

Installing & configuring KSL for Salesforce®

STEP BY STEP GUIDE TO INSTALL AND USE KSL FOR SALESFORCE®

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Summary

1. ABOUT NAELAN & KSL FOR SALESFORCE®	4
1.1. NAELAN	4
1.2. KSL FOR SALESFORCE®	4
2. INSTALLING KSL SUITE FROM THE SALESFORCE® APEXCHANGE	5
2.1. KSL SUITE TECHNICAL REQUIREMENTS	5
2.2. INSTALLING FROM SALESFORCE® APEXCHANGE	5
3. CONFIGURING KSL FOR SALESFORCE	5
3.1. USER CONFIGURING	5
3.2. SALESFORCE® ORGANISATION CONFIGURING	7
3.2.1. REMOTE SITE	7
3.2.2. CUSTOM METADATA	7
3.2.3. CUSTOM OBJECTS	8
3.2.4. KSL COMPONENT	8
4. HOW TO USE KSL FOR SALESFORCE® FOR ADMINISTRATORS	9
4.1. SETUP TAB	10
4.2. LIBRARY TAB	11
5. HOW TO USE KSL FOR SALESFORCE® FOR USERS	11
5.1. CREATE AN INTERACTIVE DOCUMENT AND ITS VERSION	11
5.1.1. EDIT ACTION	12
5.1.2. GENERATE ACTION	13
5.2. KSL DOCUMENT	13
5.3. KSL DOCUMENT (PDF)	14
6. ADD KSL FOR SALESFORCE® TO NEW OBJECTS	15
6.1. OBJECT CREATION	15
6.2. METADATA REFERENCE	15
6.3. COMPONENT	16
6.4. ACTIONS	16
6.5. DISPLAY PDF COMPONENT	18
7. EXAMPLE OF APPROVAL PROCESSES	19
7.1. QUEUE CREATION	19
7.2. APPROVAL PROCESS	19



1. About NAELAN & KSL for Salesforce®

1.1. NAELAN

Software Publisher, Consulting & Integration

Naelan is a company specialized in the proposal management, and more generally in the management of documentary processes, design, production and diffusion.

Naelan and its first solution "KSL" were born in 1993. After 25 years supporting document processes automation, our profession belongs now clearly to the customer communication management (CCM). We have more than 1,700 references in production including 720 major accounts in France.

We provide solutions to private companies as well as government and healthcare sectors.

Our customers are also customers of our partners, software companies and system integrators and our technologies are widely distributed in Europe, as well as in Africa in more than 20 countries.

We also provide the relevant consulting, delivery and support services which allow meeting your expectations. Our teams are based near Lyon and Paris.

Moreover, our company has always presented positive financial results, which allow us to invest significantly in research and development. Almost 28% of our employees are dedicated to R&D and 87% are consultants, computer scientists and programmers.

The majority of the capital of our company is held by its founding members who are also our directors, which guarantees the best and rapid decisions to serve our customers, partners, and employees.

1.2. KSL for Salesforce®

KSL for Salesforce® is a plug-in that enables the Salesforce® solution to be effectively and securely interacted with the KSL Suite Solution, for the drafting and distribution of proposals and commercial contract... and any other customer relationship document (letters, emailing, etc.)

This integration targets multiple processes:

- Dynamic retrieval of data associated with the Salesforce® objects, setting Salesforce® data models for KSL document models.
- The access via Salesforce® to the component repository shared by the models (library of graphic modules, clause lists, photo library, appendices...), under authorizations defined and controlled by KSL. Potentially multilingual and multi-company content variations, driven by a user property or a production parameter.
- Documents production from a list of KSL models associated with each Salesforce® object
 - o In simple transactional mode, immediate retrieval of the PDF document
 - o In interactive mode with the possibility for the user to customize, choose content and enrich the pre-composed document.
- The Salesforce® version of the KSL document if it has been customized
- Physical storage of documents in the KSL retention database with a logical call link in Salesforce
- Sending the KSL document in the Salesforce® validation workflow
- The distribution of the KSL document by the Salesforce® Email function



2. Installing KSL Suite from the Salesforce® AppExchange

2.1. KSL Suite Technical Requirements

To install and successfully use KSL Suite®, you must have one of the following from each category:

Salesforce® Edition :

- Performance / Unlimited
- Enterprise
- Developer

Salesforce® Products :

- Sales Cloud

KSL Suite® Products : To use KSL For Salesforce, you have to subscribe to one of the **KSL Suite®** product.

2.2. Installing from Salesforce® AppExchange

KSL Suite® is available to install from the Salesforce® AppExchange.

To install KSL Suite :

1. Install KSL Suite into your Salesforce® instance by visiting our listing on the AppExchange [link]
2. Click « Get It Now » and follow the on-screen prompts to install KSL Suite.
3. Log in to the AppExchange.
4. Specify where you want to install KSL Suite.
 - Click **Install in production** to install in your production instance.
 - Click **Install in sandbox** to install in a sandbox.
5. Read and accept the terms and conditions
 - Select the **I have read and agree to the terms and conditions** box.
 - Click **Confirm and Install**.
6. As a best practice, and to avoid access issues for end users, we recommend selecting **Install for Admins Only**. It enables you to use the permission set delivered in the package to grant the rights to the appropriate users.
7. Then click **Install**.
 - You must provide System Administrator credentials to install an application from the AppExchange.
 - After installing, you must configure the KSL Suite application, including integration settings for third-party applications.

3. Configuring KSL For Salesforce

3.1. User configuring

The first step in the configuration of KSL For Salesforce is to configure users by granting them rights on KSL For Salesforce® app.

Grant proper KSL Suite role to give users rights to create, modify, generate or delete documents on KSL server.



1. Add the field « KSL Role (KSL_Role__c) » to your **User Page Layout**
2. Give each user the KSL Role based on the rights you want to give them.
KSL roles are defined by your administrator in your KSL Suite account.

The screenshot shows the 'Users' setup page in Salesforce. The 'Additional Information' section contains a 'KSL Role' field, which is highlighted with a red arrow. Other sections include 'Mailing Address' (Street, Zip/Postal Code, City, State/Province, Country), 'Single Sign On Information' (Federation ID), 'Locale Settings' (Time Zone, Locale, Language), and 'Approver Settings' (Delegated Approver, Manager, Receive Approval Request Emails). Buttons for 'Save', 'Save & New', and 'Cancel' are at the bottom.

1. Select the « KSL User » **Permission Set** and assign it to each user that will use the KSL For Salesforces features.
2. Select the « KSL Admin » **Permission Set** and assign it to each user that will administrate KSL For Salesforce. Users with this permission set will have access to the KSL Suite Library and the customization of the objects XSD.
The Permission Set « KSL Admin » is an extension of « KSL User ». A user with this Permission Set must also have the Permission Set « KSL User » to gain access to all the features of KSL for Salesforce.

The top screenshot shows the 'KSL User' permission set configuration page. The 'Manage Assignments' button is highlighted with a red arrow. The description reads: 'This permission set allow Salesforce users to interact with KSL at a standard level (view, create documents ...)'.
The bottom screenshot shows the 'KSL Admin' permission set configuration page. The 'Manage Assignments' button is highlighted with a red arrow. The description reads: 'This permission set allow Salesforce users to interact with KSL without restriction.'



3.2. Salesforce® organisation configuring

3.2.1. Remote site

KSL for Salesforce® needs to communicate with your KSL Server. To enable this communication, you have to create a Remote Site in Salesforce® with the informations of your KSL Server.

Go to setup and search « Remote Site Settings ». Create a new record of remote site settings with your KSL Server URL.

Remote Site Details

Remote Site Detail		Edit	Delete	Clone
Remote Site Name	KSLServer			
Namespace Prefix	ksl			
Remote Site URL	<input type="text"/>			
Disable Protocol Security	<input type="checkbox"/>			
Description				
Active	<input checked="" type="checkbox"/>			
Created By	User User, 18/02/2019 15:52			
		Edit	Delete	Clone

3.2.2. Custom Metadata

- Auth. Configuration

First, you need to configure the oAuth connexion to enable the communication between Salesforce® et the KSL Server. In Setup, search « Custom metadata Types » and create a new record for « Auth. Configuration » custom metadata type.

- 1- **Endpoint:** KSL API URL aimed to communicate between KSL and Salesforce. It must end with /ksl_office8/
- 2- **Project Name:** Name of the KSL Project to synchronize with your Salesforce® organization.
- 3- **Public Key:** A couple public/private key is necessary for the oAuth2 authentication. This field must contain the same public key configure in the KSL Server.
- 4- **Private key:** SHA256 private key linked to the public key. Its size must be 32 bytes.
- 5- **Org Url Override:** If necessary, fill this field with the audience value required by the KSL server for the authentication.

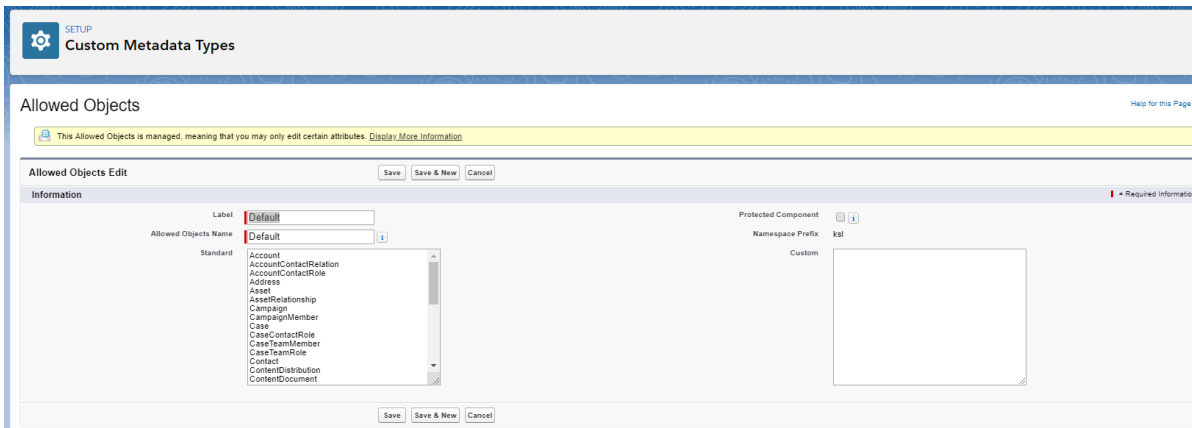
Auth. Configuration

Auth. Configuration Detail		Edit	Delete	Clone
Label	Prod			
Endpoint	<input type="text"/>			
Public Key	<input type="text"/>			
Auth. Configuration Name	Prod			
Project Name	<input type="text"/>			
Private Key	<input type="text"/>			
Protected Component	<input type="checkbox"/>			
Org Url Override	https://test.salesforce.com			
Namespace Prefix	ksl			
Created By	User User, 18/02/2019 15:52			
		Edit	Delete	Clone

- Allowed Objects

You're able to control the custom objects available in the XSD Generation. If you want to generate a XSD for a custom object, add the object API Name in the Custom Field. You can also add a Salesforce® standard object to this field if it is not in the Standard list.

Separate each custom object by a carriage return.



You can find more information about the XSD Generation in the paragraph 4.1. Setup Tab.

3.2.3. Custom Objects

By default, KSL For Salesforce® provides two objects linked to the Opportunity objects to enable you to create documents from opportunities. The KSL Document objects linked to the Opportunity object represents the interactive document in KSL, whereas the KSL Document (PDF) object represents the PDF document stored in KSL.

You can find more information about these objects in the following paragraphs: 5.2. KSL Document and 5.3. KSL Document (PDF)

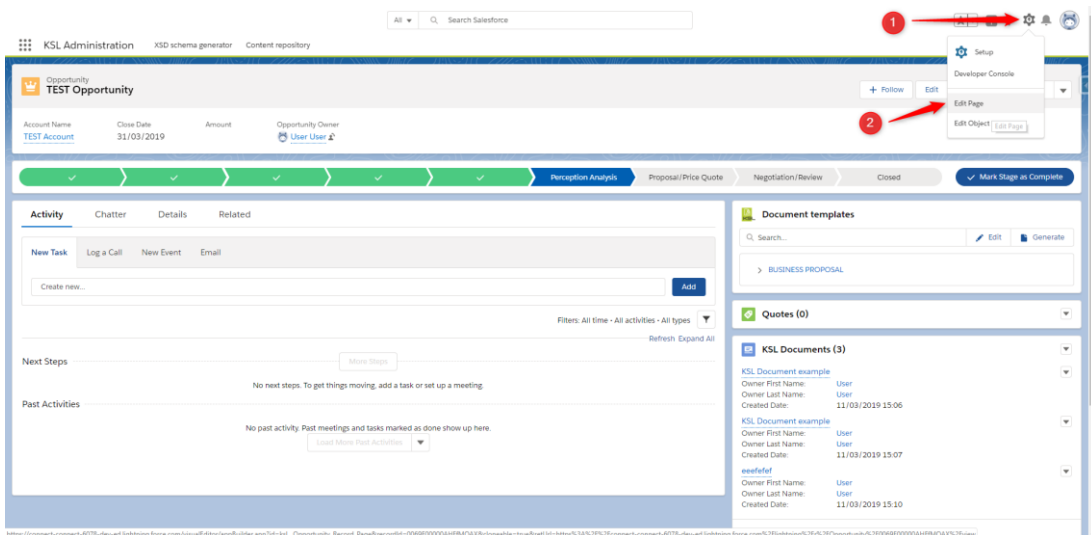
3.2.4. KSL Component

To be able to generate KSL Document from Salesforce® objects, you need to configure your object layout to display the KSL For Salesforce® elements.

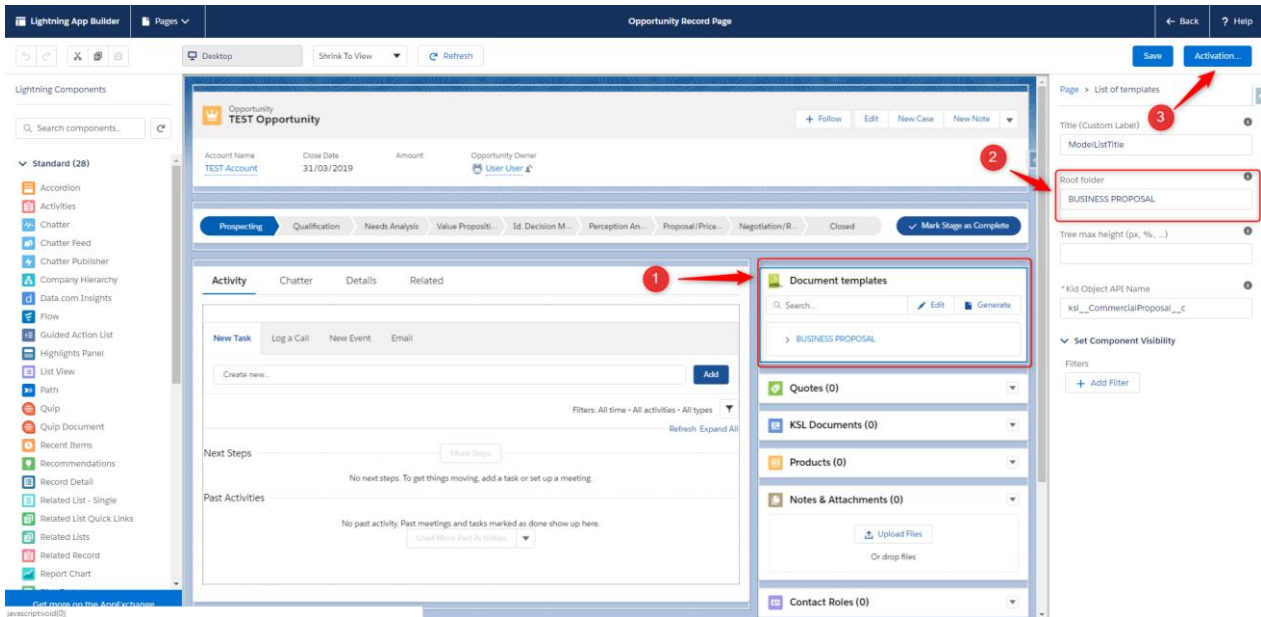
The component « Document templates » will display the templates available in the KSL Project configured in the Custom MetaData Type « Auth. Configuration ». The user will then be able to create a KSL document based on a chosen template and the Salesforce® record.

The following example guide you to display and configurate the component on the « Opportunity » Object page layout. The process is the same for any standard or custom object in Salesforce.

1. Go to the record page of an Opportunity, click on the setup icon and then click on « Edit page ».



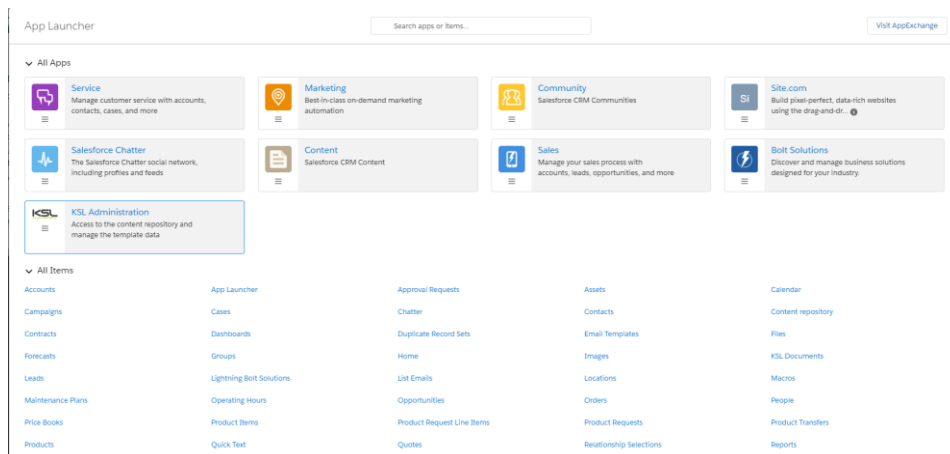
- Drag and drop the lightning component « Document templates » to the desired place on the page. In the option layout (on the right part of the screen), configure the component with the following options:
 - Title:** Displayed name of the component on the record. By default, the name is « Edit a document ».
 - Root folder:** If you don't want to display all the folder in your KSL Project, you can filter one folder by adding its name in this option.
 - Tree max height (optional):** Height size of the component on the record page.
 - Kid Object API Name:** API name of the Salesforce® object that represent the KSL Document in Salesforce. By default, KSL For Salesforce® provides the object KSL Document (ksl__CommercialProposal__c) linked to the Opportunity object.



- You may have to activate the lightning page before saving. Then don't forget to save before closing the window.
- From setup > Opportunity > page layout : Add the KSL Document related list to easily view the generated KSL documents.

4. How to use KSL For Salesforce® for administrators

Select the « KSL Administration » application from the application menu.





4.1. Setup Tab

This tab enables the administrator to generate the XSD description of all Salesforce® objects. This XSD is then used in your KSL Server to configure document templates based on Salesforce® objects.

The XSD Generator will enable you to select the principal object for your XSD. Automatically, the generator propose all the direct relationships (Parents) and the sub-relationships (Children) existing in your Salesforce® environment with this object. The checkboxes enable you to choose which relationship you want to include in your XSD and in your KSL template.

The objects available in the Object To configure picklist are configure in the « Allowed Object » MetaData Types.

Object to configure
 Opportunity

OBJECT	RELATIONSHIP NAME
<input checked="" type="checkbox"/> > Account	Account
<input type="checkbox"/> > Campaign	Campaign
<input type="checkbox"/> > Pricebook2	Pricebook2
<input type="checkbox"/> > Quote	SyncedQuote
<input type="checkbox"/> > Contract	Contract

OBJECT	RELATIONSHIP NAME
<input type="checkbox"/> > ContentDocumentLink	ContentDocumentLinks
<input checked="" type="checkbox"/> > OpportunityContactRole	OpportunityContactRoles
<input type="checkbox"/> Contact	Contact
<input checked="" type="checkbox"/> > OpportunityLineItem	OpportunityLineItems
<input type="checkbox"/> > Order	Orders
<input type="checkbox"/> > Quote	Quotes

Note: You can't select the same objects Types in the same relationship tree several time. For example, if you select « Account », you won't be able to select the parent Account because they are the same Object type in same relationship tree because the KSL Server won't allow it.

KSL Administration XSD schema generator Content repository

Search Salesforce

XSD Generator

Object to configure
 Opportunity

OBJECT	RELATIONSHIP NAME
<input checked="" type="checkbox"/> > Account	Account
<input type="checkbox"/> > Campaign	Campaign
<input checked="" type="checkbox"/> > Pricebook2	Pricebook2
<input type="checkbox"/> > Quote	SyncedQuote
<input type="checkbox"/> > Contract	Contract

OBJECT	RELATIONSHIP NAME
<input type="checkbox"/> > ContentDocumentLink	ContentDocumentLinks
<input checked="" type="checkbox"/> > OpportunityContactRole	OpportunityContactRoles
<input checked="" type="checkbox"/> Contact	Contact
<input checked="" type="checkbox"/> > OpportunityLineItem	OpportunityLineItems
<input checked="" type="checkbox"/> PricebookEntry	PricebookEntry
<input checked="" type="checkbox"/> Product2	Product2
<input type="checkbox"/> > Order	Orders
<input checked="" type="checkbox"/> > Quote	Quotes
<input type="checkbox"/> > ContentDocumentLink	ContentDocumentLinks
<input type="checkbox"/> > Order	Orders
<input checked="" type="checkbox"/> > QuoteLineItem	QuoteLineItems

```

XSD
<?xml version="1.0" encoding="UTF-8"?>
<xsd:schema xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:sf="sf">
  <xsd:element name="Opportunity" type="Opportunity"/>
  <xsd:complexType name="Opportunity">
    <xsd:sequence>
      <xsd:element name="Id" type="xsd:ID"/>
      <xsd:element name="IsDeleted" type="xsd:boolean"/>
      <xsd:element name="AccountId" type="Account" sf:is="1"/>
      <xsd:element name="IsPrivate" type="xsd:boolean"/>
      <xsd:element name="Name" type="xsd:string"/>
      <xsd:element name="Description" type="xsd:string"/>
      <xsd:element name="StageName" type="xsd:string"/>
      <xsd:element name="Amount" type="xsd:string"/>
      <xsd:element name="Probability" type="xsd:string"/>
      <xsd:element name="ExpectedRevenue" type="xsd:string"/>
      <xsd:element name="TotalOpportunityQuantity" type="xsd:double"/>
      <xsd:element name="CloseDate" type="xsd:date"/>
      <xsd:element name="Type" type="xsd:string"/>
      <xsd:element name="NextStep" type="xsd:string"/>
      <xsd:element name="LeadSource" type="xsd:string"/>
      <xsd:element name="IsClosed" type="xsd:boolean"/>
      <xsd:element name="IsWon" type="xsd:boolean"/>
      <xsd:element name="ForecastCategory" type="xsd:string"/>
      <xsd:element name="ForecastCategoryName" type="xsd:string"/>
      <xsd:element name="HasOpportunityLineItem" type="xsd:boolean"/>
      <xsd:element name="Pricebook2Id" type="Pricebook2" sf:is="1"/>
    </xsd:sequence>
  </xsd:complexType>
</xsd:schema>

```



1. Refresh XSD

Click this button after selecting each object you want to get in your XSD. The generated XSD appears in the right window. It contains all the fields of the selected objects.

2. Download XSD

This button won't work if you have not clicked on Refresh XSD before. It's enable you to download the XSD and use it in KSL to build a template.

Once you have created a template with a KSL for Salesforce® XSD, the XSD will be linked to the template. Every time your users want to generate a document with the template, the XSD will be use to request the right fields values of the record in Salesforce.

- If you create a new field in an object used in a KSL template :
 - Generate a new XSD, and upload it in KSL if you want to use it in your template.
 - Do nothing if you don't want to use it, your users will be able to generate/edit KSL documents in Salesforce.
- If you delete a field in an object used in a KSL template :
 - Generate a new XSD and upload it in all templates using this object, otherwise, your users won't be able to generate and edit KSL documents using these templates in Salesforce.

4.2. Library Tab

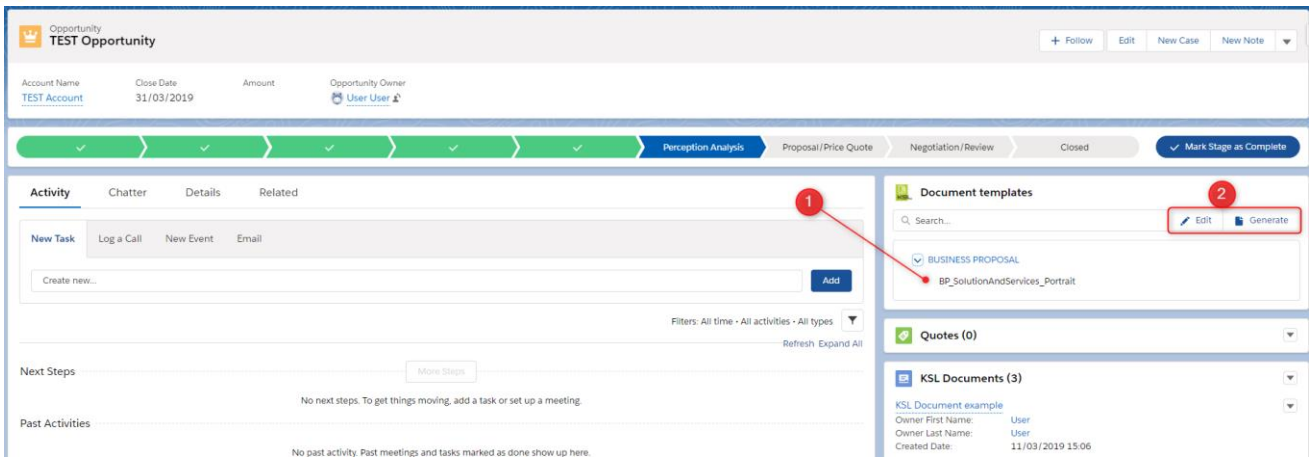
This tab opens the KSL Office library in a new tab.

The screenshot shows the KSL Office library interface. On the left, there is a sidebar with a tree view of the 'BUSINESS PROPOSAL LIBRARY'. The 'ILLUSTRATIONS' folder is selected, showing a list of files including '0.75_Collaborateur_02'. The main area displays the details for the selected file '0.75_Collaborateur_02'. The details include fields for 'Nom' (Collaborateur_02x0.75), 'Libellé' (0.75_Collaborateur_02), 'Commentaire', and 'Classement' (ILLUSTRATIONS). There is also a photo of a man in a vest and shirt. On the right, there is a section for 'Modèles de documents impactés' and 'Informations complémentaires'.

5. How to use KSL For Salesforce® for users

5.1. Create an Interactive document and its version

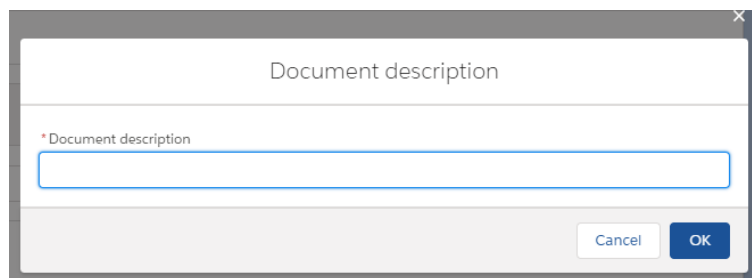
Open an opportunity record. In the « Document templates » component, select the template you want to use. You can use the search bar to refine the results. You then can choose between Edit the interactive document, or generate the final document. Depending on the template and the parameters set in your KSL, you won't be able to perform one action or the other.



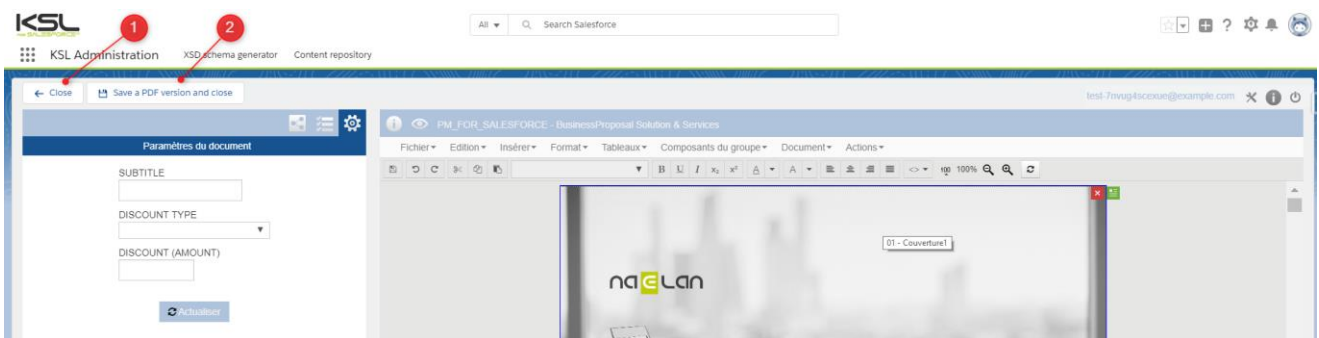
5.1.1. Edit action

This action, create an interactive document with the chosen template and values of the fields in your current record.

First, you will have to select the description of your document. This description must be 50 characters maximum.



When you validate, a KSL Document is created in Salesforce® and the interactive document is displayed in a KSL window to enable you to edit the interactive document. You can find more information about the KSL Document in the section 5.2. **KSL Document.**



Two Salesforce® buttons are displayed in the window:

- **Back:** Redirect you to the last window. Be careful, this button doesn't save the current state of your document.
- **Generate PDF:** Generate a PDF from the current interactive document saved in KSL. If you have changed the interactive document, be careful to save it using the KSL buttons before clicking on this button. If not, the PDF will not be based on this interactive document.



5.1.2. Generate action

This action creates a PDF document with the chosen template and values of the fields in your current record. As with the edit action, once you have chosen the name of the document, it opens the PDF in a new tab, and displayed the KSL Document (PDF) layout in your current window.

You can find more information about the KSL Document in the section **5.3. KSL Document (PDF)**.

5.2. KSL Document

This object represents the KSL interactive document in Salesforce. Records are automatically created when you use the « Document templates » component, and these fields mustn't be updated manually.

The screenshot shows the 'Details' tab of a KSL Document record. The record name is 'KSL Document example'. The fields and their values are:

- Document description:** KSL Document example
- KSL Document ID:** 8EA1CA376CA05B86AB6401696D140C92
- Version number:** 1
- Owner:** User User
- Opportunity:** TEST Opportunity
- Created By:** User User, 11/03/2019 15:07
- Last Modified By:** User User, 11/03/2019 15:07

In this object, you will find the following fields:

- **Document description:** Description of the document.
- **Model Name:** Name of the template used for the document generation.
- **KSL Document Id:** Id of the interactive document in the KSL Server.
- **Version number:** Number of KSL Document (PDF) for this KSL Document.
- **Opportunity:** Opportunity parent.
- **Owner:** Creator of the KSL Document.

You can find all the versions associated to this KSL Document in the « Related » tab.

The screenshot shows the 'Related' tab of a KSL Document record. It displays a list of related KSL Documents (PDF) with the following columns: DOCUMENT DESCRIPTION, CREATED BY, CREATED DATE, and VERSION NUMBER.

DOCUMENT DESCRIPTION	CREATED BY	CREATED DATE	VERSION NUMBER
KSL Document example	User User	11/03/2019 15:07	1

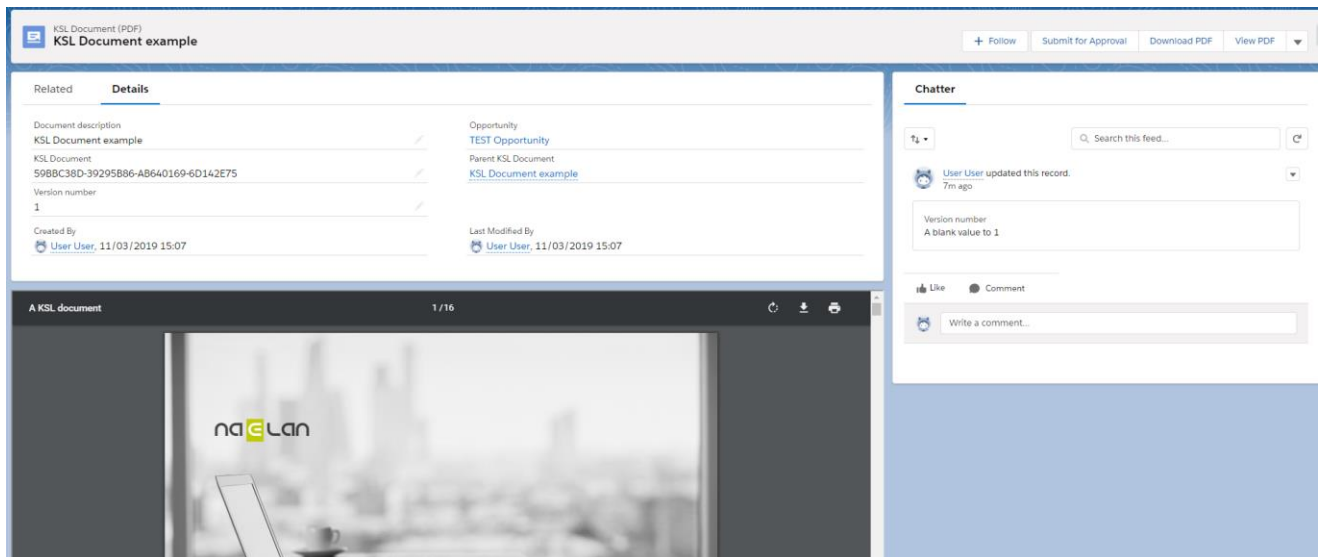
There is a 'View All' link below the table.

There are several actions for this object:

- **Edit:** Open the interactive document to edit it in the KSL window.
- **Delete:** Delete the interactive document and the Salesforce® record. If the KSL Document has one or several PDF, it delete also all its PDF.
- **Submit for approval:** You can create an approval process for the KSL Document object, and submit the record to the process with this button. You will find some example of Approval Process you can create in the section **7. Example of Approval Processes**.

5.3. KSL Document (PDF)

This object represents the KSL document (PDF) in Salesforce. Records are automatically created when you use the generate action in « Document templates » component or « Save a PDF version and close » in the KSL window, and these fields mustn't be updated manually.



In this object, you will find the following fields:

- **Document description:** Description of the document with the version number. It increases automatically when a new KSL Document (PDF) is created for the KSL Document.
- **KSL Document:** Id of the document in the KSL Server.
- **Version number:** Version number.
- **Opportunity:** Opportunity parent.
- **Parent KSL Document:** KSL Document parent.

Below the details, a component display the PDF stored in KSL.

There are several actions available for this object:

- **Submit for approval:** You can create an approval process for the KSL Document (PDF) object, and submit the record to the process with this button. You will find some example of Approval Process you can create in the section **7. Example of Approval Processes**.
- **Download PDF:** Download the PDF.
- **View PDF:** Display the PDF in full view in a new browser tab.
- **Delete:** Delete the interactive document and the Salesforce® record.



6. Add KSL For Salesforce® to new objects

6.1. Object creation

By default, KSL For Salesforce® proposed to create document for opportunities. However, you can use KSL For Salesforce® for all your Salesforce® objects. This paragraph will explain how to configure the application for this purpose.

For each object for which you want to be able to create KSL document, you have to create two custom objects:

- A **KSL interactive document object** linked to your object that will contain the reference to the interactive document in KSL (for example KSL Document).
- A **KSL document version object** linked to the previous object that will represent the PDF versions of your interactive document (for example KSL Document (PDF)).

For the **KSL interactive document object**, you have to create at least the following fields:

- An text external id field to store the KSL document Id.
- A text field to store the name of the model used for your document.
- A lookup relationship field linked to the related Object from which you create or generate your document.

The **KSL document version object**, you have to create at least the following fields:

- A master-detail relationship field linked to your custom object described above.
- An text external id field to store the KSL document version Id.

If you want to easily see the version number, you can add a roll-up summary field as COUNT of the KSL document version object..

You then are free to add any other field to these two objects.

6.2. MetaData reference

Once you have created the previous object, you have to declare them in the **KidObject Description** metaData Type.

In Set Up, search Custom MetaData Types and click on Manage Records for the **KidObject Description** MetaData to add a new record.

In this metadata you'll have to store structure information about your KSL interactive document object and your KSL document version object for the previous created objects.

The following informations are needed:

- **KidObject API Name:** API name of your KSL interactive document object created previously.
- **KidObject Lookup Id API Field Name:** API name of the lookup relationship field of your KSL interactive document object.
- **KidObject Document Id API Field Name:** API name of the field that will store KSL document Id on your KSL interactive document object.



- **KidObject Name of the model Field:** API name of the field that will store the name of the template used to create the document on your KSL interactive document object.
- **KidVersion APIName:** API name of your KSL document object created previously.
- **KidVersion Lookup Id API Field Name:** API name of lookup relationship field of KSL interactive document object.
- **KidVersion Document API Field Name:** API name of the field that will store the id of the PDF on your KSL document object.

You will find an example of the KidObject description for the KSL Document et KSL Document (PDF) that enable you to use KSL For Salesforce® on Opportunities:

The screenshot shows the Salesforce 'Custom Metadata Types' setup page. The main heading is 'KidObject Description'. Below it, a yellow banner states: 'This KidObject Description is managed, meaning that you may only edit certain attributes. [Display More Information](#)'. The 'KidObject Description Detail' section includes 'Edit', 'Delete', and 'Clone' buttons. The 'Information' section shows 'Label: KidObject Opportunity', 'Protected Component:

6.3. Component

Once the previous steps are done, you can follow the instruction on paragraph 3.2.4.KSL Component to add the « Document templates » component to the object on which you want to be able to generate KSL Documents.

6.4. Actions

To have access to the functionalities of Ksl For Salesforce® for your newly created objects, you have to create the following actions.

For the KSL interactive document object mentioned above, go to its setup, and choose « Buttons, Links and Actions », and then « Create Action »:

- **Delete KSL:** Choose the lightning component « RemoveDocument » to be able to delete the KSL interactive document and KSL document as well as the Salesforce® record.



Action Detail		Edit	Delete
Label	Delete KSL	Object Name	Commercial Proposal
Standard Label Type		Action Type	Lightning Component
Name	Delete_KSL_Document	Icon	⚡
Namespace Prefix	ksl		
Description			
Lightning Component	RemoveDocument		
Height	70px		
Created By	KSL Connector Admin , 19/02/2019 10:55	Modified By	Blandine ALVAREZ , 22/02/2019 14:45
	Edit	Delete	

- **Edit KSL:** Choose the lightning component « EditKSLDocument » to be able to open the KSL Window to edit the KSL interactive document.

Action Detail		Edit	Delete
Label	Edit Document	Object Name	Commercial Proposal
Standard Label Type		Action Type	Lightning Component
Name	EditKSLDoc	Icon	⚡
Namespace Prefix	ksl		
Description	Open Launck Kid to edit the interactif document		
Lightning Component	EditKSLDocument		
Height	70px		
Created By	KSL Connector Admin , 19/02/2019 10:55	Modified By	KSL Connector Admin , 20/02/2019 14:45
	Edit	Delete	

For the KSL document object mentioned above, go to its setup, and choose « Buttons, Links and Actions », and then « Create Action »:

- **Delete KSL:** Choose the lightning component « RemoveDocument » to be able to delete the KSL document as well as the Salesforce® record.

Action Detail		Edit	Delete
Label	Delete KSL	Object Name	Commercial Proposal
Standard Label Type		Action Type	Lightning Component
Name	Delete_KSL_Document	Icon	⚡
Namespace Prefix	ksl		
Description			
Lightning Component	RemoveDocument		
Height	70px		
Created By	KSL Connector Admin , 19/02/2019 10:55	Modified By	Blandine ALVAREZ , 22/02/2019 14:45
	Edit	Delete	

- **View PDF:** Choose the Lightning Component « ViewPDF » to be able to open the PDF in another browser tab.



Action Detail		Edit		Delete	
Label	View PDF	Object Name	<u>Commercial Proposal Version</u>		
Standard Label Type		Action Type	Lightning Component		
Name	ViewPDF	Icon	⚡		
Namespace Prefix	ksl				
Description					
Lightning Component	<u>ViewPDF</u>				
Height	70px				
Created By	<u>KSL Connector Admin</u> , 19/02/2019 10:55	Modified By	<u>Blandine ALVAREZ</u> , 22/02/2019 14:45		
			Edit		Delete

- **Download PDF:** Choose the Lightning Component « DownloadPDF » to be able to download the PDF from your KSL document object.

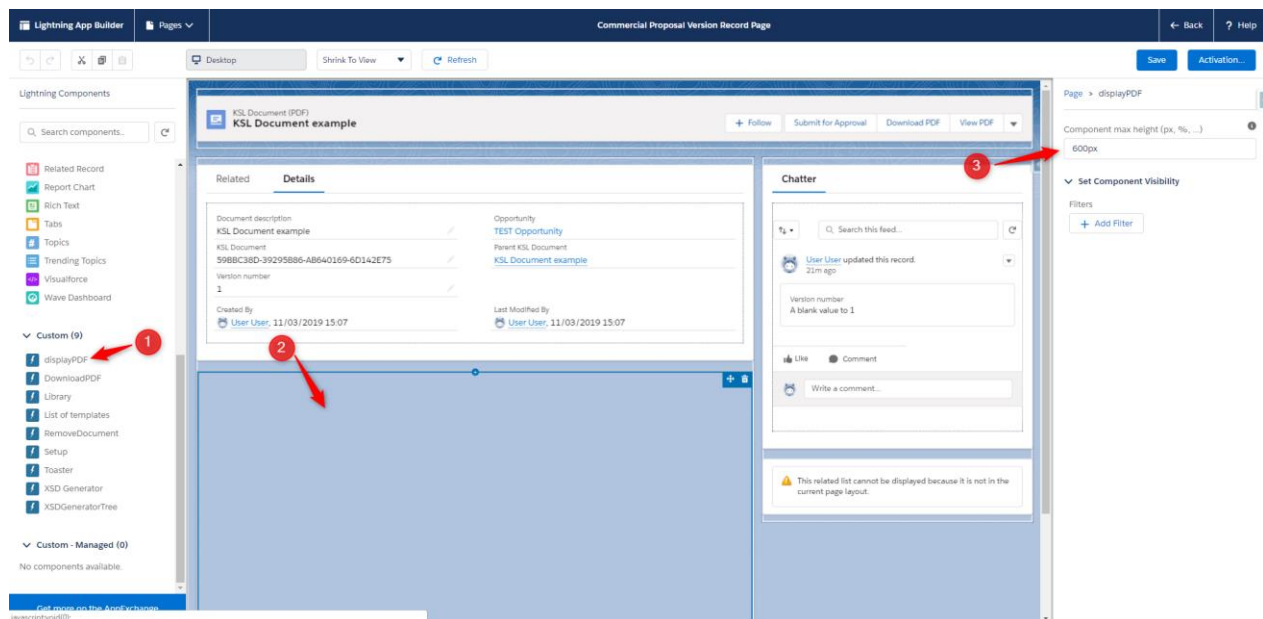
Action Detail		Edit		Delete	
Label	Download	Object Name	<u>Commercial Proposal Version</u>		
Standard Label Type		Action Type	Lightning Component		
Name	DownloadPDF	Icon	⚡		
Namespace Prefix	ksl				
Description	Extract and Download PDF from KSL				
Lightning Component	<u>DownloadPDF</u>				
Height	116px				
Created By	<u>KSL Connector Admin</u> , 19/02/2019 10:55	Modified By	<u>Blandine ALVAREZ</u> , 22/02/2019 14:45		
			Edit		Delete

Then you can add the previous action to the objects Page Layout.

6.5. Display PDF component

KSL For Salesforce® enables you to display the PDF directly in your KSL document object layout.

In the lightning record page of your object, add the component displayPDF in the layout. You will be able to choose the height of the component in the options.





7. Example of Approval Processes

In Salesforce, you can configure Approval Processes to validate your records. With KSL For Salesforce®, KSL Documents are records in Salesforce, so you can use these processes to validate your generated documents.

In this paragraph you will find an example of a simple approval process you can configure for the KSL Document (PDF). For more information about Approval Processes you can read the Salesforce® documentation.

7.1. Queue creation

If you have several users assign to the validation of document, you can create a queue.

In Set Up, search Queues, and click on the button New.

The screenshot shows the 'Queue Edit' page in Salesforce. The page title is 'KSL Validator'. There are 'Save' and 'Cancel' buttons at the top right. The 'Queue Name and Email Address' section contains the following fields: 'Label' (KSL Validator), 'Queue Name' (KSL_Validator), and 'Queue Email' (empty). A red arrow labeled '1' points to the 'Queue Name' field. Below this is a 'Send Email to Members' checkbox. The 'Supported Objects' section contains a list of 'Available Objects' (Case, Goal, Image, Knowledge Article Version, Lead, Location, Macro, Maintenance Plan, Metric, Order, Product Item, Product Request, Product Transfer, Quick Text) and a 'Selected Objects' list (KSL Document). A red arrow labeled '2' points to the 'Selected Objects' list. There are 'Add' and 'Remove' buttons between the two lists.

1. Choose the name of your Queue
2. Choose the objects on which you will be able to assign the Queue. In our example KSL Document.
3. Choose the members of the queue. It can be users, roles or Public Group.

7.2. Approval Process

In the Set Up, search Approval Processes. Choose the object on which you want to create your approval process, in this example KSL Document (PDF), and then chose Create New Approval Process.



Approval Processes

Approval Process Information

The Jump Start wizard creates a one-step approval process for you in just a few minutes.
Enter a name for your process in the box below and then select an email template to notify the approver (optional).

Name:

Unique Name:

Approval Assignment Email Template:

Add the Submit for Approval button and Approval History related list to all KSL Document page layouts

Use Approver Field of KSL Document Owner

Specify Entry Criteria

Use this approval process if the following :

Field	Operator	Value	
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND

Add Filter Logic...

Select Approver

Using the options below, specify the user to whom the approval request should be assigned.

Let the submitter choose the approver manually.

Automatically assign an approver using a standard or custom hierarchy field:

Automatically assign to queue:

Automatically assign to approver(s).

1. Choose your Approval Process Name and the email template send to the approver if necessary.
2. Specify if the KSL Document (PDF) is automatically pushed to the approval process and on which condition. Otherwise, the user will be able to manually submit his KSL Document (PDF) to the approval process.
3. Select the approval of the KSL Document (PDF). In this example, the record is assign to the queue we created previously.

In the Approval Process layout, you will be able to add new Approval steps and choose if the Salesforce® record must be locked when the record is approved or rejected.