

Opportunity object definition visible, and on the other screen your Word document. Build the document and assign your merge fields.

IMPORTANT NOTE: DO NOT copy/paste the integration names to your word document. The extra html formatting will prevent the merge from working correctly. If you manually type the first one directly in Word, you can copy/paste and then edit those tokens. **ALSO NOTE:** integration names are case sensitive.

Uploading the Form to a Template

Once you have completed your form (or for that fact, while you are building it), you can create a new Template in the object definition. Click the **New Document Template** button and fill out the screen as shown:

Opportunity: New Document Template Save Cancel

Define Document Template

Template Name

Integration Code

Render as PDF (for HTML templates only)

Flatten Populated Form (for PDF Forms only)

Template Helper String Tokens Test EVAL[] block

Opportunity [ccOpportunity]

Upload File Choose File Bid Request Form.doc

Supported template formats: DOC, XLS, HTML, RTF, CSV, XML, TXT, PDF

Create a Document Template Field

In order to automate the generation of this document, you will need to create a new field to hold the

Opportunity: Edit Field Save Cancel

Field Properties

Field properties are global settings that apply to this field wherever it is presented for input or display.

Field Type Document Template

Field Label

You can specify text label to be used in the headers in Views and Reports. This label is optional. If not specified, Display Label will be used.

View Header

View Width pixels or %

Default Template

Document template populated with record's data will appear in **pop-up window**. You can specify default size of that window.

Width in Pixels

Height in Pixels

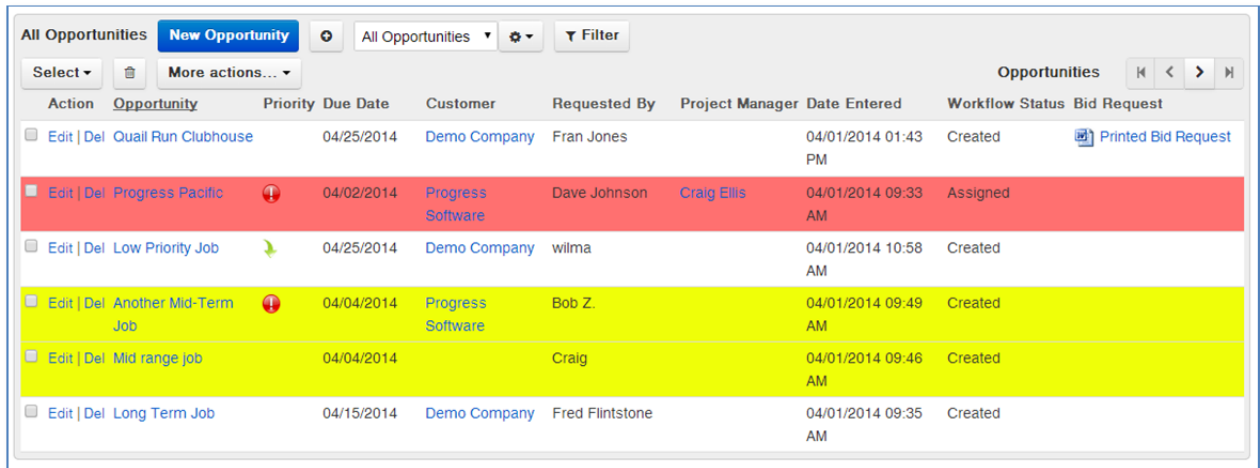
Advanced Field Properties

Advanced field properties are global settings that allow you to control how this field is used throughout your system.

- Document Template fields cannot be indexed
- Track all changes to this field in each record's Audit Trail for a complete historical log. This may increase your database space usage if the field value changes often
- Always require a value in this field in order to save a record
- This field allows inline editing from view pages by clicking on icon

template that we just created. Give it a Field Label of “Bid Request”, but most importantly, choose the default template in the drop down provided. This template will now be assigned to all new opportunities.

You can now use this field anywhere on your grids or your view forms. (On edit and new, you get the drop down to select the form) If we add this column to the Opportunities view, you can simply generate the document directly from the list by clicking on the hyperlink.



BID REQUEST

DATE RECEIVED	04/01/2014 01:43 PM	DUE DATE	04/25/2014
CONTRACTOR	Demo Company	REQUESTED BY	Fran Jones
PHONE #	(239)101-0999	FAX NUMBER	(239)221-1211
JOB NAME		LOCATION	

ITEMS REQUESTED

TYPE	REINFORCEMENT	QUANTITY

SPECIAL CONCRETE REQUIREMENTS None _____

NOTES AND COMMENTS
These are the fully formatted notes and comments section to be merged onto the bid request.

CALL TAKEN BY Craig Ellis _____

Clicking on the link will then download a merged document for you to view, print or email.