

# Connecting Formstack Documents from Salesforce

How to install, access, and  
manage Formstack Documents  
from Salesforce.com





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## Install WebMerge from the Salesforce.com AppExchange

Head over to the AppExchange and search for **WebMerge** or go to <https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B53bmEAB> to get started.

Sign in as a **System Administrator** for the Salesforce Org that you'd like to install WebMerge for Salesforce.com.

Once you're logged in, you'll be presented with details on what will be installed into your Salesforce Organization.

After reviewing, click **Continue**.

The screenshot shows the Salesforce interface for installing a package. The main content area is titled "Package Installation Details" and displays the following information:

- Package Name: Webmerge
- Version Name: Spring 2014
- Version Number: 1.2
- Publisher: undefined
- Description: (empty)

Below this information are two buttons: "Continue" (highlighted in orange) and "Cancel".

The "Package Components" section is expanded, showing three categories of components:

- Objects (4):**

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Field Mapping		Custom Object	This is a brand new component.
Create	Webmerge Credentials		Custom Setting	This is a brand new component.
Create	Webmerge Mapping		Custom Object	This is a brand new component.
Create	Webmerge Mapping Criteria		Custom Object	This is a brand new component.
- Tabs (3):**

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Webmerge Settings		Tab	This is a brand new component.
Create	Webmerge Mappings		Tab	This is a brand new component.
Create	Webmerge Documents		Tab	This is a brand new component.
- Apps (1):**

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Webmerge		Document Folder	This is a brand new component.

Salesforce needs permission to talk to WebMerge. Check the box for **Yes, grant access to these third-party web sites** and click **Continue**.

The screenshot shows a dialog box titled "Approve Third-Party Access" with a green checkmark icon. The text inside reads: "This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)"

Below the text is a table with two columns: "Website" and "SSL Encrypted".

Website	SSL Encrypted
www.webmerge.me	<input checked="" type="checkbox"/>

At the bottom of the dialog, there is a checkbox labeled "Yes, grant access to these third-party web sites" which is currently unchecked. Below the checkbox are two buttons: "Continue" and "Cancel".

Review the Object Permissions on the next page and click **Next**.

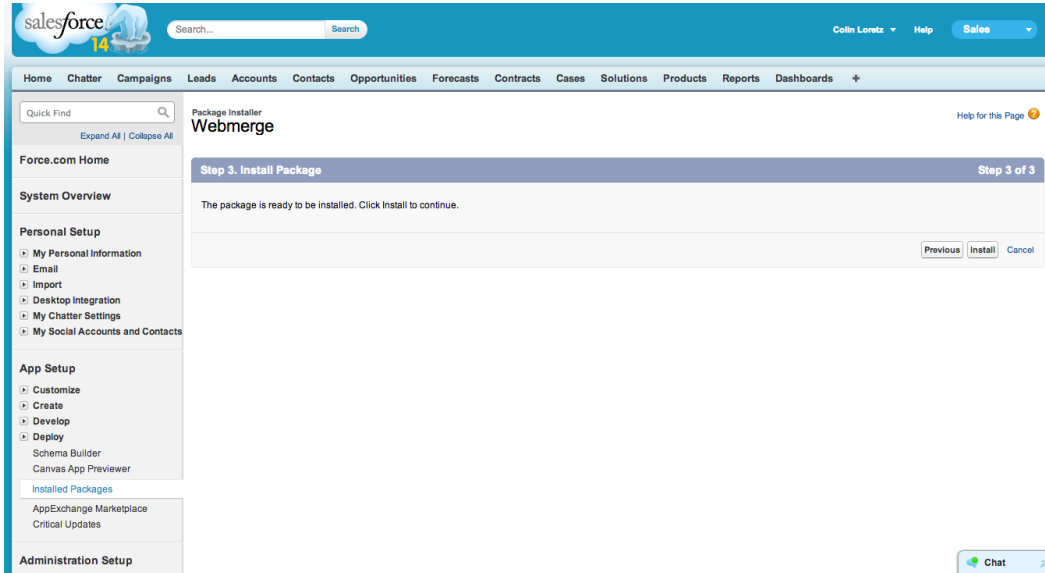
The screenshot shows the 'Webmerge' package installer configuration page. On the left is a navigation menu with categories: Communication Templates, Build, Monitor, and Jobs. The main content area is titled 'GENERAL USER PERMISSIONS' and contains two columns of permissions, each with a 'Read Create Edit Delete' header. All permissions in both columns have checkmarks in all four columns. Below the permissions are sections for 'General User Permissions' and 'Administrative Permissions', each with a descriptive text box. At the bottom right are 'Next' and 'Cancel' buttons. The footer contains copyright information and a 'Chat' button.

	Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓
Assets	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓
Cases	✓	✓	✓	✓
Coaching	✓	✓	✓	✓
Contacts	✓	✓	✓	✓
Contracts	✓	✓	✓	✓
Documents	✓	✓	✓	✓
Feedback	✓	✓	✓	✓
Feedback Questions	✓	✓	✓	✓
Feedback Question Sets	✓	✓	✓	✓
Feedback Requests	✓	✓	✓	✓
Goals	✓	✓	✓	✓
Goal Collaborators	✓	✓	✓	✓
Goal Links	✓	✓	✓	✓
Ideas	✓	✓	✓	✓
Leads	✓	✓	✓	✓
Live Agent Sessions	✓	✓	✓	✓
Live Chat Transcripts	✓	✓	✓	✓
Live Chat Visitors	✓	✓	✓	✓
Opportunities	✓	✓	✓	✓
Performance Cycles	✓	✓	✓	✓
Price Books	✓	✓	✓	✓
Products	✓	✓	✓	✓
Push Topics	✓	✓	✓	✓
Quick Text	✓	✓	✓	✓
Solutions	✓	✓	✓	✓

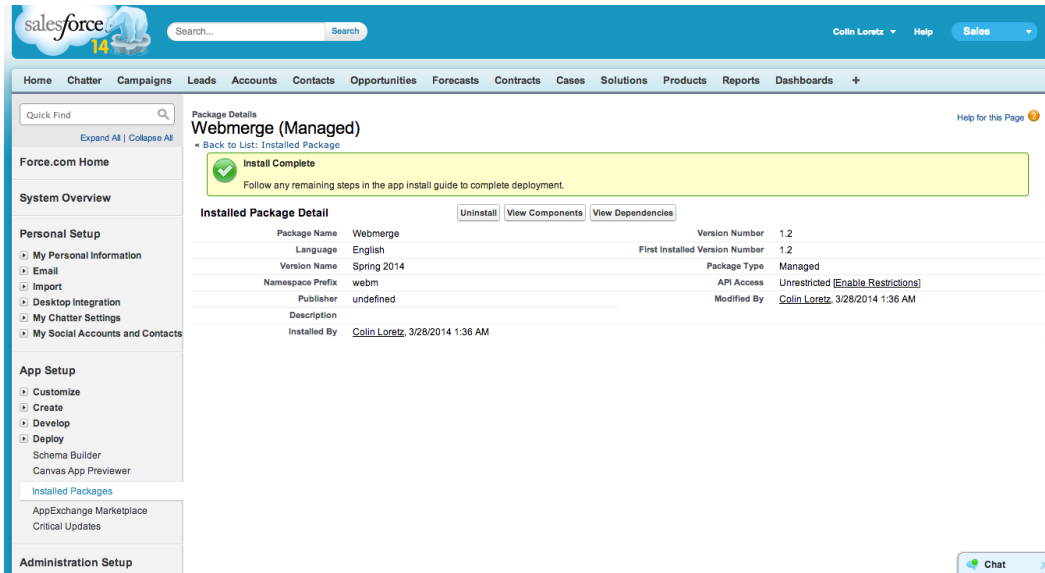
Select a security level. **Grant access to all users** is recommended if you want your users to be able to merge documents themselves. There are some areas of the WebMerge for Salesforce.com application that will only be accessible from System Administrators.

The screenshot shows the 'Webmerge' package installer configuration page at 'Step 2. Choose security level'. The page has a top navigation bar with the Salesforce logo, a search bar, and user information. The main content area is titled 'Step 2. Choose security level' and contains a section for 'Select security settings:'. There are three radio button options: 'Grant access to admins only', 'Grant access to all users' (which is selected), and 'Select security settings'. Each option has a corresponding description of the security level. At the bottom right are 'Previous', 'Next', and 'Cancel' buttons. The footer contains a 'Chat' button.

Click **Install** and you'll receive an email when WebMerge for Salesforce.com is installed in your organization.

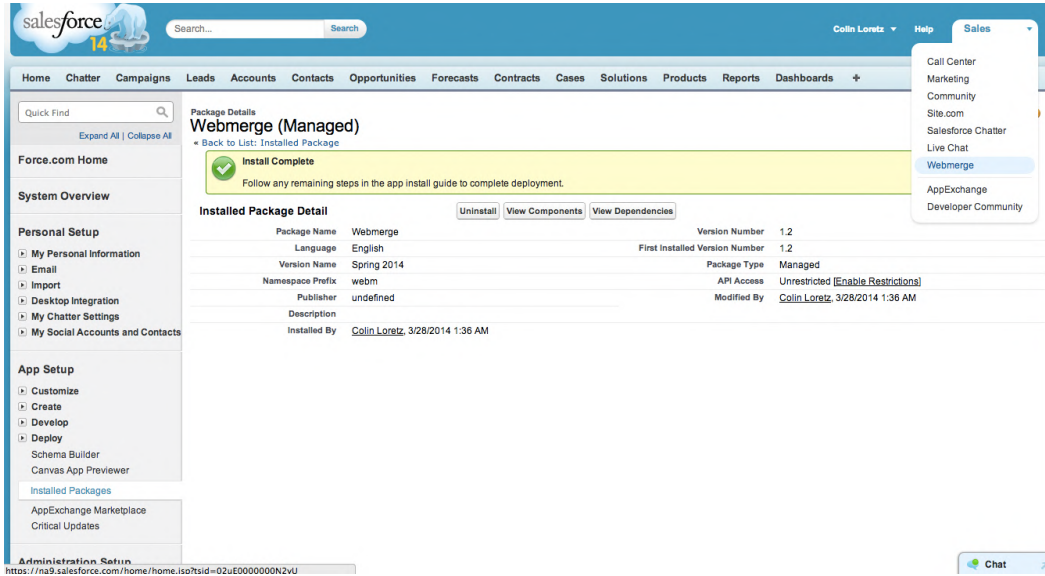


Installed and ready to go!



# Accessing WebMerge for Salesforce.com

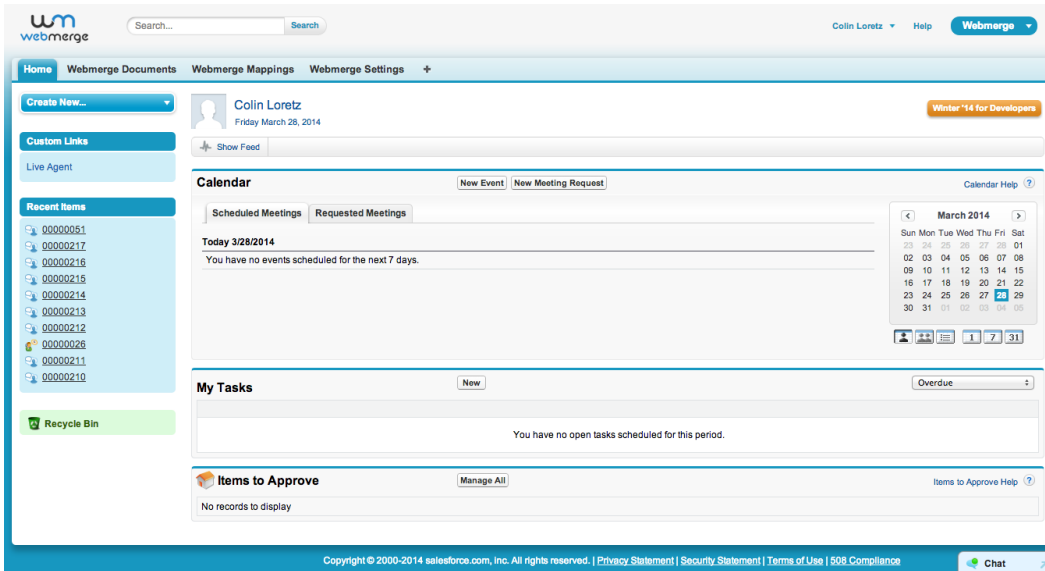
You can access WebMerge for Salesforce.com at any time in your **Apps** dropdown in the top right of Salesforce.



WebMerge for Salesforce.com gives you access to three new Tabs:

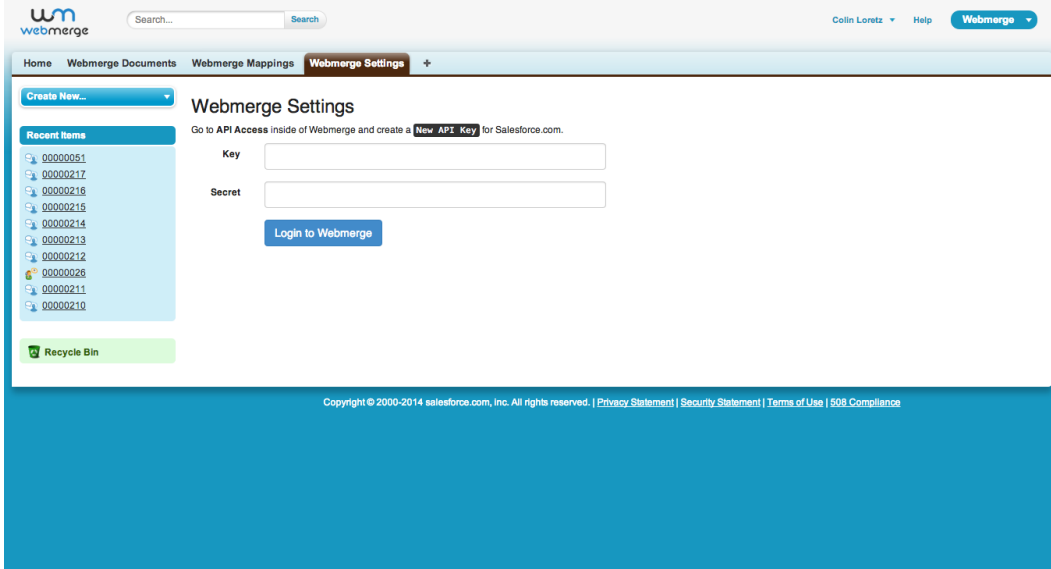
1. **Webmerge Documents**
2. **Webmerge Mappings**
3. **Webmerge Settings**

These Tabs are where you will be able to manage your WebMerge document mappings and settings.

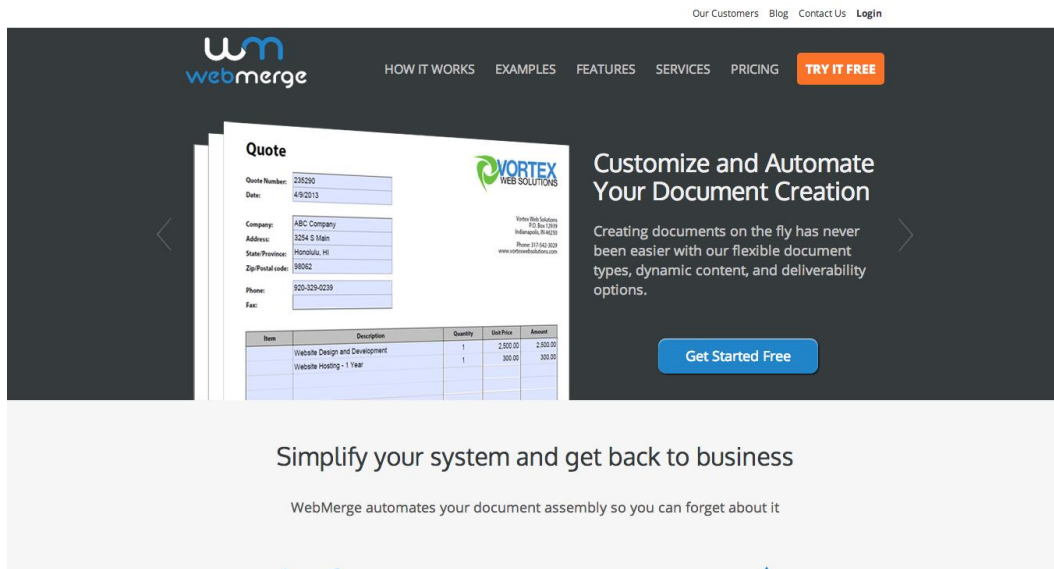


# WebMerge Settings

To give Salesforce.com access to your WebMerge documents, we need to setup an **API Key** and **API Secret** in WebMerge.



Visit [www.webmerge.me](http://www.webmerge.me) and either sign in or create a new account.



Under your **Profile**, click on **API Access**.

The screenshot shows the WebMerge user interface. At the top, there is a navigation bar with 'Documents', 'Data Routing', and 'Reports' tabs. A search bar is present with the text 'Search by name or fields...'. Below the navigation bar, the 'My Documents' section lists several documents: 'AppExchange Project (inactive)', 'Client Proposal', 'Event Proposal', 'Invoice', 'Note Listing', 'Powerpoint Test', and 'Scope of Work'. On the right side, a user profile dropdown menu is open, showing options: 'Hi Colin!', 'Login Settings', 'My Profile', 'Users', 'Billing', 'API Access' (highlighted), 'Delivery Accounts', 'Referral Program', 'Reseller', and 'Logout'. Below the menu, there is a 'How To: Create a...' video player and a 'Tips and Articles' section with links like 'Automatically Generate a Contract from Insightly using Torpio'.

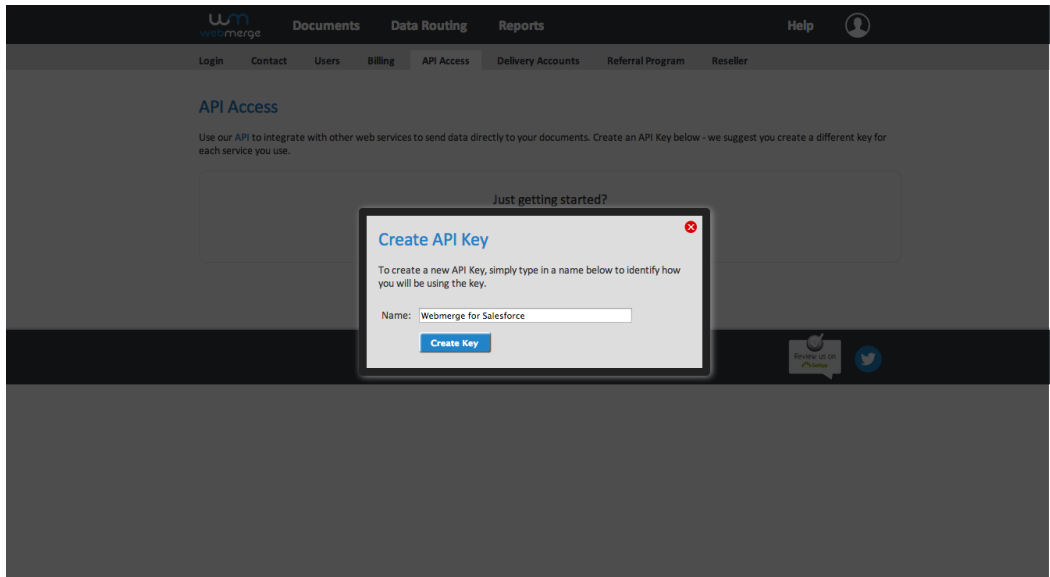
<https://www.webmerge.me/manage/account?page=api>

Click on **Click here to create an API Key!** to get started.

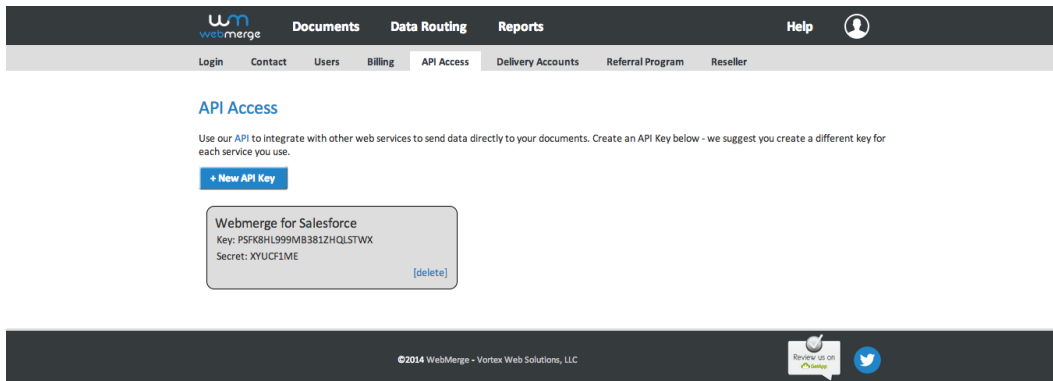
The screenshot shows the 'API Access' page. At the top, there is a navigation bar with 'Documents', 'Data Routing', and 'Reports' tabs. Below the navigation bar, there is a secondary navigation bar with links: 'Login', 'Contact', 'Users', 'Billing', 'API Access' (active), 'Delivery Accounts', 'Referral Program', and 'Reseller'. The main content area is titled 'API Access' and contains the text: 'Use our API to integrate with other web services to send data directly to your documents. Create an API Key below - we suggest you create a different key for each service you use.' Below this text is a large button that says 'Just getting started? Click here to create an API Key!'. At the bottom of the page, there is a footer with the copyright notice '©2014 WebMerge - Vortex Web Solutions, LLC' and social media icons for 'Review us on' and 'Twitter'.



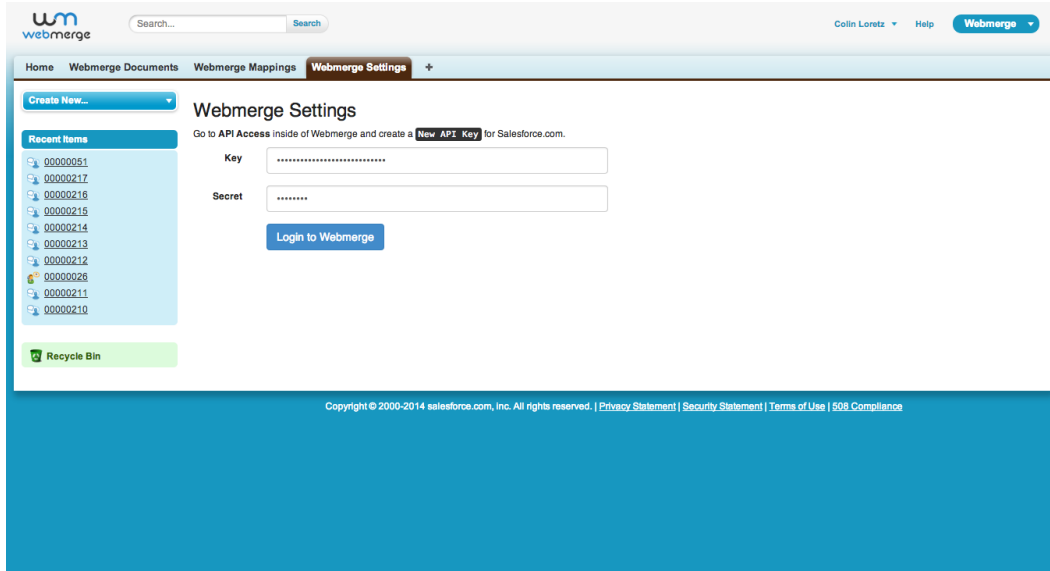
Give your **API Key** a name. For this example, we're going to call it **WebMerge for Salesforce**.



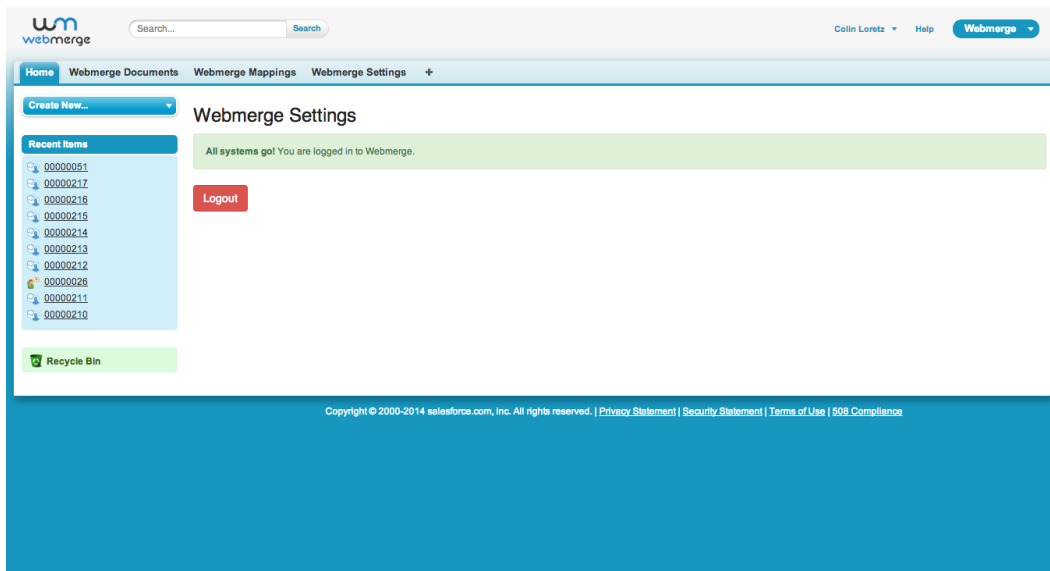
Now you want to copy and paste the **API Key** and **API Secret** from WebMerge into WebMerge for Salesforce.com settings.



Click **Login to WebMerge** using your new API credentials.



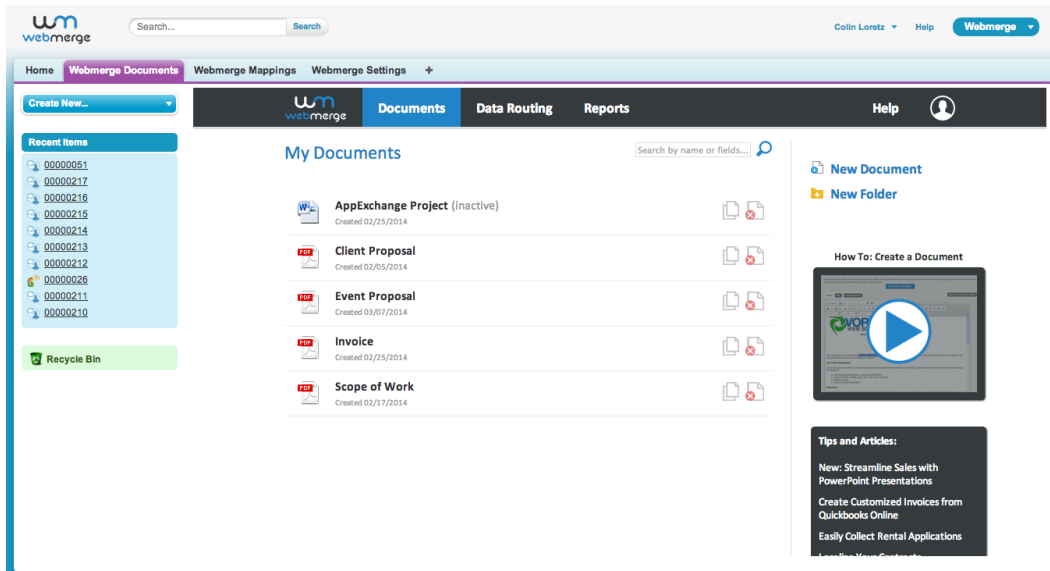
If everything was entered correctly, you'll be logged in.



## Managing WebMerge Documents

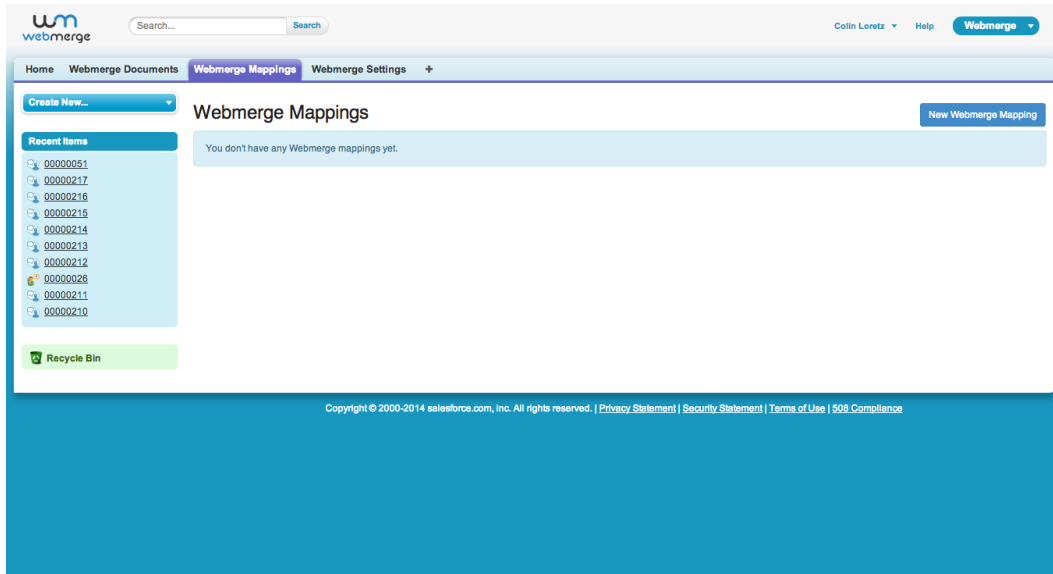
Now that you are logged in to WebMerge, you can view the **WebMerge Documents** and **WebMerge Mappings** tabs.

Click on **WebMerge Documents** and you'll see that we have given you full access to your WebMerge account right within Salesforce. You can create new **Documents** or **Data Routes** here and they will be available to be used in the **WebMerge Mappings** tab.

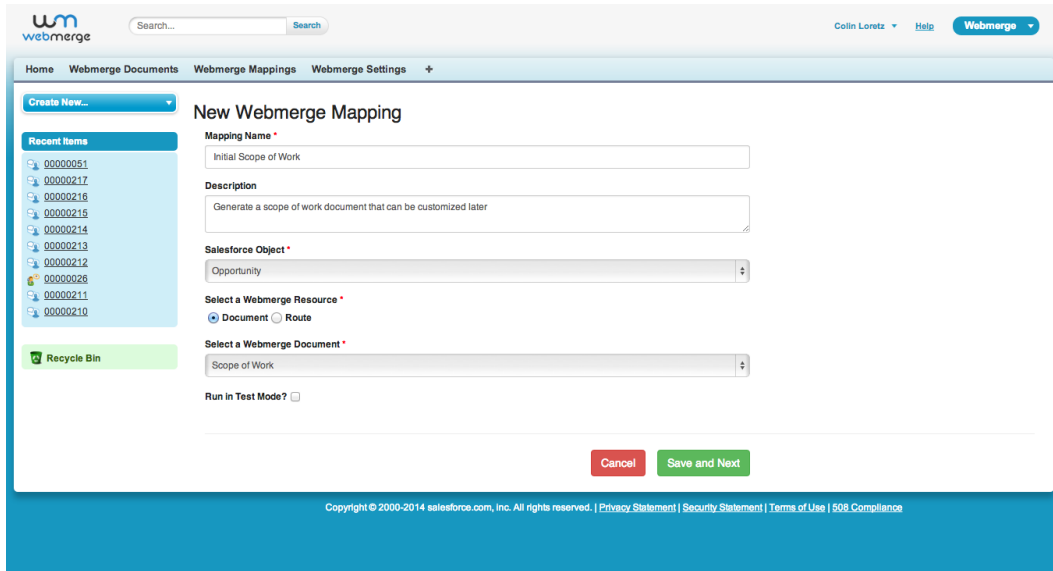


## Creating a WebMerge Mapping

WebMerge for Salesforce allows you to create WebMerge document mappings using data from Salesforce.com records.



Click **New WebMerge Mapping** to get started on creating a new mapping.



Fill out the details on the New WebMerge Mapping screen:

- **Mapping Name:** Give this mapping a name that will be descriptive to you and your users.
- **Description:** Give users a description of what this mapping does or what use case it was created for.

- **Salesforce Object:** Select a Salesforce.com standard object for which you'd like to merge the document with.
- **Select a WebMerge Resource:** WebMerge allows you to create **Documents** or **Data Routes**. You can toggle between both types of resources here. Selecting Documents will give you access to a list of available, active Documents in WebMerge.
- **Select a WebMerge Document (or Route):** Select the specific **Document** or **Data Route** from WebMerge you'd like to create a mapping for.
- **Run in Test Mode?** This option will allow you to test your mapping while you're designing it without using up your quota of document merges. Documents created in Test Mode have a WebMerge watermark.

Click **Save and Next** to continue on to **Field Mapping**.

## Creating Field Mappings

Now that we have created a new **WebMerge Mapping**, we are presented with a series of WebMerge Fields that we can map to existing Salesforce.com fields on the Salesforce object that we selected on the previous screen.

*Note: Changing a WebMerge Mapping's Salesforce Object or WebMerge Resource is not currently supported. A new WebMerge Mapping has to be created if you wish to change these values.*

The screenshot displays the 'Edit Webmerge Mapping' interface. On the left, there is a 'Recent Items' list with several entries, each with a small icon and a numerical ID. Below this list is a 'Recycle Bin' button. The main area is titled 'Edit Webmerge Mapping' and contains the following fields and sections:

- Mapping Name:** A text input field containing 'Initial Scope of Work'.
- Description:** A text area containing 'Generate a scope of work document that can be customized later'.
- Salesforce Object:** A dropdown menu set to 'Opportunity'.
- Webmerge Resource:** A dropdown menu set to 'Scope of Work'.
- Run in Test Mode?** A checkbox that is currently unchecked.
- Field Mapping:** A section with two columns: 'Webmerge Field' and 'Salesforce Field'. It contains three rows of dropdown menus:
  - Row 1: 'FirstName' (Webmerge Field) mapped to '--None--' (Salesforce Field).
  - Row 2: 'ProjectName' (Webmerge Field) mapped to '--None--' (Salesforce Field).
  - Row 3: 'RepName' (Webmerge Field) mapped to '--None--' (Salesforce Field).
- Automatically generate the documents given the following rule:** A checkbox that is currently unchecked.
- Buttons:** 'Cancel' (red), 'Save & Activate' (green), and 'Save & Close' (green).

Select the **Salesforce Field** that you want to map to each **WebMerge Field**. As you are doing this, you will have access to:

- Fields from the selected **Salesforce Object**
- Fields from parent records like Owner, Account, etc.
- Child Relationships. See **Working with Child Relationships** for more information on using Child Relationships in your WebMerge documents.

## Automatically Generating Documents

With WebMerge you can automatically have a WebMerge Mapping generate a document when specific criteria are met.

The screenshot shows a configuration window for automatic document generation. At the top, there are three dropdown menus: 'FirstName' with 'Account: Account Name', 'ProjectName' with 'Name', and 'RepName' with 'Owner: Full Name'. Below these is a checked checkbox labeled 'Automatically generate the documents given the following rule'. Underneath is the 'Evaluation Criteria' section, which includes a dropdown menu for 'Evaluate the following rule when a record is:' set to '--None--'. Below that is a table for criteria:

Field	Operator	Value
--None--	equals	--None--
--None--	equals	--None--
--None--	equals	--None--
--None--	equals	--None--

At the bottom of the form are three buttons: 'Cancel' (red), 'Save & Activate' (green), and 'Save & Close' (green). A footer at the very bottom reads: 'Copyright © 2000-2014 salesforce.com, Inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance'.

### Evaluate the following rule when a records is:

- **Created** - this will evaluate the rule every single time a record is created. If the rule criteria are met, the document will be created.
- **Created, and every time it's edited** - this will evaluate the rule every single time a record is created and every single time the record is edited. If the rule criteria are met, the document will be created.
- **Created, and any time it's edited to subsequently meet criteria** – this option will evaluate the rule every time a record is created any every time the record is edited and did not previously meet the criteria.

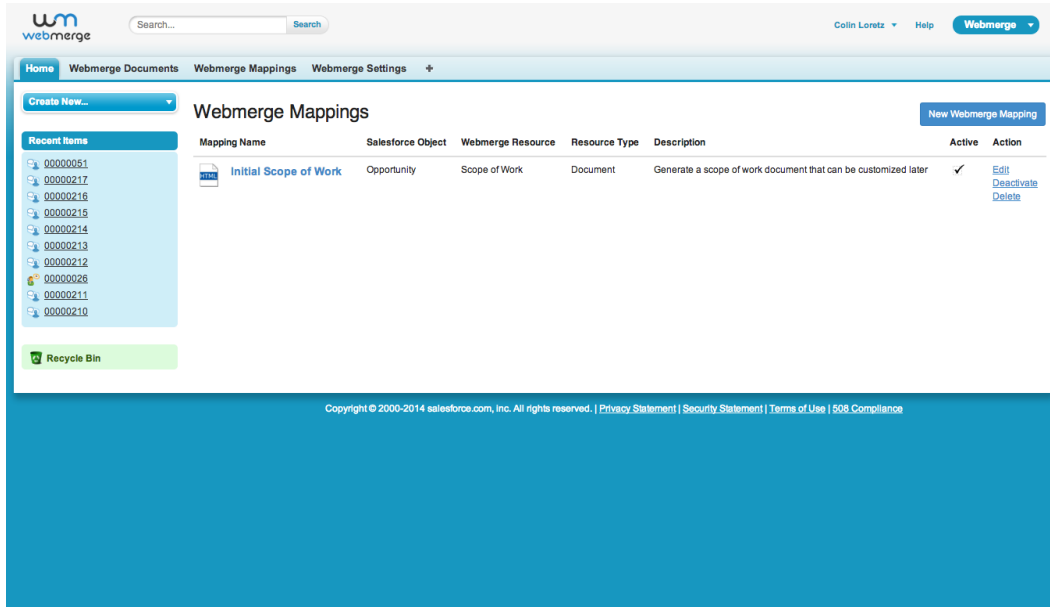
Once you've selected the evaluation criteria, you can select up to four criteria that must be met in order for the document to be generated automatically. You have access to the fields on the **Salesforce Object** that you selected when creating the **WebMerge Mapping** as well as fields from parent objects like Owner.Name or Account.Name.

## Activating and Deactivating WebMerge Mappings

As you build your **WebMerge Mapping**, you can save it and return to it at any time as you gather requirements and design your document in WebMerge. If you are working with a new mapping, you can **Save & Close** or **Save & Activate**. If you choose to **Save & Close**, you will be able to activate the mapping later.

### Activated Mappings

Once you activate a mapping, it will be available to your users through the WebMerge button on a record. If your mapping has been configured to automatically generate documents, those rules will now be active as well.



The screenshot shows the WebMerge Mappings interface. At the top, there is a search bar and a user profile for Colin Loretz. The main content area is titled "Webmerge Mappings" and contains a table with the following columns: Mapping Name, Salesforce Object, Webmerge Resource, Resource Type, Description, Active, and Action. A "Recent Items" sidebar on the left lists several mappings with IDs like 00000051, 00000217, etc. The table shows one mapping named "Initial Scope of Work" which is active (indicated by a checkmark) and has actions for Edit, Deactivate, and Delete. A "Recycle Bin" button is located at the bottom left of the table area.

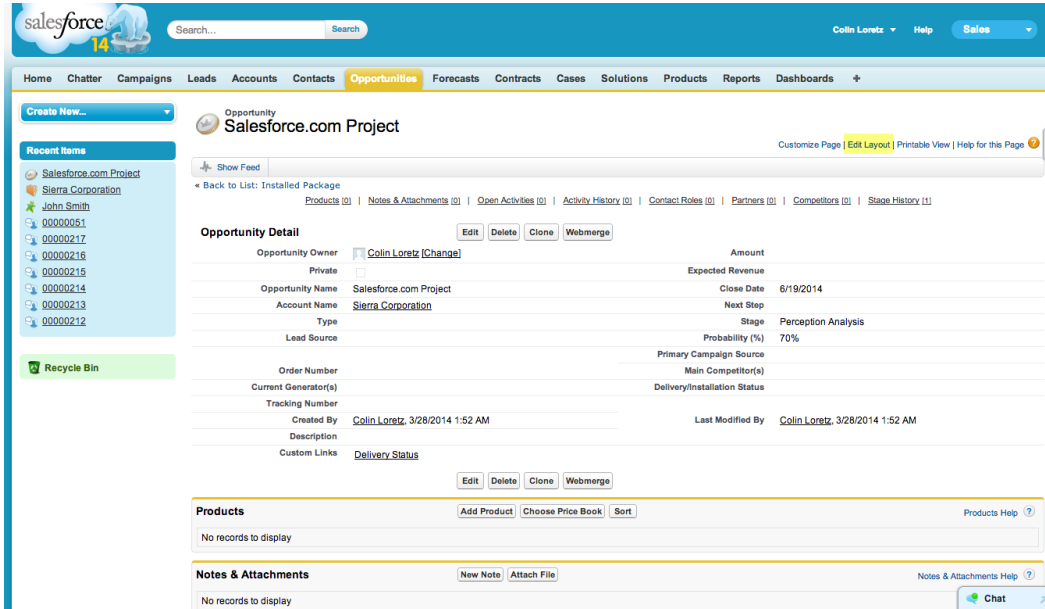
Mapping Name	Salesforce Object	Webmerge Resource	Resource Type	Description	Active	Action
Initial Scope of Work	Opportunity	Scope of Work	Document	Generate a scope of work document that can be customized later	✓	<a href="#">Edit</a> <a href="#">Deactivate</a> <a href="#">Delete</a>



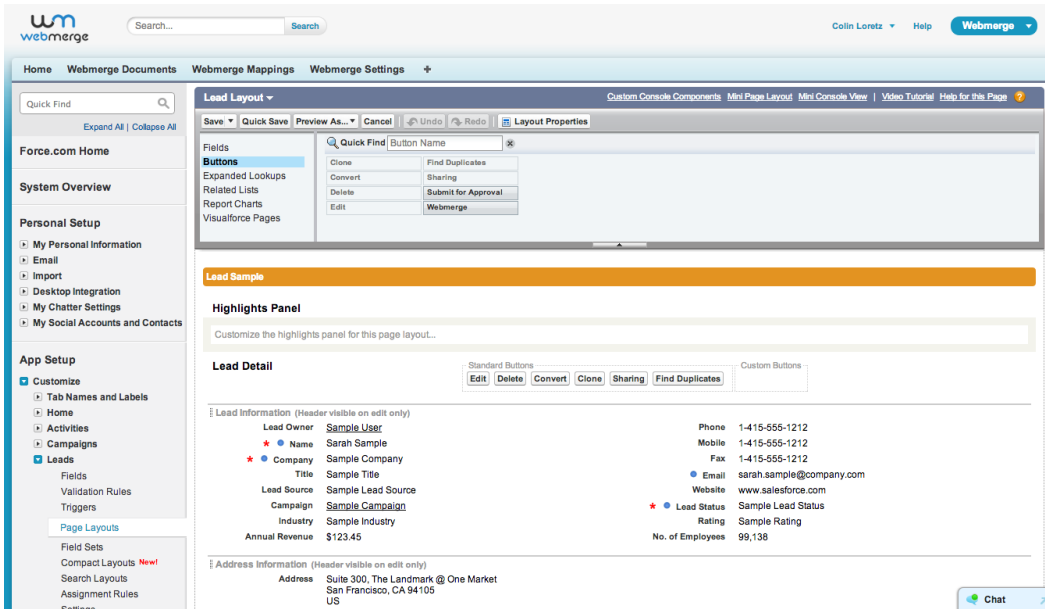
# Adding WebMerge Buttons to Salesforce Page Layouts

Not only do you have the option to setup criteria for generating documents automatically, users can also generate documents on demand using the WebMerge button on a Salesforce record. The objects currently supported by WebMerge are: Account, Case, Contact, Contract, Lead and Opportunity.

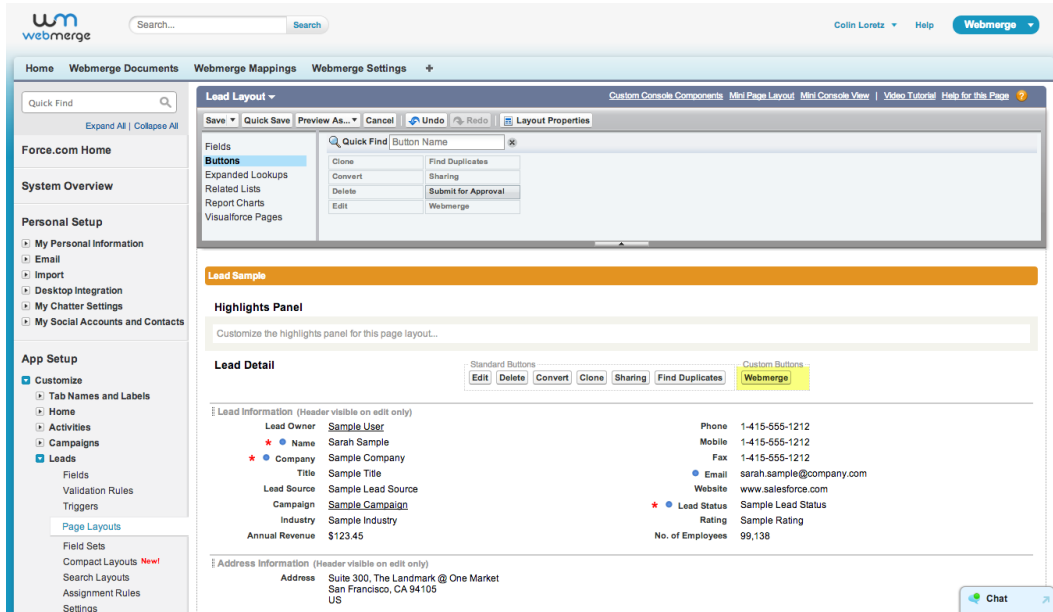
View a record from each of these objects and click on **Edit Layout** in the upper right menu.



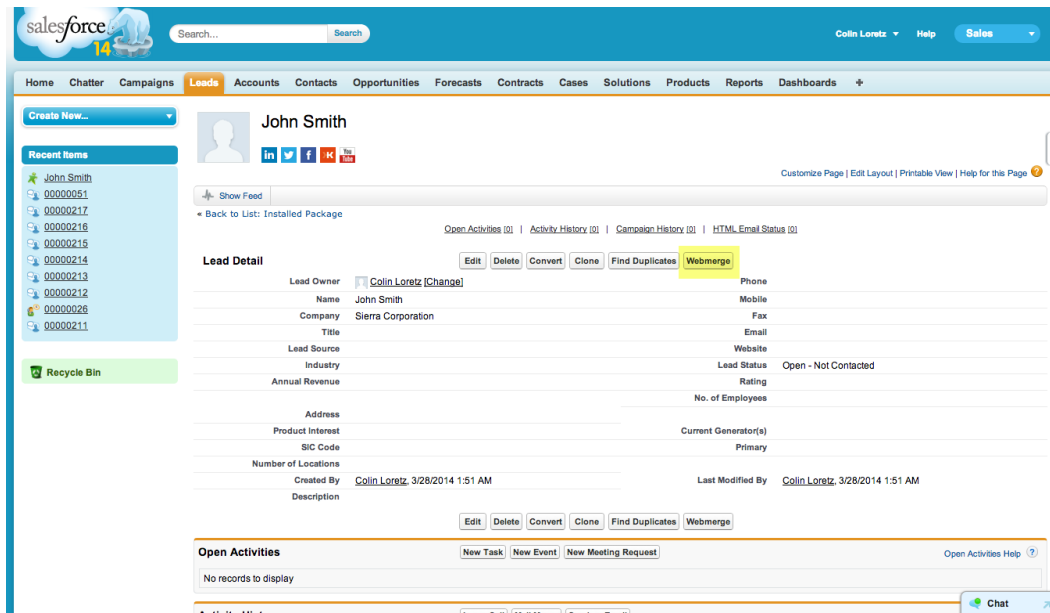
Click on the **Buttons** section and you will see a **WebMerge** button.



Drag the **WebMerge** button into the **Custom Buttons** section of the Page Layout.



Save the Page Layout and you will now see the WebMerge button on the detail record. Repeat this for each of the supported Salesforce objects.



## Showing Attachments on Salesforce Records

If you've recently started using Salesforce.com or have not used the **Notes & Attachments** feature of the platform, you might not immediately see the documents that are created by WebMerge.

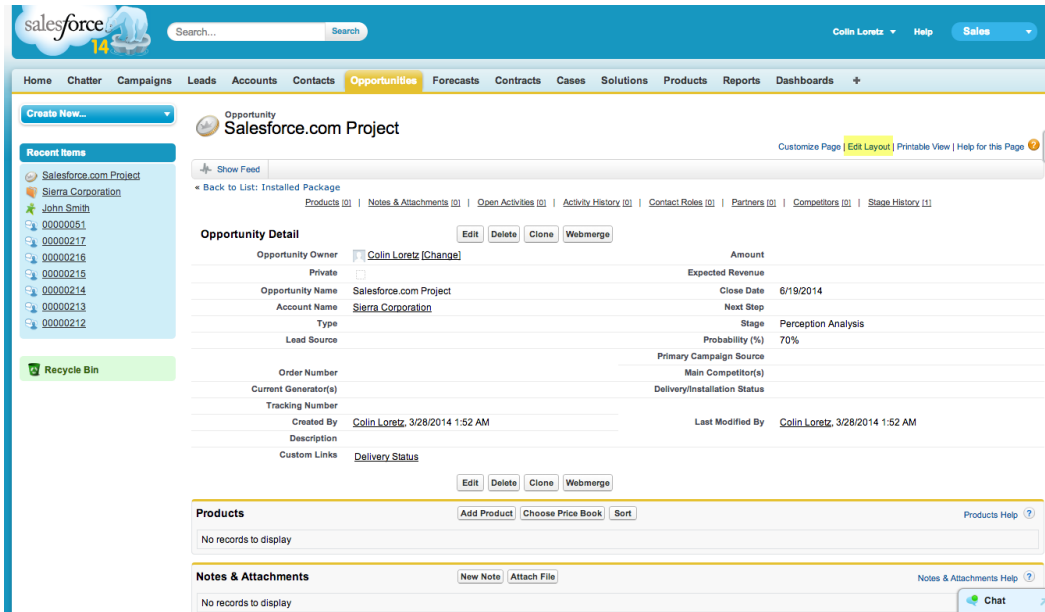
To see all attachments on a record, ensure that the **Notes & Attachments** related list is added to each of your page layouts. Pull up a record for an object. Click on **Customize Page** in the upper right.

The screenshot shows the Salesforce interface for an Opportunity record titled "Salesforce.com Project". The page layout includes a navigation bar at the top with tabs for Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities (selected), Forecasts, Contracts, Cases, Solutions, Products, Reports, and Dashboards. On the left, there is a sidebar with "Recent Items" and a "Recycle Bin". The main content area displays the "Opportunity Detail" section, which includes fields for Opportunity Owner (Colin Loretz), Amount, Private status, Opportunity Name, Account Name (Sierra Corporation), Type, Lead Source, Order Number, Current Generator(s), Tracking Number, Created By, Description, and Custom Links (Delivery Status). Below the detail section are sections for "Products" and "Notes & Attachments", both showing "No records to display". A "Customize Page" button is visible in the top right corner of the record view.

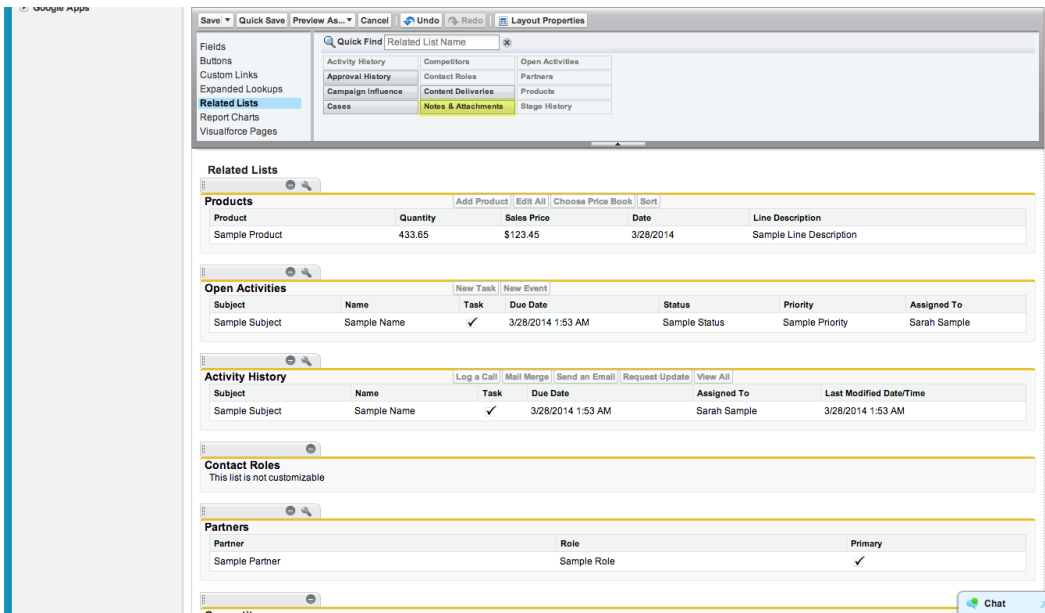
Make sure that **Notes & Attachments** is listed under **Selected List** and click **Save**.

The screenshot shows the "Customize My Page" dialog for the Opportunity object. The dialog is titled "Opportunity" and contains a "Related Lists" section. Below this section, there are two columns: "Available List" and "Selected List". The "Available List" contains a "--None--" option. The "Selected List" contains the following items: Products, Notes & Attachments, Open Activities, Activity History, Contact Roles, Partners, Competitors, and Stage History. There are "Add" and "Remove" buttons between the lists, and "Up" and "Down" arrows within the "Selected List" to reorder items. At the bottom of the dialog, there are "Save" and "Cancel" buttons.

You will now need to add the Related List to the Page Layout. Click on **Edit Layout** in the upper right menu.



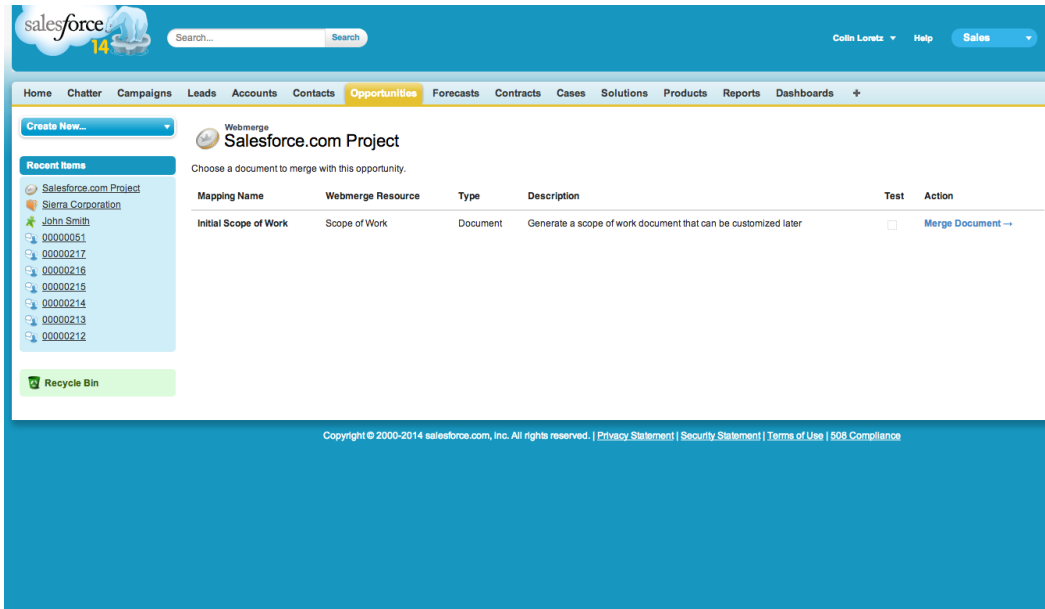
Click on the **Related Lists** section and drag the **Notes & Attachments** Related List into the Page Layout if it is not already there.



Save the Page Layout.

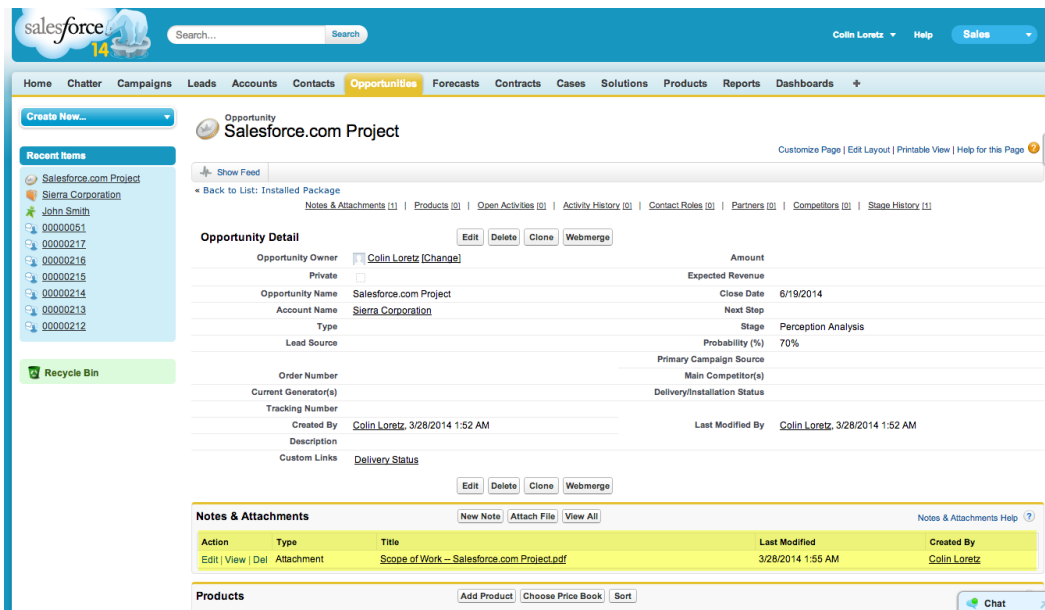
## Creating a Document using the WebMerge Button

After you've placed the WebMerge buttons and setup a couple WebMerge Mappings, click the **WebMerge** button on a record. This will show you a list of available mappings for this object.



Click **Merge Document** next to the mapping you'd like to use with this record.

You will be returned back to your Salesforce record and you should now see your newly generated attachment in the **Notes & Attachments** Related List.



## Advanced Feature: Working with Child Relationships

Salesforce supports master-detail relationships and we've given you the ability to use those relationships in WebMerge Mappings.

To use Child Relationships, you will need to create a Smarty Template in your document that supports iterating over a list of data. To do so:

```
{foreach from=$notes item=note}
{$note.Title}
{$note.Body}
{/foreach}
```

In your Salesforce WebMerge Mapping you will now have the ability to map a Salesforce field or relationship to **notes** and **note**. When working with child relationships, we're going to ignore the **note** field in this situation because it is the iterator. Let's instead look at **notes** and in the **Salesforce Field** section, find the relationship you want to map to the list. In this example, we will use **Child Relationship: Notes**. This will allow you to create a WebMerge generated document that iterates over all the child notes attached to a Salesforce record and output their *Title* and *Body*.

## Adding support for a Salesforce Object

After you've logged into WebMerge in the **WebMerge Settings** tab, click on **Salesforce Object Settings** in the upper right corner.

Here you can add or remove support for various Salesforce objects. We allow you to see a list of all the Salesforce objects that exist within Salesforce but keep in mind that you will only be able to add Merge Buttons and Triggers to certain objects. A good rule of thumb is to stick to standard objects like Quote, Contract, Event, or Task and custom objects.

## Adding Merge Buttons for other Salesforce Objects

WebMerge for Salesforce works with a few standard Salesforce Objects out of the box. If you'd like to add more, you can do so.

1. **Create a new Visualforce Page**
2. **Set the standardController for your new page:** Set the standardController property on the page to be the object you'd like to add support for. Also add the docType and optionally add your own title. In the following example, we are

displaying the account name. Keep in mind that not every Salesforce object has a **Name** property.

```
<apex:page standardController="Account" docType="html-5.0" title="Webmerge Account: {!account.Name}">
```

**3. Add the WebMerge Wizard Component:** Add the following Visualforce component to your new page. Set the record attribute to be equal to the Salesforce record that comes from the standardController. In most cases

```
<webm:WebmergeWizard record="{!Quote}" />
```

**4. Create a new button:** Set the button type to Visualforce and select your new Visualforce page.

**5. Add your new button to a Page Layout**

## Adding Apex Triggers for other Salesforce Objects

- 1. Create a new Apex Trigger:** Select the Salesforce Object you'd like to trigger on and select **After Insert** and **After Update** only. Do not set any other values for this.
- 2. Add the Apex Trigger code:** Add the following code snippet to your new Apex Trigger.

```
trigger MyQuoteTrigger on Quote (after insert, after update) {  
    new webm.WebmergeTriggerEvaluator(Trigger.new,  
Trigger.old).doTrigger();  
}
```



## Upload, merge, and deliver smart documents in a snap.

Formstack Documents is a seamless document creator for versatile teams. Use Formstack Documents to transform data into beautifully designed documents you can send anywhere.

Learn more at [formstack.com/documents](https://formstack.com/documents)