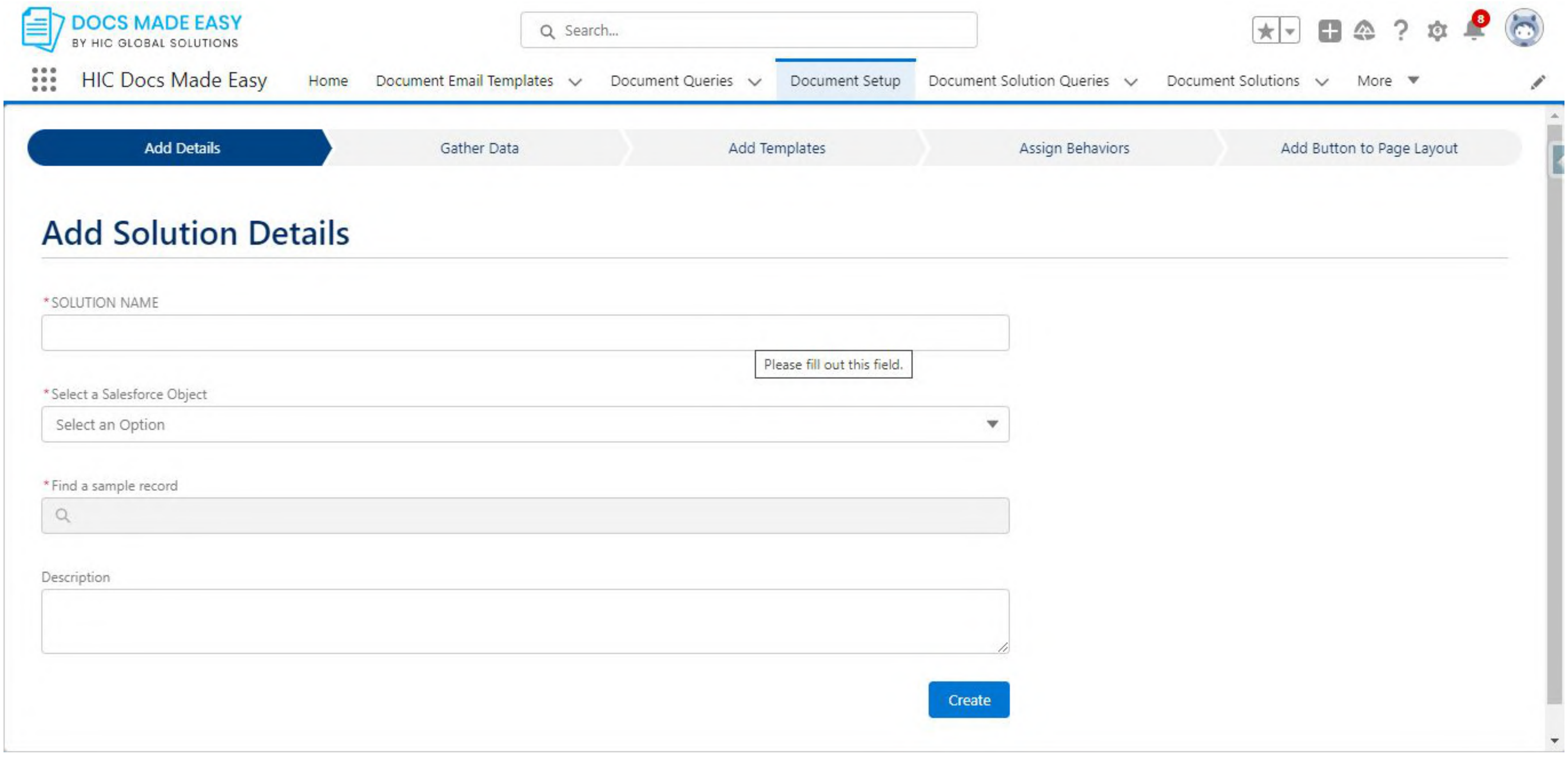


Figure : 15

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

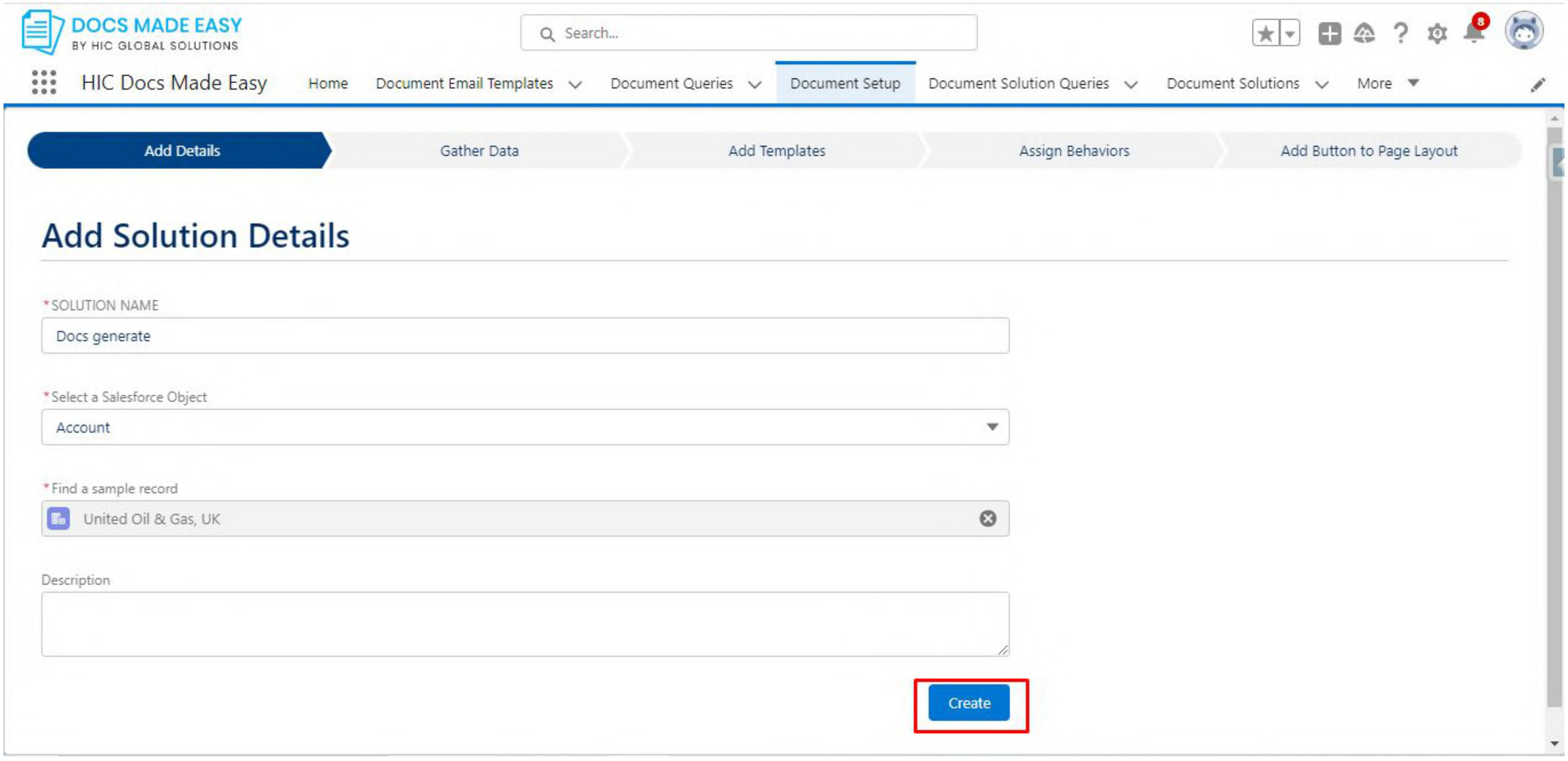


Figure : 16

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.

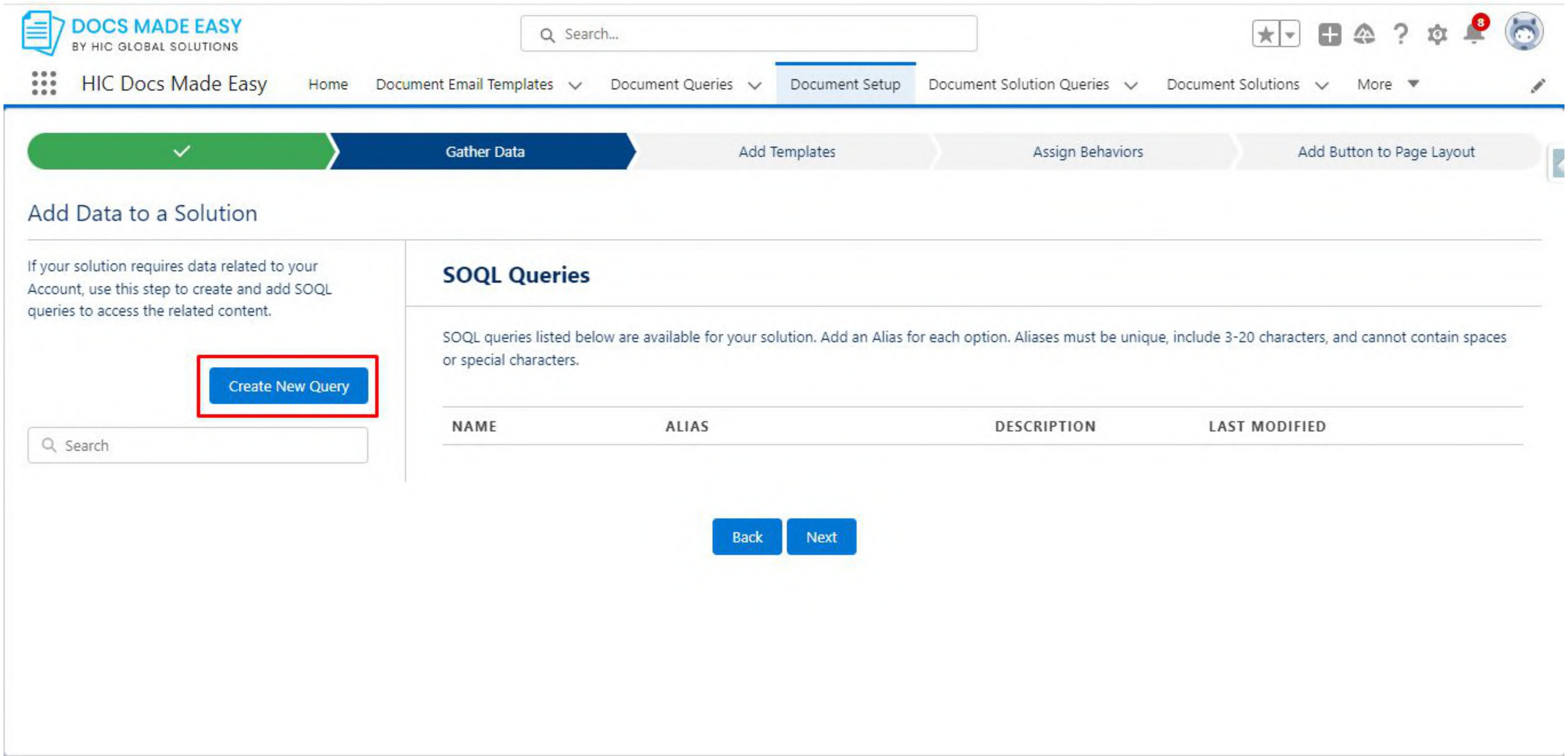


Figure : 17

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**

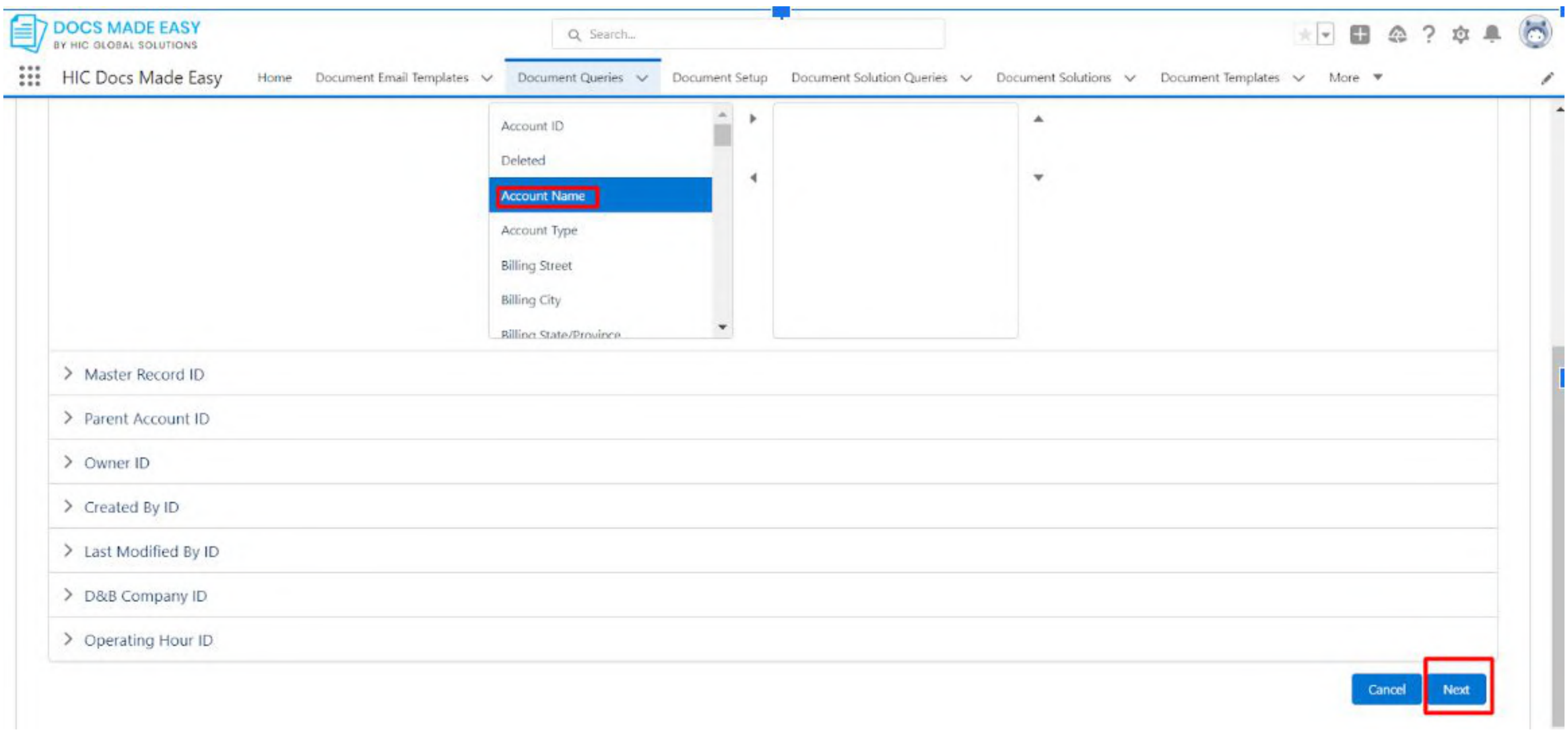


Figure : 18

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

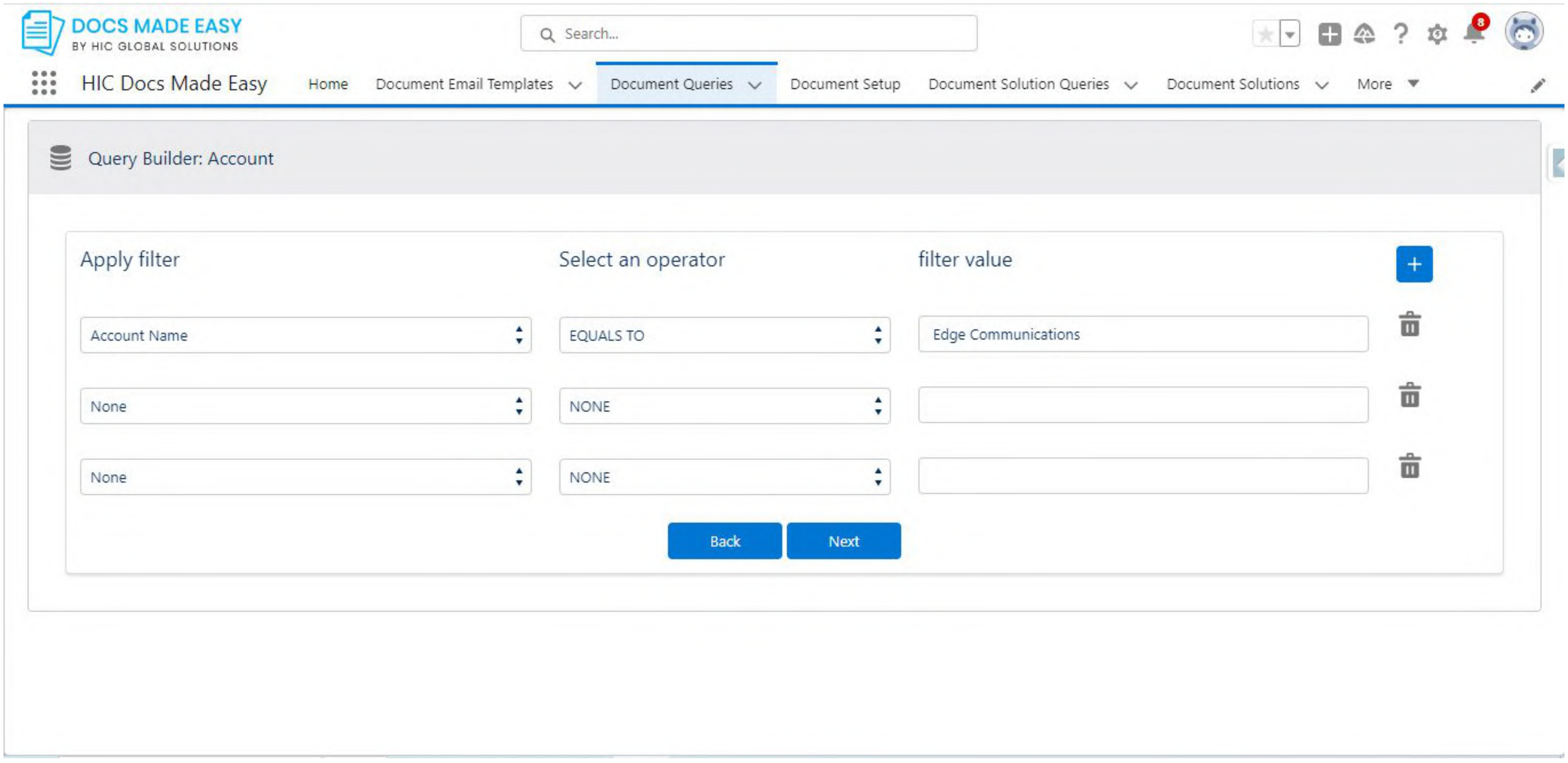


Figure : 19

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

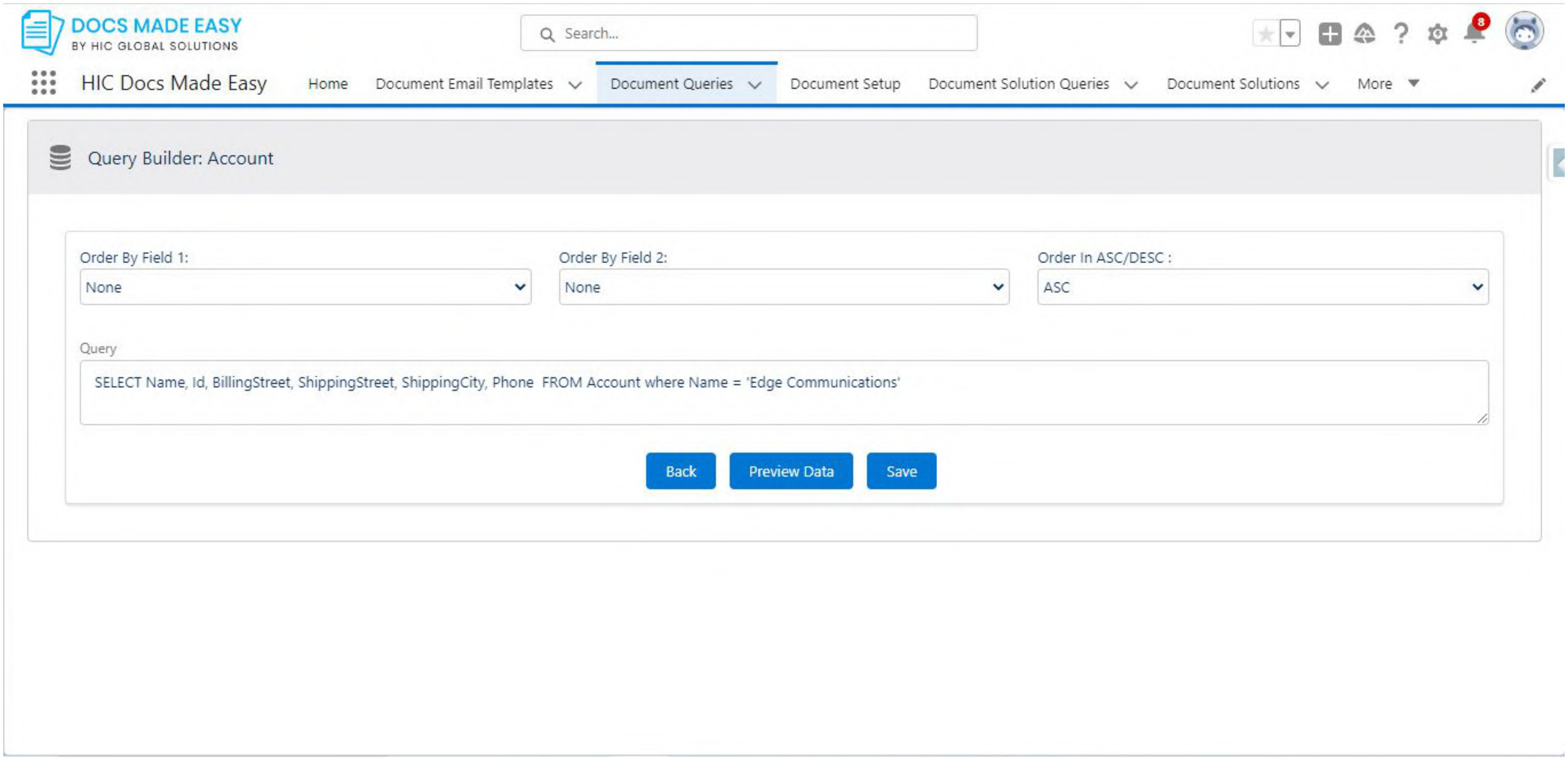


Figure : 20

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

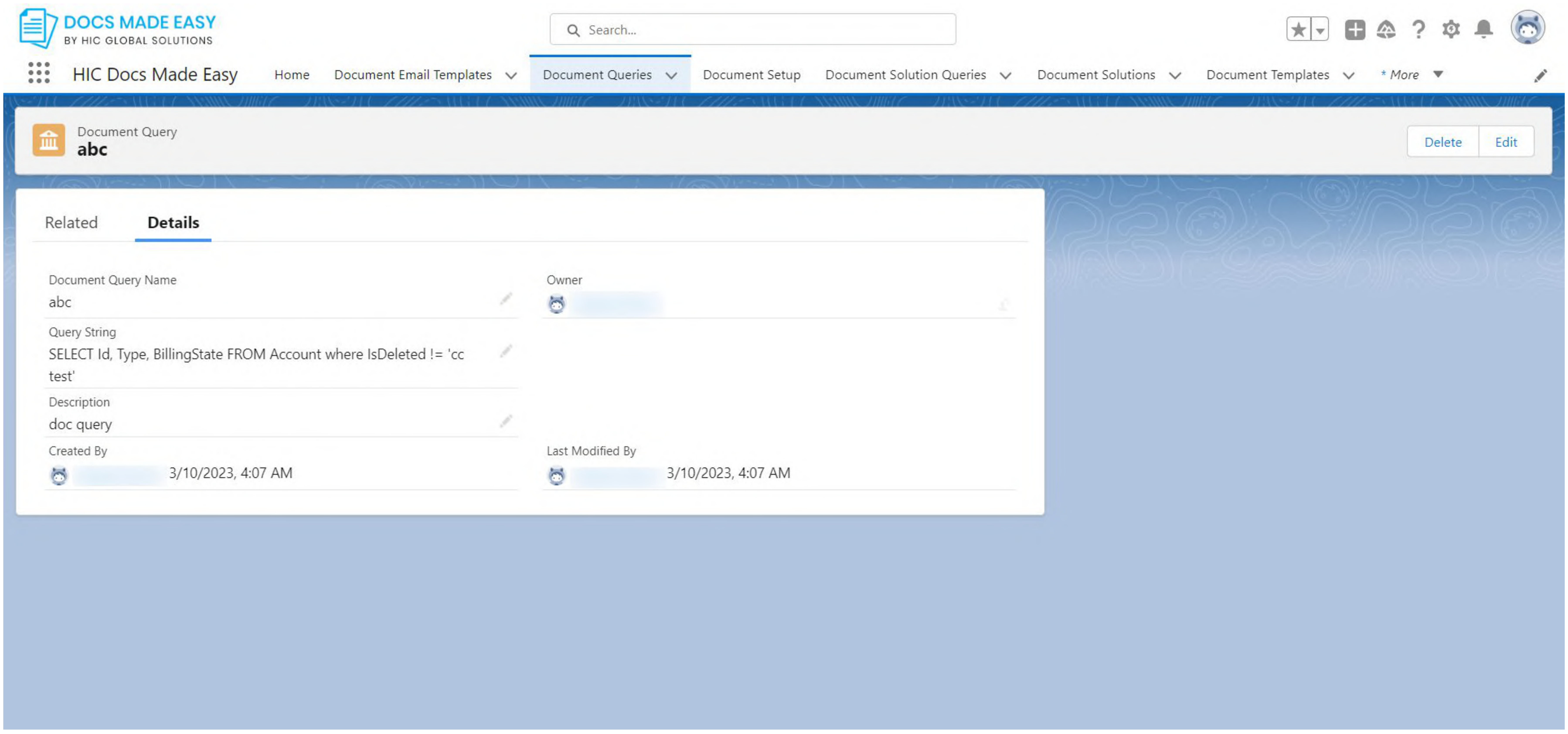


Figure : 21

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.

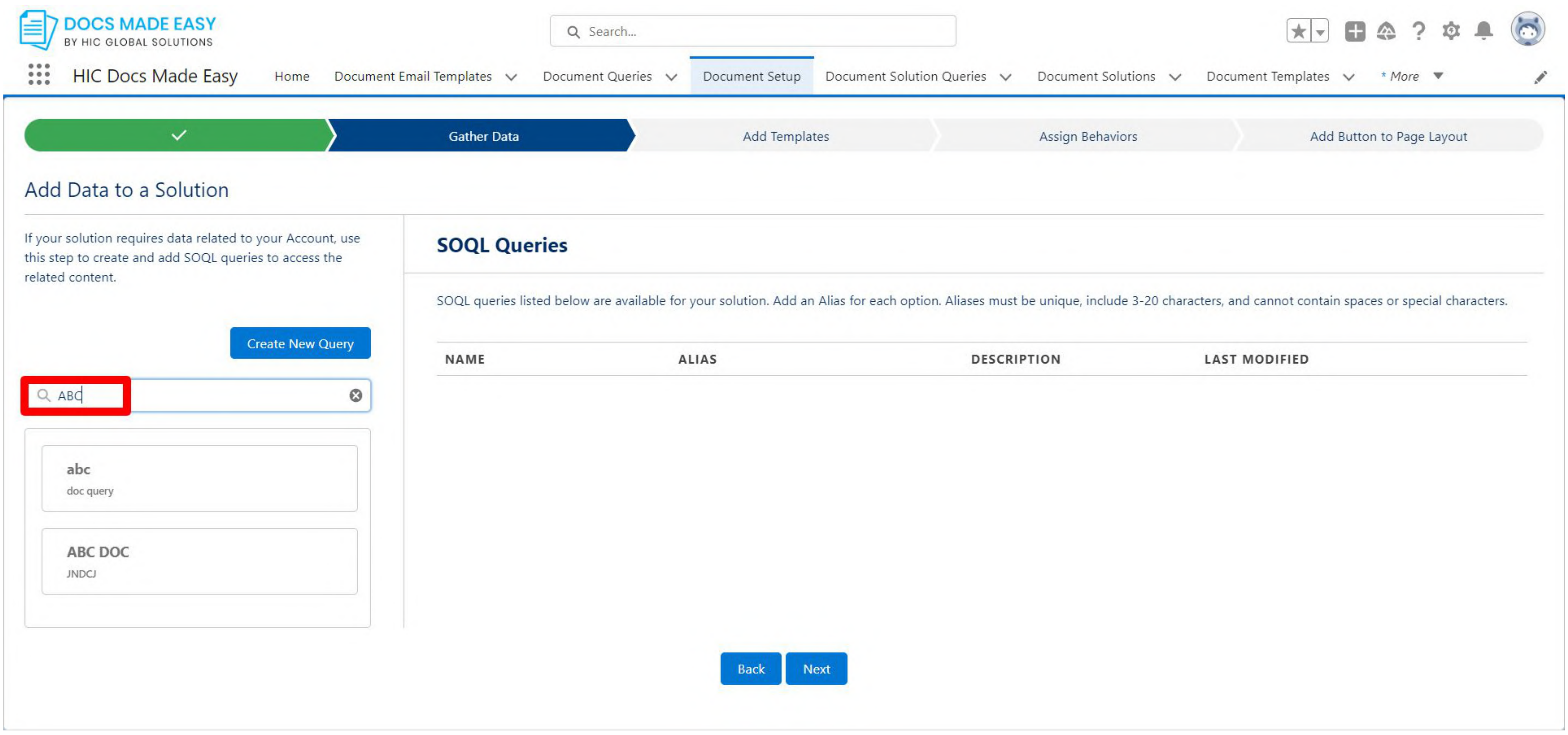
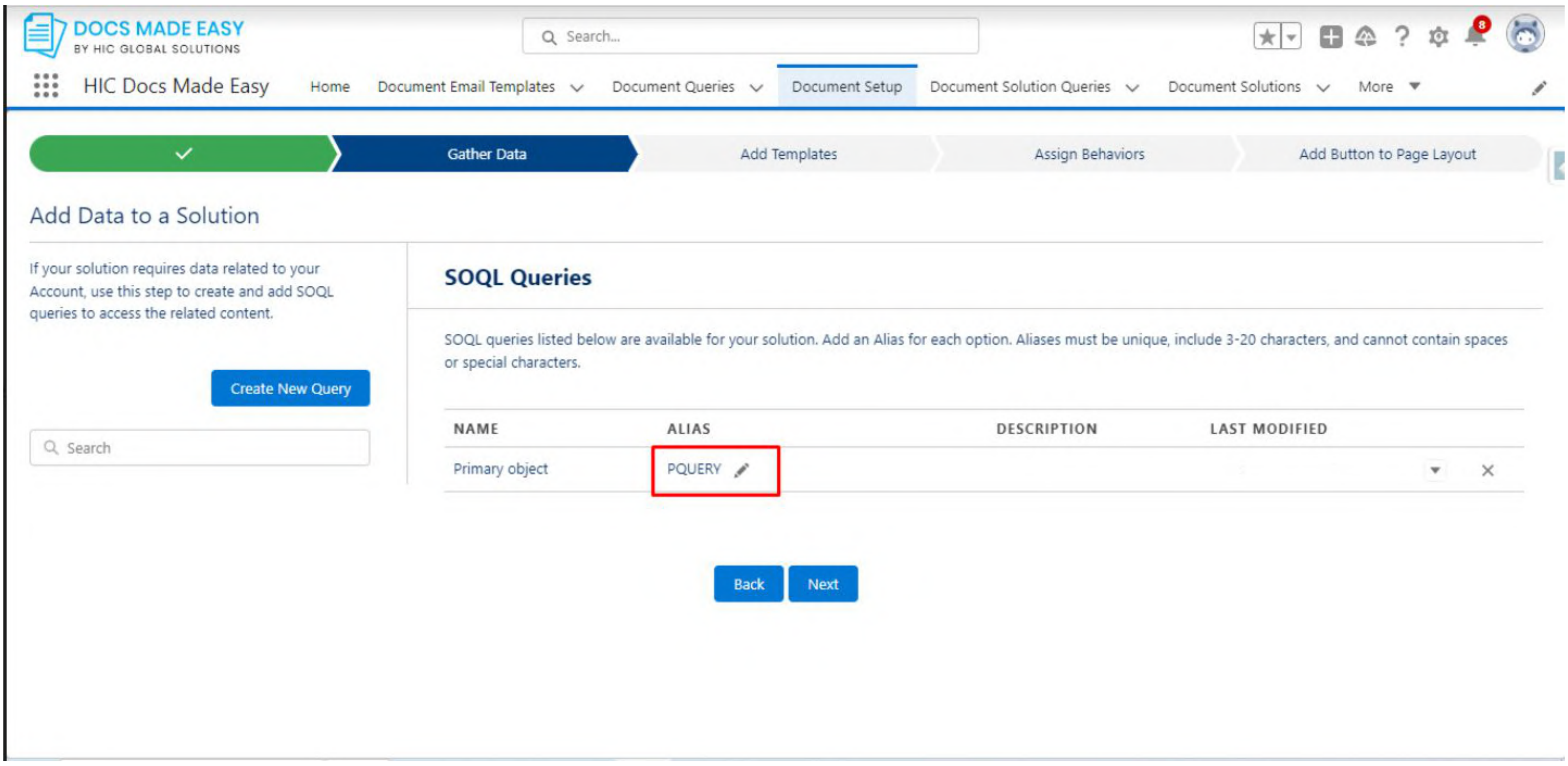


Figure : 22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Document Email Templates
Document Queries
Document Setup
Document Solution Queries
Document Solutions
More
Gather Data
Add Templates
Assign Behaviors
Add Button to Page Layout
Add Data to a Solution
If your solution requires data related 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.

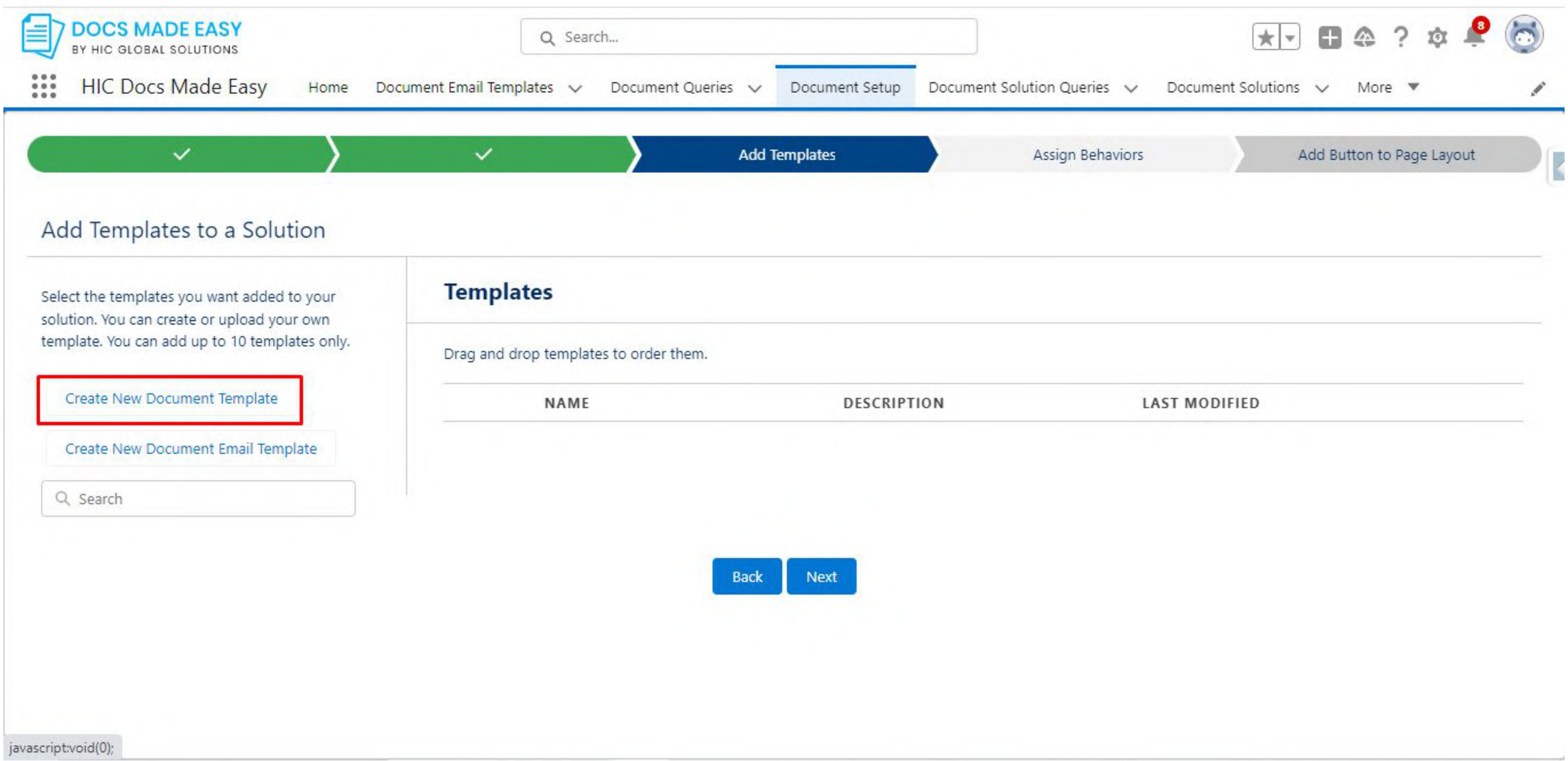


Figure : 24

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.

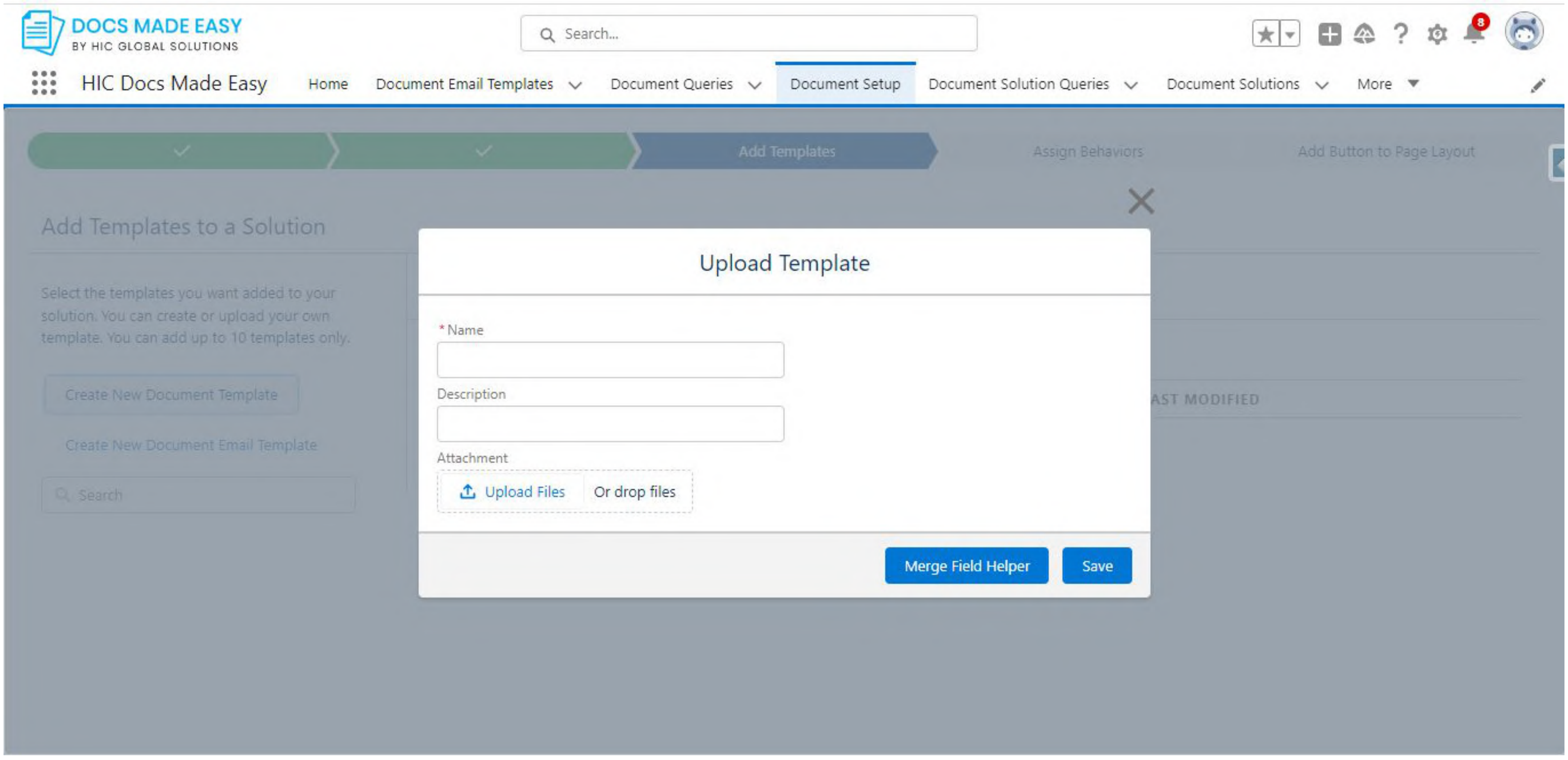


Figure : 25

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.

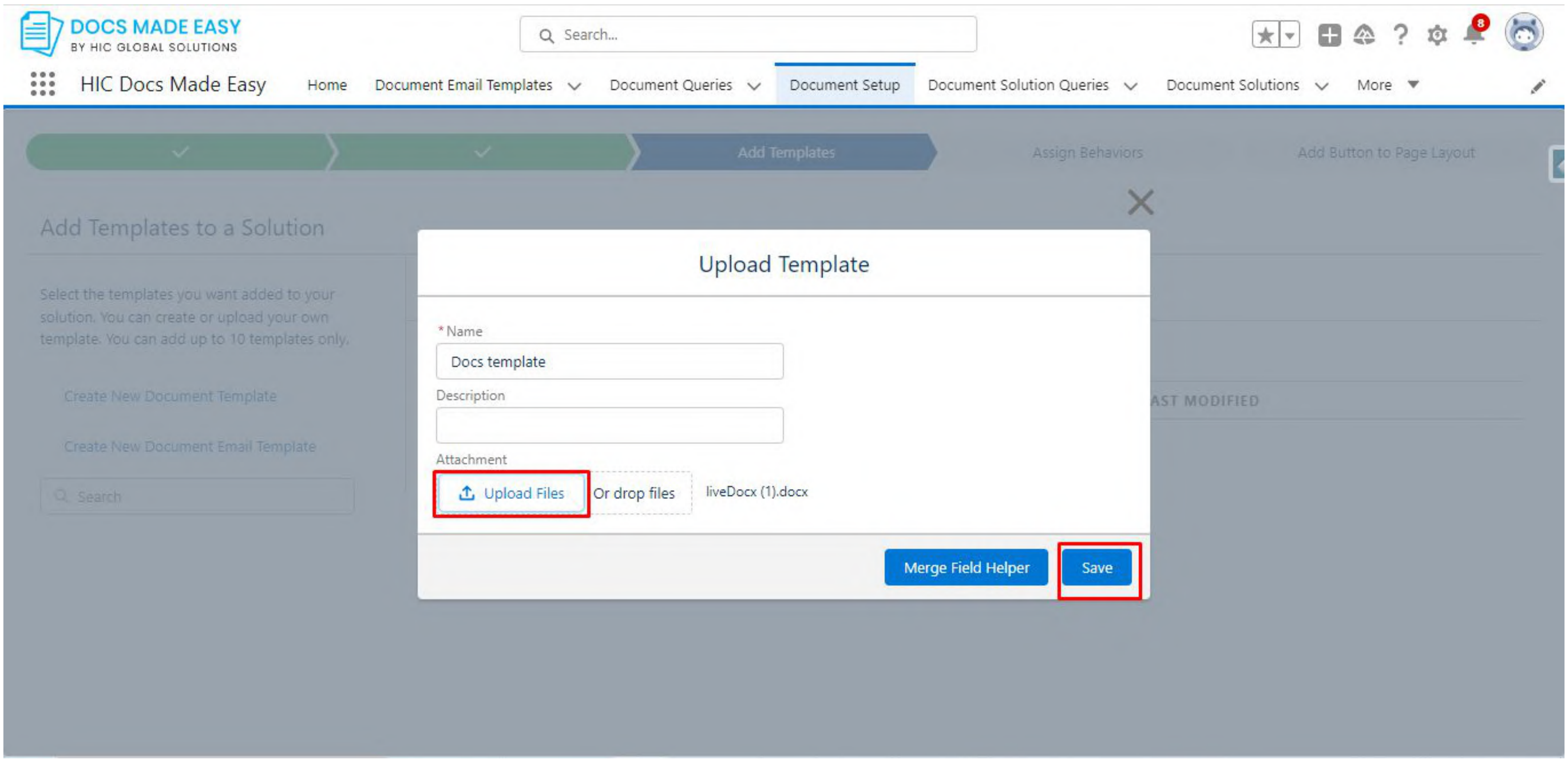


Figure : 26

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

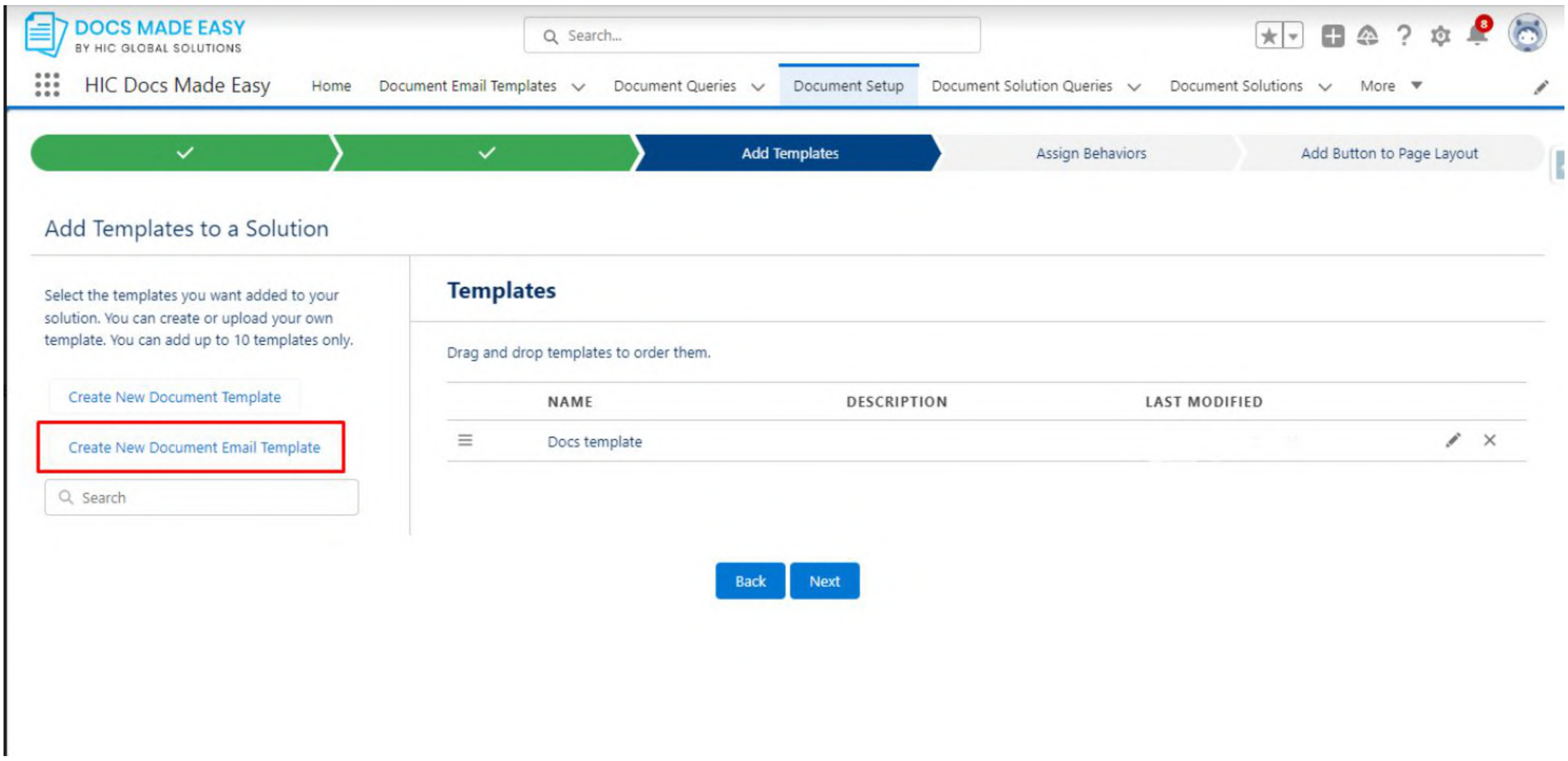


Figure : 27

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

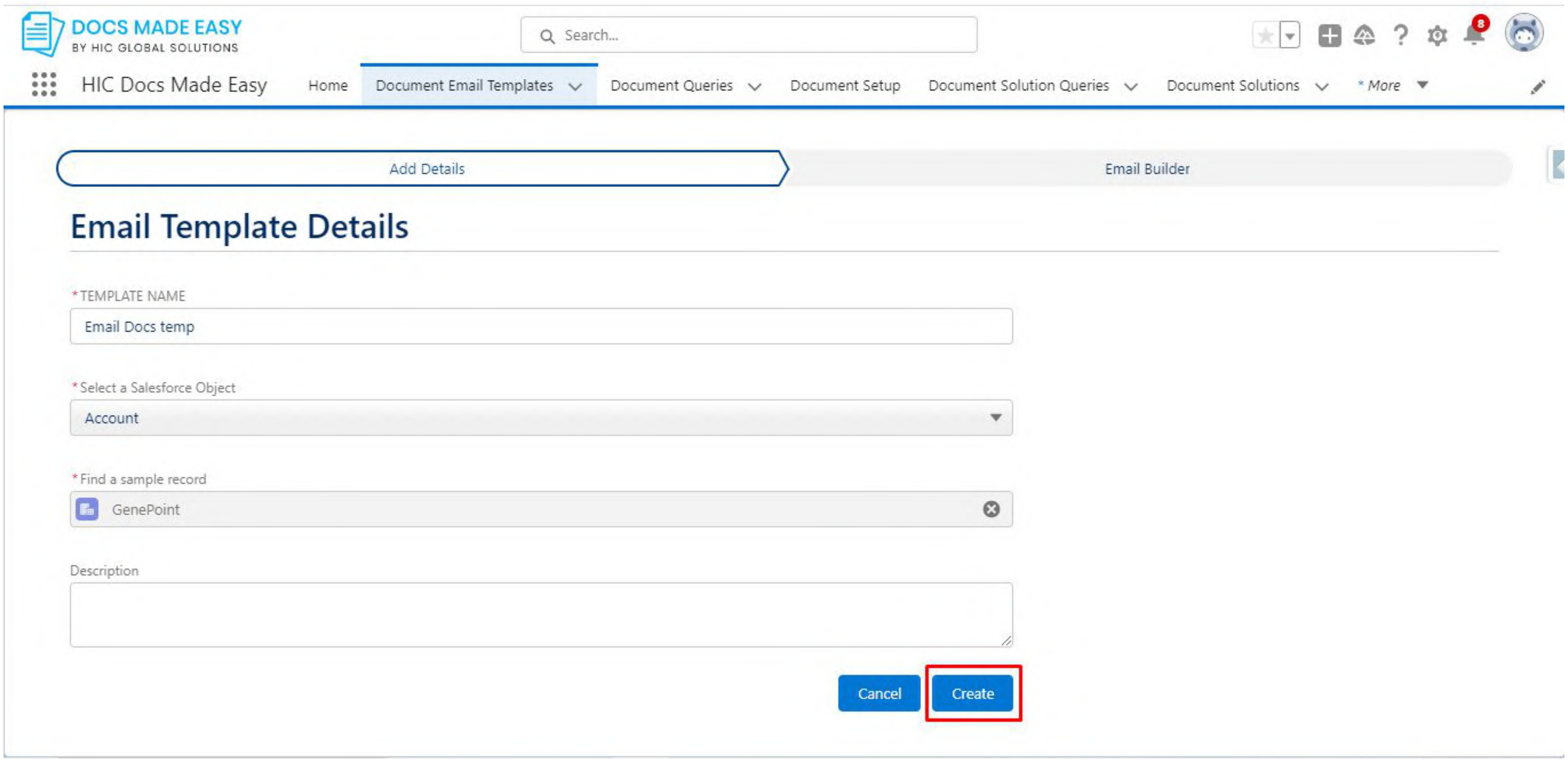


Figure : 28

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 &

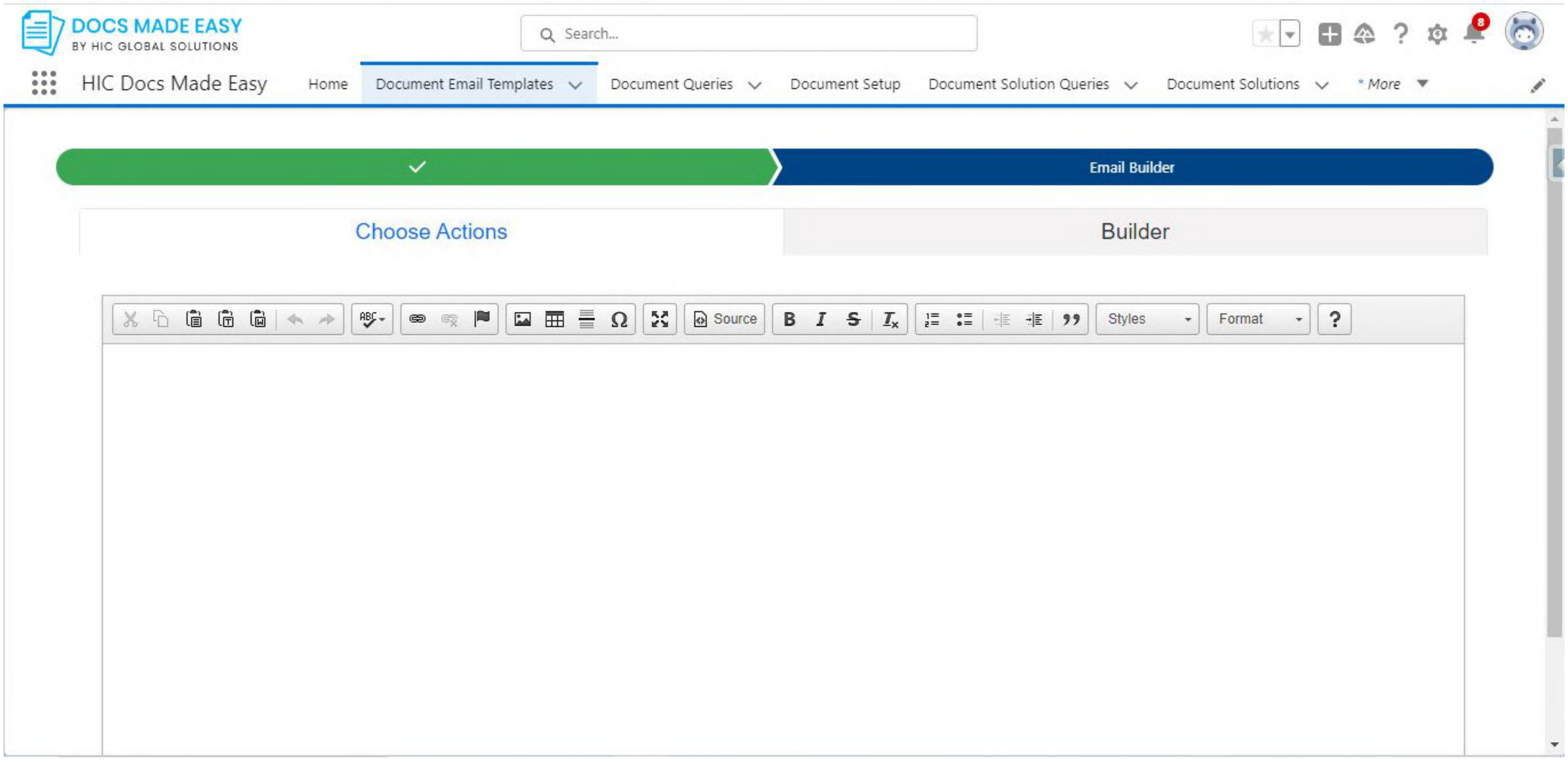
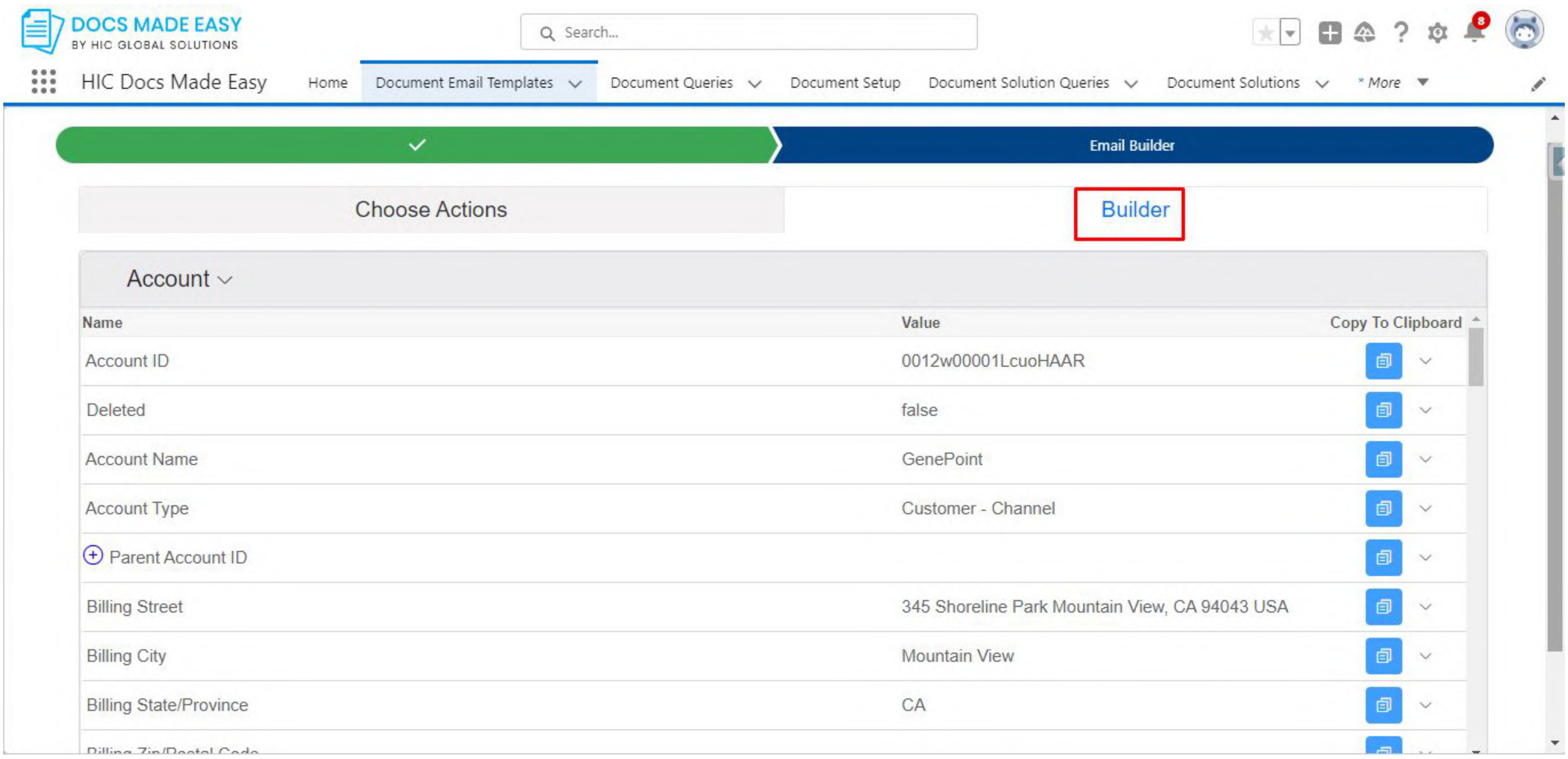


Figure : 29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Document Solution Queries
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Name
Value
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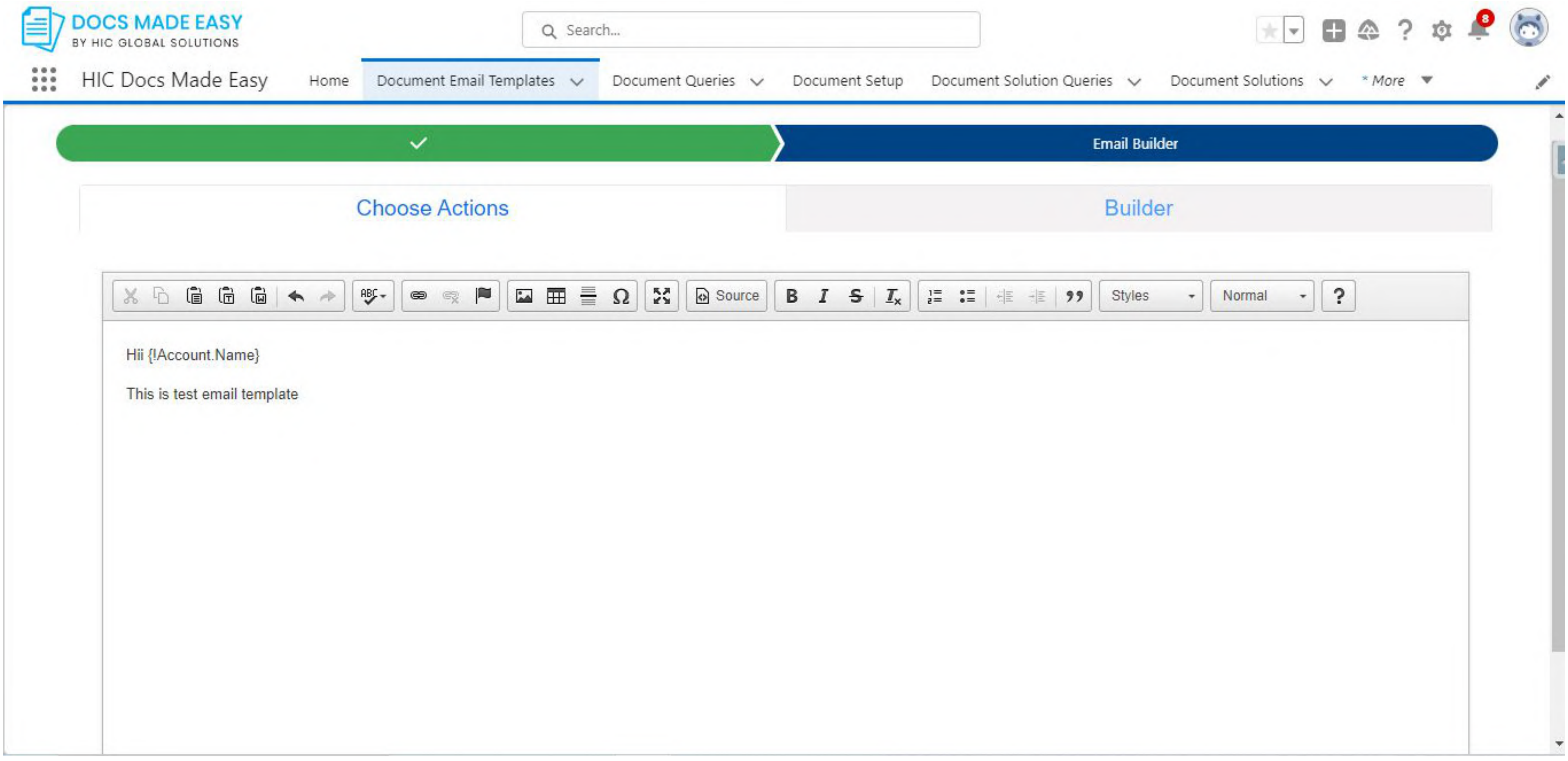
Account ID
0012w00001LcuoHAAR
Deleted
false
Account Name
GenePoint
Account Type
Customer - Channel
Parent Account ID
Billing Street
345 Shoreline Park Mountain View, CA 94043 USA
Billing City
Mountain View
Billing State/Province
CA

Figure : 30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HIC Docs Made Easy
Home
Document Email Templates
Document Queries
Document Setup
Document Solution Queries
Document Solutions
More
Email Builder
Choose Actions
Builder
Source
Styles
Normal
Hii {!Account.Name}
This is test email template

Figure : 31

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

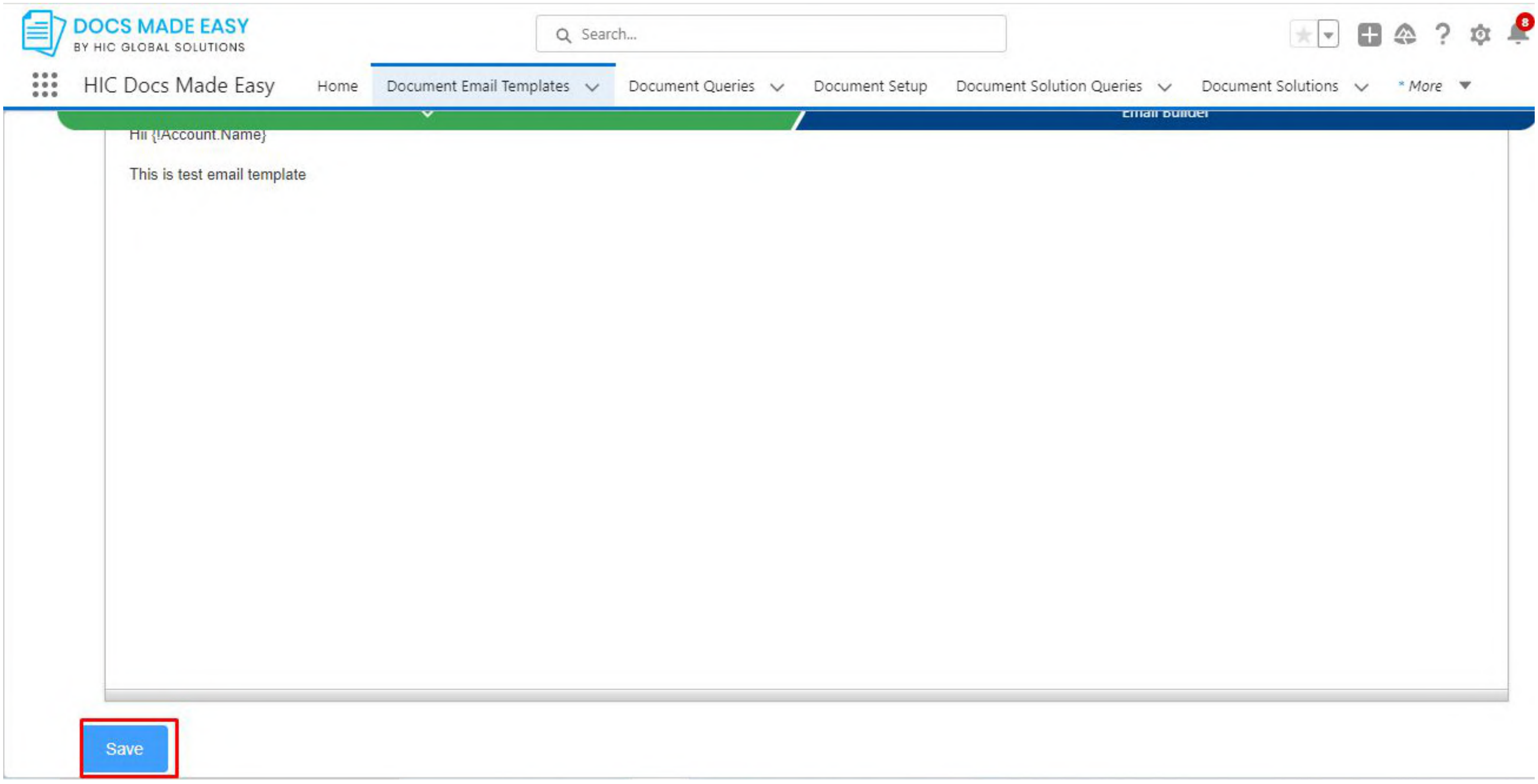


Figure : 32

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

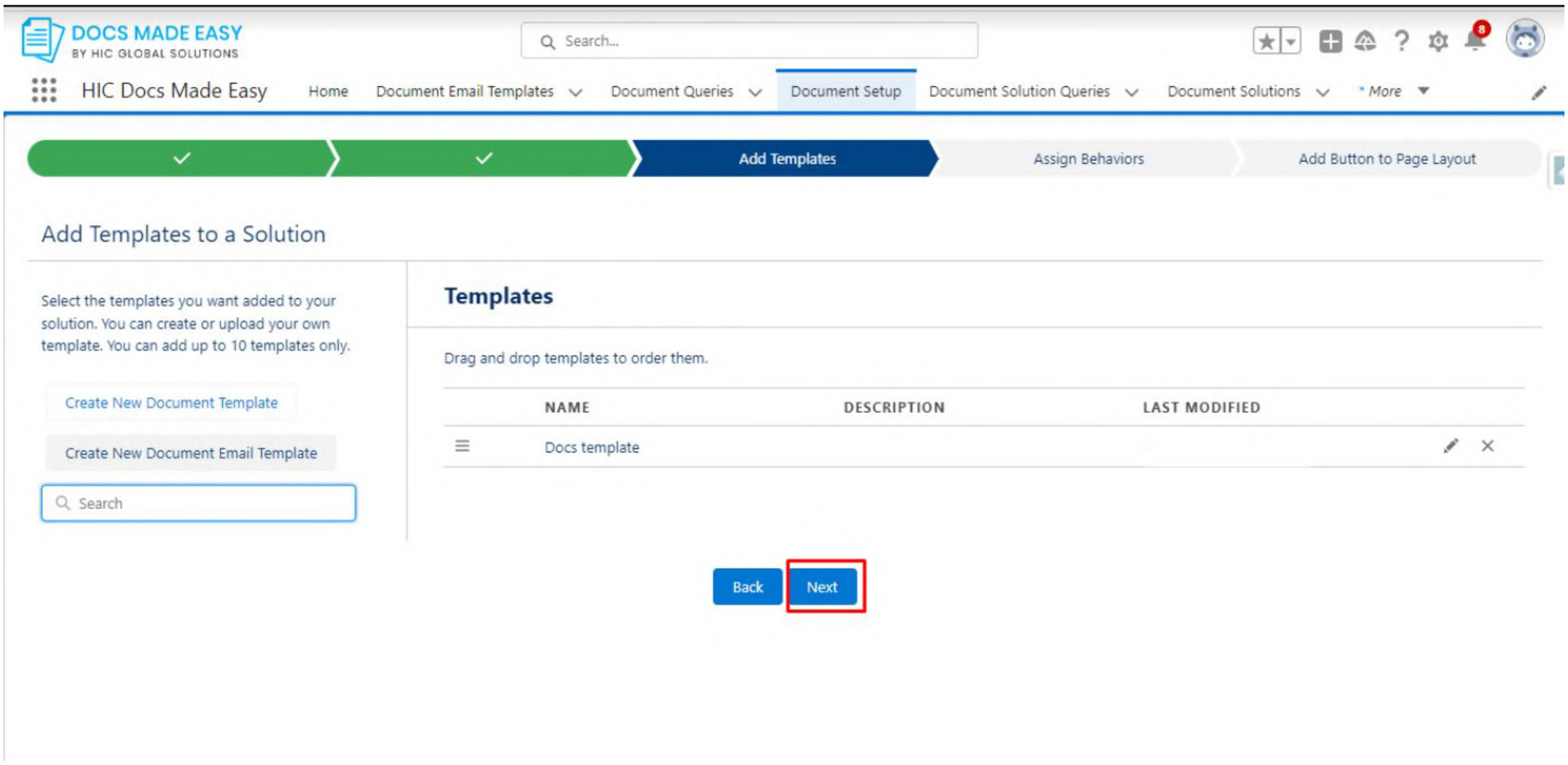


Figure : 33

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.

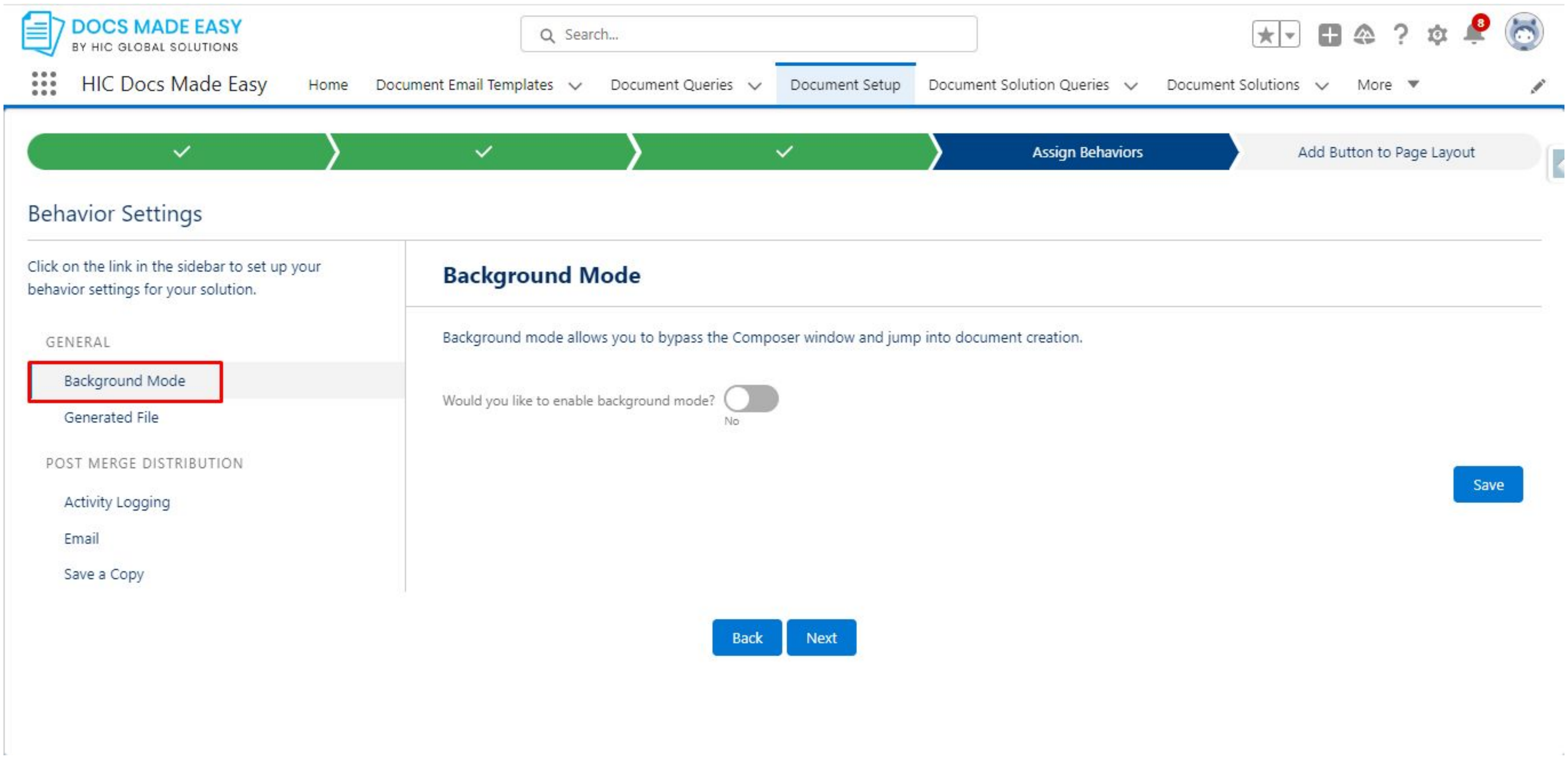


Figure : 34

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.

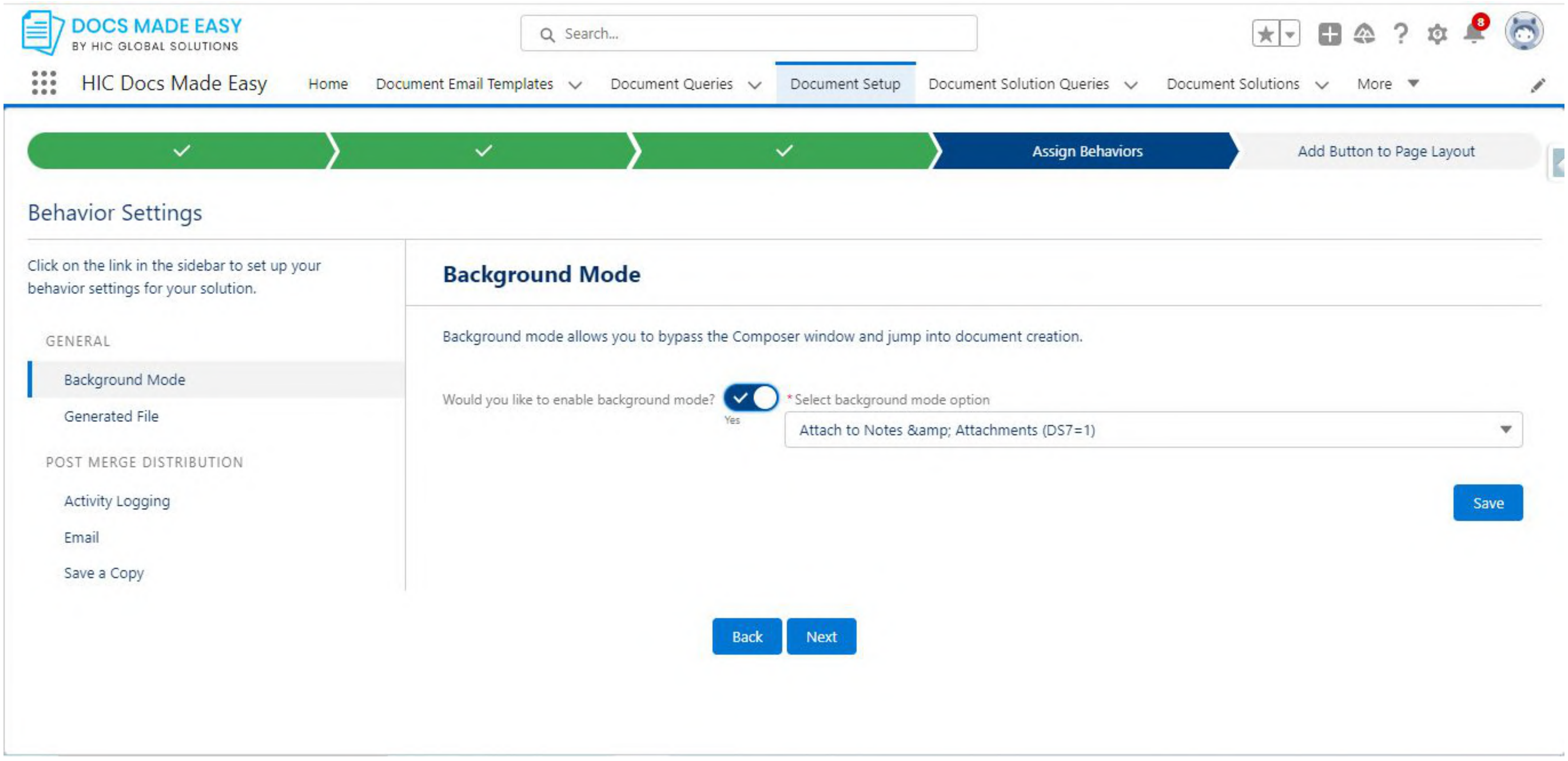


Figure : 35

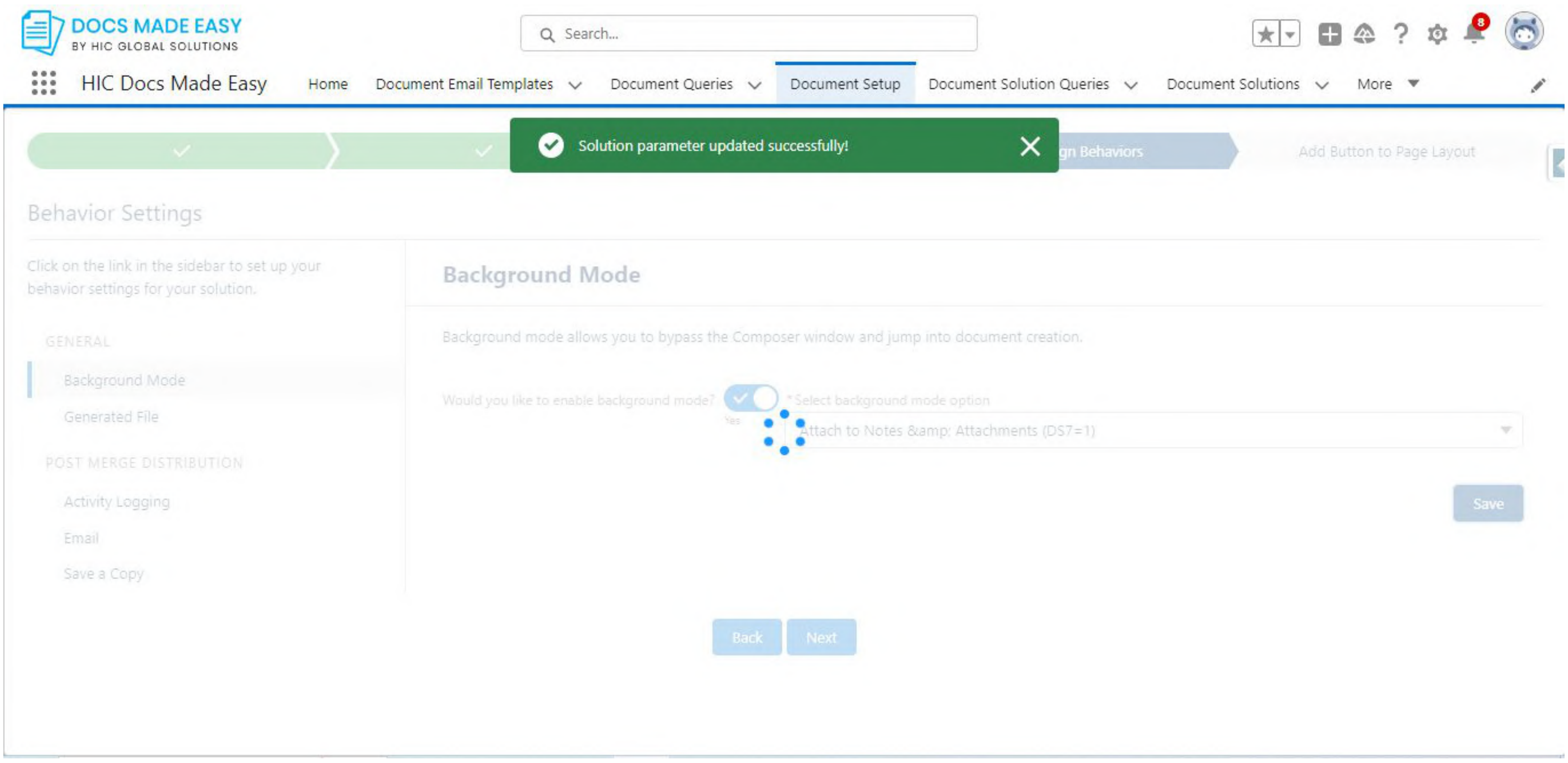

DOCS MADE EASY
BY HIC GLOBAL SOLUTIONS
Search...
HIC Docs Made Easy
Home
Document Email Templates
Document Queries
Document Setup
Document Solution Queries
Document Solutions
More
Solution parameter updated successfully!
gn Behaviors
Add Button to Page Layout
Behavior Settings
Click on the link in the 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?
*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

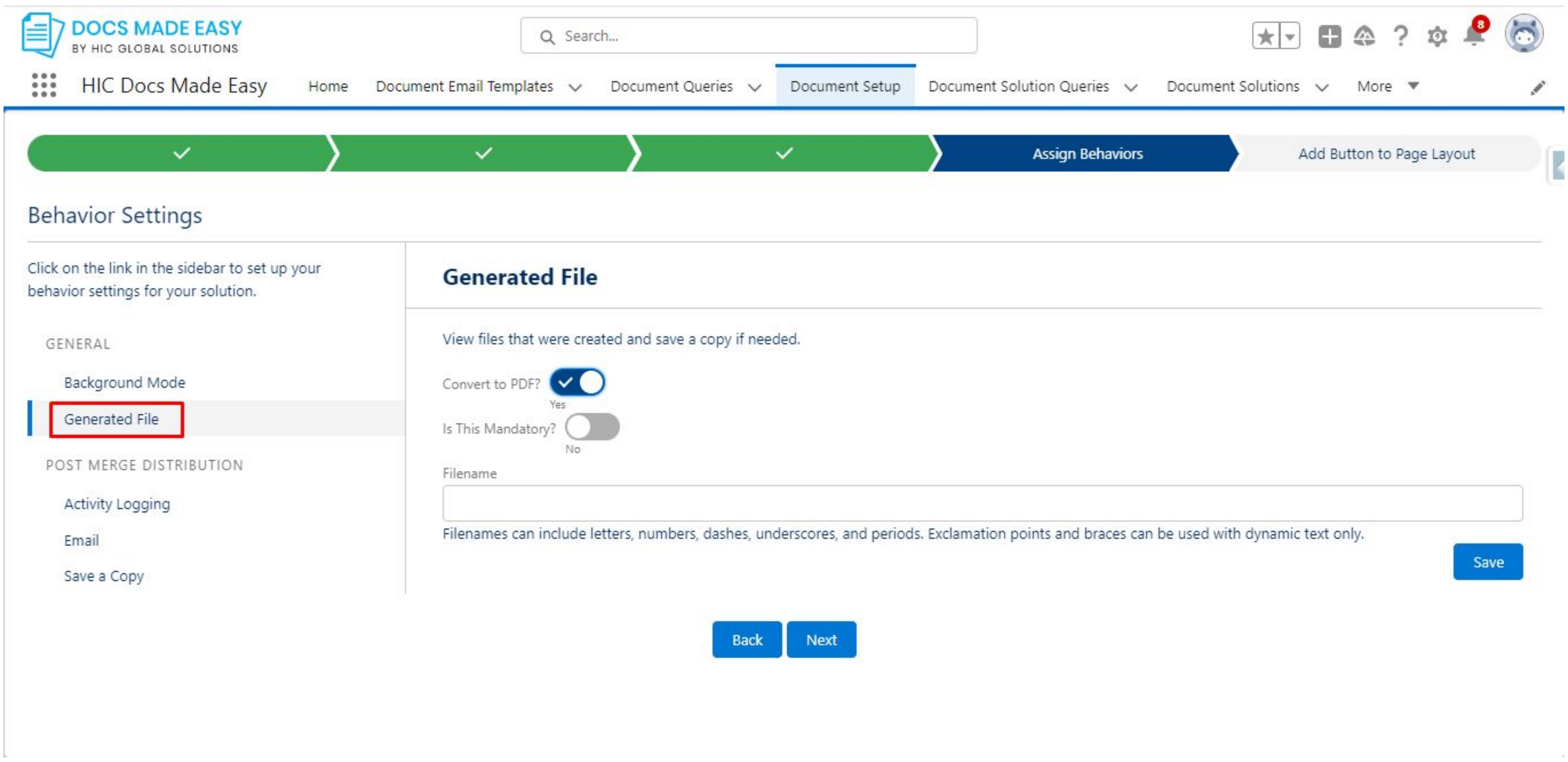
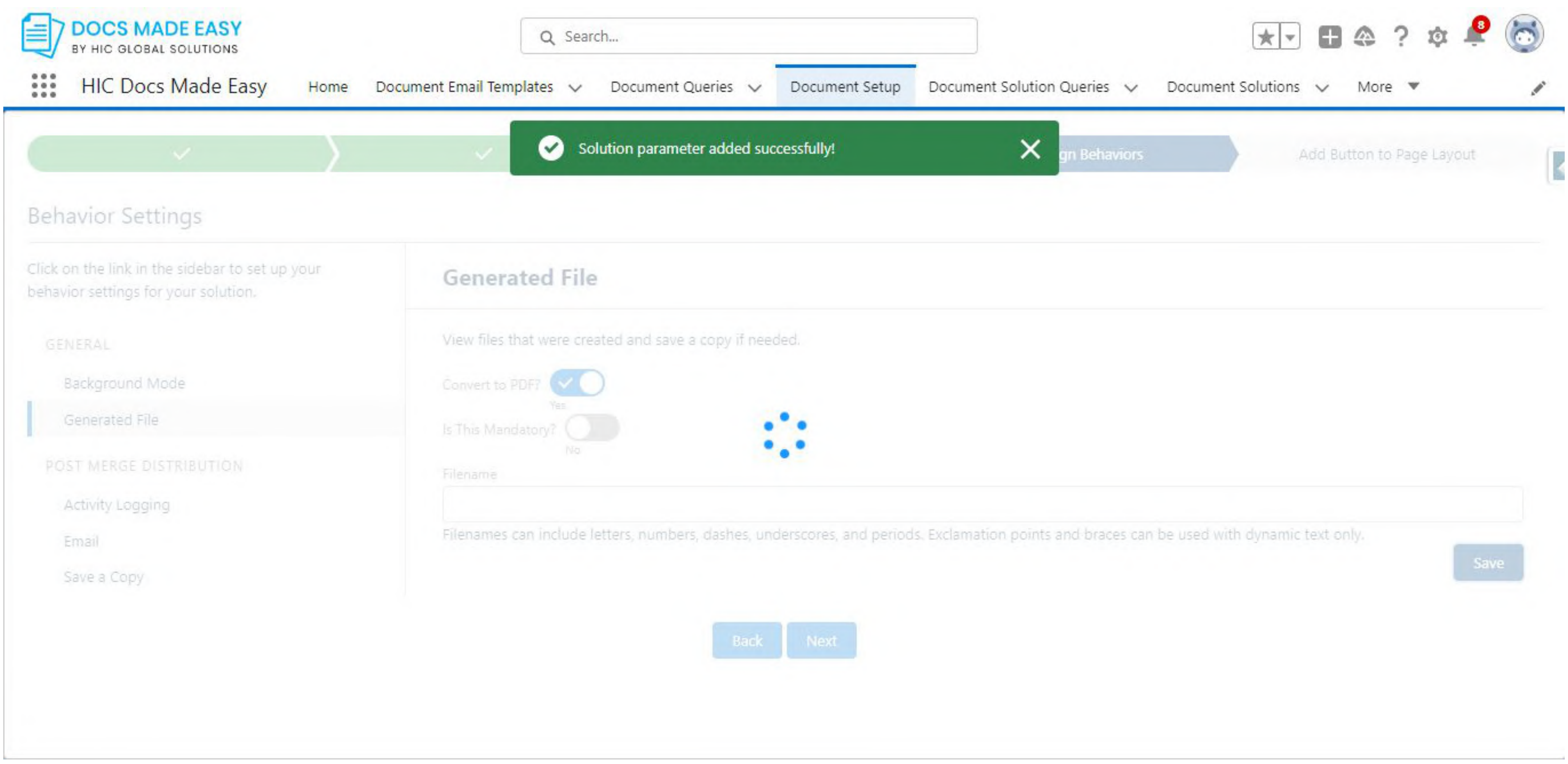


Figure : 37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Home
Document Email Templates
Document Queries
Document Setup
Document Solution Queries
Document Solutions
More
Solution parameter added successfully!
gn Behaviors
Add Button to Page Layout
Behavior Settings
Click on the link in the sidebar to set up your behavior settings for your solution.
GENERAL
Background Mode
Generated File
POST MERGE DISTRIBUTION
Activity Logging
Email
Save a Copy
Generated File
View files that were created and save a copy if needed.
Convert to PDF?
Yes
Is This Mandatory?
No
Filename
Filenames can include letters, numbers, dashes, underscores, and periods. Exclamation points and braces can be used with dynamic text only.
Save
Back
Next

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.

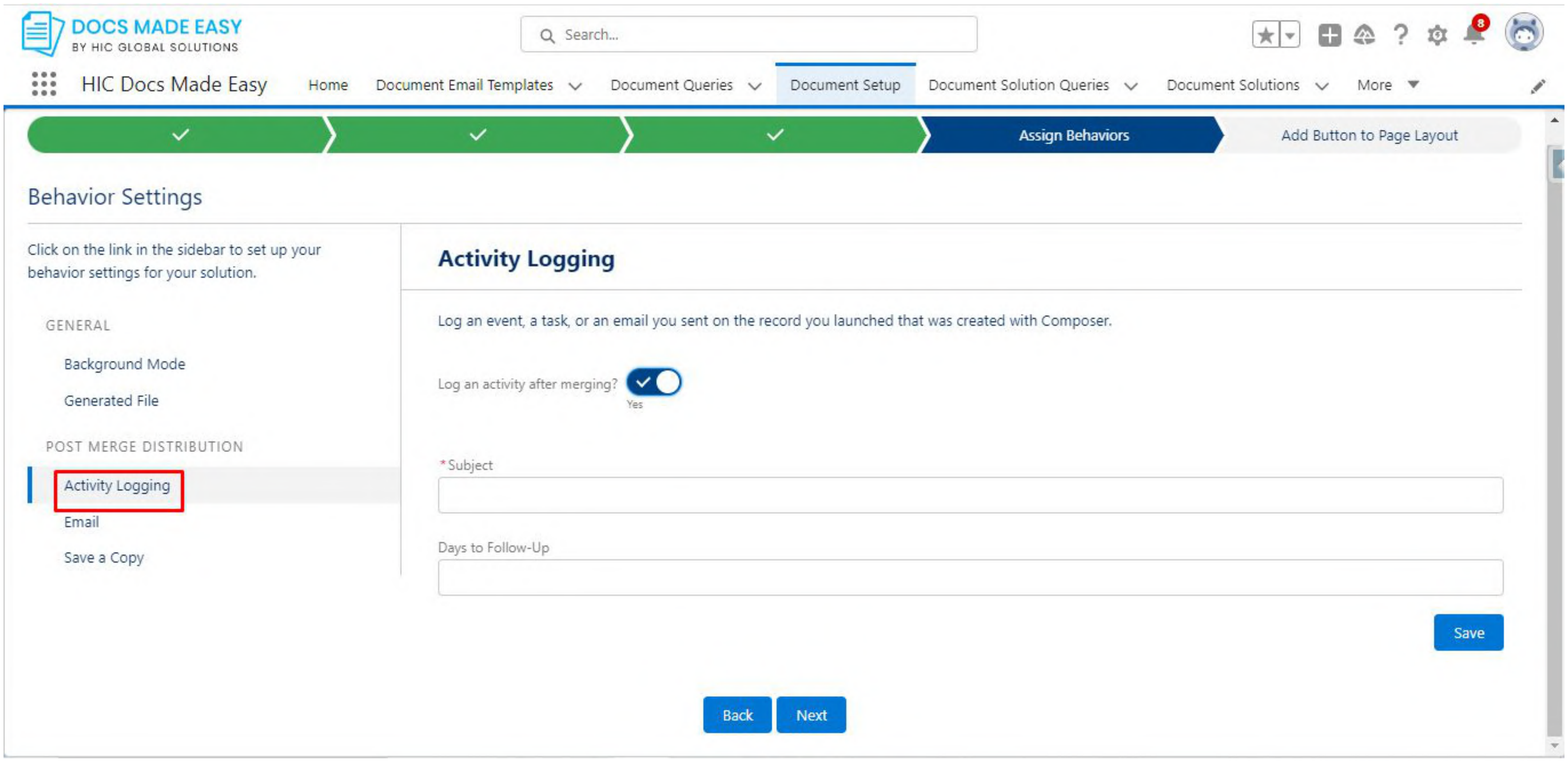


Figure : 39

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.

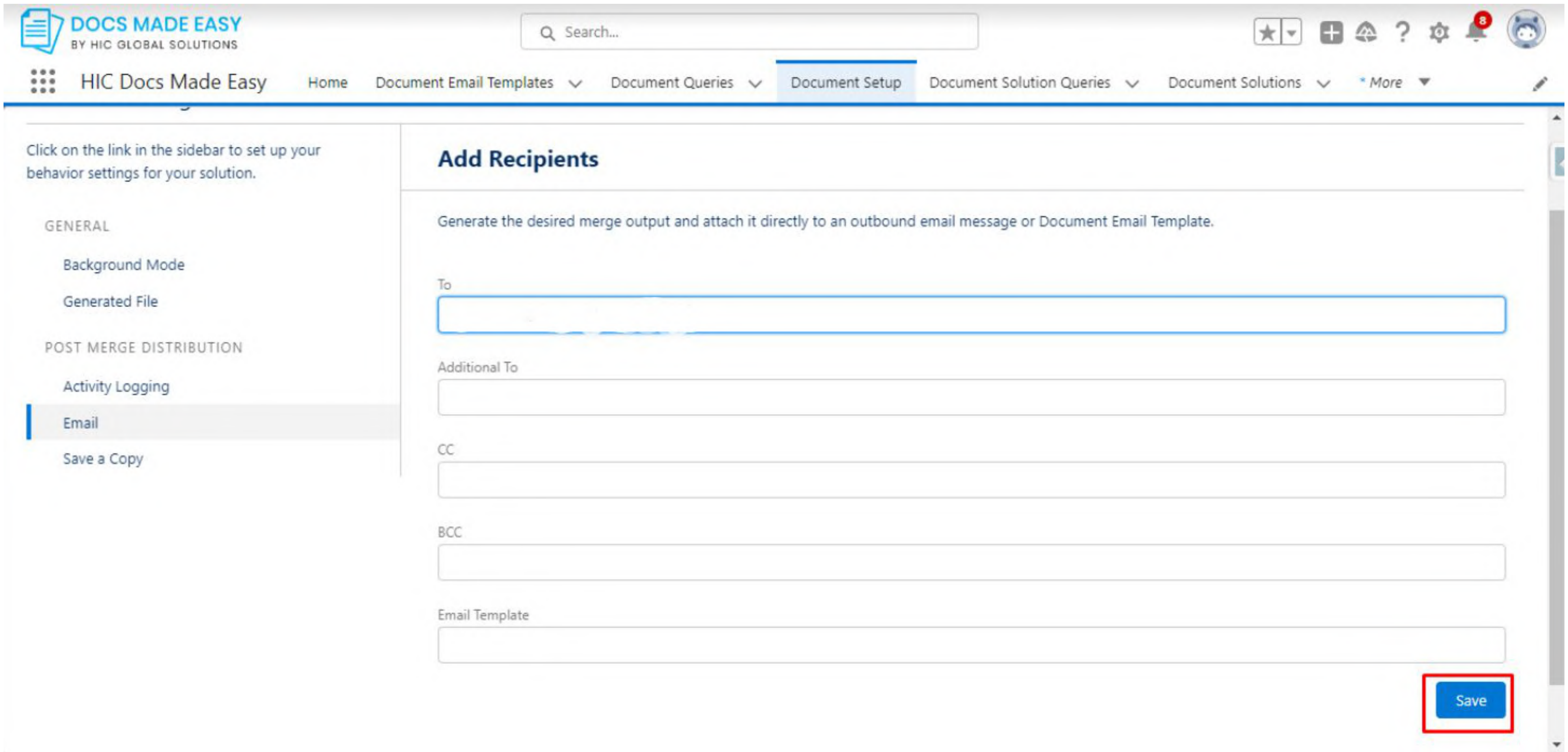


Figure : 40

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

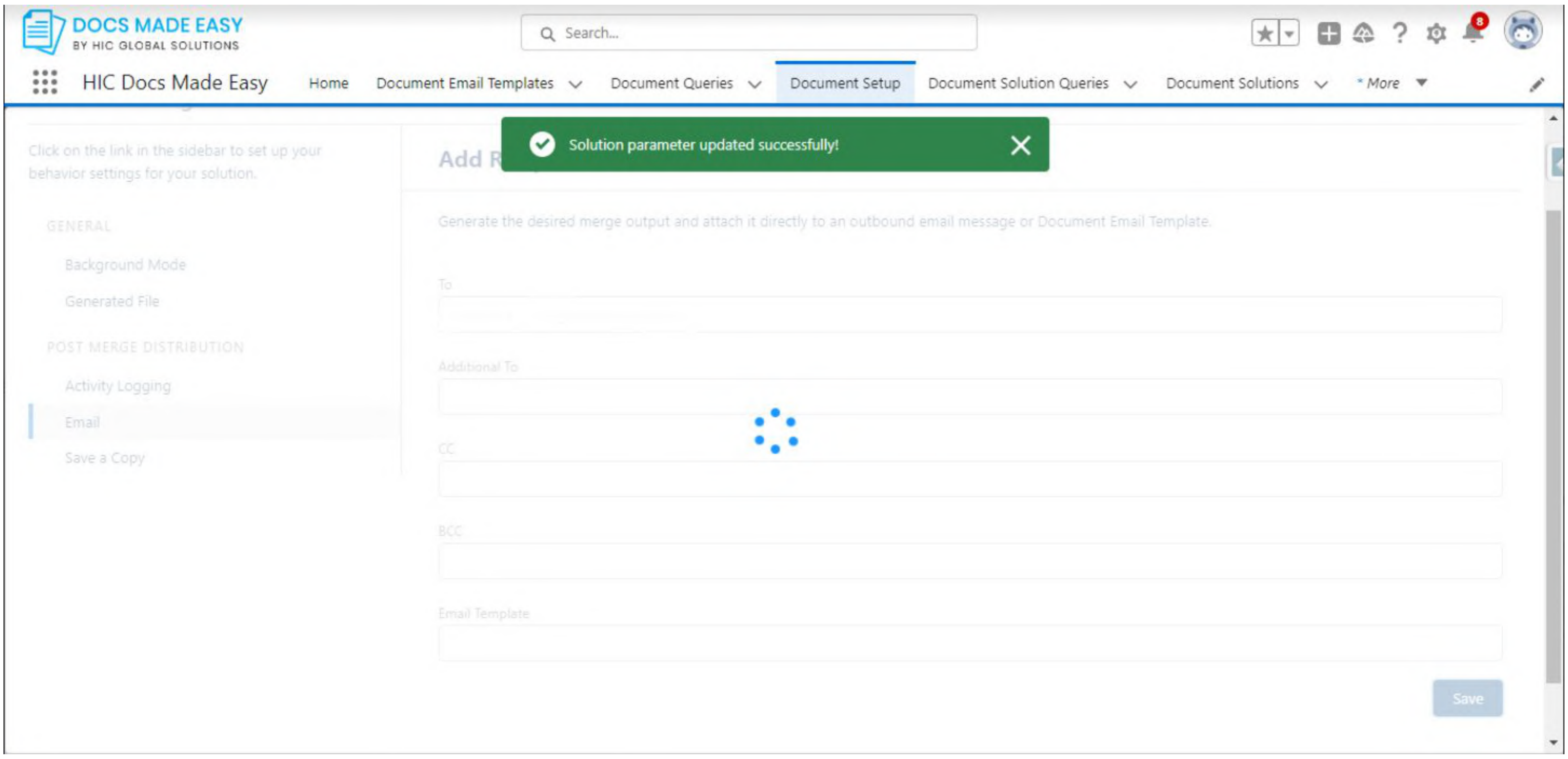


Figure : 41

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

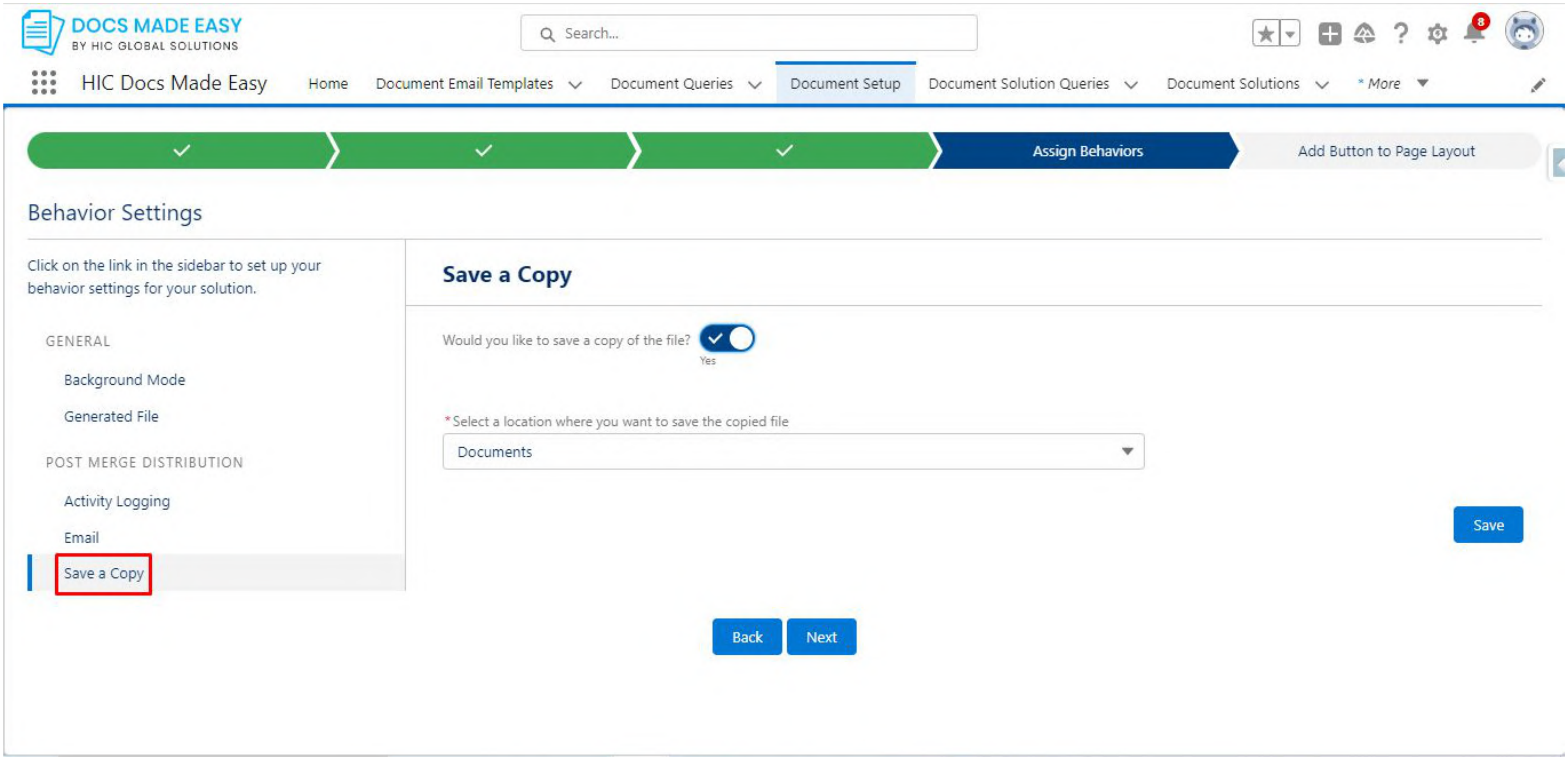


Figure : 42

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

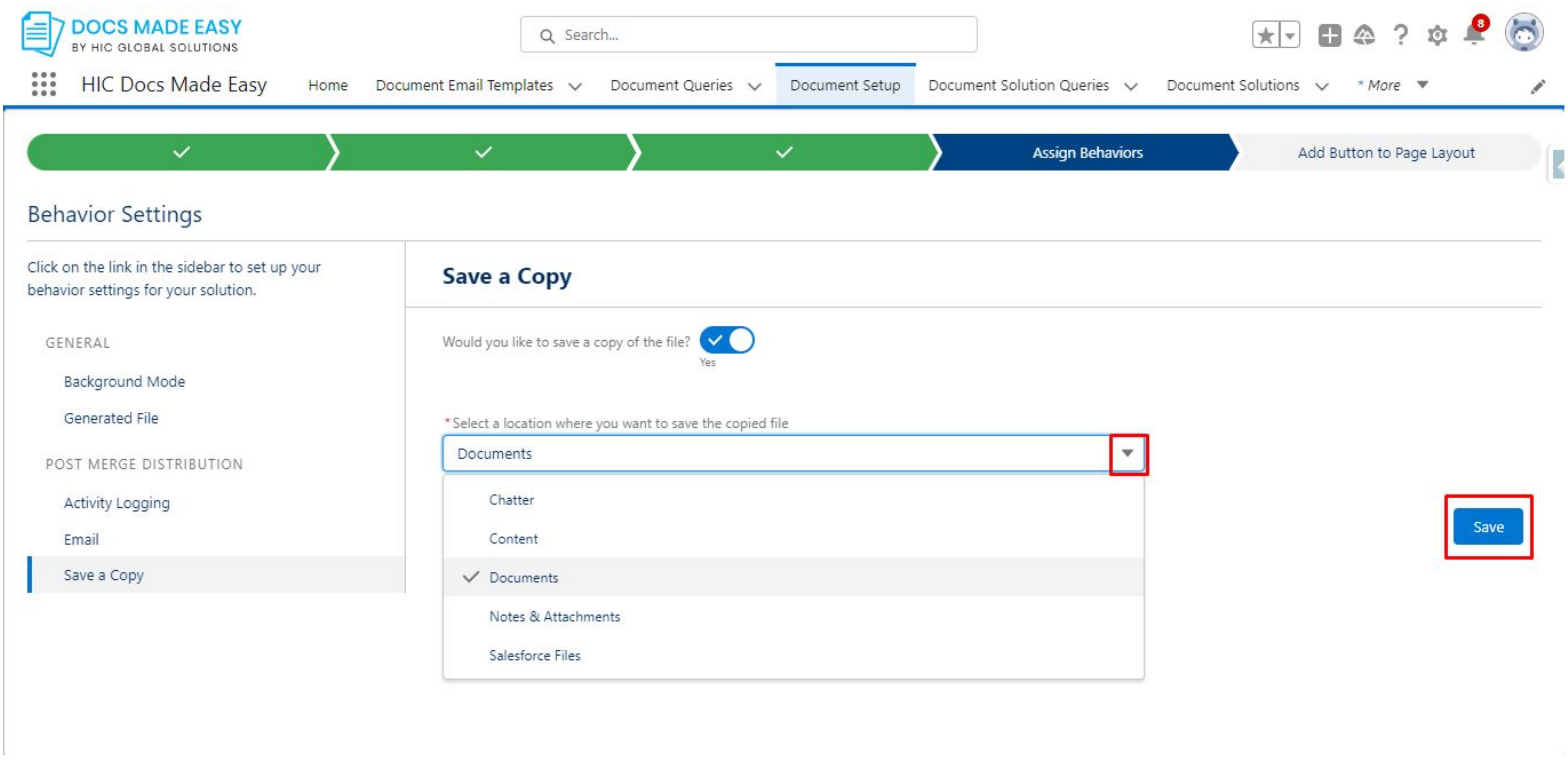


Figure : 43

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.

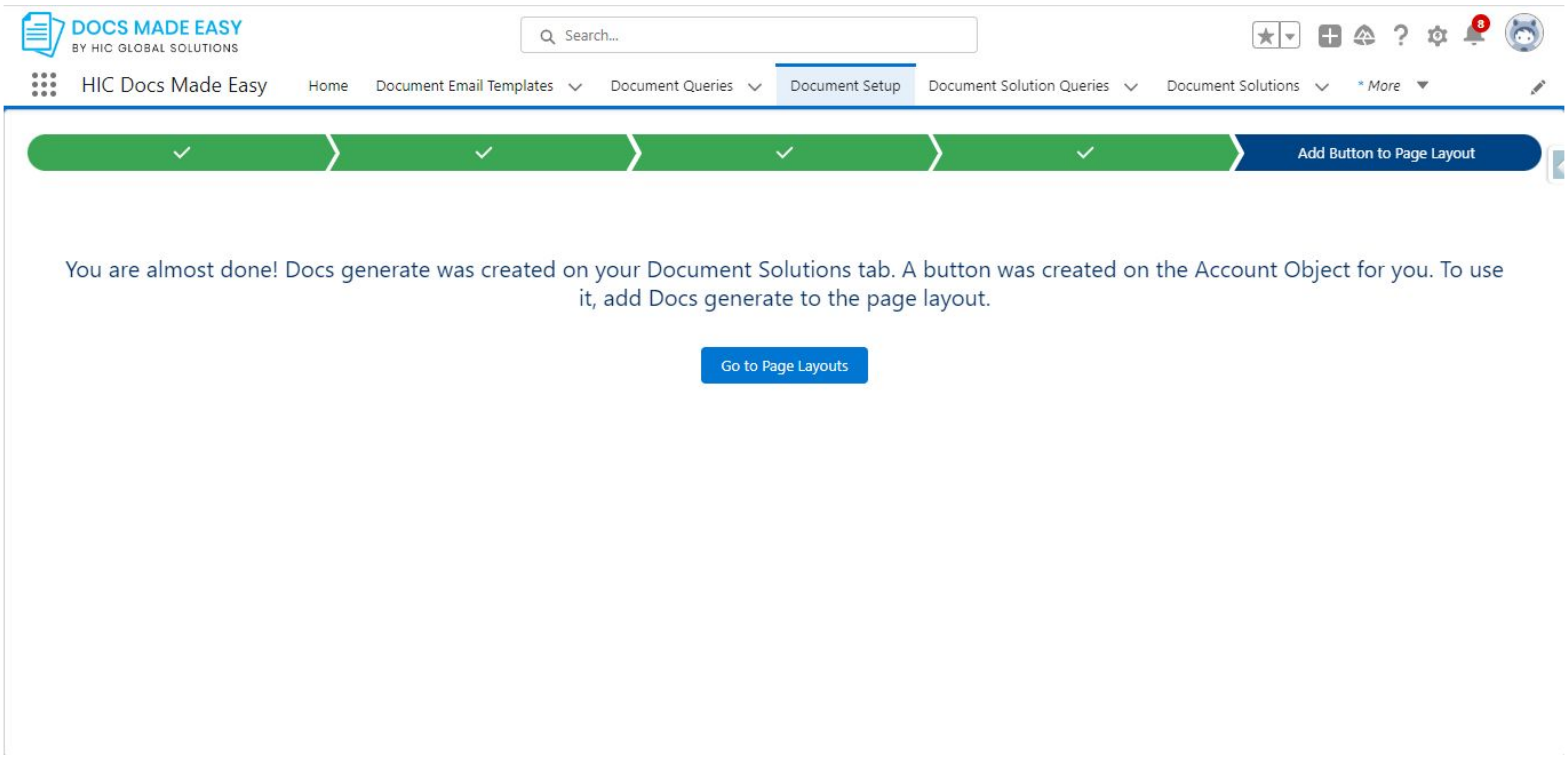


Figure : 44

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.

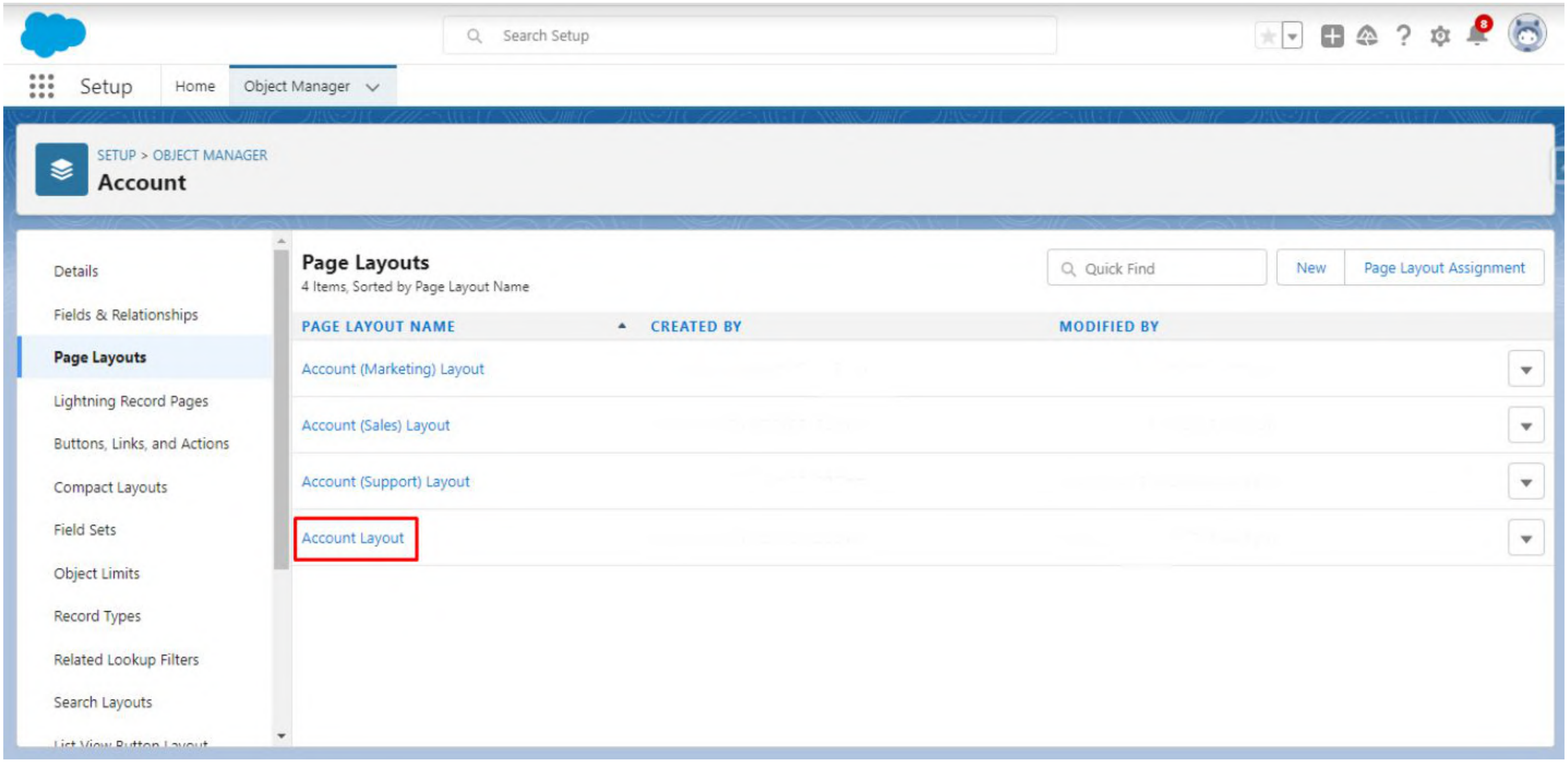


Figure : 45

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.

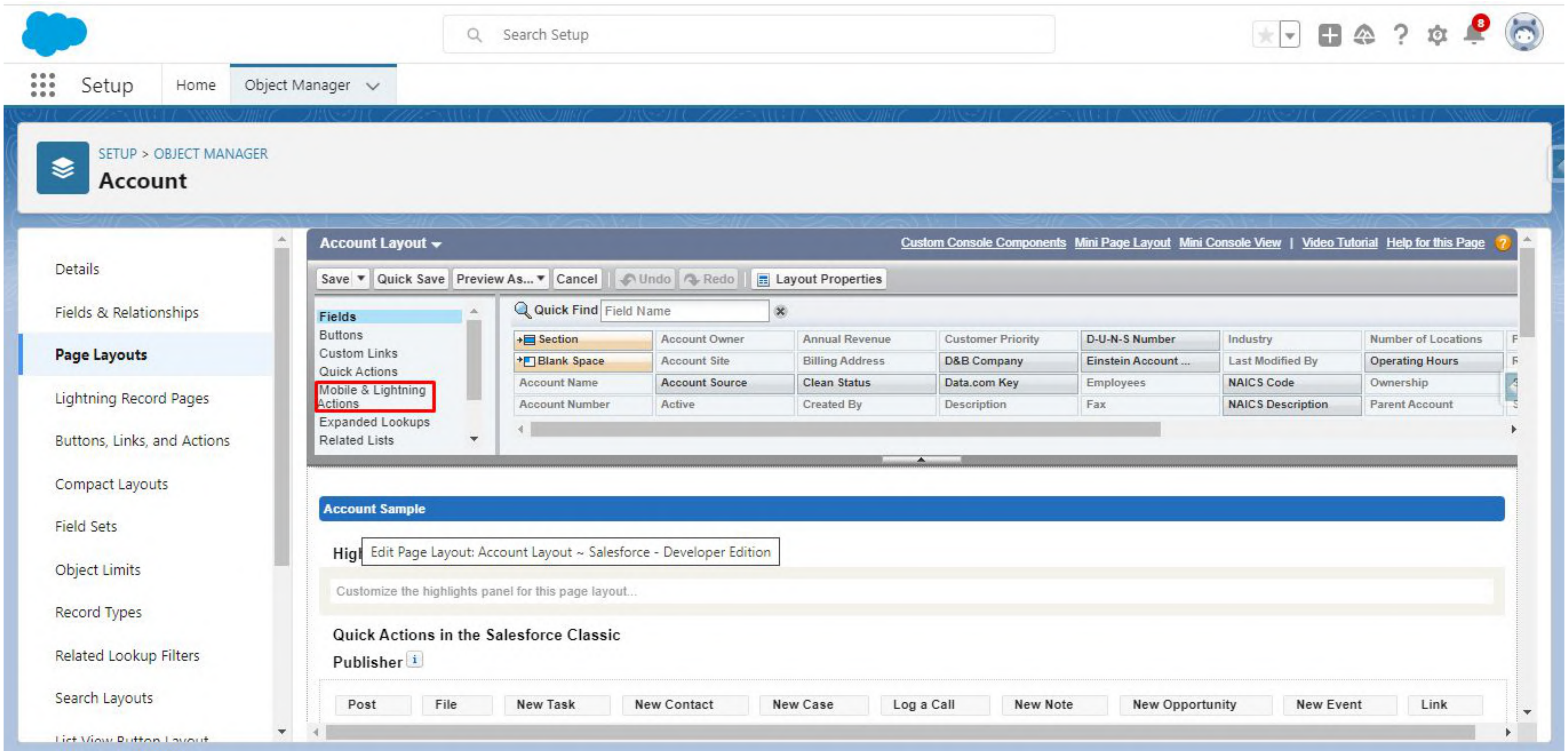


Figure : 46

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

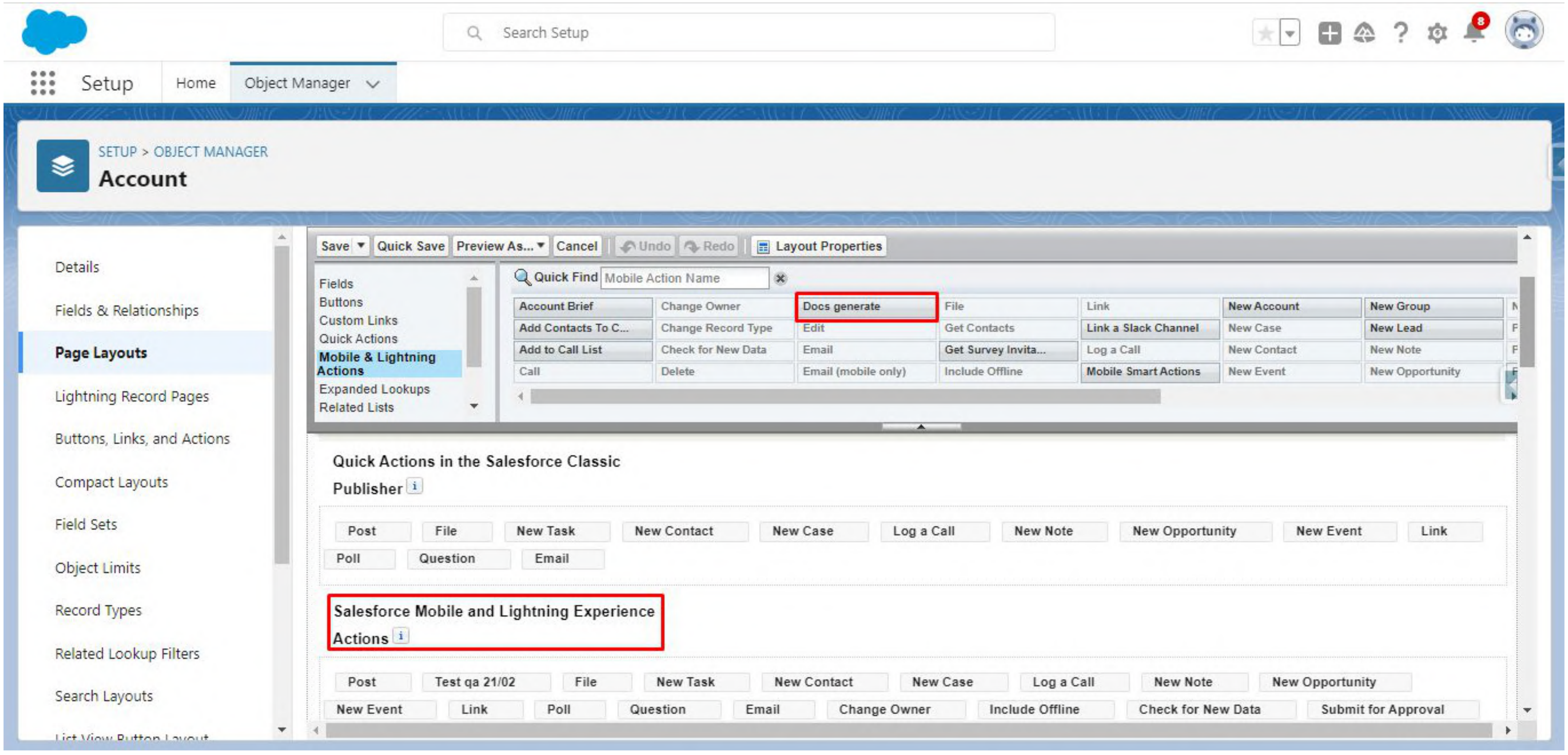


Figure : 47

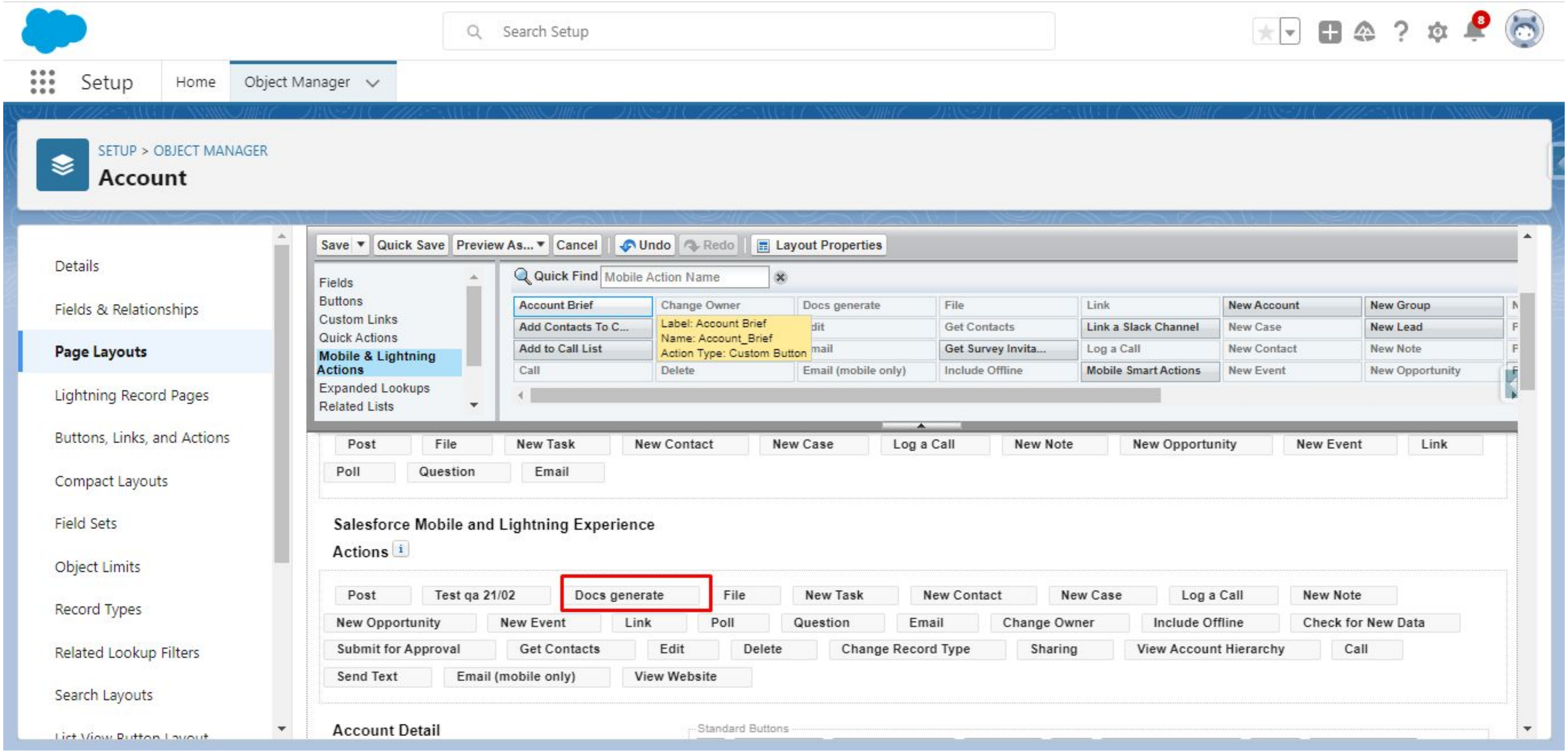

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Account
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Quick Find
Mobile Action Name
Label: Account Brief
Name: Account_Brief
Action Type: Custom Button
Salesforce Mobile and Lightning Experience Actions
Post
Test qa 21/02
Docs generate
File
New Task
New Contact
New Case
Log a Call
New Note
New Opportunity
New Event
Link
Poll
Question
Email
Change Owner
Include Offline
Check for New Data
Submit for Approval
Get Contacts
Edit
Delete
Change Record Type
Sharing
View Account Hierarchy
Call
Send Text
Email (mobile only)
View Website
Account Detail

Figure : 48

Now, Hit the Save button.

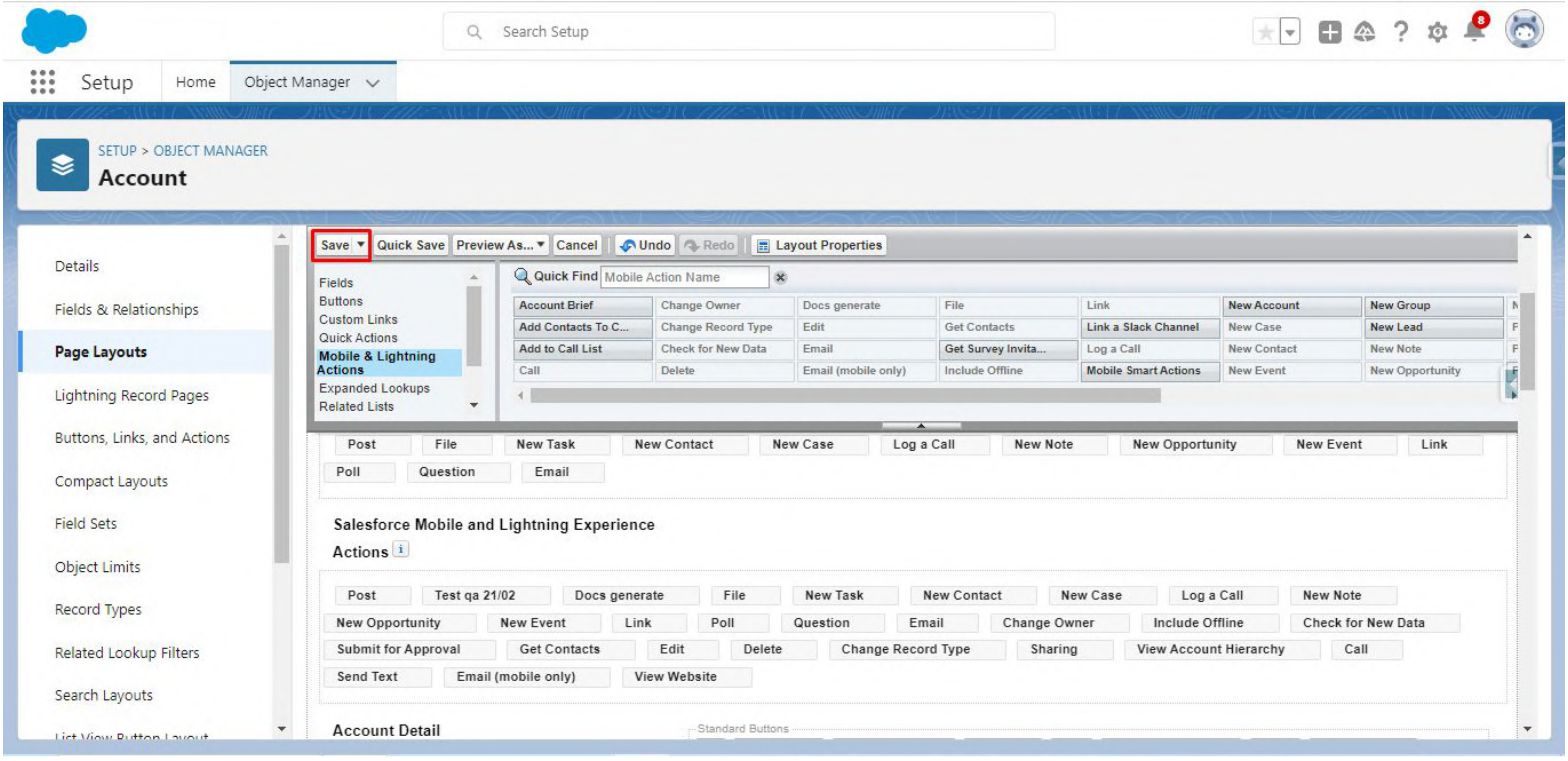


Figure : 49

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**

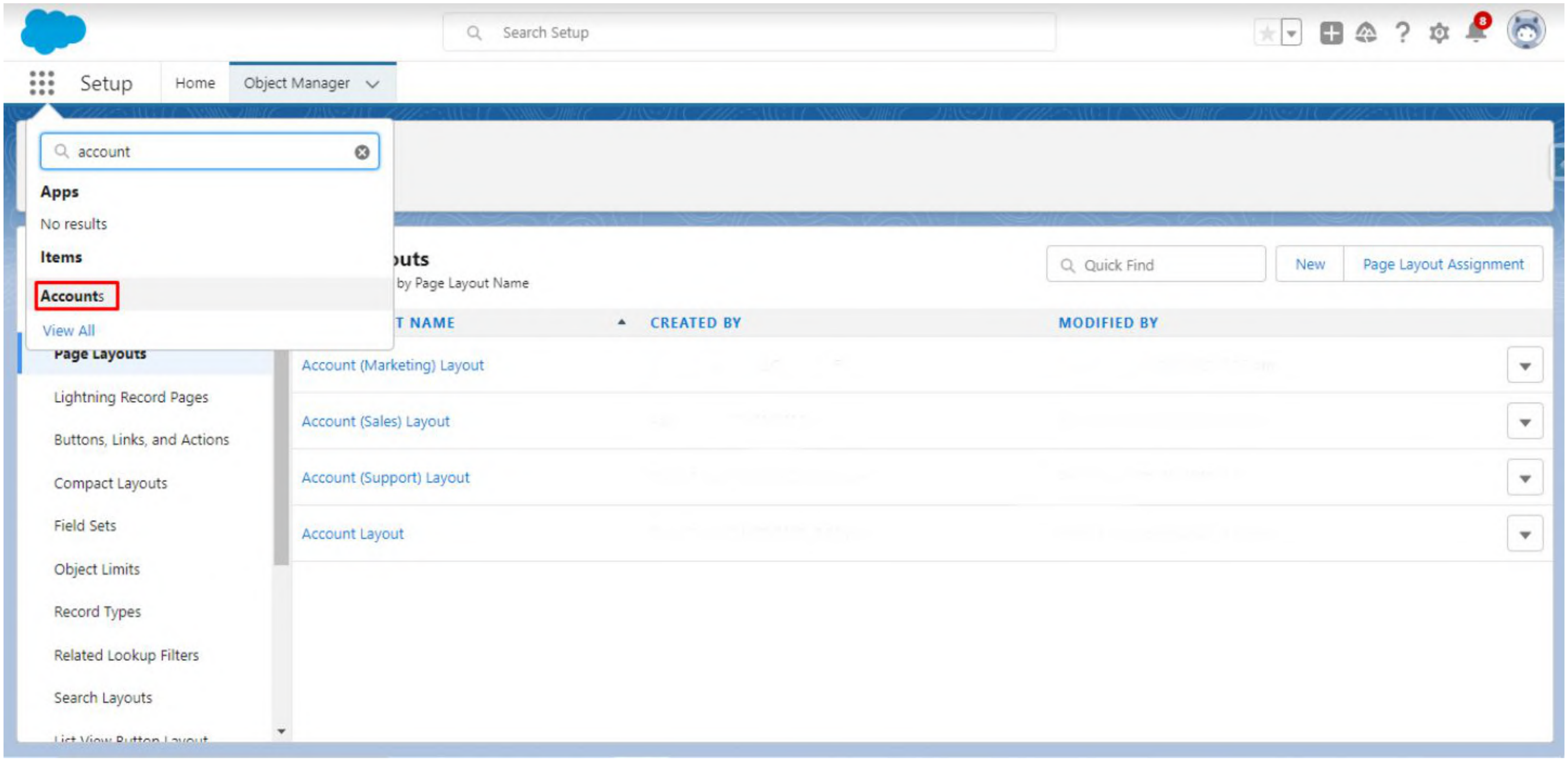


Figure : 50

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

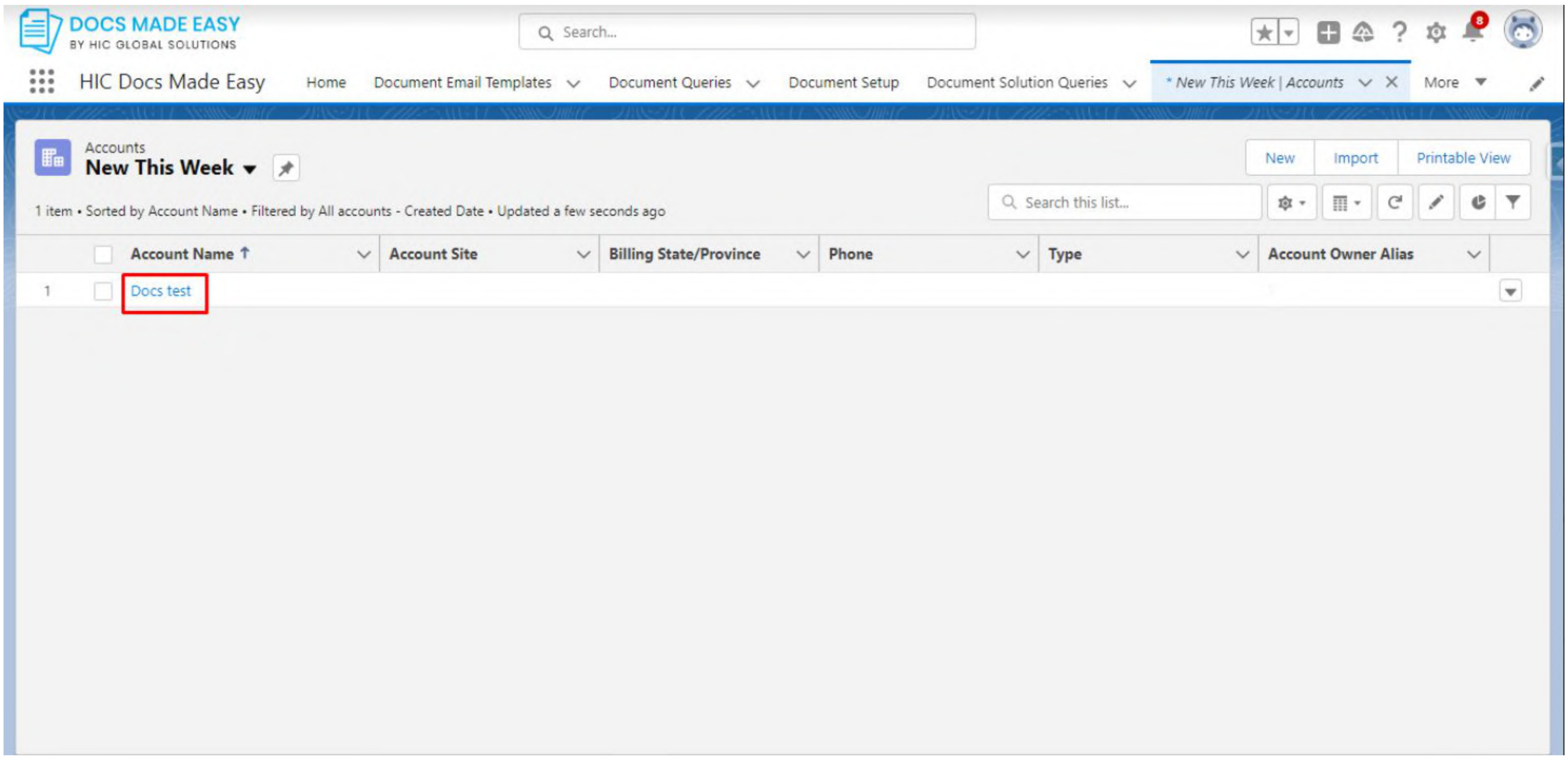


Figure : 51

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

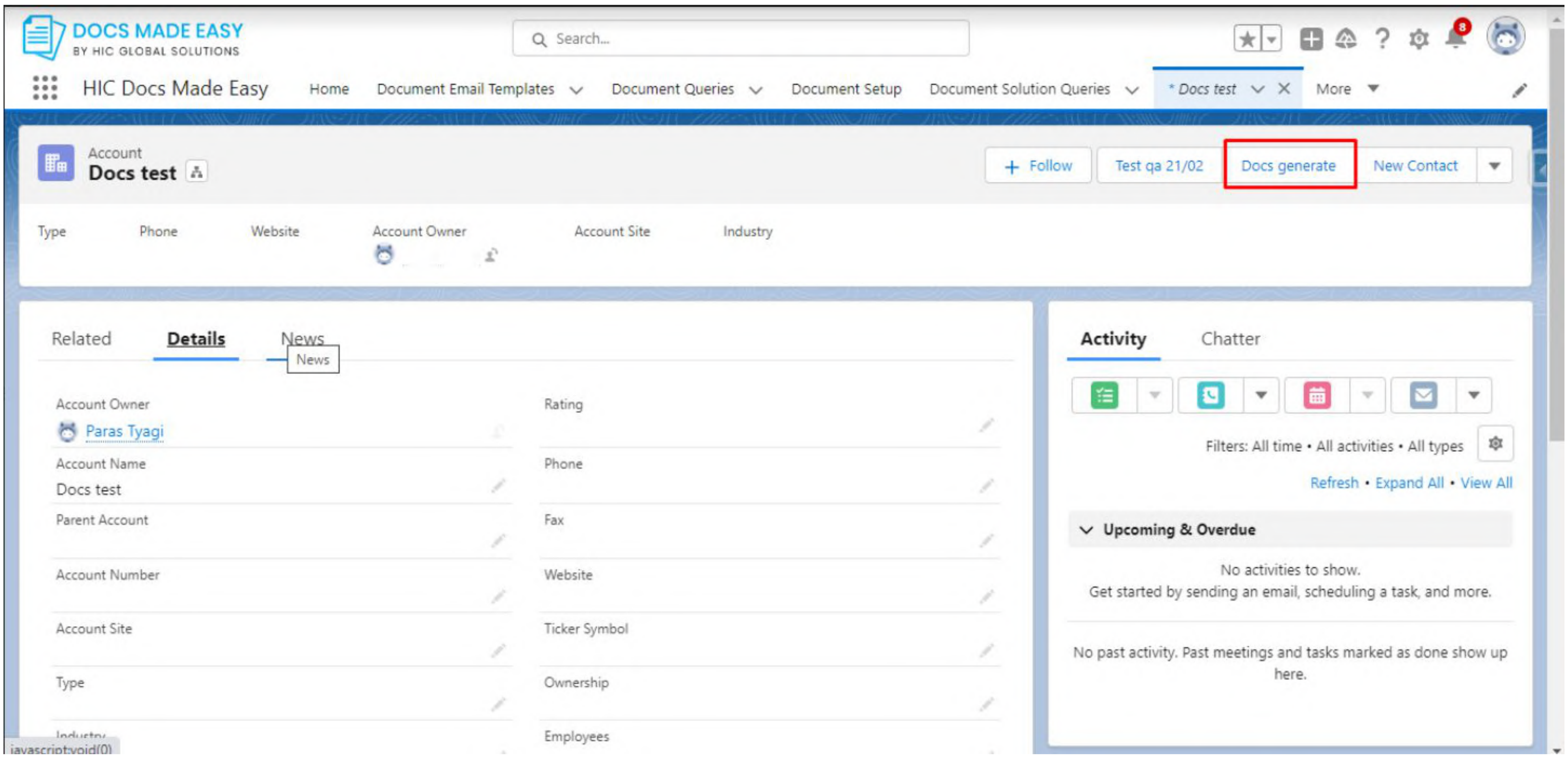


Figure : 52

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.

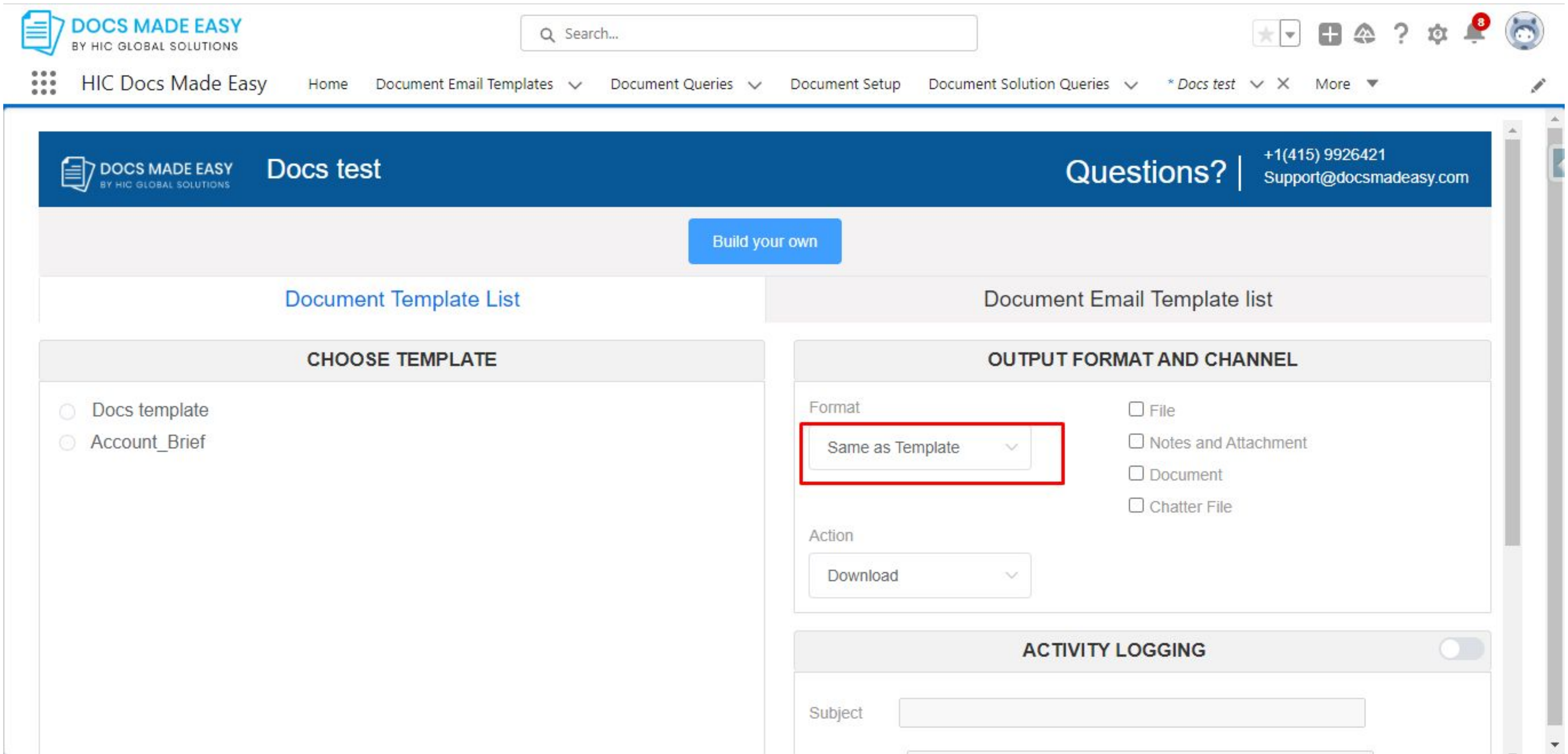
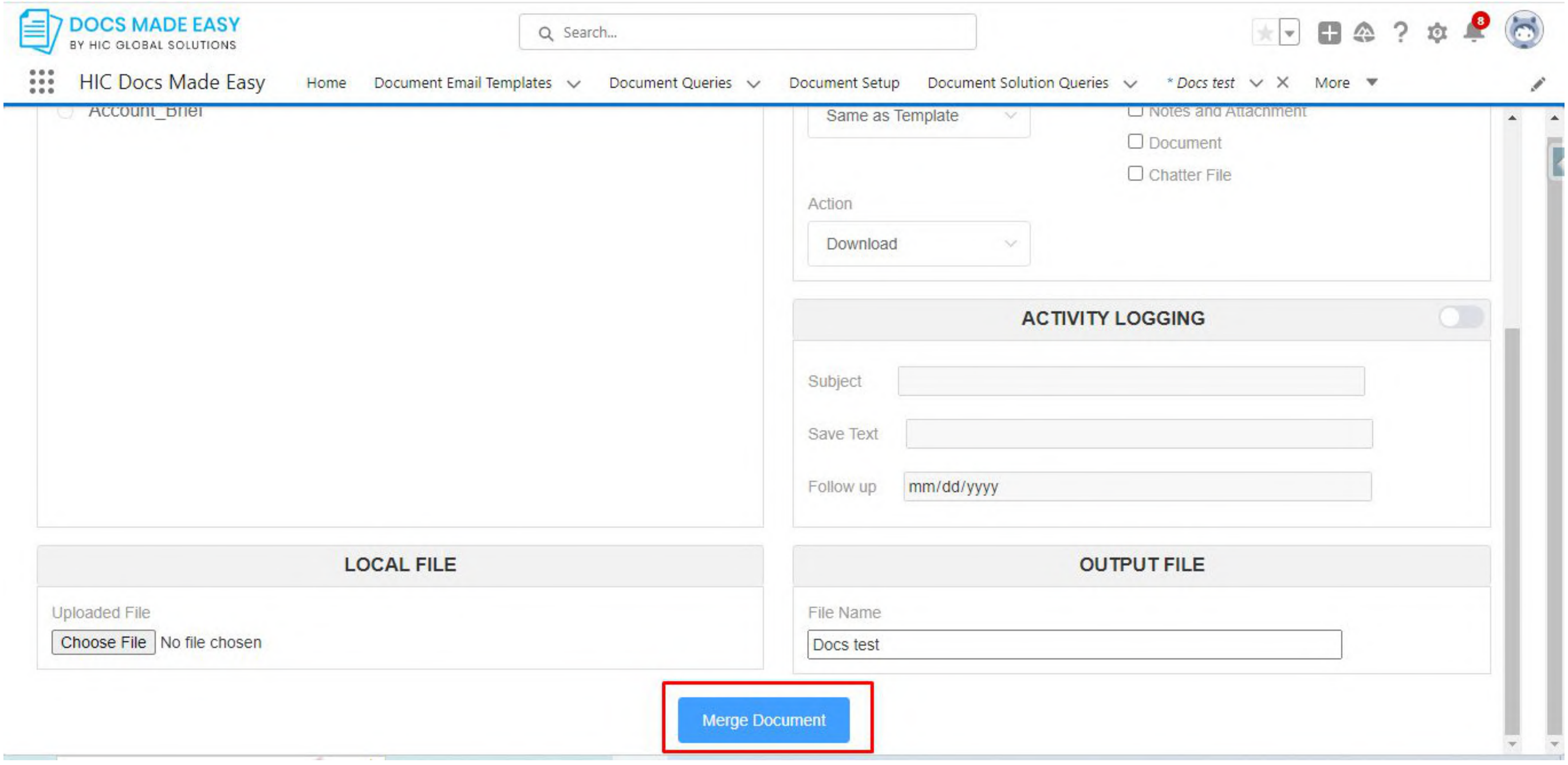


Figure : 53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Search...
HIC Docs Made Easy
Home
Document Email Templates
Document Queries
Document Setup
Document Solution Queries
* Docs test
More
Same as Template
Notes and Attachment
Document
Chatter File
Action
Download
ACTIVITY LOGGING
Subject
Save Text
Follow up
mm/dd/yyyy
LOCAL FILE
Uploaded File
Choose File
No file chosen
OUTPUT FILE
File Name
Docs test
Merge Document

Figure : 54

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

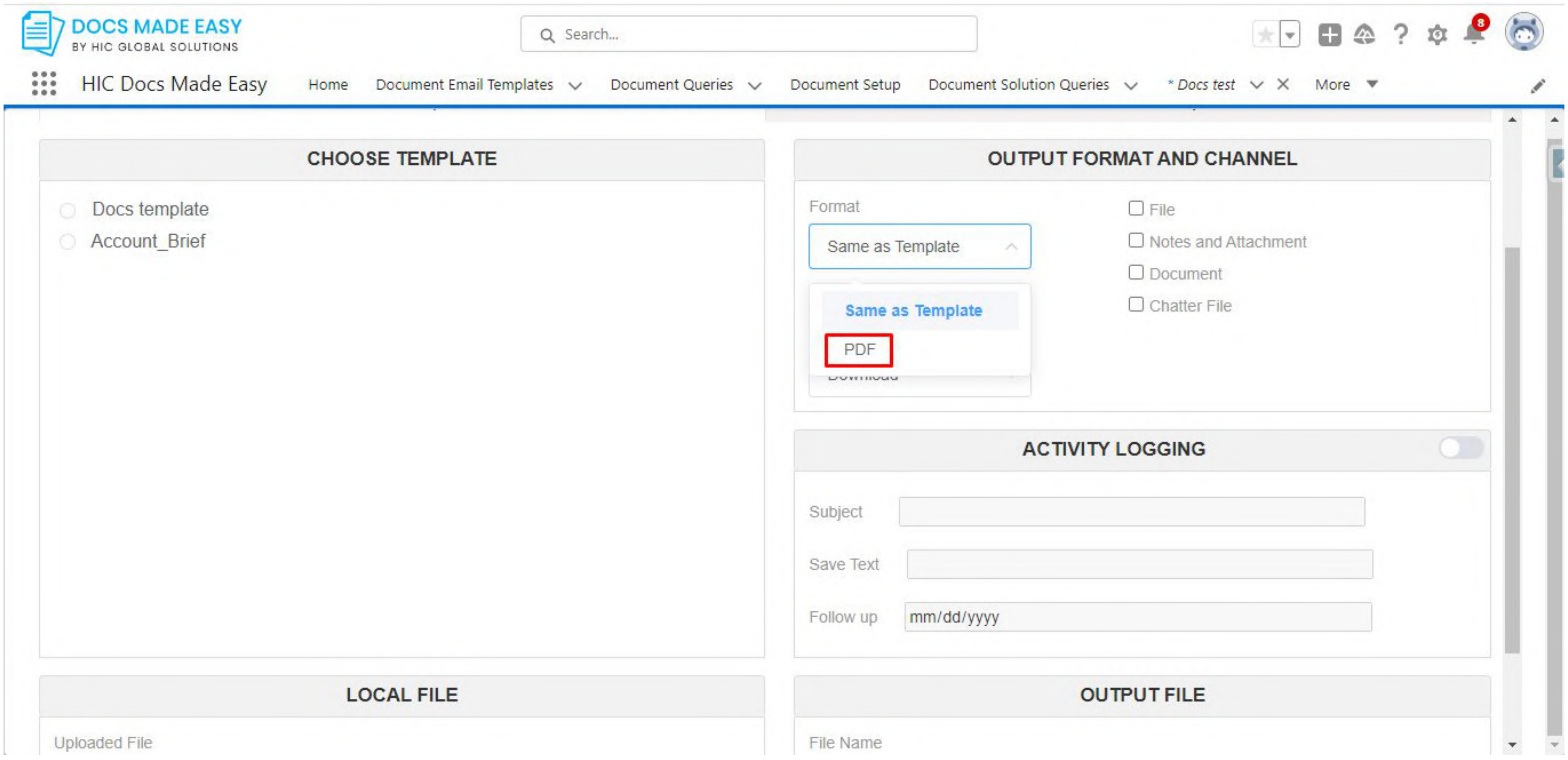
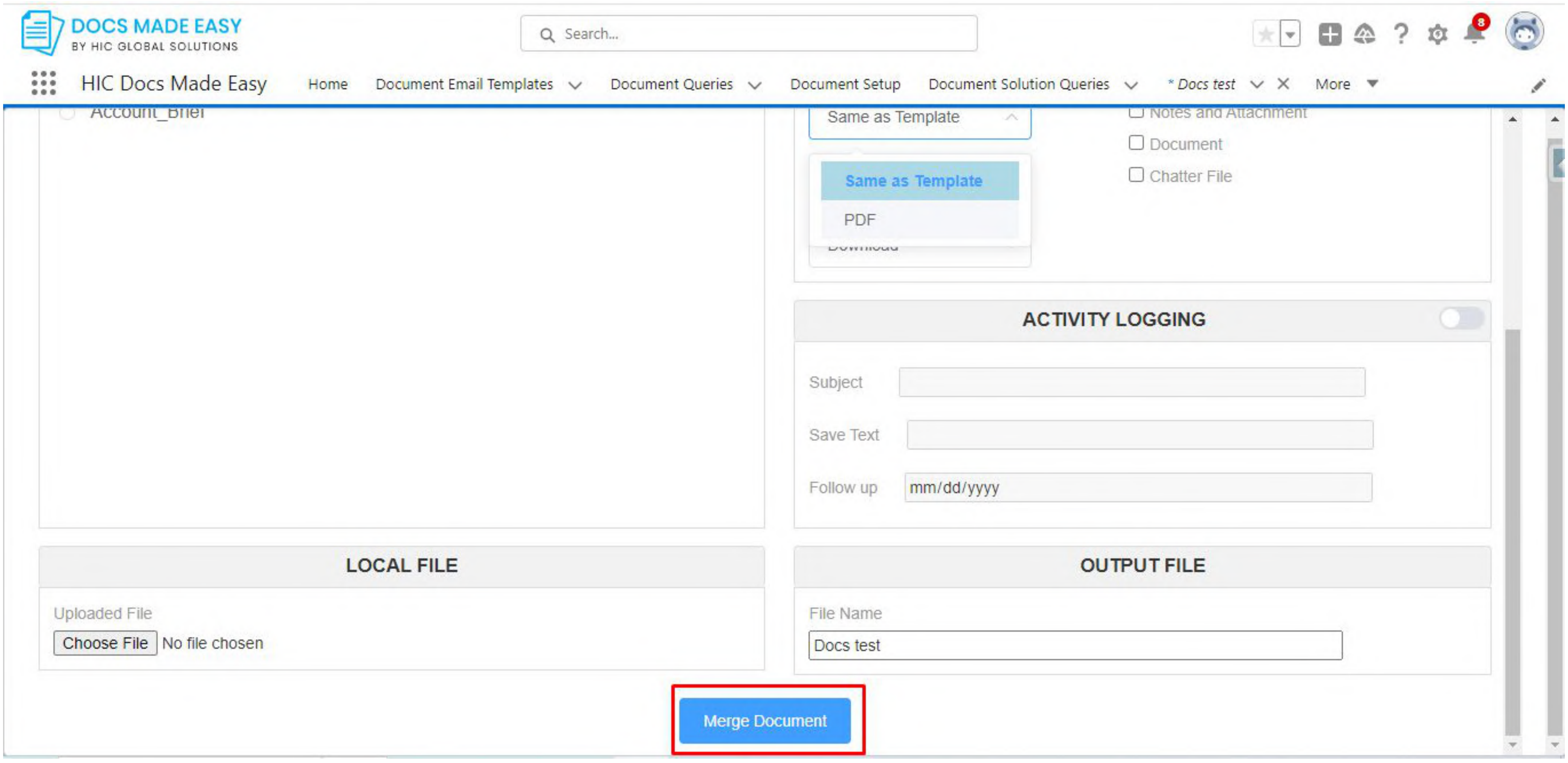


Figure : 55

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



Your PDF document is now ready to be downloaded.

Figure : 56

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Thank You!