Installation & Setup Guide

PRODUCT GUIDE • VERSION 1.25.2

Step-by-step instructions for installing and configuring 360 SmartDocs
in your Salesforce organization

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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
- **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
- **360 File Sync** — Sync Salesforce files to external cloud storage (Google Drive, OneDrive, SharePoint, AWS S3, SFTP)

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.

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	Yes	Full support
Essentials Edition	No	Limited API and customization support

2.2 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"**.

3.2 Choosing Installation Options

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

- **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.

1. Click **"Install"**.
2. Wait for the installation to complete. For large orgs, you may receive an email notification when installation finishes.

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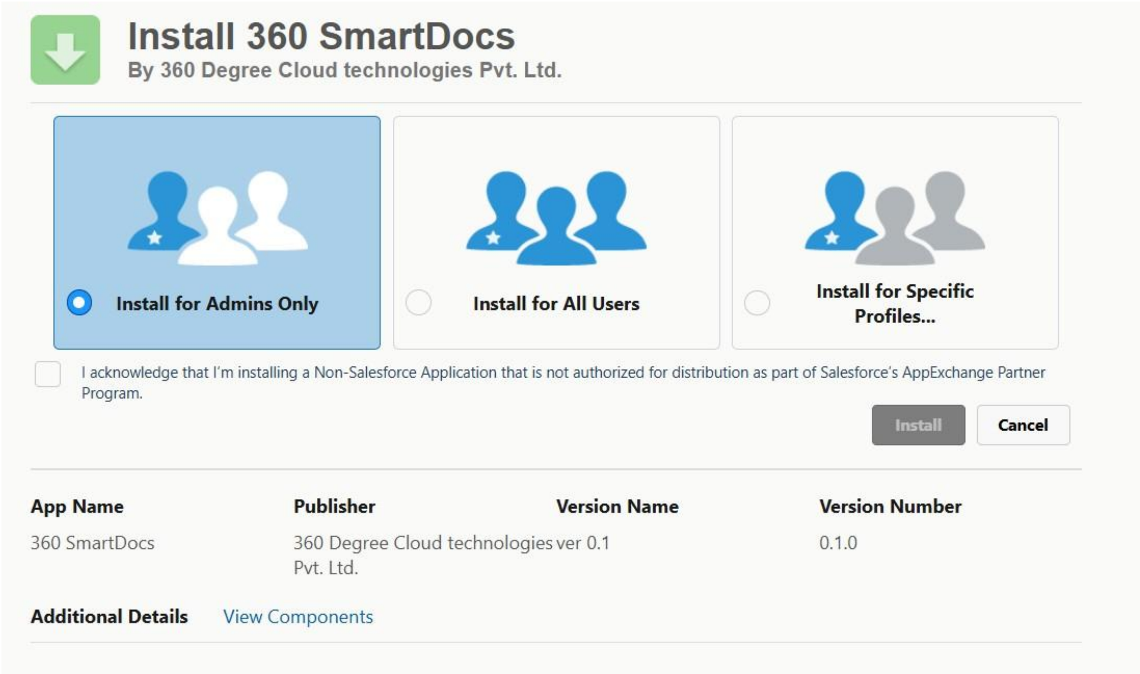
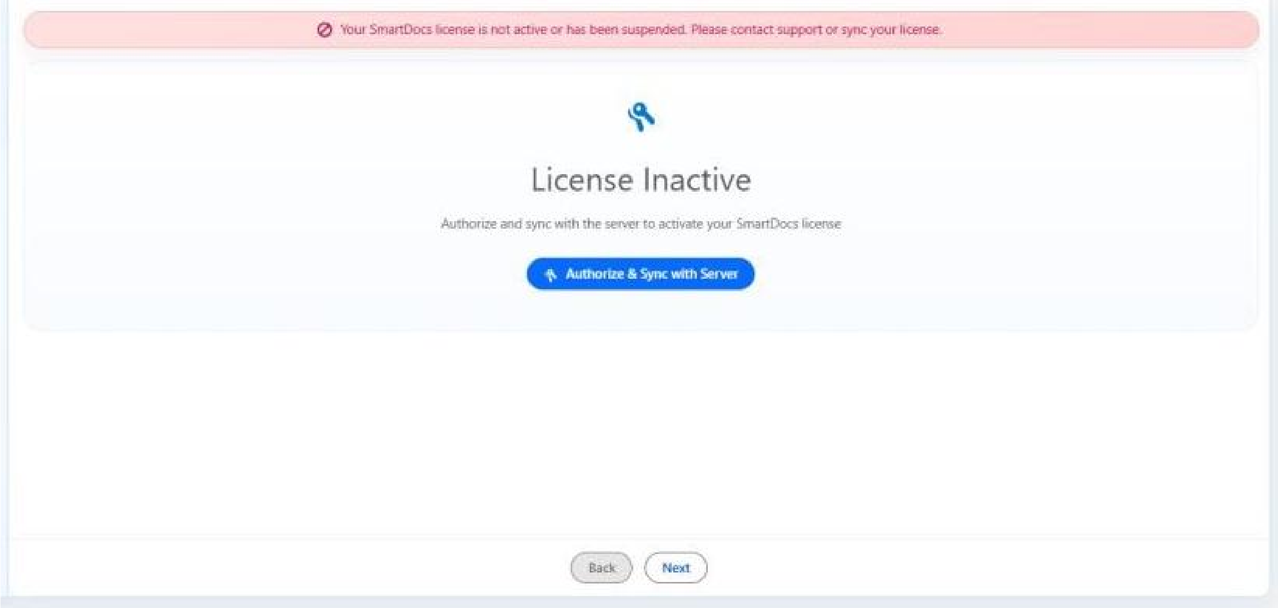


Installation options page showing "Install for Admins Only" selected and the "Approve Third-Party Access" checkbox checked.

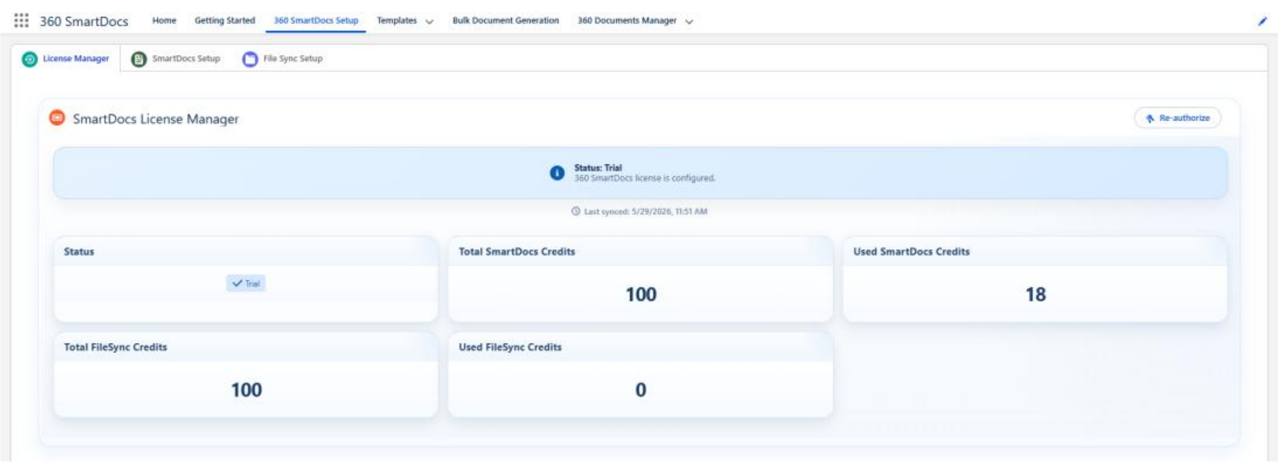
> **Tip:** We recommend "Install for Admins Only" so you can complete the full setup before granting access to end users.

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.



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.

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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: License Activation & Sync

Now that the package is installed, you can activate and sync your 360 SmartDocs license.

1. Open the **App Launcher** and navigate to the **360 SmartDocs** app.
2. Click the **"360 SmartDocs Setup"** tab in the top navigation bar.
3. Go to the **"License Manager"** sub-tab.
4. You will see the License Manager 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.

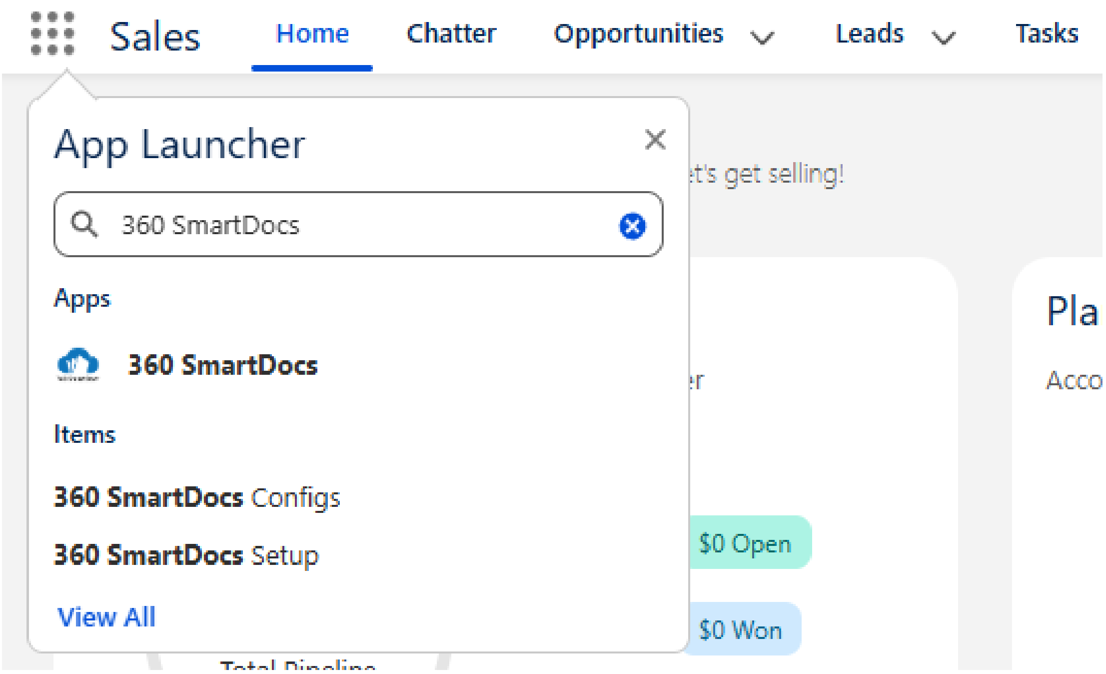
After successful authorization, the License Manager will display:

- **License Status** — Active (with a green status badge) or Trial
- **Last Synced** — The date and time of the last successful sync
- **License Settings** — A grid of tiles showing credits, expiration, and features enabled


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

360 SmartDocs Setup → License Manager in its inactive state, showing the "Authorize & Sync with Server" button.



License Manager after successful authorization, showing Trial status, sync timestamp, SmartDocs Credits, and FileSync Credits.

> **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.

4.2 Step 2: Permission Set Assignment

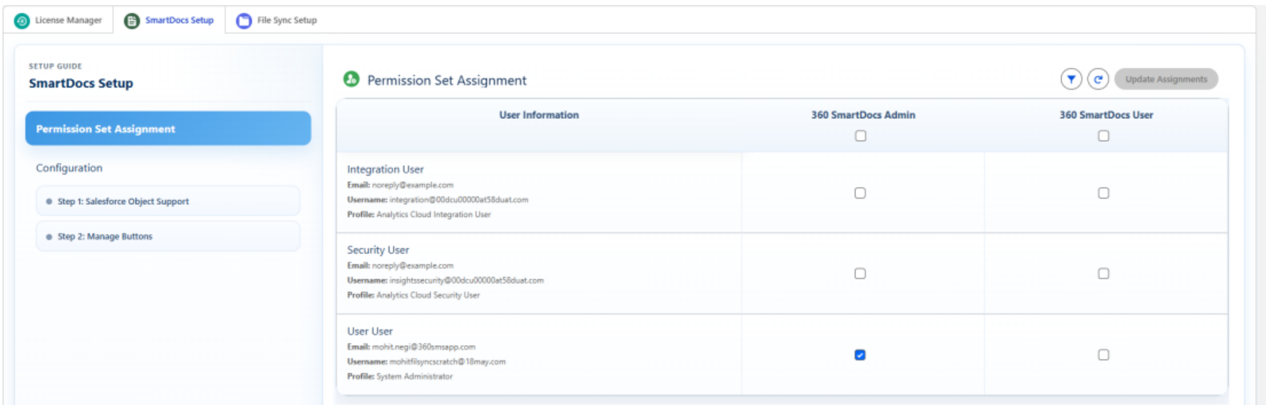
360 SmartDocs includes two permission sets that control access to the application:

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. Check **360 SmartDocs Admin** for administrators; check **360 SmartDocs User** for end users.
5. To assign a permission set to all visible users at once, use the **Select All** checkbox in the column header.
6. Once you have made your selections, click the **"Update"** button at the top-right of the panel.
7. A success notification will confirm the assignments have been saved.



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.

4.3 Step 3: Template Sharing Rules for End Users

The 360 SmartDocs User permission set grants Read access to the 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 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 Template__c

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

2 Scroll down to the **"Template" (x360SmartDocs__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: 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

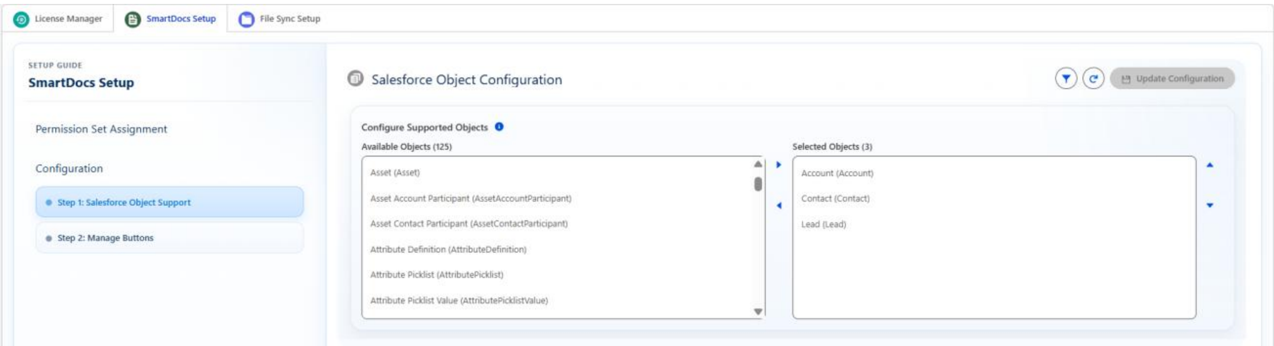
Scenario	Rule Type	Criteria / Owner	Share With	Access Level
All active templates visible to all users	Criteria-based	IsActive__c = TRUE	Public Group: All SmartDocs Users	Read Only

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

4.4 Step 4: 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. Click the sub-tab **"Step 1: Salesforce Object Support"** in the sidebar.
3. The dual listbox shows:
   Left side: Available Objects — all Salesforce objects in your org
   Right side: Selected Objects — objects currently enabled for SmartDocs
   Use the search fields above each list to filter objects by name. Move the objects you need (e.g., Account, Contact, Opportunity, Quote, Contract, Case, Lead, and any custom objects) to the Selected side.
4. Click the **"Update Configuration"** button at the top-right to save your selections.
5. A success message will confirm the configuration has been saved.



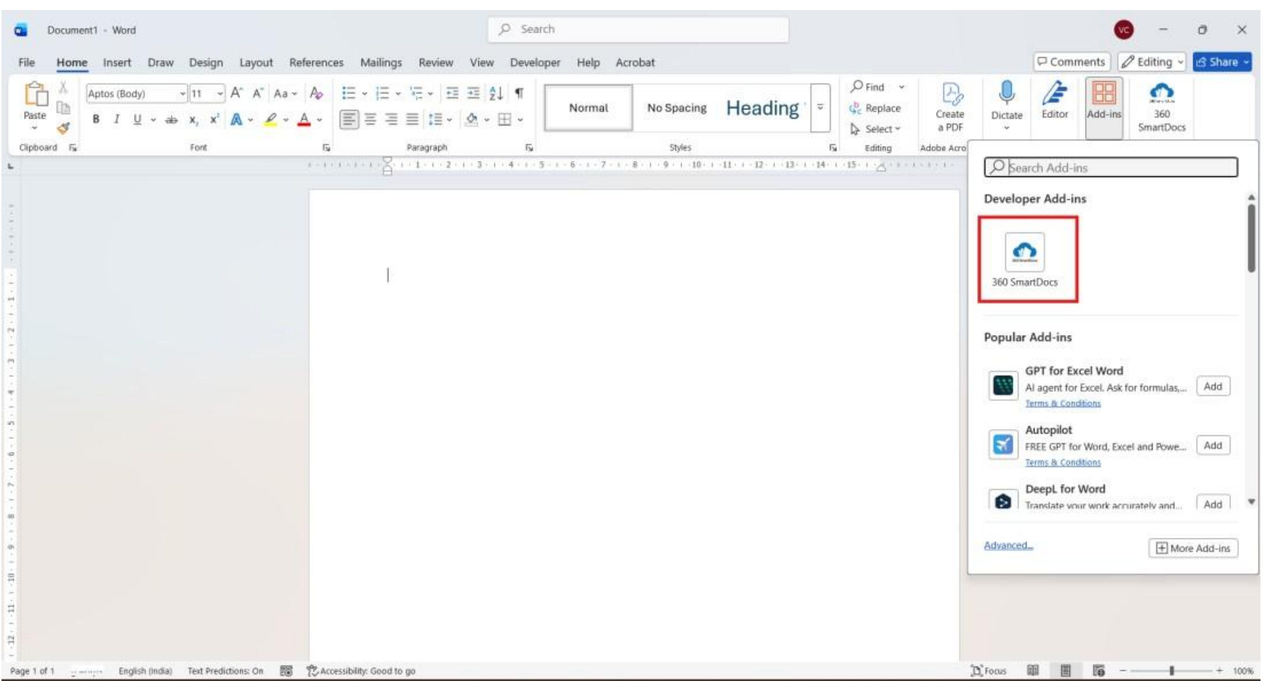
Object Configuration dual listbox with Available Objects on the left and Selected Objects (Account, Contact, Opportunity, Quote) on the right.

> **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.

4.5 Step 5: 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.
8. Click the **SmartDocs icon** in the ribbon to open the Add-In sidebar.
9. In the sidebar, click **Sign in to Production** or **Sign in to Sandbox** to authenticate.
10. Follow the login prompts to authorize the connection.



Microsoft Word with the 360 SmartDocs Add-In visible in the Developer Add-ins panel. Click "Add" to install it.

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Note: If users cannot connect the Word Add-In, verify that the user has the appropriate permission set assigned and that the OAuth policies are configured correctly.

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 six tabs are visible: Home, Getting Started, 360 SmartDocs Setup, Templates, Bulk Document Generation, 360 Document Manager
- ☑ License sync shows an "Active" or "Trial" status on the SmartDocs Setup → License Manager 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
- ☑ 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

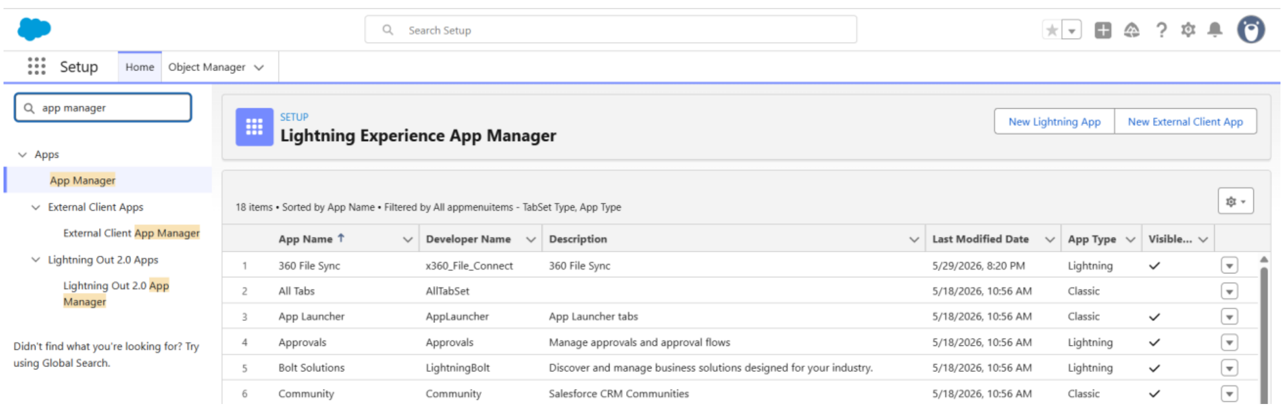
Issue	Likely Cause	Resolution
360 SmartDocs app not visible in App Launcher	Permission set not assigned or user not logged out/in after assignment	Assign 360 SmartDocs Admin or 360 SmartDocs User permission set to the user. Have them log out and log back in.
License shows "Inactive" after clicking "Authorize & 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.
"Record Id is missing in the button configuration" error when clicking a URL button	The c__recordId parameter is missing or the merge field is incorrect	Verify the URL includes c__recordId={!Object.Id} with the correct object merge field (e.g., {!Opportunity.Id}).
"Execution mode is missing" error	The c__mode parameter is not included in the button URL	Add &c;__mode=auto or &c;__mode=view to the button URL.
"Template Id is missing" error	The c__templateId parameter is missing when mode is set to auto	Add &c;__templateId=YOUR_TEMPLATE_ID to the URL, or set c__mode=view to let users select a template.
No templates appear in the template selection dropdown	Templates are not active, not mapped to the correct object, the object is not enabled in Object Configuration, or Sharing Rules are not configured	1) Check that the template's IsActive checkbox is checked. 2) Verify the template's SObject_Name matches the record's object. 3) Ensure the object is enabled in SmartDocs Setup → Configuration → Object Support. 4) Verify Sharing Rules on Template__c are configured to grant the end user visibility to template records.
Word Add-In cannot connect to Salesforce	OAuth policies not configured, or user not assigned to a permitted permission set	Ensure the user's permission set is assigned. Verify OAuth External Client App configuration in Salesforce Setup.
Document generation fails with a server error	Remote Site Setting is missing, or the document generation server is unreachable	Verify the x360SmartDocs 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.
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. Important Notes for Upgrading to SmartDocs v1.24 or Later

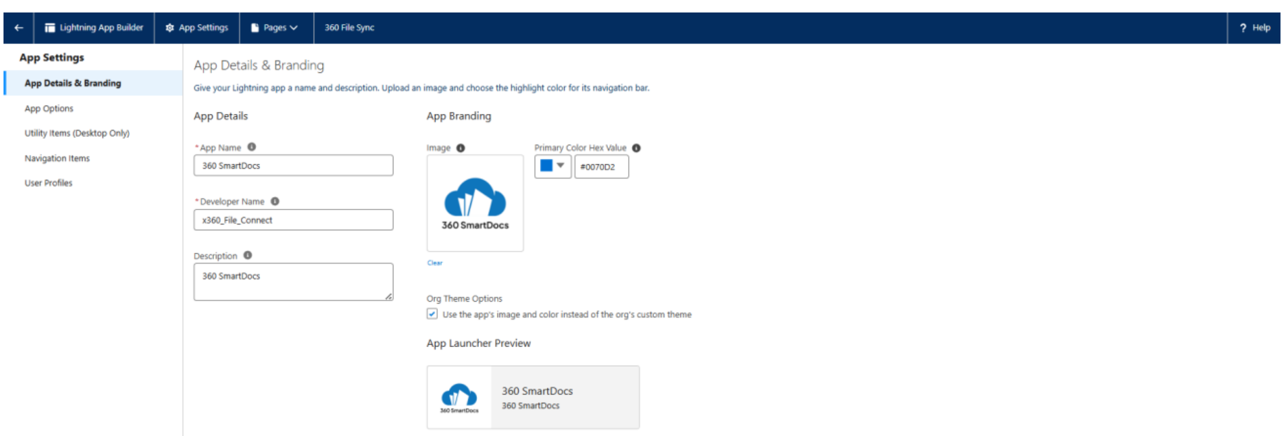
Important: When upgrading the SmartDocs application from version 1.23 or earlier to version 1.24 or later, users must manually update the application name and application logo from the App Manager due to Salesforce package upgrade limitations.

Steps to Update the App Name and Logo

1. Go to **Setup**.
2. Search for **App Manager** in the Quick Find box.
3. Select **360 File Sync** from the list and click **Edit**.
4. Update the **App Name** and **Image** under the **App Branding** section.



Lightning Experience App Manager — search for "360 File Sync" in the list and click Edit.



App Details & Branding screen — update the App Name and Image under the App Branding section.

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Note: The Sync Setup button has been moved from the Configuration Setup under File Setup section to the **License Manager** tab under **360 SmartDocs Setup**.

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