



Installation & Setup Guide

PRODUCT GUIDE • VERSION 1.0

Table of Contents

1. Introduction
 1. About 360 SmartDocs
 2. Key Features
 3. Document Conventions
2. Prerequisites
 1. Salesforce Edition Requirements
 2. User Permissions Required
 3. Browser Requirements
3. Package Installation
 1. Installing from AppExchange
 2. Choosing Installation Options
 3. Verifying Installation
4. Post-Installation Setup
 1. Step 1: External Client App / OAuth Configuration
 2. Step 2: License Activation & Sync
 3. Step 3: Permission Set Assignment
 4. Step 4: Template Sharing Rules for End Users
 5. Step 5: Object Configuration
 6. Step 6: Creating Buttons on Objects
 1. Creating a Quick Action
 2. Creating a URL Button

3. Creating a List View Button

7. Step 7: Microsoft Word Add-In Installation

5. Verification Checklist

6. Troubleshooting Common Installation Issues

7. URL Parameter Reference

8. Appendix: Permission Sets Detail

1. Introduction

1.1 About 360 SmartDocs

360 SmartDocs is a powerful Salesforce-native document generation solution that lets you create professional documents — SOWs, contracts, proposals, invoices, and more — directly from your Salesforce data. By using reusable templates with dynamic merge fields, SmartDocs eliminates manual copy-paste work, ensures consistency across documents, and dramatically reduces document turnaround time.

SmartDocs integrates seamlessly with Salesforce Lightning Experience and includes a Microsoft Word Add-In for visual template design. Documents can be generated in **DOCX** or **PDF** format, attached to records, and optionally emailed to recipients — all without leaving Salesforce.

1.2 Key Features

- **Single Document Generation** — Generate documents from any Salesforce record via Quick Actions or URL Buttons
- **Bulk Document Generation** — Generate documents for hundreds of records at once from Reports or List Views
- **Microsoft Word Add-In** — Design and edit templates visually in Microsoft Word with a dedicated sidebar for inserting Salesforce merge fields
- **Template Versioning** — Maintain multiple versions of each template, activate the current version, and roll back when needed
- **Email Integration** — Send generated documents via email directly from the generation wizard with configurable From, To, CC, and BCC fields
- **Custom Related List** — Display document generation history on any record page
- **Flow & Apex Integration** — Trigger document generation from Salesforce Flows or Apex code for automated workflows
- **Error Logging** — Built-in error log tracking for troubleshooting and auditing

1.3 Document Conventions

This guide uses the following visual conventions:

Tip: Helpful suggestions and best practices.

Note: Additional information or clarification.

Warning: Important cautions that may affect functionality.

Important: Critical steps that must not be skipped.

Throughout this guide, UI mockups like the one below illustrate Salesforce screens and dialogs you will encounter during setup:

Related Documentation:

- **360 SmartDocs Feature & User Guide** — Complete guide for using the product: template management, single and bulk document generation, and more.
- **360 SmartDocs Word Add-In User Guide** — Detailed instructions for building and editing document templates in Microsoft Word.

2. Prerequisites

2.1 Salesforce Edition Requirements

360 SmartDocs is compatible with the following Salesforce editions:

Edition	Supported	Notes
Enterprise Edition	Yes	Full support
Performance Edition	Yes	Full support
Unlimited Edition	Yes	Full support
Developer Edition	Yes	For development and testing
Professional Edition	No	Does not support managed packages with Apex
Essentials Edition	No	Limited API and customization support

2.2 User Permissions Required

The following permissions are required to install and configure 360 SmartDocs:

Task	Required Permission
Install the package	System Administrator profile
Configure the application	System Administrator or 360 SmartDocs Admin permission set
Assign permission sets to users	"Manage Users" permission
Configure OAuth / External Client Apps	"Manage External Client Apps" permission
Create Quick Actions and Buttons	"Customize Application" permission

2.3 Browser Requirements

360 SmartDocs runs within Salesforce Lightning Experience. Supported browsers include:

- Google Chrome (latest version) — **Recommended**
- Microsoft Edge (Chromium-based, latest version)
- Mozilla Firefox (latest version)
- Apple Safari (latest version, macOS only)

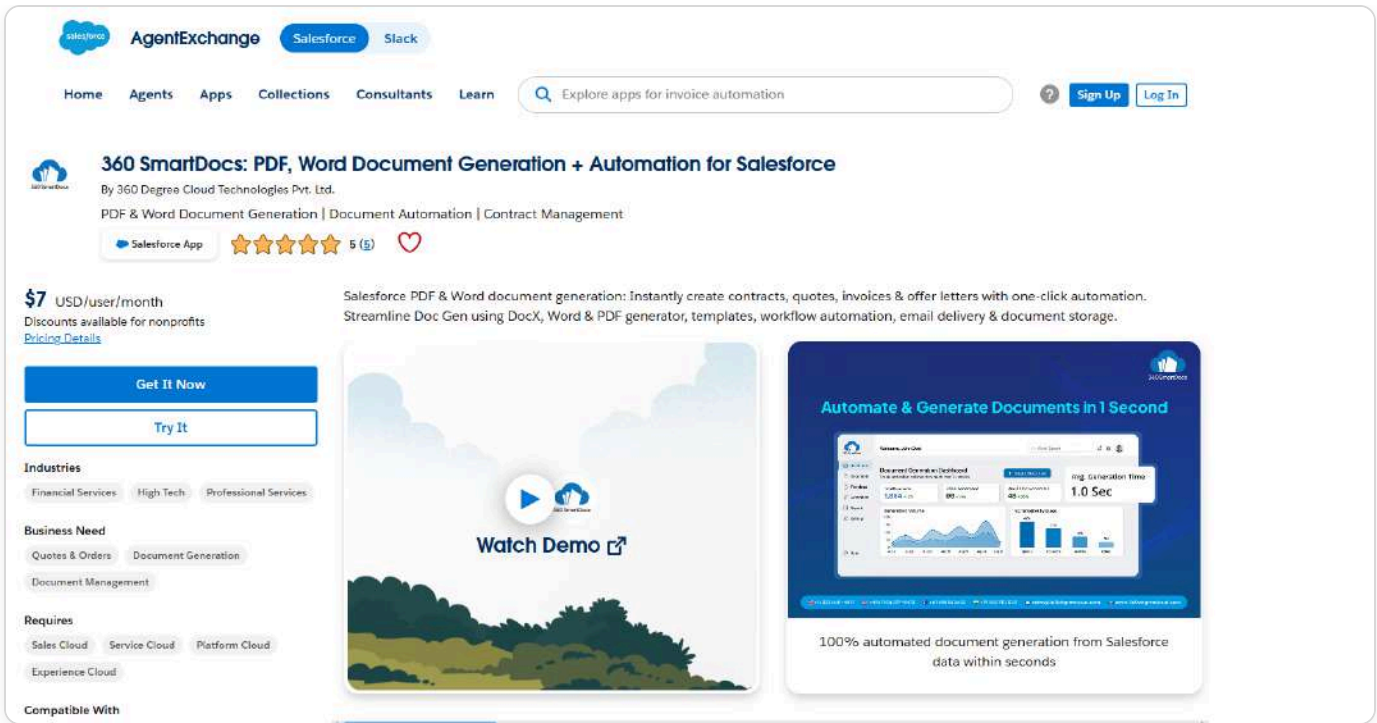
Note: Salesforce Classic is not supported. Ensure your org has Lightning Experience enabled.

3. Package Installation

3.1 Installing from AppExchange

Follow these steps to install 360 SmartDocs in your Salesforce org:

- 1 Log in to your Salesforce org as a **System Administrator**.
- 2 Navigate to the **360 SmartDocs** listing on Salesforce AppExchange.
- 3 Click the "**Get It Now**" button on the AppExchange listing page.
- 4 If prompted, log in to your Salesforce account and authorize the AppExchange to access your org.
- 5 Select the target org — choose **Production** for your live org or **Sandbox** for testing.
- 6 Confirm the terms and conditions, then click "**Confirm and Install**".



AppExchange listing page for 360 SmartDocs showing the product card with rating and the "Get It Now" button.

3.2 Choosing Installation Options


On the installation options page, you will be asked who should have access to the package:

- 1 Select one of the following options:
 - **Install for Admins Only** (Recommended) — Only System Administrators will see the app initially. You can grant access to other users later via permission sets.
 - **Install for All Users** — All users in the org will have immediate access.
 - **Install for Specific Profiles** — Choose which profiles should have access.

- 2 Check the box to **"Approve Third-Party Access"** if prompted. This is required for SmartDocs to communicate with the document generation server.


- 3 Click **"Install"**.

- 4 Wait for the installation to complete. For large orgs, you may receive an email notification when installation finishes.




Install 360 SmartDocs


By 360 Degree Cloud technologies Pvt. Ltd.



Install for Admins Only



Install for All Users



Install for Specific Profiles...

I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install
Cancel

App Name	Publisher	Version Name	Version Number
360 SmartDocs	360 Degree Cloud technologies ver 0.1 Pvt. Ltd.		0.1.0

Additional Details [View Components](#)

Installation options page showing "Install for Admins Only" selected and the "Approve Third-Party Access" checkbox checked.

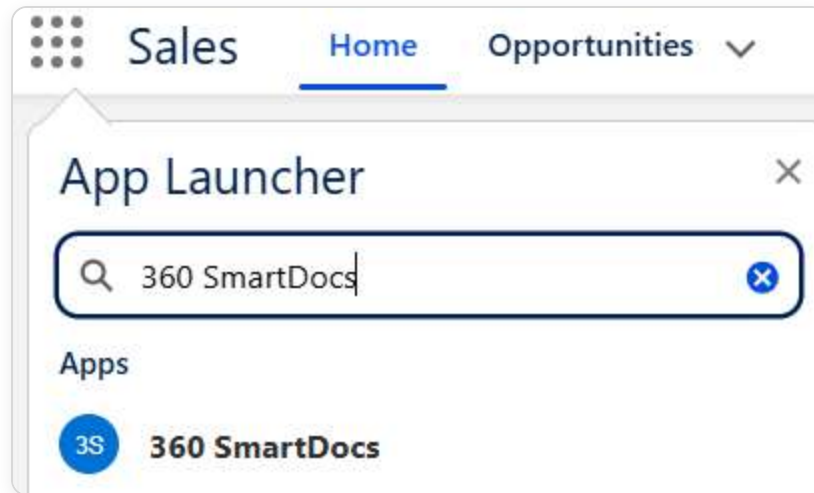
Tip: We recommend **"Install for Admins Only"** so you can complete the full setup before granting access to end users.

3.3 Verifying Installation

- 1
 Navigate to **Setup** → search for **"Installed Packages"** in the Quick Find box.
- 2
 Locate **360 SmartDocs** in the list of installed packages.
- 3
 Verify that the **Status** column shows **"Installed"** and the version number is correct.
- 4
 Open the **App Launcher** (the grid icon in the top-left of the navigation bar) and search for **"360 SmartDocs"**.
- 5
 Click on the **360 SmartDocs** app to confirm it opens successfully.

Installed Packages										
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	360 SmartDocs	360 Degree Cloud technologies Pvt. Ltd.	0.1.0	x360SmartDocs	3/31/2026, 6:58 AM	✓	1	7	9	Passed

Setup → Installed Packages showing 360 SmartDocs with Status "Installed" and version 1.0.



App Launcher search results showing the 360 SmartDocs app with its icon.

4. Post-Installation Setup

After installing the package, complete the following steps in order to fully configure 360 SmartDocs. Each step builds on the previous one.

Important: Complete these steps in the order listed. Skipping steps may result in errors or missing functionality for end users.

4.1 Step 1: External Client App / OAuth Configuration

The 360 SmartDocs package uses an External Client App (ECA) for authentication between Salesforce and the document generation server, as well as the Microsoft Word Add-In. You must create a permission set, assign it to the ECA, configure its OAuth policies, and assign it to the admin user **before** performing the license authorization.

Step 1a: Create a Permission Set for the External Client App

1 Navigate to **Salesforce Setup** (click the gear icon → "Setup").

2 In the **Quick Find** box, search for "**Permission Sets**" and click it.

3 Click **"New"** to create a new permission set.

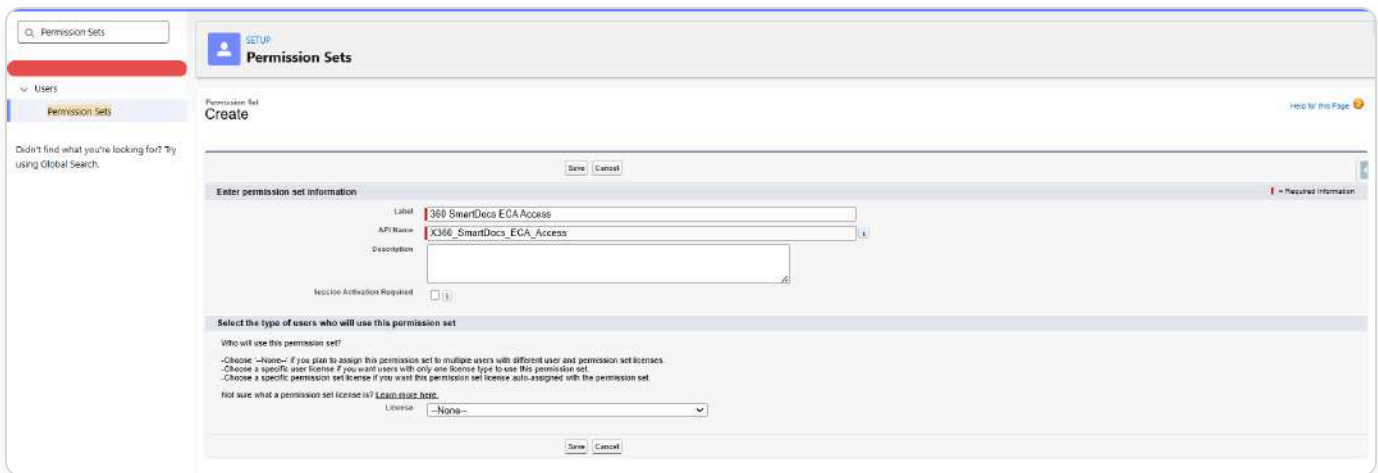
4 Fill in the details:

- o **Label:** Enter a descriptive name, e.g., **"360 SmartDocs ECA Access"**
- o **API Name:** Auto-populates (e.g., `X360_SmartDocs_ECA_Access`)
- o **License:** Leave as **"--None--"** (Salesforce default)

5 Click **"Save"**.

6 After saving, you will be on the permission set detail page. **Assign this permission set to the admin user** (the user who will perform the license authorization):

- o Click **"Manage Assignments"**
- o Click **"Add Assignment"**
- o Search for and select the admin user (e.g., **John Doe**)
- o Click **"Assign"**



Setup → Permission Sets → New Permission Set form with Label "360 SmartDocs ECA Access".

Step 1b: Configure the External Client App OAuth Policies

1 In **Salesforce Setup**, search for **"External Client App Manager"** in the Quick Find box and click it.

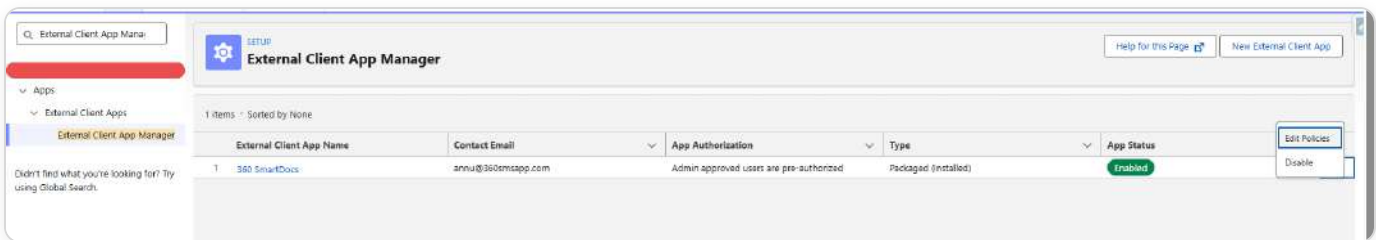
2 In the External Client App Manager list, locate the **"360 SmartDocs"** External Client App.

3 Click the **dropdown arrow** (▼) on the right side of the 360 SmartDocs row, and select **"Edit Policies"**.

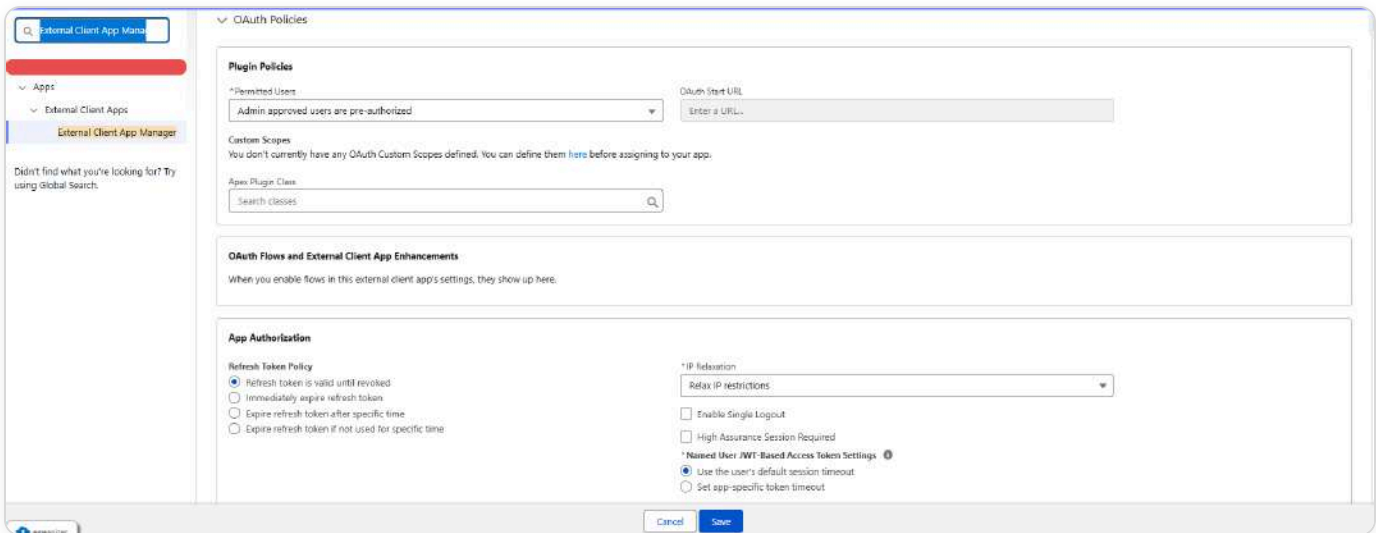
4 On the management page, click **"OAuth Policies"**.

- 5 Configure the following OAuth policy settings:
- **Permitted Users:** Set to **"Admin approved users are pre-authorized"**
 - **Refresh Token Policy:** Set to **"Refresh token is valid until revoked"**
 - **IP Relaxation:** Set to **"Relax IP restrictions"** (Bypass IP enforcement)

6 Click **"Save"**.



Setup → External Client App Manager showing the 360 SmartDocs row with the dropdown menu and "Edit Policies" option highlighted.



Edit Policies screen showing the three OAuth policy dropdowns configured with the recommended values.

Step 1c: Assign the Permission Set to the External Client App

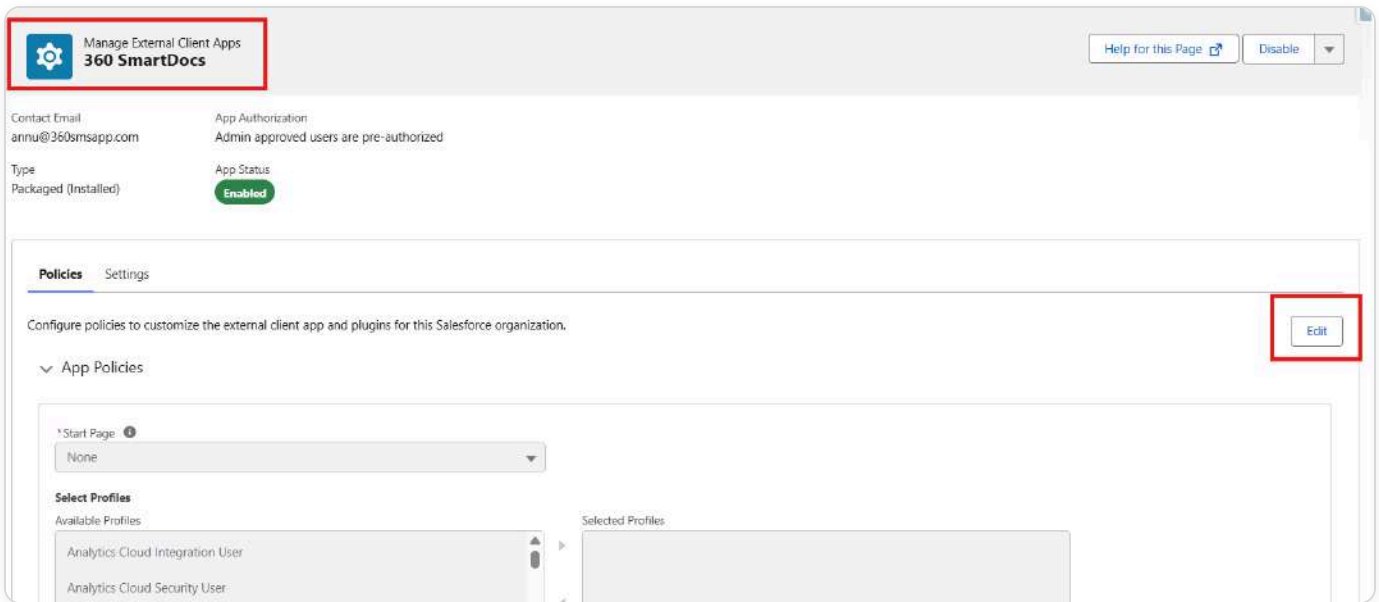
1 After saving the OAuth policies, you will be on the 360 SmartDocs external client app management page.

2 Click the **Edit** button on the same page.

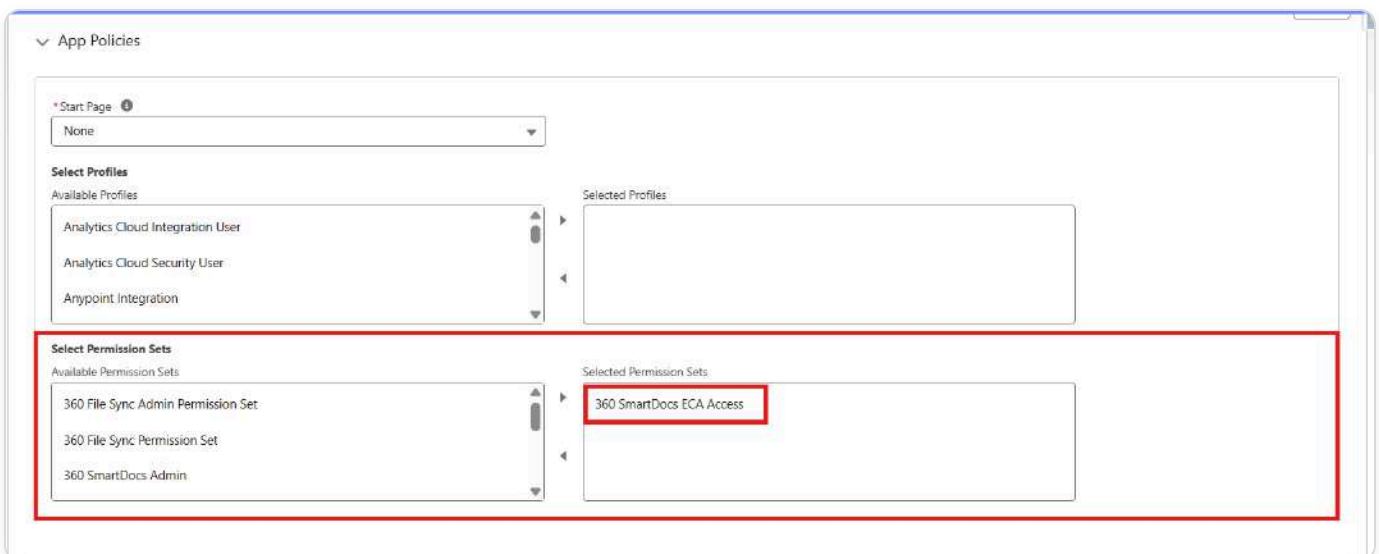
3 Scroll down to the **"Permission Sets"** section.

4 Select the permission set you created in Step 1a (e.g., **"360 SmartDocs ECA Access"**).

5 Click **"Save"**.



External Client App → 360 SmartDocs external client app management page with edit button.



External Client App → Permission Sets showing "360 SmartDocs ECA Access" in the Selected list.

Warning: These OAuth policies and the permission set assignment are **required** for the Microsoft Word Add-In and server integrations to authenticate properly. Skipping this step will prevent the Add-In from connecting to Salesforce and may cause document generation and license authorization failures.

Tip: Only users assigned to the permission set linked to the External Client App will be authorized to use the Word Add-In and server integrations. Make sure to assign this permission set to all users who need these capabilities.

4.2 Step 2: License Activation & Sync

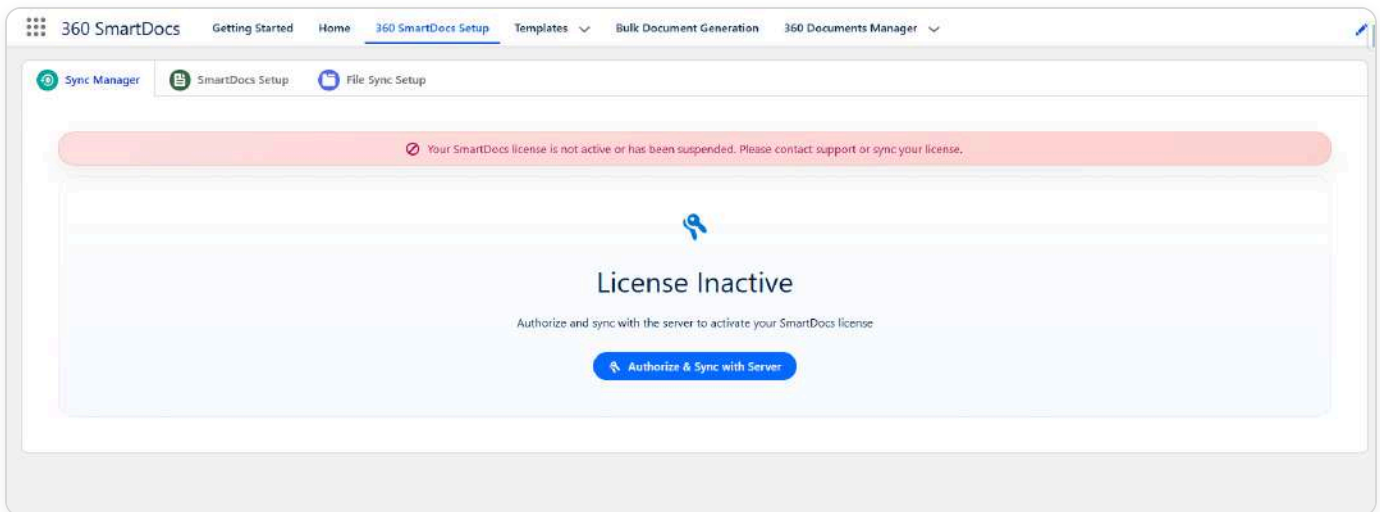
Now that the External Client App is configured, you can activate and sync your 360 SmartDocs license.

Important: Before initiating the license sync, ensure the required Permission Set (e.g., **360 SmartDocs ECA Access**) has been assigned to your user account in Step 1c. Attempting to authorize without the correct permission set will result in a **"callback error: success: false"** error.

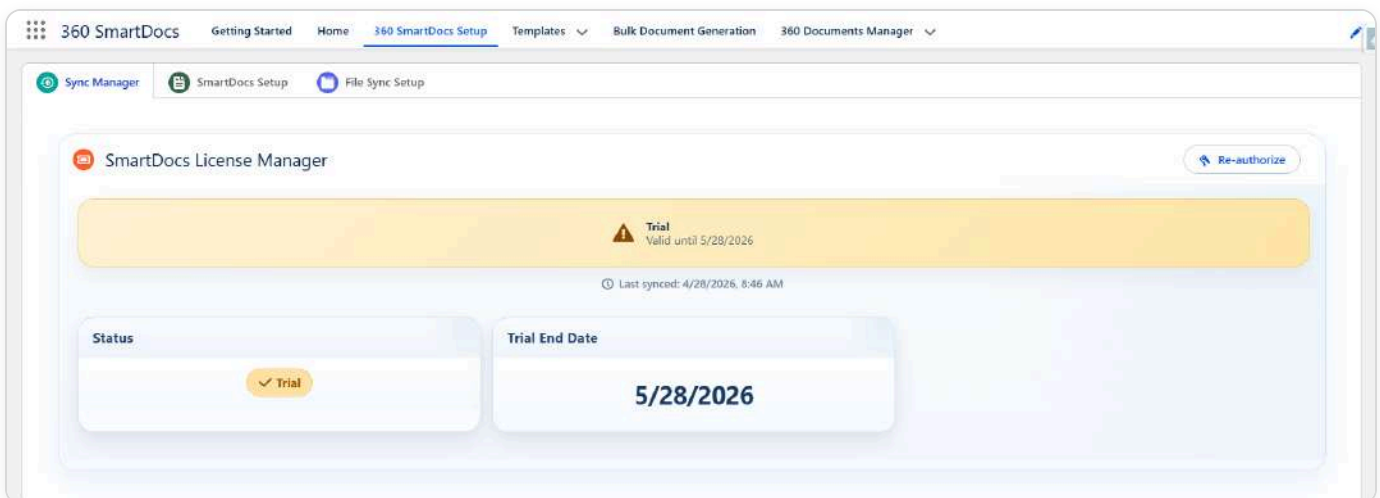
- 1 Open the **App Launcher** and navigate to the **360 SmartDocs** app.
- 2 Click the **"Smart Docs Setup"** tab in the top navigation bar.
- 3 In the left sidebar, **"License Details"** should be selected by default (it is the first menu item).
- 4 You will see the License Sync component. If the license is inactive, you will see a centered message saying **"License Inactive"** with an **"Authorize & Sync with Server"** button.
- 5 Click the **"Authorize & Sync with Server"** button.
- 6 A browser popup window will open for OAuth authorization. Follow the prompts to authorize the connection between your Salesforce org and the SmartDocs server.
- 7 Once authorization is complete, the popup will close automatically. The License Details panel will refresh. What you see depends on your license type:
 - **Fully Activated License:**
 - **License Status** — Active (with a green status badge)
 - **Last Synced** — The date and time of the last successful sync

- **Trial License:**
 - **License Status** — Trial
 - **Last Synced** — The date and time of the last successful sync
 - **Trial End Date** — The date your trial period expires

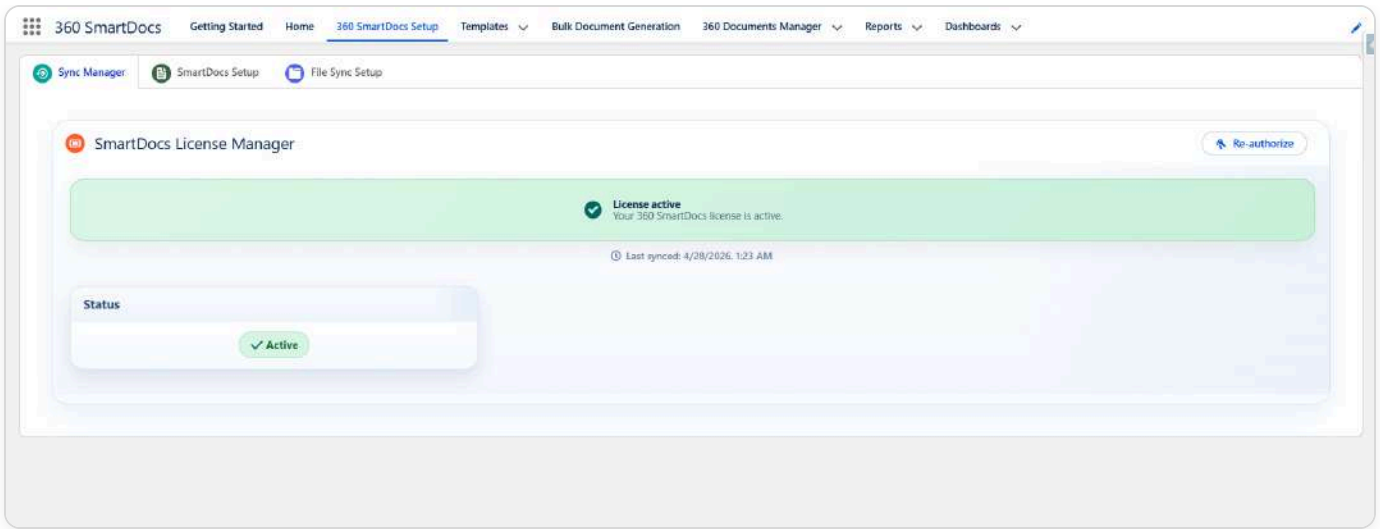
Note: If you are on a **trial license**, the License Details panel will only display the **Trial** status and **Trial End Date** — it will not show the full license settings grid (credits, features, etc.). This is expected behavior. The full license details will appear once your license is fully activated after purchase.



SmartDocs Setup → License Details in its inactive state, showing the "Authorize & Sync" button.



SmartDocs Setup → License Details after successful authorization, showing trial status, sync timestamp, and license tiles.



SmartDocs Setup → License Details after successful authorization, showing Active status, sync timestamp, and license tiles.

Tip: If you ever need to re-authorize (for example, after a sandbox refresh), click the **"Re-Authorize"** button that appears in the header when the license is active.

4.3 Step 3: Permission Set Assignment

360 SmartDocs includes two permission sets that control access to the application:

Permission Set	Purpose	Assign To
360 SmartDocs Admin	Full administrative access: configure the application, manage templates, manage buttons, view error logs, and generate documents.	Salesforce Administrators and SmartDocs power users
360 SmartDocs User	Standard user access: generate documents from records, use bulk generation, and view generated documents.	Sales reps, managers, and all other end users who need to generate documents

Assigning Permission Sets via SmartDocs Setup

1 In the **SmartDocs Setup** page, click **"Permission Set Assignment"** in the left sidebar.

2 The Permission Set Assignment panel loads, displaying a table of all users in your org.

3 The table has columns for **User Information** (Name, Email, Username, Profile, Role) and checkboxes for each permission set: **360 SmartDocs Admin** and **360 SmartDocs User**.

4 Use the **Filter** section (click "Toggle Filters" if hidden) to search for users by Profile, Name, Email, or Username.

5 Check the appropriate permission set checkbox for each user:

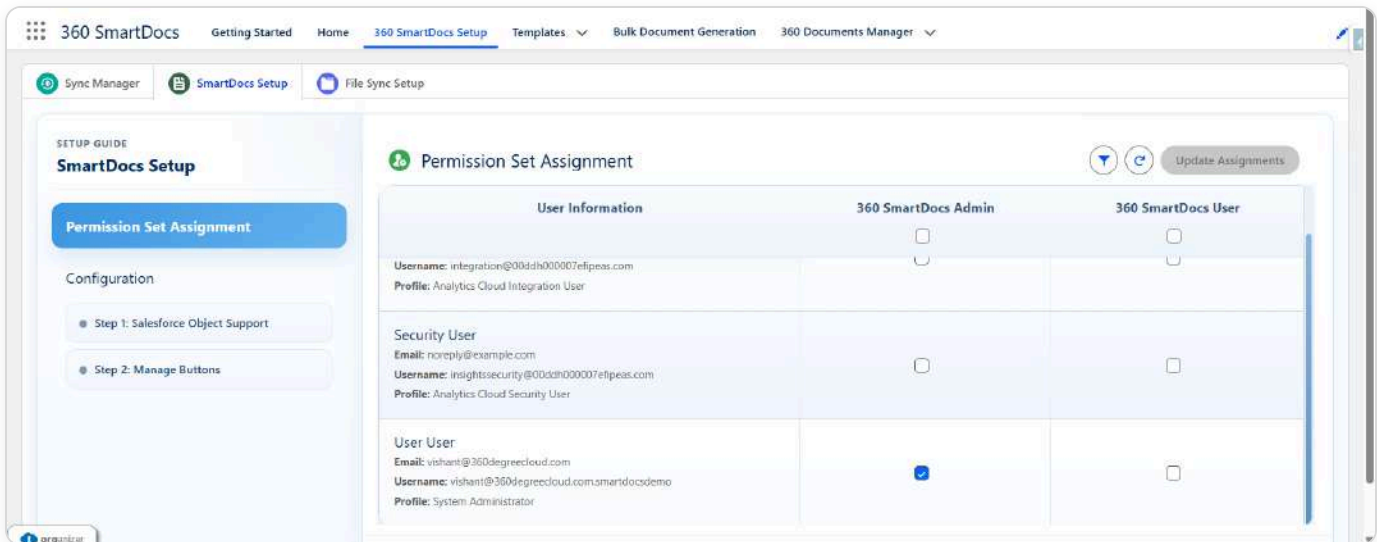
- Check **360 SmartDocs Admin** for administrators
- Check **360 SmartDocs User** for end users

6 To assign a permission set to all visible users at once, use the **Select All** checkbox in the column header.

7 Once you have made your selections, click the **"Update Assignments"** button at the top-right of the panel.

8 A success notification will confirm the assignments have been saved.

Important: Use the **"Select All"** option with caution. Ensure you exclude unsupported users when assigning the **360 SmartDocs User** permission set. For example, inactive users or users with an incompatible Salesforce license (e.g., Platform, Identity, or Chatter-only licenses) may cause assignment errors. Filter or deselect such users before clicking **"Update Assignments"**.



SmartDocs Setup → Permission Set Assignment panel showing users with Admin/User checkboxes and the "Update" button.

Note: Users must **log out and log back in** (or refresh their browser session) after permission set assignment for the changes to take effect.

4.4 Step 4: Template Sharing Rules for End Users

The `360 SmartDocs User` permission set grants **Read** access to the `x360dc__Template__c` object but does **not** include "View All" permission. This means end users can only see templates that are explicitly shared with them. You must create **Sharing Rules** on the `x360dc__Template__c` object to grant visibility to end users.

Important: Without sharing rules, end users will **not see any templates** in the document generation wizard, even though they have the `360 SmartDocs User` permission set assigned. The permission set allows access to the object, but the sharing model controls which specific records are visible.

Step 4a: Create a Public Group for SmartDocs Users

- 1 Go to **Setup** → search for "**Public Groups**" in Quick Find.
- 2 Click "**New**" to create a new group.
- 3 Set the **Label** to `All SmartDocs Users` (or a name that fits your organization).
- 4 In the "**Search**" dropdown, select "**Users**" and add all users who have the `360 SmartDocs User` permission set. Alternatively, select "**Roles**" or "**Roles and Subordinates**" to include entire teams.
- 5 Click "**Save**".

Tip: If your organization uses Roles, you can add roles instead of individual users. This way, new users assigned to those roles will automatically be included in the group.

Step 4b: Create a Sharing Rule on `x360dc__Template__c`

- 1 Go to **Setup** → search for "**Sharing Settings**" in Quick Find.

2 Scroll down to the **"Template"** (x360dc_Template_c) section.

3 Click **"New"** under the Template Sharing Rules list.

4 Enter a **Label**, for example: `Share Active Templates with All Users` .

5 For **Rule Type**, select **"Based on criteria"**.

6 Set the criteria: **Field:** `x360dc__IsActive__c` **Operator:** `equals` **Value:** `True` .

7 Under **"Share with"**, select the Public Group you created (e.g., `All SmartDocs Users`).

8 Set the **Access Level** to **"Read Only"**.

9 Click **"Save"**.

Note: Sharing rule recalculation may take a few minutes for large organizations. You can monitor the progress in Setup → Sharing Settings.

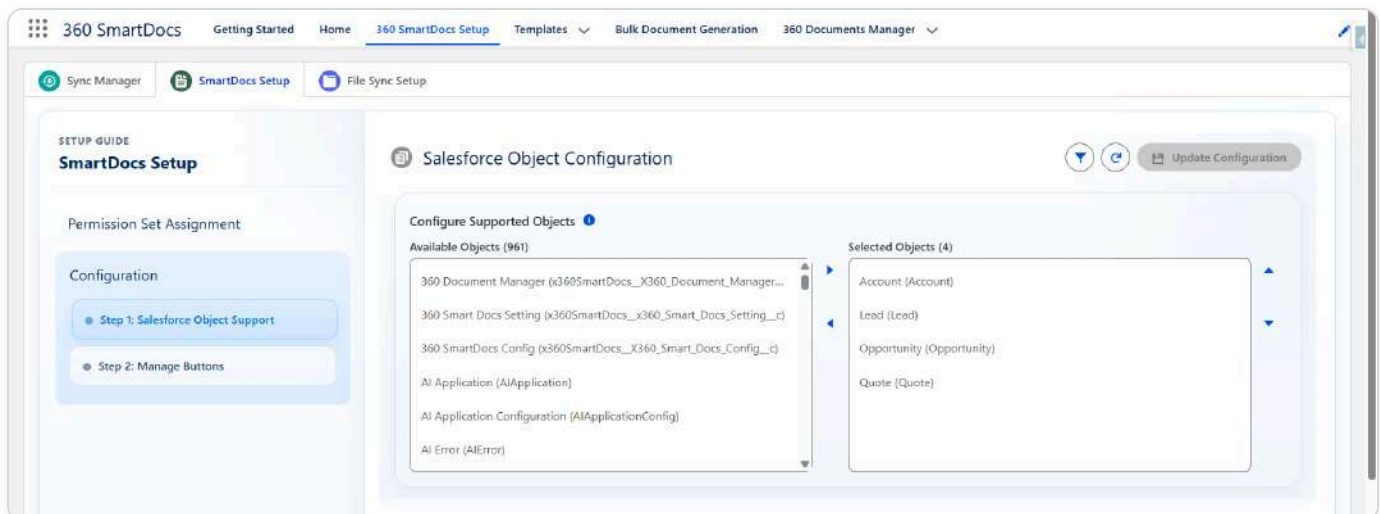
Recommended Sharing Rule Configurations

Scenario	Rule Type	Criteria / Owner	Share With	Access Level
All active templates visible to all users	Criteria-based	<code>x360dc__IsActive__c = TRUE</code>	Public Group: All SmartDocs Users	Read Only
Templates shared by department	Owner-based	Owned by specific Admin Role	Role: Sales / Support / etc.	Read Only
Specific templates for specific teams	Criteria-based	Standard/Custom Field (e.g., Name = "Sales Template")	Public Group: Sales Team	Read Only

4.5 Step 5: Object Configuration

Before users can generate documents, you must specify which Salesforce objects should be available for document generation in SmartDocs.

- 1 In the **SmartDocs Setup** page, click "**Configuration**" in the left sidebar.
- 2 You will see the Configuration overview page with two steps described. Click the "**Next**" button at the bottom or click the sub-tab "**Step 1: Salesforce Object Support**" in the sidebar.
- 3 The Object Configuration panel loads, showing a **dual listbox** interface:
 - **Left side:** Available Objects — all Salesforce objects in your org
 - **Right side:** Selected Objects — objects currently enabled for SmartDocs
- 4 Use the **search fields** above each list to filter objects by name.
- 5 Select objects from the **Available Objects** list and move them to the **Selected Objects** list. Common objects to enable include:
 - Account, Contact, Opportunity, Quote, Contract, Case, Lead
 - Any custom objects your organization uses for document generation
- 6 Click the "**Update Configuration**" button at the top-right to save your selections.
- 7 A success message will confirm the configuration has been saved.



Object Configuration dual listbox with Available Objects on the left and Selected Objects (Account, Contact, Opportunity, Quote) on the right.

Tip: You must enable at least one object before users can generate documents. You can return to this page at any time to add or remove objects.

4.6 Step 6: Creating Buttons on Objects

To allow users to generate documents from record pages or list views, you need to create buttons (actions) on the relevant Salesforce objects. SmartDocs supports three types of buttons:

Button Type	Where It Appears	Use Case
Quick Action	Record page highlight panel (actions menu)	Generate a document from a single record with a guided wizard
URL Button	Record detail page (button section or page layout)	Generate a document with pre-configured settings (template, type, mode)
List View Button	Object list view toolbar	Bulk generate documents for selected records from a list view

4.6.1 Creating a Quick Action

A Quick Action adds a "**Create Document**" button to the record page actions menu. When clicked, it opens the SmartDocs Document Generation Wizard as a modal dialog.

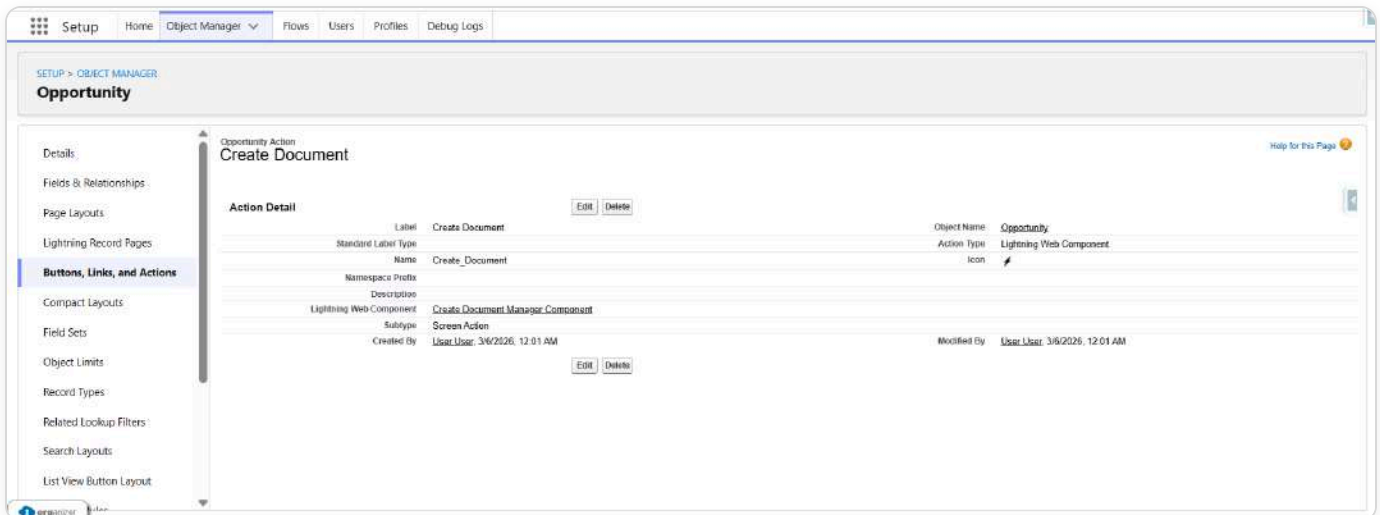
- 1 Navigate to **Salesforce Setup** → **Object Manager**.
- 2 Select the object you want to add the action to (e.g., **Opportunity**).
- 3 In the left sidebar of the object detail page, click "**Buttons, Links, and Actions**".
- 4 Click the "**New Action**" button.
- 5 Fill in the action details:
 - **Action Type:** Select "**Lightning Web Component**"

- **Lightning Web Component:** Select `x360dc__createDocumentManagerComponent` from the dropdown
- **Height:** Leave as default or set to a suitable pixel height (e.g., `500px`)
- **Label:** Enter a user-friendly name, e.g., **"Create Document"** or **"Generate Document"**
- **Name:** This auto-populates based on the label (e.g., `Create_Document`)

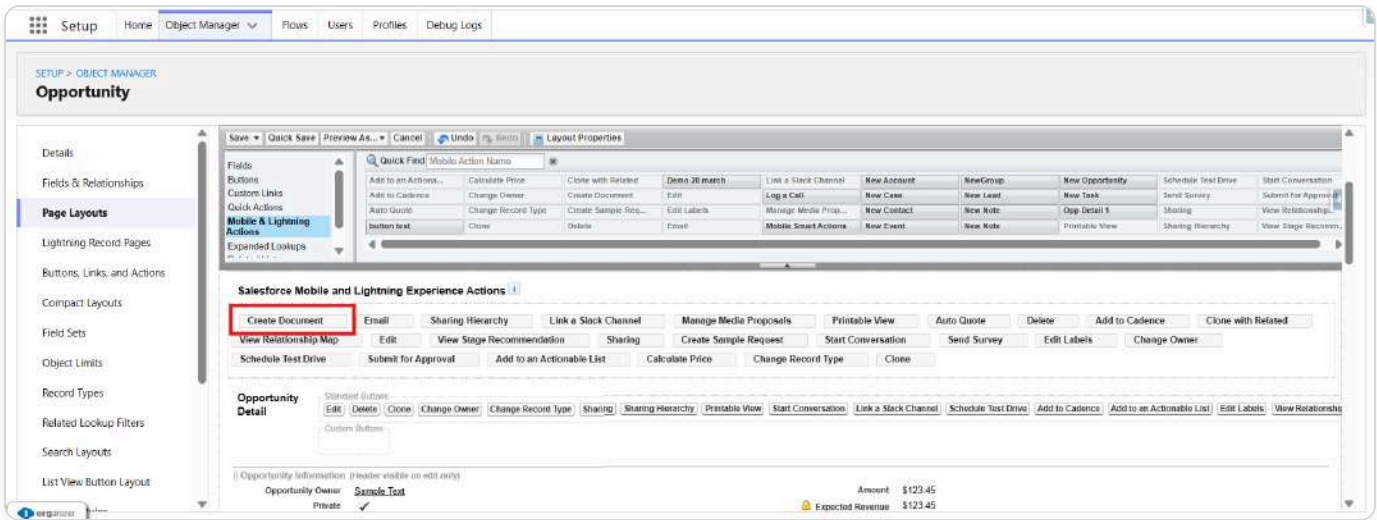
6 Click **"Save"**.

7 Now add the Quick Action to the object's **Page Layout**:

- Go back to the object in Object Manager
- Click **"Page Layouts"** in the left sidebar
- Click the page layout name to edit it
- In the layout editor, click **"Mobile & Lightning Actions"** in the palette at the top
- Find your newly created action (e.g., "Create Document")
- Drag it into the **"Salesforce Mobile and Lightning Experience Actions"** section of the layout
- Click **"Save"**



New Action form with Action Type "Lightning Web Component", the LWC set to `x360dc__createDocumentManagerComponent`, and Label "Create Document".



Page Layout editor showing "Create Document" action in the Mobile & Lightning Actions section of the Opportunity layout.

Note: The Quick Action launches the full Document Generation Wizard with template selection, optional recipient mapping, and optional email sending. No URL parameters are needed — the component automatically detects the record context.

4.6.2 Creating a URL Button

A URL Button navigates the user to the SmartDocs document generation component with pre-configured parameters. This allows you to create buttons that are pre-set to use a specific template, document type, or execution mode.

- 1 Navigate to **Salesforce Setup** → **Object Manager**.
- 2 Select the target object (e.g., **Opportunity**).
- 3 Click "**Buttons, Links, and Actions**" in the left sidebar.
- 4 Click "**New Button or Link**".
- 5 Fill in the button details:
 - **Label:** A descriptive name, e.g., "**Generate SOW (PDF)**"
 - **Name:** Auto-populates (e.g., `Generate_SOW_PDF`)
 - **Display Type:** Select "**Detail Page Button**"
 - **Behavior:** Select "**Display in existing window without sidebar or header**"
 - **Content Source:** Select "**URL**"

6

In the URL formula field, enter the SmartDocs URL with the appropriate parameters:

```
/lightning/cmp/x360dc__createDocumentManagerComponent?c__recordId={!Opportunity.Id
```

Replace `YOUR_TEMPLATE_ID` with the actual 18-character Salesforce ID of your Template record. Replace `{!Opportunity.Id}` with the appropriate merge field for your object (e.g., `{!Opportunity.Id}`, `{!Case.Id}`).

7

Click "**Save**".

8

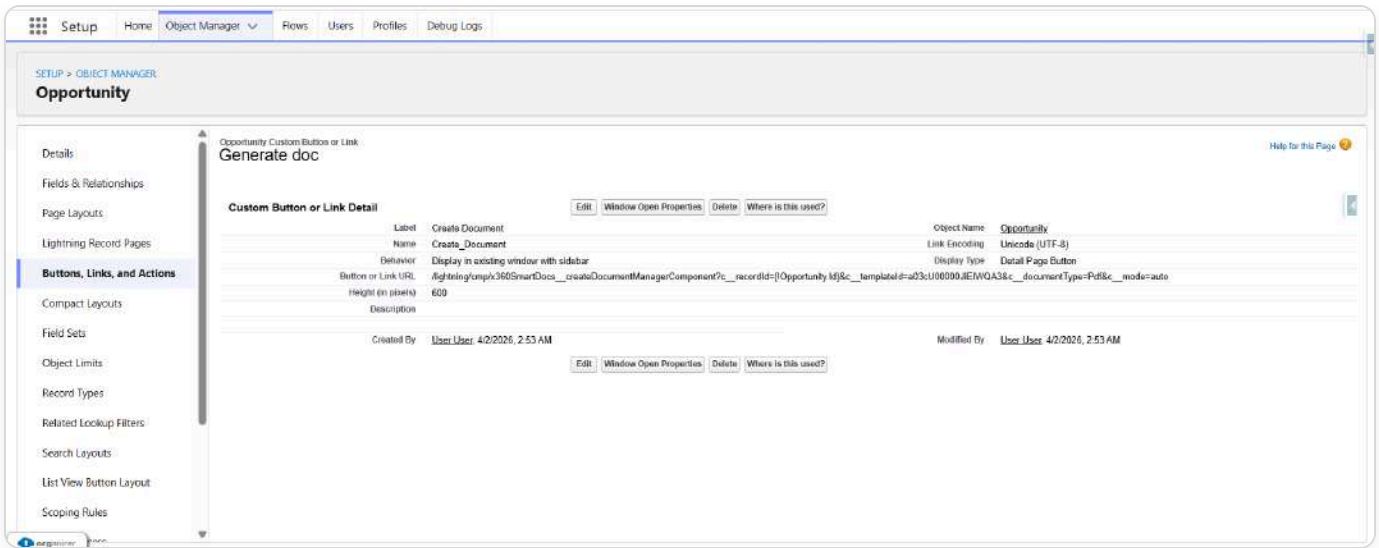
Add the button to the object's **Page Layout**:

- Edit the page layout for the object
- Click "**Buttons**" in the palette at the top
- Drag your new button into the "**Custom Buttons**" section of the layout
- Click "**Save**"

URL Parameters Reference

Parameter	Required	Description	Accepted Values
<code>c__recordId</code>	Yes	The Salesforce record ID of the record to generate the document for. Use a merge field to dynamically insert the current record's ID.	18-character Salesforce Record ID or merge field
<code>c__mode</code>	Yes	Controls the execution mode of the wizard. auto: Skips the wizard and immediately starts document generation. view: Shows the full wizard for user interaction (template selection, preview, etc.).	<code>auto</code> or <code>view</code>
<code>c__templateId</code>	Conditional	The ID of the Template record to use. Required when <code>c__mode=auto</code> . Optional when <code>c__mode=view</code> (user can select a template in the wizard).	18-character x360dc__Template__c Record ID

Parameter	Required	Description	Accepted Values
<code>c__documentType</code>	No	The output format for the generated document. If specified, the document type selector in the wizard is locked to this value.	<code>Doc</code> (DOCX) or <code>Pdf</code> (PDF)
<code>c__configKey</code>	No	A configuration key that loads pre-saved settings from a SmartDocs Button Configuration record. When provided, this overrides all other URL parameters (templated, mode, documentType) with the values stored in the config record. It also loads email configuration settings.	String matching <code>x360dc__SmartDocs_Button_Config__c.x360dc</code>



New Button or Link form showing "Generate SOW (PDF)" with Display Type "Detail Page Button", Content Source "URL", and the URL formula populated.

Example URL Patterns

Example 1: Auto-generate a PDF using a specific template:

```
/lightning/cmp/x360dc__createDocumentManagerComponent?c__recordId={!Opportunity.Id}&c__mode=auto
```

Example 2: Open the wizard in view mode (user selects template):

```
/lightning/cmp/x360dc__createDocumentManagerComponent?c__recordId={!Account.Id}&c__mode=view
```

Example 3: Use a config key to load all settings from a Button Configuration record:

```
/lightning/cmp/x360dc__createDocumentManagerComponent?c__recordId={!Quote.Id}&c__configKey=quote
```

Tip: Using `c__configKey` is the recommended approach for production deployments. It centralizes all button settings (template, mode, document type, email configuration) in a single configuration record that can be updated without modifying the button URL.

4.6.3 Creating a List View Button

A List View Button allows users to select multiple records from a list view and generate documents for all of them in bulk. This requires a Visualforce page as an intermediary.

Step A: Create the Visualforce Page

1 Navigate to **Salesforce Setup** → search for "**Visualforce Pages**" in the Quick Find box.

2 Click "**New**" to create a new Visualforce page.

3 Enter a **Label** and **Name** for the page. Use underscores in the Name field for readability (e.g., Label: **Create Documents VF** , Name: **Create_Documents_VF**). Avoid spaces or special characters in the Name field.

4 Paste the following code into the Visualforce page editor, replacing **Opportunity** with your target object's API name:

```
<apex:page standardController="Opportunity"
  extensions="x360dc.BulkDocumentGenerationVFController"
  recordSetVar="records"
  showHeader="false" sidebar="false" standardStylesheets="false">

  <x360dc:BulkDocumentGenerationComponent
    configKey=""
    templateId=""
    documentType=""
    mode=""
    selectedRecords="{!selectedRecords}"
    listViewId="{!listViewId}"
  />

</apex:page>
```

5 Check "**Available for Lightning Experience, Lightning Communities, and the mobile app**".

6 Click "**Save**".

Note: Replace `Opportunity` in `standardController="Opportunity"` with the API name of your target object (e.g., `Opportunity`, `Case`, `Custom_Object__c`). The `configKey` attribute can be left empty or set to a specific configuration key from your SmartDocs Button Configuration records. The three new optional attributes — `templateId` (single ID or comma-separated IDs for filtered template selection), `documentType` (`Doc`, `Docx`, or `Pdf`), and `mode` (`auto` to process immediately or `view` to show the wizard) — can be left empty for default behavior or set to control the component directly. See the **Component Attribute Reference** table in the Feature & User Guide (Section 11.4) for full details. The `x360dc:BulkDocumentGenerationComponent` is a Visualforce component included in the package — it handles the bulk generation UI automatically.

Tip — Naming Convention: When naming Visualforce pages, use underscores to separate words in the **Name** field (e.g., `Create_Documents_VF`, `Opportunity_Bulk_Gen_VF`). This improves readability and avoids issues with spaces or special characters. The **Label** field can use normal spacing.

Step B: Create the List View Button

- 1 Navigate to **Setup** → **Object Manager** → select the target object.
- 2 Click "**Buttons, Links, and Actions**" → "**New Button or Link**".
- 3 Fill in the button details:
 - **Label:** e.g., "**Bulk Generate Documents**"
 - **Display Type:** Select "**List Button**"
 - Check the box "**Display Checkboxes (for Multi-Record Selection)**"
 - **Content Source:** Select "**Visualforce Page**"
 - Select the Visualforce page you created in Step A
- 4 Click "**Save**".

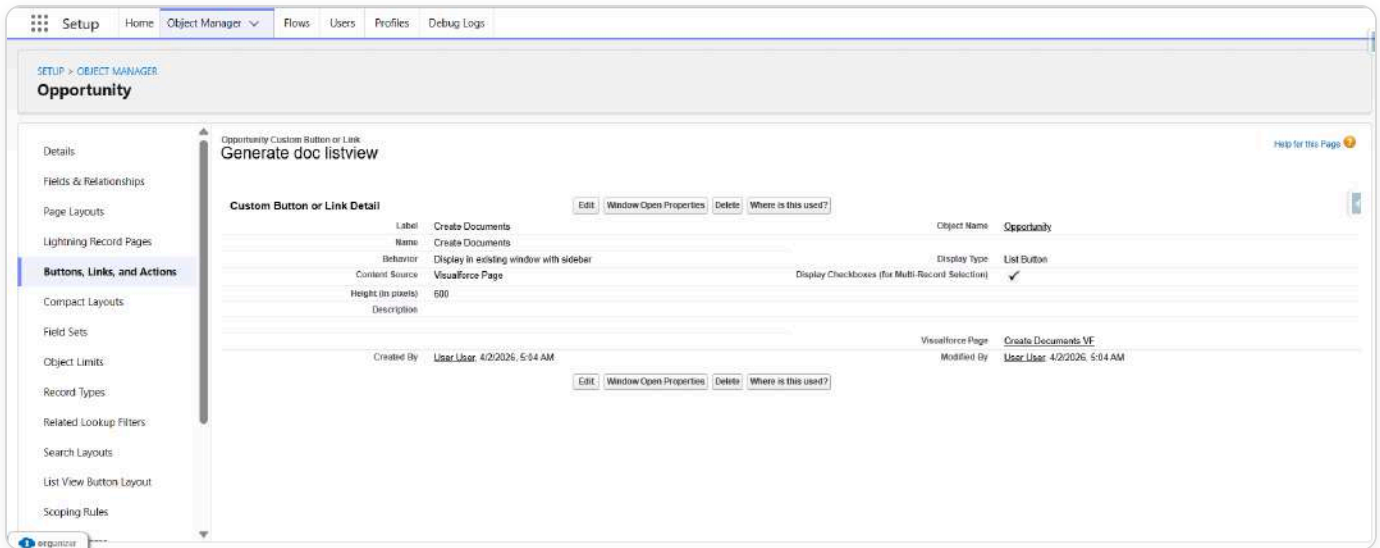
Step C: Add the Button to Search Layouts

- 1 In Object Manager for the same object, click "**Search Layouts for Salesforce Classic**" or "**List View Button Layout**".

2 Edit the **List View** layout.

3 Add your new button (e.g., "Bulk Generate Documents") to the **Selected Buttons** list.

4 Click **"Save"**.



New Button or Link form for a List View Button with "Visualforce Page" content source and the CreateDocumentsVF page selected.

Tip: When users select records from the list view and click the button:

- **0 records selected:** An error message is shown
- **1-199 records:** Documents are generated immediately for the selected records
- **200 records (Salesforce list view selection cap):** Users are given a choice to process the selected 200 or all records matching the current list view filter

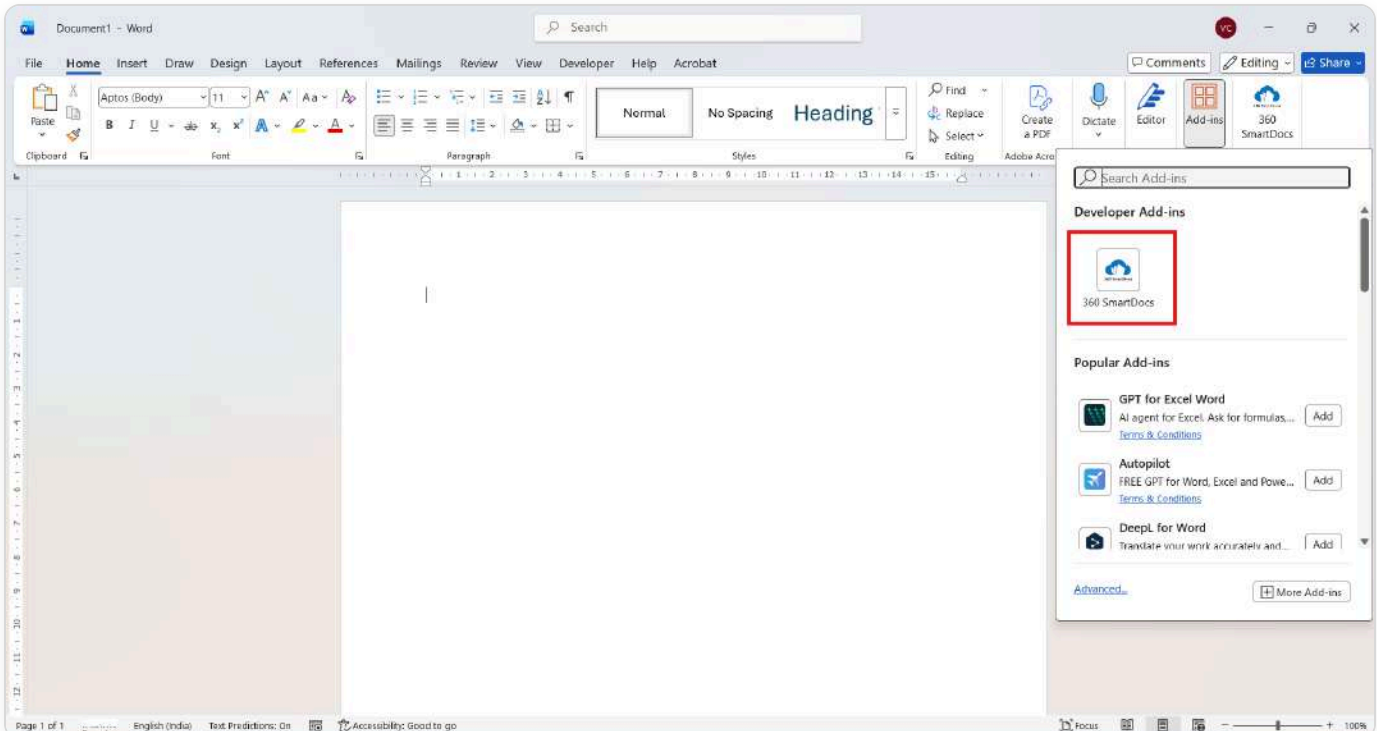
4.7 Step 7: Microsoft Word Add-In Installation

The 360 SmartDocs Word Add-In allows users to design and edit templates visually in Microsoft Word, with a dedicated sidebar for browsing Salesforce fields and inserting merge tokens.

1 Open **Microsoft Word** (desktop version, Microsoft 365 or Office 2019+).

2 Click the **"Insert"** tab in the Word ribbon.

- 3 Click "**Get Add-ins**" (or "**Office Add-ins**" depending on your Word version).
- 4 In the Office Add-ins dialog, switch to the "**Store**" tab.
- 5 Search for "**360 SmartDocs**".
- 6 Click "**Add**" next to the 360 SmartDocs Add-In in the search results.
- 7 The Add-In will install and appear in the Word ribbon (usually under the "**Home**" tab or a dedicated "**SmartDocs**" tab).
- 8 Click the SmartDocs icon in the ribbon to open the Add-In sidebar.
- 9 The sidebar displays a login screen. Click "**Sign in to Production**" or "**Sign in to Sandbox**" depending on your environment.
- 10 A Salesforce login window will open. Enter your **Salesforce username and password**, then follow the prompts to authorize the connection.



Microsoft Word with "360 SmartDocs" in the search results.

Note: The Word Add-In requires the External Client App / OAuth configuration from Step 3 to be completed. If users cannot connect, verify that the OAuth policies are set correctly and that the user has the appropriate permission set assigned.

Important: Document templates (`.docx` files) must be created and edited in **Microsoft Word using the 360 SmartDocs Word Add-In**. The Add-In provides a visual interface for inserting Salesforce merge fields, previewing with real data, and publishing templates directly to Salesforce. Do not attempt to create or edit templates with merge fields directly within Salesforce — this may result in incorrect template structure, missing merge fields, or upload failures. You may also upload a pre-made sample `.docx` file to the template record if one is provided.

5. Verification Checklist

After completing all setup steps, use this checklist to verify that 360 SmartDocs is fully configured and ready for use:

- 360 SmartDocs app** is visible in the App Launcher and opens successfully
- All **five tabs** are visible: Getting Started, Smart Docs Setup, Templates, Bulk Document Generation, 360 Document Manager
- License sync** shows an "Active" status on the SmartDocs Setup → License Details page
- Permission sets** are assigned to at least one admin user (`360 SmartDocs Admin`) and one test user (`360 SmartDocs User`)
- Template Sharing Rules** are configured so that end users with the `360 SmartDocs User` permission set can see active templates in the document generation wizard
- External Client App OAuth** policies are configured with "Admin approved users are pre-authorized"
- At least one object** is enabled in SmartDocs Setup → Configuration → Salesforce Object Support
- A **Quick Action or URL Button** is created on at least one object and is visible on the record page
- A test user with `360 SmartDocs User` permission can see the SmartDocs app and the Quick Action

on a record page

- The **Microsoft Word Add-In** is installed and can successfully connect to your Salesforce org

- A test **document generation** completes successfully (create a simple template, generate a document, verify the output file)

6. Troubleshooting Common Installation Issues

Issue	Likely Cause	Resolution
360 SmartDocs app not visible in App Launcher	Permission set not assigned or user not logged out/in after assignment	Assign <code>360 SmartDocs Admin</code> or <code>360 SmartDocs User</code> permission set to the user. Have them log out and log back in.
License shows "Inactive" after clicking "Authorize & Sync with Server"	OAuth popup was blocked by the browser, or authorization was not completed	Disable popup blockers for your Salesforce domain. Try the authorization again. Ensure you complete the full OAuth flow in the popup.
"Callback error: success: false" during Salesforce connection	Required Permission Set is not assigned to the user, incomplete user authorization, or misconfigured Connected App settings	1) Ensure the correct Permission Set (e.g., 360 SmartDocs ECA Access) is assigned to the user before initiating the connection. 2) Verify the External Client App OAuth policies are configured correctly (see Step 1b). 3) Confirm the Permission Set is added to the External Client App's permitted list (see Step 1c). 4) Have the user log out and log back in, then retry the authorization.
"Record Id is missing in the button configuration" error when clicking a URL button	The <code>c__recordId</code> parameter is missing or the merge field is incorrect	Verify the URL includes <code>c__recordId={!Object.Id}</code> with the correct object merge field (e.g., <code>{!Opportunity.Id}</code>).
"Execution mode is missing" error	The <code>c__mode</code> parameter is not included in the button URL	Add <code>&c__mode=auto</code> or <code>&c__mode=view</code> to the button URL.
"Template Id is missing" error	The <code>c__templateId</code> parameter is missing when mode is set to <code>auto</code>	Add <code>&c__templateId=YOUR_TEMPLATE_ID</code> to the URL, or set <code>c__mode=view</code> to let users select a template.
No templates appear in the template selection	Templates are not active, not mapped to the correct	1) Check that the template's <code>IsActive</code> checkbox is checked. 2) Verify the

Issue	Likely Cause	Resolution
dropdown	object, the object is not enabled in Object Configuration, or Sharing Rules are not configured	template's <code>SObject_Name</code> matches the record's object. 3) Ensure the object is enabled in SmartDocs Setup → Configuration → Object Support. 4) Verify that Sharing Rules on x360dc_Template_c are configured to grant the end user visibility to the template records (see Step 4: Template Sharing Rules).
Word Add-In cannot connect to Salesforce	External Client App OAuth policies not configured, or user not assigned to a permitted permission set	Complete Step 3 (External Client App / OAuth Configuration). Ensure the user's permission set is added to the External Client App's permitted permission sets.
Document generation fails with a server error	Remote Site Setting is missing, or the document generation server is unreachable	Verify the <code>x360SmartDocs</code> Remote Site Setting exists in Setup → Remote Site Settings and is active. Check the Error Log tab for detailed error messages.
Quick Action not visible on record page	Action not added to the page layout	Edit the object's page layout and add the Quick Action to the "Salesforce Mobile and Lightning Experience Actions" section. Also check that the user's profile/permission set has access to the action.
Bulk generation button not visible on list view	Button not added to the list view search layout	In Object Manager, edit the Search Layouts / List View Button Layout and add the button to the Selected Buttons list.

7. URL Parameter Reference

This is the complete reference for all URL parameters supported by the `x360dc__createDocumentManagerComponent` Lightning Web Component.

Base URL

Parameters

Parameter	Required	Type	Description	Values
<code>c__recordId</code>	Yes	String (ID)	The 18-character Salesforce record ID of the parent record. Use merge fields in button URLs to dynamically insert the ID.	<code>{!Account.</code> <code>{!Opportun</code> <code>{!Custom_0</code>
<code>c__mode</code>	Yes	String	<p>auto — Immediately starts document generation without showing the wizard. Requires <code>c__templateId</code> .</p> <p>view — Displays the full Document Generation Wizard where the user can select a template, choose document type, and optionally send an email.</p>	<code>auto</code> <code>view</code>
<code>c__templateId</code>	Conditional	String (ID)	The 18-character ID of the <code>x360dc__Template__c</code> record to use for document generation. Required when <code>c__mode=auto</code> . When <code>c__mode=view</code> , it pre-selects the template in the wizard but the user can change it.	<code>a01Hn00000.</code>
<code>c__documentType</code>	No	String	Sets the output document format. When specified, the document type dropdown in the wizard is locked to this value.	<code>Doc</code> (Micro: DOCX) <code>Pdf</code> (PDF)
<code>c__configKey</code>	No	String	A unique key matching the <code>x360dc__Config_Key__c</code> field on a <code>x360dc__SmartDocs_Button_Config__c</code> record. When provided, all settings (template, mode, document type, email configuration) are loaded from the config record. This overrides any other URL parameters.	Any alphanu (e.g., <code>opp_sc</code> <code>account_nd.</code>

Validation Rules

The component validates URL parameters on load. If validation fails, the wizard enters view-only mode and displays error messages:

- If `c__recordId` is missing: **"Record Id is missing in the button configuration"**
- If `c__mode` is missing: **"Execution mode is missing in the button configuration"**
- If `c__templateId` is missing and `c__mode` is not `view`: **"Template Id is missing in the button configuration"**

Config Key Behavior

When `c__configKey` is provided, the component calls the server to load the full `SmartDocs_Button_Config__c` record. The following fields from the config record are applied:

Config Record Field	Overrides	Purpose
<code>x360dc__Template_Id__c</code>	<code>c__templateId</code>	Pre-selects the template
<code>x360dc__Mode__c</code>	<code>c__mode</code>	Sets execution mode
<code>x360dc__Document_Type__c</code>	<code>c__documentType</code>	Sets output format
<code>x360dc__Object_API_Name__c</code>	—	Sets object context for email field resolution
<code>x360dc__Email_Enabled__c</code>	—	Enables/disables the email step in the wizard
<code>x360dc__Email_To_Fields__c</code>	—	Pre-configures email To recipients
<code>x360dc__Email_Cc_Fields__c</code>	—	Pre-configures email CC recipients
<code>x360dc__Email_Bcc_Fields__c</code>	—	Pre-configures email BCC recipients
<code>x360dc__Email_Template_Id__c</code>	—	Pre-selects an email template
<code>x360dc__Email_From_Type__c</code>	—	Sets the From address type (User or OrgWide)

8. Appendix: Permission Sets Detail

360 SmartDocs Admin Permission Set

Provides full administrative access to all 360 SmartDocs features and configuration.

Category	Access Level
x360dc__Template__c	Create, Read, Edit, Delete, View All, Modify All
x360dc__X360_Document_Manager__c	Create, Read, Edit, Delete, View All, Modify All
x360dc__SmartDocs_Button_Config__c	Create, Read, Edit, Delete, View All, Modify All
x360dc__X360_Smart_Docs_Config__c	Create, Read, Edit, Delete, View All, Modify All
x360dc__Error_Log__c	Create, Read, Edit, Delete, View All, Modify All
All custom fields	Read and Edit
All Apex classes	Enabled
360 SmartDocs application	Visible
All custom tabs	Visible (Getting Started, Smart Docs Setup, Templates, Bulk Document Generation, 360 Document Manager, Error Logs, SmartDocs Config)
Template Record Types	Main_Template, Sub_Template

360 SmartDocs User Permission Set

Provides standard user access for generating and viewing documents.

Important: The User permission set grants **Read** access to `x360dc__Template__c` but does **not** include "View All". End users will only see templates shared with them via **Sharing Rules**. See [Step 4: Template Sharing Rules](#) for setup instructions.

Category	Access Level
x360dc_Template__c	Read (Sharing Rules required for record visibility)
x360dc_X360_Document_Manager__c	Create, Read, Edit
x360dc_SmartDocs_Button_Config__c	Read
Required Apex classes	Enabled (document generation and retrieval classes only)
360 SmartDocs application	Visible
Core tabs	Visible (Getting Started, Templates, Bulk Document Generation, 360 Document Manager)

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