## Revision History

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<td>V1.0.0.0</td>
<td>User Manual</td>
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<td>24-Jan-2017</td>
<td>V1.0.0.1</td>
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1. HOW TO USE THIS USER MANUAL

Each feature of COOLDOX is explained in separate section followed by a step-by-step process description.

*Notes* are included in separate section as shown below:

**Note:** <Note details added here>

Cautions that user need to follow is included in separate section as below:

**Caution:** <Caution details added here>
2. **INTRODUCTION**

COOLDOX is a MS-Word Add-in developed to help Salesforce users to create impressive, rich-text documents like Sales proposals (Quotes), Customer contracts or agreements, and other such documents. You can create new templates, import your existing templates from Salesforce, modify them and create rich documents using COOLDOX. Documents generated using COOLDOX are immediately available in Salesforce, and you can start sharing them with your colleagues or even send them to your customers.
3. INSTALLATION AND SYSTEM REQUIREMENT

Please refer COOLDOX Installation Guide to understand system requirements and steps to install COOLDOX on user machine.

COOLDOX Installation Guide is available for download at:

http://www.digicloudsolns.com/products/cooldox.html

Under Documentation section, click **Installation Guide** link to download the document.

Once COOLDOX is installed, the user can view the new menu in MS Word where various COOLDOX features can then be accessed.
4. LOGIN TO COOLDOX

To logon to COOLDOX

1. Under COOLDOX menu, click **Login**.
2. When logging in for the first time, SFDC Login window is displayed.

   ![Login Window](image)

3. Select correct environment under **Select Environment** to log on to Salesforce. Provide link if logging into custom domain and click **Load**.

   **New Feature**: COOLDOX now supports Partner Community Users Login from version 1.0.0.3 onwards. To log in using Partner Community User, select “Custom Domain” environment, enter Partner Community URL and click Load. Partner Community login page displays. Enter your partner user credentials.

   **Note**: COOLDOX supports login to all Salesforce environments including partner community login environment as specified above. **OAuth** authentication is used to set up connection with given Salesforce instance.

4. Enter Username and Password and click **Log In**.

   A confirmation window asks you to permit access to the Salesforce environment. Click **Allow** to confirm access for COOLDOX to the given Salesforce environment.
5. COOLDOX authenticates the user and allows the authorized user to access various features.

6. The User Details window is displayed. The User Name and Profile photo of the authenticated user is displayed.

7. Click Profile photo or User Name to see details about the user.

8. The User can view the Salesforce environment details along with COOLDOX Start Date.

9. The User need not log in again in future sessions unless the user explicitly logs out. To Log out, Click Log Out button under User Details. To log in with other Salesforce credentials, click Login with other credentials.
5. CREATE TEMPLATE

To create a template,

1. Under COOLDOX menu, Click Create
   - If user is not logged in already then, a Login prompt appears prompting the user to login.

2. If the objects for the Salesforce instance are not selected, then the Object Selection form appears. All objects of logged in Salesforce instance are listed to choose the respective object.

3. Select the desired Salesforce Objects for which you want to create a given template and click Select
   The Salesforce Object sidebar appears. It contains the following sections:
   - **Selected Object**: Contains the fields available on selected object. You can access fields of referenced Salesforce Objects on given object up to 5 levels. The fields under this section should be used anywhere in the document except Tables.
   - **Object Related Lists**: Contains a list of related objects and their fields only up to 1 level. Fields under this section should be used only in Tables.
   - **Generic Objects**: Contains Generic Objects, User and Organization. Fields under this section should be used anywhere in the document except Tables.
• **Content Library** – Lists documents available in user’s Salesforce Content.

![Salesforce Objects](image)

**Caution:**

If COOLDOX logged in user is changed after loading the Salesforce object sidebar, it is advised that user should reload the sidebar by using **Change Object** button to fetch details about objects from the new user’s salesforce organization.

4. You can start creating the Template by adding your general template document contents. Drag the required Salesforce Object fields from Salesforce Object sidebar at positions where the field’s value should be populated while generating document from
5. Drag the fields in headers and footers of the document as per the requirement. COOLDOX now supports processing of fields in headers and footer from version 1.0.0.2.

6. Create tables using standard tables supported by Microsoft Word and Object Related List sections from Salesforce Object sidebar.

7. Drag fields from Generic Objects wherever required on the template.
8. Apply all formatting to the fields and tables that user intends to see after generating document. Any formatting applied to the field is automatically set to the value replaced while generating the document. You can include Salesforce content document right into current template by simply dragging it at specific location.

Caution:
When user drags fields, fields are dropped on the document in a specific format as below:

```
{{[Object Name].Field}}
```

User should take care that this format is not touched while dragging other fields or modifying document manually. Document will not generate correctly if these fields are modified.

COOLDOX Supports generation of tables in two ways:

**Single Row Table:**
Table to be generated will have only single row, with Object Related List Fields.
In this case, default table header row is added by using labels fetched from Salesforce for given field.

```
{{[QuoteLineItems].LineNumber}}  {{[QuoteLineItems].Description}}  {{[QuoteLineItems].Quantity}}  {{[QuoteLineItems].UnitPrice}}
```

**Double Row Table:**
Table to be generated will have two rows. First row will have user defined headers. Second row will contain dragged fields from Salesforce Related List Objects.

In this case, Header row for table is kept intact as per user choice and only rows are fetched.

<table>
<thead>
<tr>
<th>Line Number</th>
<th>Item Description</th>
<th>Quantity Bought</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>{{QuoteLineItems::LineNumber}}</td>
<td>{{QuoteLineItems::Description}}</td>
<td>{{QuoteLineItems::Quantity}}</td>
<td>{{QuoteLineItems::UnitPrice}}</td>
</tr>
</tbody>
</table>

**Caution:**

While generating tables, user must use fields from Salesforce Object Related List section only. Results will be unpredictable if fields from any other section are used in tables.

Make sure that you fill all columns of the table with valid field. Avoid keeping blank rows.

COOLDOX supports template creation by attaching only single object at a time. In case you want to change the current object, Click **Change Object** on Salesforce Object Sidebar.

**Note:** COOLDOX supports only one object than can be attached to template. If user uses any fields that are not supported by given objects, those fields will be treated as invalid and will not be replaced while generating document.

Use **Expand** and **Collapse** buttons to easily navigate through fields on Salesforce Object Sidebar.

COOLDOX supports Rich Text Area Fields in Salesforce (including fields that have Images). To enable this feature, please contact COOLDOX Support.
6. **Upload Template**

Template created using COOLDOX can be saved back to connected Salesforce instance in Document Folders.

To upload template,

1. Under **COOLDOX Menu**, Click **Save**.
   
   If not logged in before, Login prompt will appear asking user to login.

2. A prompt appears to select folder in the Salesforce Documents

   ![Upload Template](image)

3. Select desired Document folder where user want to store the template.

4. Enter the file name and description details.

5. Click **Upload** to upload the template to selected folder.

**Note:** Only valid COOLDOX templates can be uploaded to Documents Folders through COOLDOX Save Template menu. Only .DOCX and .DOC template file types are supported.
7. DOWNLOAD TEMPLATE

Template created and uploaded using COOLDOX in Document Folders can be used repeatedly for different records by downloading it from connected Salesforce instance.

To download template

1. Under COOLDOX Menu, Click **Download**.
   
   If the user is not logged in earlier, then a Login prompt appear asking user to login.

2. Prompt will appear to select folder and Templates in the Salesforce Documents.

3. Select desired Document folder and corresponding template to download.

4. Click **Download** to download the template to current document in MS Word.

**Note:** Only valid COOLDOX templates can be downloaded from Documents Folders through COOLDOX Download menu. Only .DOCX and .DOC template file types are supported.
8. **GENERATE DOCUMENT**

You can generate rich documents using COOLDOX Template created and uploaded using COOLDOX in **Document Folders** for different records available in connected Salesforce instance.

To generate document,

1. Under COOLDOX Menu, Create, or Download existing COOLDOX Templates. If the user is not logged in earlier, Login prompt appears asking the user to login.

2. Click Generate. A Prompt appears to search and Select records available for selected Object for given template.

Make sure correct object is selected.

3. You can search records for a given object by specifying partial or full text for selected record Field and then click **Search**. If **Search Text** is not specified, all records are returned that you can access.

4. You can search only those records created by you by checking the **Search records created by me** checkbox.

5. Select the desired **Record** for which document needs to be generated from given template and click **Select**. COOLDOX fetches all required data for given record from Salesforce and replaces the template fields with actual record data. Any wrong fields found are highlighted in red.

6. If your template contains tables with related list fields, check the option **“This template contains tables with Related List data”**. Else, keep it unchecked.
9. PREVIEW DOCUMENT

Documents generated using COOLDOX can be previewed in PDF format.

To preview documents

1. Under COOLDOX Menu, Click **Preview**.
   - If the user is not logged in earlier, the Login prompt appears asking user to login.

2. The Document is previewed in PDF Format.
10. **UPLOAD DOCUMENT**

Documents generated using COOLDOX can be uploaded to the selected record that was used while generating document. Document can be uploaded to Notes and Attachment Section of given record in Salesforce as DOCX or PDF format.

To upload document

1. Under COOLDOX Menu, Click **Save** under Document section. If the user is not logged in earlier, a Login prompt appears asking user to login.

2. The Prompt appears confirming user which record given document will be uploaded to as an attachment.

   ![Save (Upload) Document](image)

3. You can choose to upload document as is in DOCX format or check **Upload document as PDF** to upload document as PDF to selected record and Click **Upload**.

4. Document will be uploaded to **Notes and Attachments** Section of the record.
11. **VIEW DETAILS ABOUT COOLDOX**

COOLDOX information is available in About section.

To view details:

1. Under COOLDOX Menu, Click **About**.
2. Details about current installation will be shown.

3. If User face any issue/problem while using COOLDOX, same can be notified to COOLDOX support directly from Microsoft Word itself by:

4. Click **Click to open a Case**

**Note:**

- From **Help** menu of COOLDOX
- Version and License information can be verified in **About** section.
12. REPORT ISSUE/PROBLEM

You can notify or contact COOLDOX Support with the issues/problems faced. You can send the details right from MS Word itself.

To report a problem:

1. Click Click to open a Case in About section.

To report from Help menu of COOLDOX:

1. Under COOLDOX Menu, Click About → Click to Open Case Or click Help. A prompt appears where you can provide additional details of the problem.

2. You can also attach screenshots or other information/document from attachment section.

3. Click Submit.

COOLDOX Support assures each COOLDOX User for quick response and proper resolution in time.