# wDocs User Guide

# wDocs User Guide

## Overview

The wDocs plug-in for SugarCRM is a paid add-on that lets users easily generate Microsoft Word documents natively from Sugar. Create letter templates, NDAs, letter quotes, statements of work, account visit-planning reports, and more. This guide covers how users can engage with wDocs for SugarCRM after it has been installed and configured by an administrator. For more information on installing wDocs to your Sugar instance, please refer to the [W-Systems Product Installation Guide](). For information on activating the package, please refer to the [wDocs Administration]() section of this page.

This guide pertains to the [latest release ]() of wDocs. If you are not using the latest version of wDocs, then you may not have access to some of the features listed on this page.

**Note**: wDocs has been integrated into Sugar Sell and Serve as the Doc Merge feature starting with version 11.2.0. Please refer to the [Sugar Application Guide]() for more information.

## Features

A common need among Sugar users is the ability to create letters, contracts, proposals, mailing labels, and forms.

- **Create polished Microsoft Word documents natively from Sugar**: Easily and automatically generate documents your users need from Sugar. Examples of files can include (but are not limited to) letter templates, NDA agreements, letter quote, Statement of Work, Account Visit Planning Report, and more.
- **Merge information from any combination of modules**: The document automation module can merge any module-related data from Sugar into a predefined Word template. For instance, from the Accounts module, quickly generate a contract or letter template.
- **Merge multiple records from related tables**: Create documents with merges of data from one-many relationships. For instance, when merging a document from the Account module, include information from the related contacts or meetings modules for the account.
- **Mass Record Merge from Module List Views**: From Sugar list views, select multiple records to create multiple merge documents. When in the Accounts list view, select multiple accounts and generate a merge of address labels or letter templates for those accounts.

- **Merge to Your Local Computer as a Sugar Linked Document**: Keep all documents within your Sugar instance as a linked document instead of downloading it to your local computer. The file then will be accessible by anyone within Sugar. wDocs will merge and directly attach the merged document as a linked document in Sugar.
- **Merge Using Microsoft Word Template and Auto Convert to PDF**: Once your Microsoft Word Template is uploaded, you can choose between downloading the final merged file as either an MS Word or PDF document. Design your templates in Word but output directly to PDF formatting.
- **Document Template Builder**: Easily create your own formatted Google Docs or Microsoft Word documents from module or related module fields. You can also quickly generate tables and format various field types including date, boolean, and text.

# wDocs Administration

To perform these steps, you will need **System Administrator** rights in Sugar.

## Activating Your License

To start using wDocs, an administrator must first create a new Admin user account to be used exclusively for wDocs.

**IMPORTANT NOTES:**

- The user created for wDocs should not be used for any other purpose.
- The user created for registering wDocs will not be able to merge documents.
- If a user is not registered with the wDocsForMicroService in these steps, no users will be able to merge documents.

**Note**: All Sugar instances hosted On Demand use SugarIdentity. As a rule, we need to use a Sugar Admin user, created exclusively for wDocs licenses, for SugarCloud-hosted instances. When activating the wDocs license, you will need to enter the wDocs Sugar user's credentials in Admin > wDocs License Management.

1. Go to Admin > wDocs License Management. The **Users** Module will now be displayed in your navigation bar. Click on Users > Create New User.
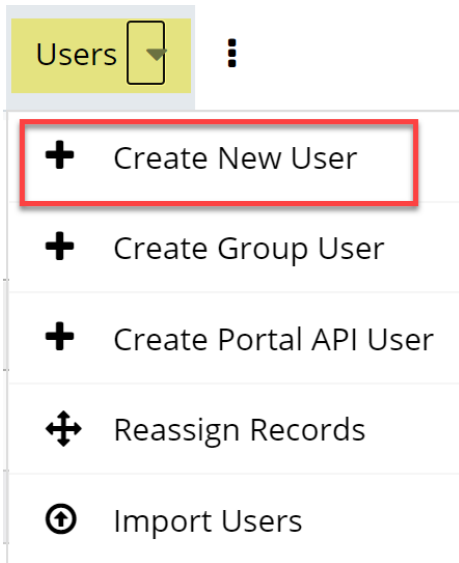
2. From the **User Profile** tab, name your user and set the **User Type** to **System Administrator User**.



3. From the< **tab, set a password, confirm it, and press Save to create your new System Admin User.**

Create

Save    Cancel

| User Profile | Password | Advanced |

**Password**

New Password
*          ............

Confirm
Password   ............

✔ Must contain one upper case letter (A-Z)
✔ Must contain one lower case letter (a-z)
✔ Must contain one number (0-9)
✔ Minimum Length =6 and Maximum Length
   =40

Save    Cancel

4. Navigate to the Administration page and find the wDocs Section. Click the Manage wDocs License link available in the section.

**wDocs**

Configure product settings and manage license

| 🔧 Manage wDocs License | Manage wDocs License and API user credentials | 🔧 wDocs Config | Configure document name prompt, limit count of related records being merged, custom merge server |

5. A new page will open. Here you will be required to enter the credentials of the new System Admin User that you created earlier.

# wDocs License Management

Request License

## The services are online

🔴 Registration Status: **The
   license is not active.**  🔄

Username: [                    ]

Password: [                    ]

Save    Delete

6. Enter the credentials and save your configuration. Your wDocs license is now

available.

# wDocs License Management

**Request License**

## The services are online

🔴 Registration Status: **The** ⟳
license is not active.

Username: wDocs Admin User

Password: ••••••••••••••••

**Save**    Delete

To activate a Sugar API license for wDocs, follow the steps below.

In Sugar, click your user name on the User Menu in the upper right area and select **Administration**. On the **Administration** page, locate the **wDocs Users** section:

**wDocs**

Configure product settings and manage license

| 🔧 Manage wDocs License | Manage wDocs License and API user credentials | 🔧 wDocs Config | Configure document name prompt, limit count of related records being merged, custom merge server |
|---|---|---|---|

Click the **Manage wDocs License** link and click on the **Request License** button.

# wDocs License Management

**Request License**

## The services are online

🔴 Registration Status: **The license is not active.** ⟳

Username: 

Password: 

**Save** **Delete**

Once pressed, the button will generate a new **Portal API user** license which will automatically generate a wDocs license for the user.

## The services are online

🟢 Registration Status: **You have an** ↻
**active license.**

Username: wdocs_portal

Password: ..........

**Save** **Delete**

After the registration is successful, **wDocs** can be used.

**Note**: If a user needs to be changed, use the **Delete** button to remove the current user and then enter the credentials of the replacement user to be registered to the wDocs microservice. When changing or re-entering user credentials, always make sure to delete the existing ones.

## Field and Document Module Layout Configuration

The installation of the wDocs module adds custom fields to Sugar's **Documents** module. The following fields need to be added to the EditView and DetailView layouts in Sugar. Here are details for these fields:

| Label | Field name | Data type | Field description |
|---|---|---|---|
| Template? | is_template (*) | checkbox | This field must be ticked for the document to be recognized and used with wDocsForMicroService. |
| DOCUMENT MODULE | doc_module_c | drop-down | This field is used for setting the primary module being merged into the template. |
| USE REVISIONS | use_revisions_c | checkbox | If this field is ticked (field is ticked by default) and there is already a merged document with the same name, adds a new revision document to that document record. |

| FOR LABEL MERGING | for_label_merging_c | checkbox | This field should be ticked to specify the template is to be used for the **Generate Labels** action. |
|---|---|---|---|

\* **is_template**  is not a custom field but must be available in the EditView to be used for designating a document to be used with wDocs.
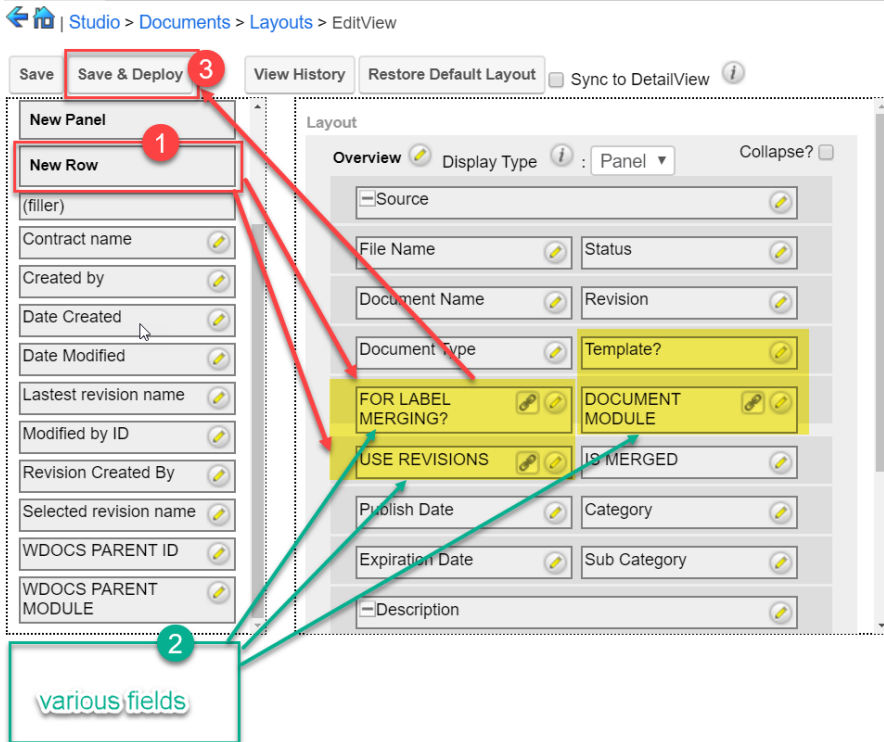
## Adding the fields to the EditView and DetailView Layouts

To add the fields to the edit and detail views, navigate to Admin > Studio > Documents > Layouts > EditView Layout.

**IMPORTANT NOTES:** The following example assumes that the **EditView** and the **DetailView** in Sugar are being synced when the EditView is modified so these views display the same layout for users. If you are "not" syncing these two views (i.e., the **Sync to DetailView** checkbox is not ticked), please be sure to add the same fields to each view separately. For further detail on the **Sync to DetailView** checkbox functionality, please refer to the Sugar documentation.

The following image shows three (3) steps that need to be performed as described here:

1. Drag and drop a **New Row** into your layout where desired. In our example, we've placed two new rows just below the row containing the "Template?" checkbox.
2. Drag and drop the fields into the new rows.
3. Click the **Save & Deploy** button to allow Sugar to update the user interface (**Note**: users will need to refresh their browser to see this new field if they are viewing the Contacts EditView or DetailView.

After successfully adding the fields, the **Documents** module DetailView should contain the fields too. Certain fields will appear in the EditView when the **Template?** checkbox is ticked (the **DOCUMENT TEMPLATE** field shown here is one of them):



In EditView, the **DOCUMENT MODULE** field is a drop-down:

The wDocs configuration is now complete!

## Optional Configuration
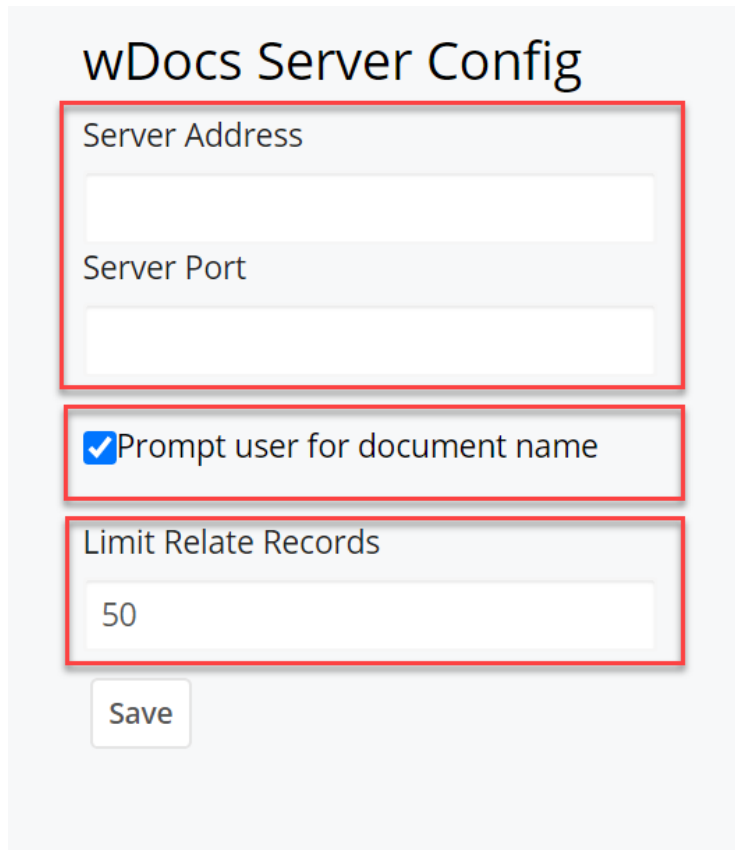
On the Sugar Administrator page's **wDocs Users** section, there is a link for **wDocs Config**:

**wDocs**

Configure product settings and manage license

| | | | |
|---|---|---|---|
| 🔧 Manage wDocs License | Manage wDocs License and API user credentials | 🔧 wDocs Config | Configure document name prompt, limit count of related records being merged, custom merge server |

There are three configuration options available:

## wDocs Server Config

Server Address

Server Port

☑ Prompt user for document name

Limit Relate Records

50

Save

**Note**: Please be sure to use the **Save** button after making any of these configuration changes.

- Server Address / Server Port

These fields are used for specific situations when the wDocs service moves to

another server or if the client is located in a region where the DNS propagation might take a longer time to reach our server. For most installations, these should not be used and if there is any question, please contact Sugar [Support](#).

- Prompt user for document name

When ticked, wDocs will prompt the end-user to set the filename before the merged template is saved to disk. This is handy when a user wants to give the merged files specific names to help identify the merged documents. Another reason this is useful is that wDocs uses "names" from the module and these names might be something the recipient of the document should not be allowed to see. Using this option alleviates that possibility.

- Limit Relate Records

This configuration field allows the user to limit the number of records from where the merge occurs. Sometimes, if the merge occurs from too many records (i.e. 100.000 records), the hosting servers might encounter performance issues.

# Enabling Pop-Ups in Your Browser

For any user merging documents, be sure that pop-ups are enabled on the browser being used. Following are steps that need to be performed in Google Chrome to allow the pop-ups.

**Note**: If you are using a browser other than Google Chrome, please find instructions for allowing pop-ups for your specific

**For Chrome:**

- On your computer, open Chrome.
- At the top-right, click More
- Click Settings.
- At the bottom, click Show advanced settings.
- Under "Privacy," click Content settings.
- Under "Pop-ups," select this option: "Allow all sites to show pop-ups"

You can choose to allow pop-ups only from a site:

- On your computer, open Chrome.
- Find a page that has pop-ups blocked for you.
- In the address bar, click Pop-ups blocked**.**
- Click the link for the pop-up window that you'd like to see.
- To always see pop-ups for the site, select Always show pop-ups from [site]

**>** Done.

# Usage

Before a document can be merged, a template needs to be created and then uploaded to Sugar's Documents module. Once a template is in Sugar, it can be used to merge data. Please follow these steps to meet these requirements:

- [Create Template Document](#)
- [Upload the Document to Sugar](#)
- [Merge a Document Template](#)
- [wDocsMergeRequests Module](#)

## wDocs Widget

When users process documents, they are added to a wDocs list that can be accessed in order to check the document's merge status (also top download the merged document). This list is available on the Sugar footer using the wDocs button shown here:
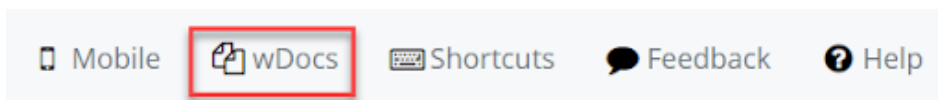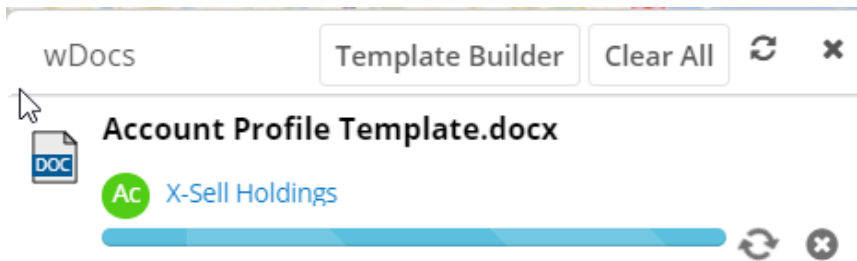


Each user will see their own wDocs list populated with their merged documents.

### wDocs Widget Capabilities

- Once the merge process starts, the user is notified that the document has been added to merge queue:
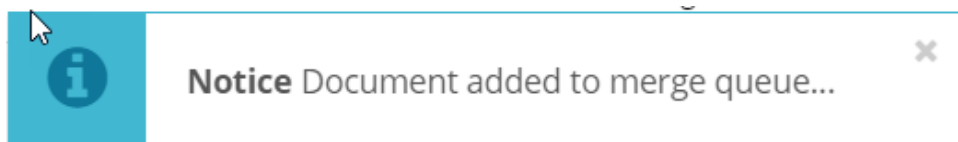


- The document that is "in progress" to be merged will be marked with a refresh icon that is spinning during the merge process and a progress bar colored blue:
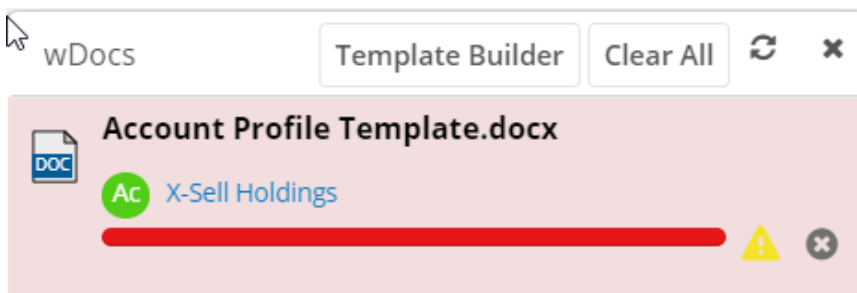
- Once the merge process has completed successfully, the user is notified that the document is successfully merged (progress bar colored green):
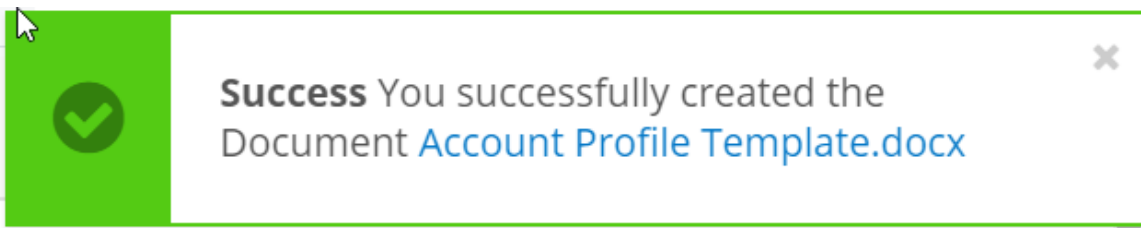


- Once the merge process has completed successfully, the user is notified that the document is successfully merged (progress bar colored green):
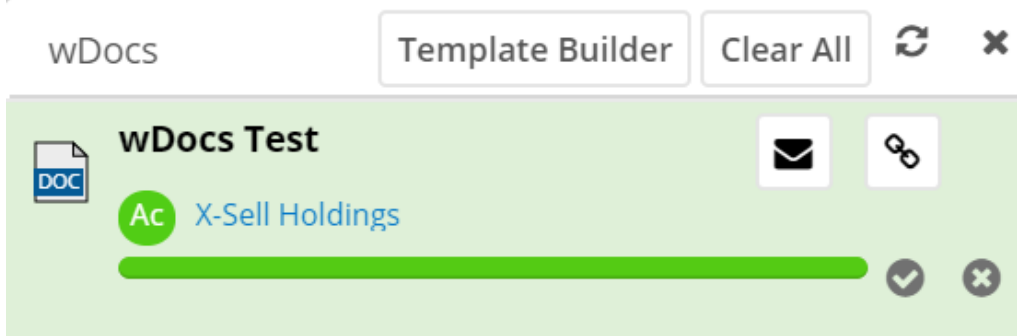


- The user will also be notified if the document failed to merge:



- Validate documents: All merged documents (successful and/or failed) will have a green (success) / red (failed) background that will turn white after it is clicked on. The white background designates the user clicked it (similar to email as being "marked as read"):
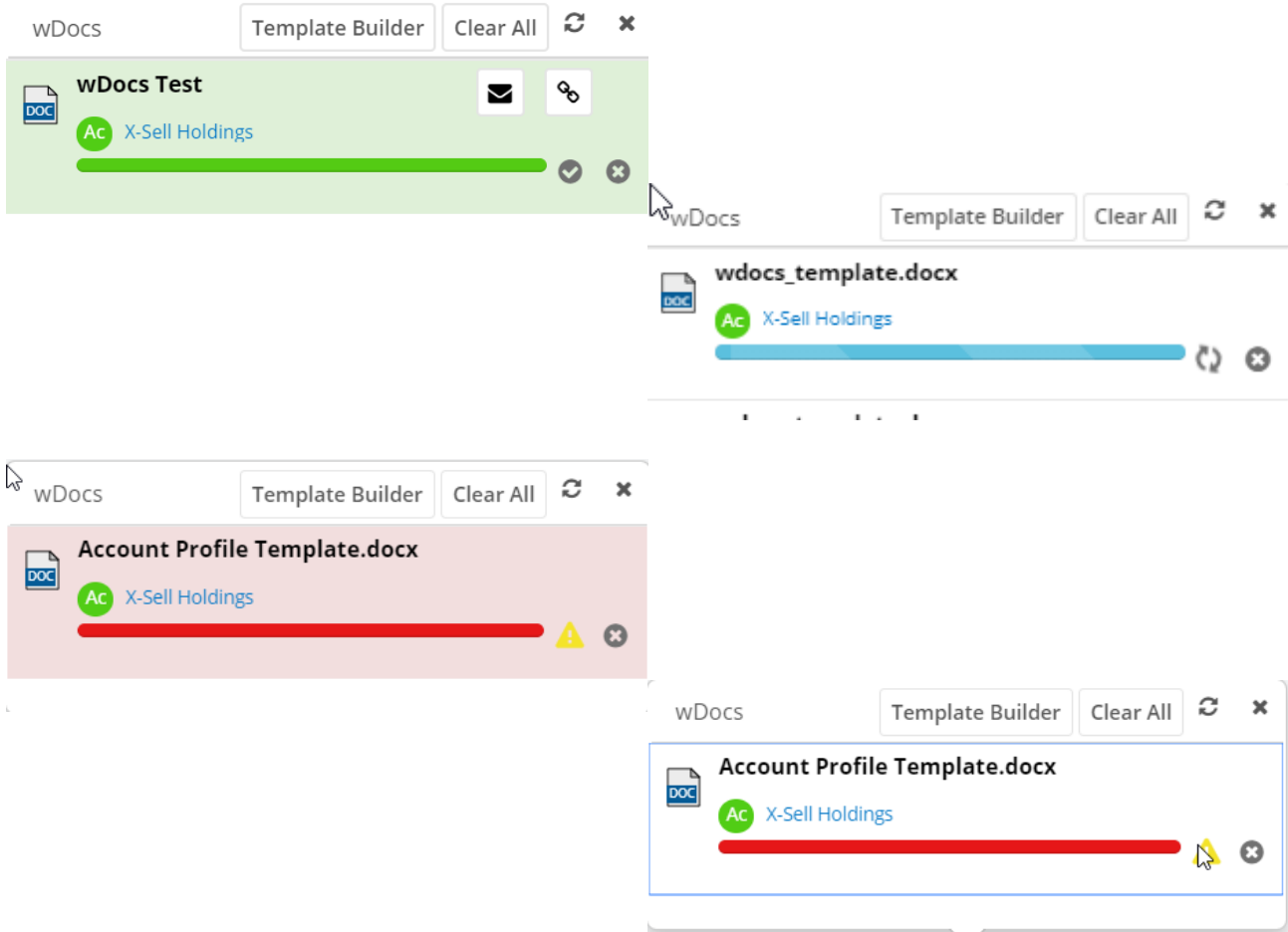
- Remove a single document from the list by clicking on the '**x**':
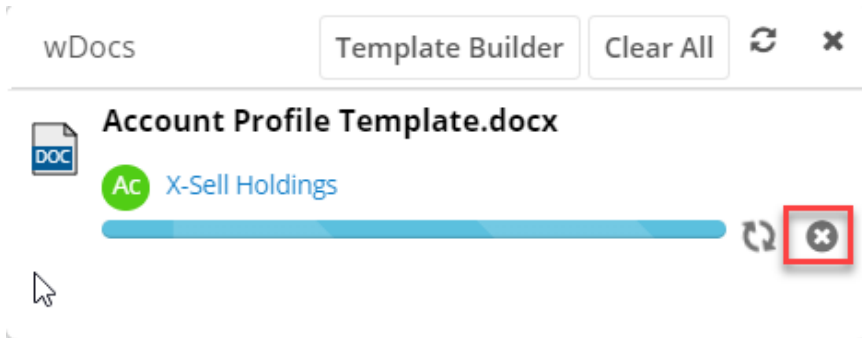


- Clear the wDocs List: This action will remove "all" records from wDocs List for the current user only:
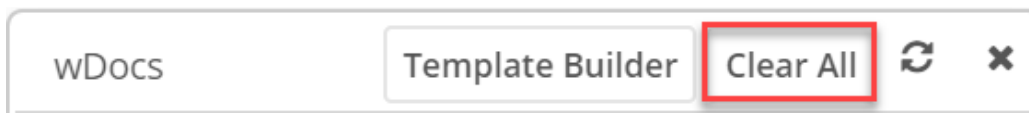


- Refresh the wDocs List: Click the icon to refresh the list.
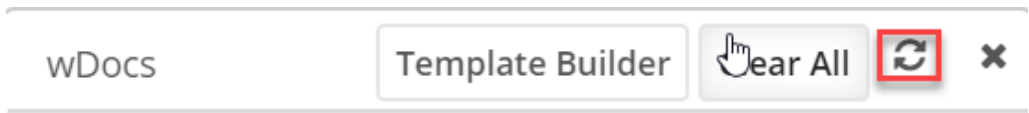
**Document Icons** : For successfully merged documents, when clicked, will allow a download of the merged document to the user's computer. A save as dialog will be presented to the user.

(**Note**: Failed merges cannot be downloaded.):



## wDocs Widget Tooltips

Hover the mouse cursor over items to get tooltips to appear.

- Tooltip for Document type for single and multi-record merging (when hovering over the progress bar):
    - "Merge" for Word documents
    - "PDF Merge" for PDF documents
    - "Excel Merge" for PDF documents
    - "Multimerge" for multi-record Word merge
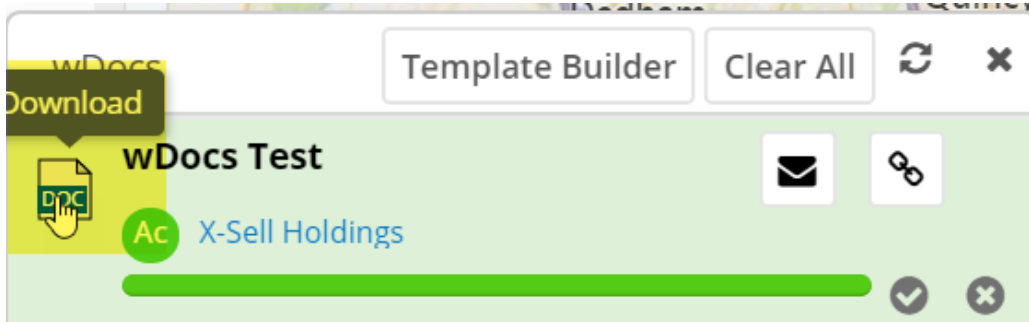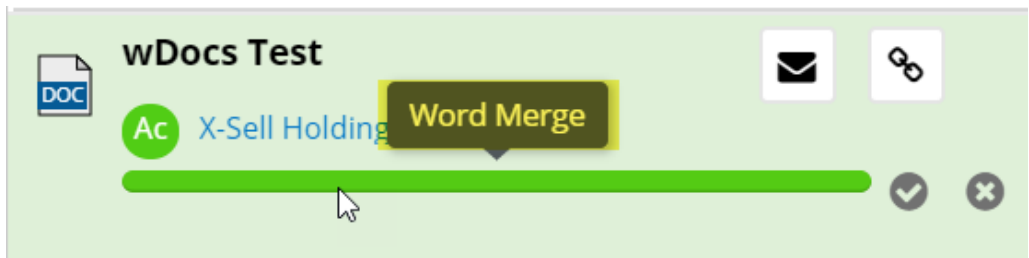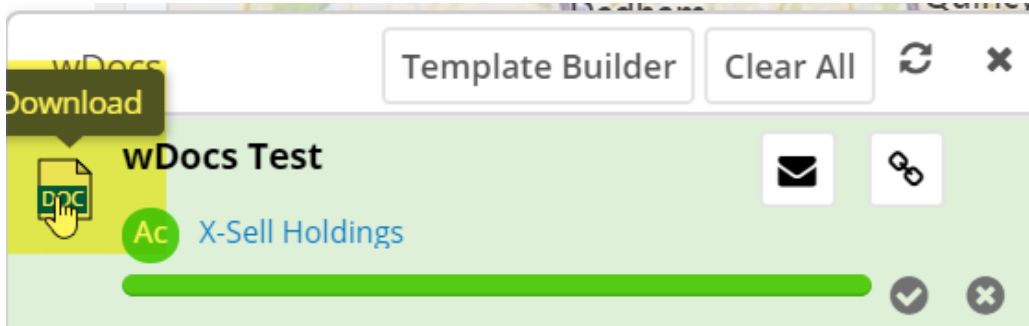    - "PDF Multimerge" for multi-record PDF merge
    - "Generate labels" for Generate Labels

- Tooltip for Documents without errors: "No error"
- Tooltip for Documents with errors: "Template Error"

**Merge single record**: The record's name is hyperlinked in the wDocs List. When the link is clicked, it will place the user on that RecordView:
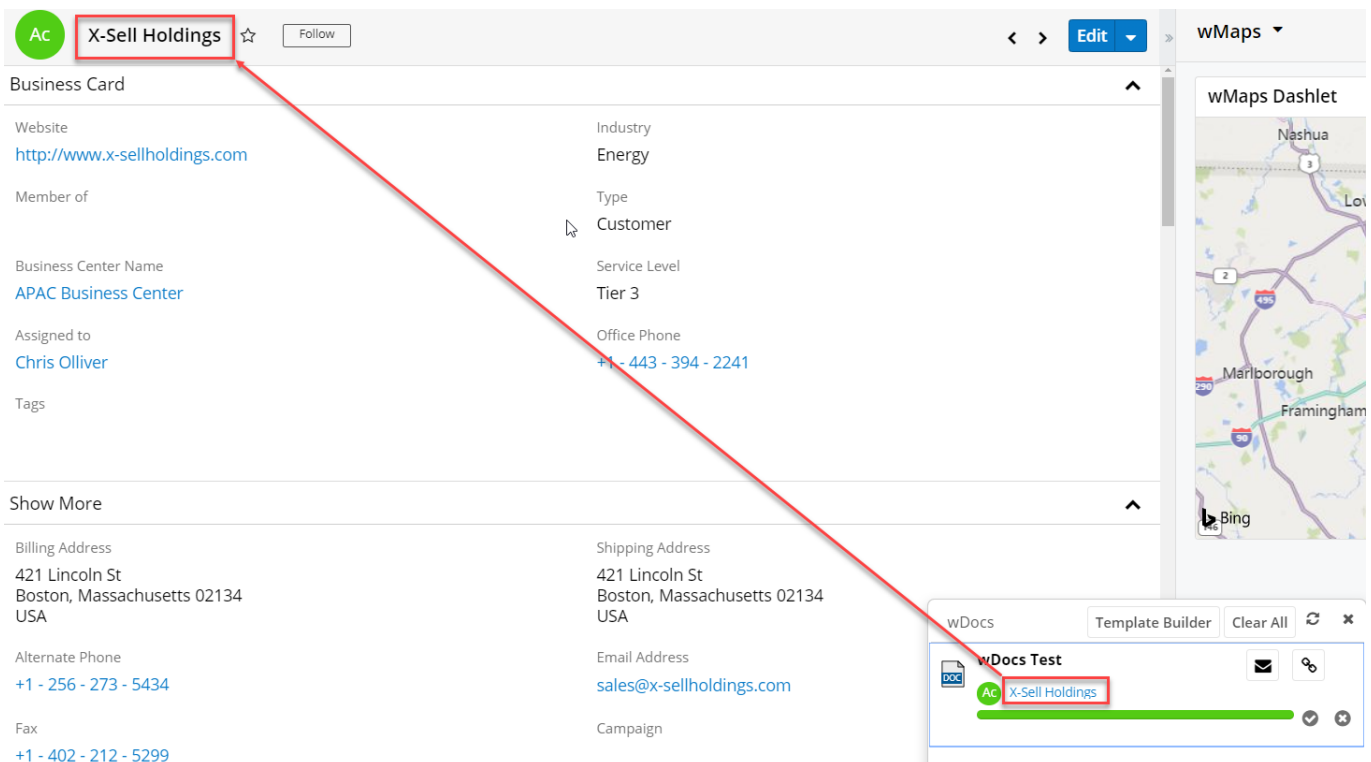


**Multi-record merge**: The user is able to see the number of merged records when performing a multi-record merge. The number is hyperlinked and will open the list of records included in the merged document. Each record is hyperlinked and will place the user on that RecordView.
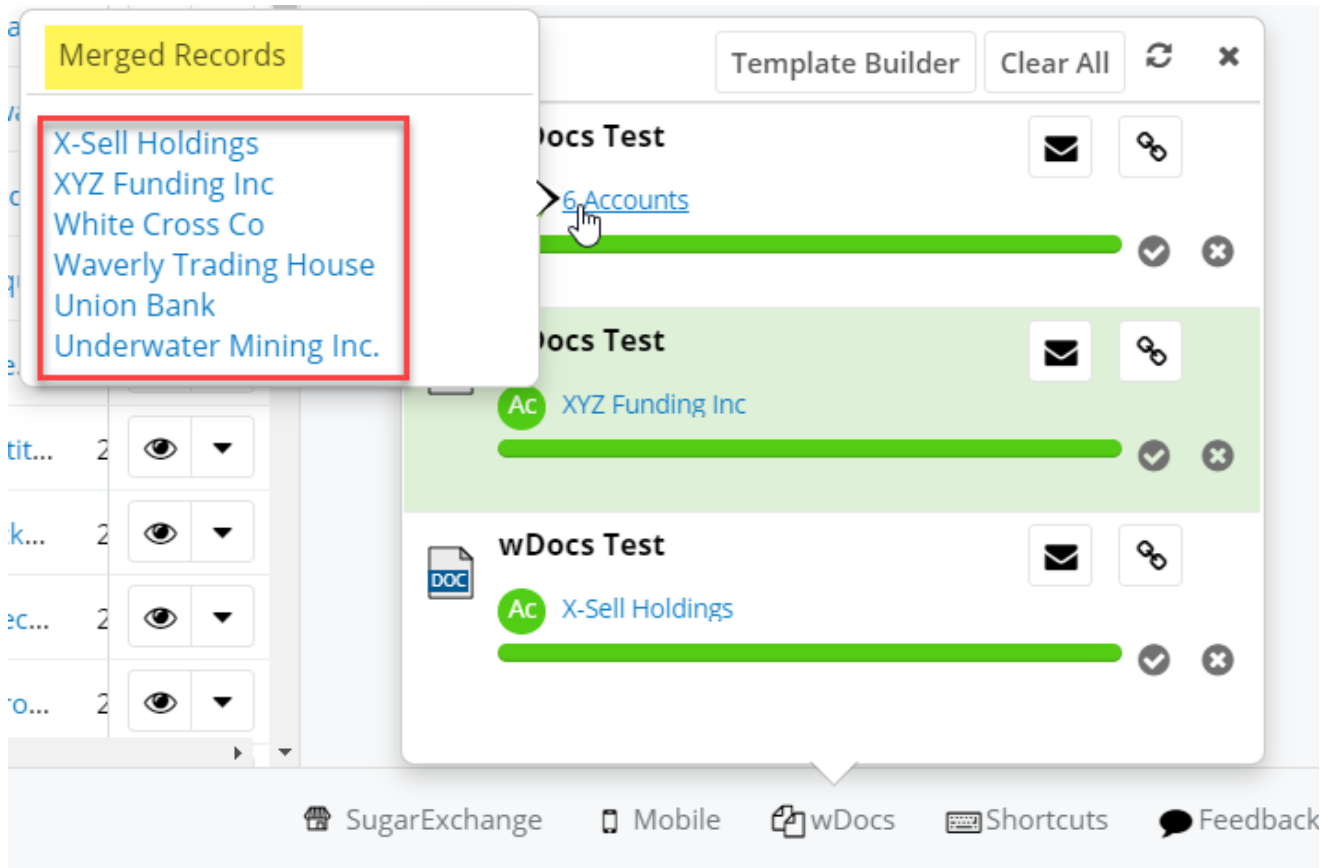
## wDocsMergeRequests Module

A custom module named **wDocsMergeRequests** is created when the wDocs package is installed.

With this module, users can review the details regarding each merge action for a given merge:

- Merge type: Merge, PDF Merge, Multimerge, PDF Multimerge, or Generate Labels.
- Template: The name of the document template that was used for merging. This value is a hyperlink and if clicked, will place the user on the document template in RecordView.
- The record's name from where the merge action was performed.
- Merge status: Success, Processing. Error, or Canceled.

Screenshot of RecordView for a merged document:

## Create Template Document

wDocs requires that the templates are created with a version of Microsoft Word/Excel that saves files with the **.docx/.xlsx** file extensions respectively.

**Note**: The term "template" used in this topic refers to a Word Document (*.docx) file and should not be confused with an actual Word Template (*.doct) file. Likewise, for Excel, use an Excel Document (*.xlsx) file and not an actual Excel "template" file (*.xltx).

A Word document (saved as type: **Word Document (*.docx)** ) or an Excel document (saved as type: **Excel Document (*.xlsx)** ) must be created using specific field formatting to support merging data from Sugar into the document template. Preparing a document involves adding fields (standard/related/etc.) and may include certain attributes and formatting.

**Field Names**

When creating the document template, field names from appropriate Sugar modules will be used. The fields can be referenced using Studio ( **Administration > Studio** in Sugar). In the following screenshot, the Contacts module fields are shown highlighted. The "Name" column holds the field names to be used for the merge field values:
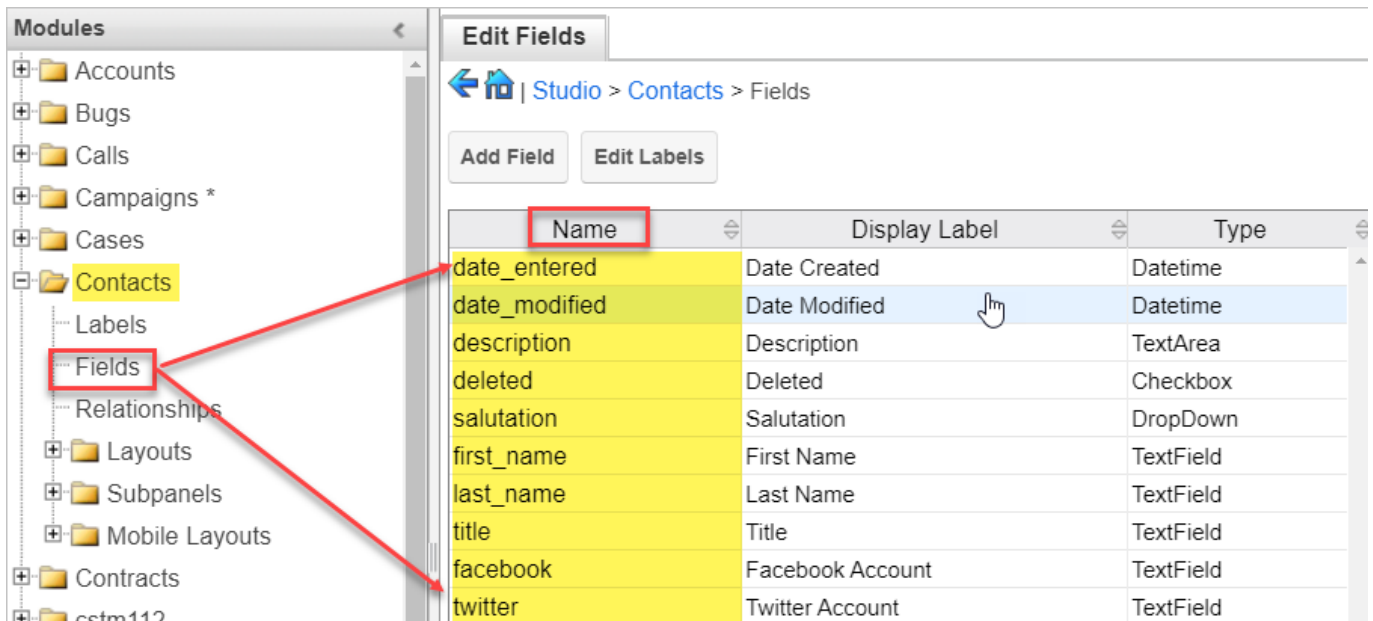
## Basic Merge

Within a template, merge fields need to be placed inside curly braces "{}". When the document is merged, the field name and curly braces will be replaced with data from the Sugar record. For example, if you want to get contact information merged into a document used as a form letter, use the following merge syntax (this example is based on the **Contacts** module in Sugar):

{first_name} {last_name}

{title}

{account_name.name}

{primary_address_street}

{primary_address_city}, {primary_address_state} {primary_address_postalcode}

Email: {email1}

**Note**: {email1} merges the "primary" email address. A merge can also use: email2, email3, etc. to get the secondary email addresses. However, if there is no value set for an email address placeholder (i.e., {email2}, {email3}, etc.) in the merge document, the value will be empty. (See below for merging "all" email addresses for a contact using a loop syntax.)

After the merge completes, the resulting document will contain the following where the merge fields were placed:

Brandi Steel

Sales and Support

President

Cloud View Systems Inc.

777 West Filmore Ln

Santa Fe, CA 60300

Email: brandiengage@gmail.com

**See also:**

- [Attributes](#)
- [Relate Fields](#)
- [Custom Modules](#)
- [Formatting Fields](#)
- [Collections and Inner Collections](#)
- [Conditions](#)

**Building a Template**

The following template is a working example. When this template was uploaded into Sugar, it was configured with the Document Module drop-down field pointing to the Accounts module. However, the information being merged into this template from Sugar is not limited to the Accounts module's fields. This example also merges information from the Account module's relationships including: Contacts, Opportunities, Meetings, and Cases (i.e., data from subpanels). Please note the usage of the merging loops tags and the module's fields are put between them in the different columns/cells). The Account module fields are used at the top of the template to merge the account's name and billing address information.

**Note**: A [Template Builder](#) has been added to assist end-users with obtaining field codes to use in wDocs templates.

Feel free to use this [example](#) as a jumping point to create your own templates.

## W-Systems

## Account Name: {name}

| Location: | |
|---|---|
| City: | {billing_address_city} |
| Country: | {billing_address_country} |
| Postal Code: | {billing_address_postalcode} |
| State: | {billing_address_state} |
| Street: | {billing_address_street} |

**General Details:**

**Date Created:**  {date_entered format='d,Mo/D/Y, kk:mm:ss,a'}

**Date Modified:**  {date_modified}

**Created By:**  {created_by_name}

**Primary Email:**  {email1}

| {#opportunities}Opportunities | | | | |
|---|---|---|---|---|
| **Name** | **Sales Stage** | **Expected Close Date** | **Assigned User** | **Probability** |
| {name} | {sales_stage} | {date_closed} | {assigned_user_name} | {probability} |
| **Contacts** | | | | |
| **First_name** | **Last name** | **Primary Email** | **Phone** | **Call?** |
| {#contacts max_num='10' sort='first_name:desc'} {salutation} {first_name} | {last_name} | {email1} | {phone_mobile} | {do_not_call}{/contacts}{/opportunities} |

| Cases | | | | |
|---|---|---|---|---|
| **Num.** | **Subject** | **Status** | **Priority** | **Assigned User** |
| {#cases}{case_number} | {name} | {status} | {priority} | {assigned_user_name}{/cases} |

| Documents | | | | |
|---|---|---|---|---|
| **Num.** | **File** | **Source** | **Status** | **Publish Date** |
| {#documents}{document_name} | {filename} | {doc_type} | {status_id} | {active_date}{/documents} |

# Upload the Document to Sugar

After a document template is prepared so it includes merge fields, the document template must be uploaded into Sugar's Documents module as a template. Following are instructions for uploading a document template.
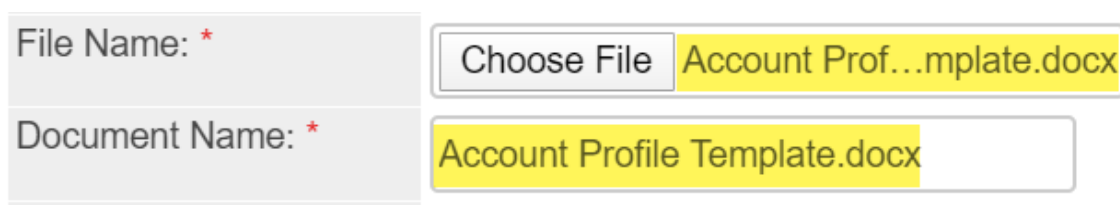
**Uploading a Document Template**

In Sugar, locate the **Documents** module tab and use the drop-down to select **Create Document**:
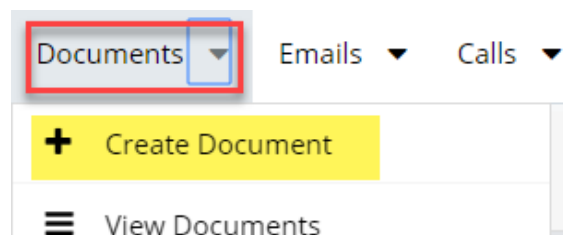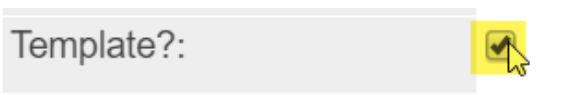


Sugar will open a **Create** page and you will need to configure, at a minimum, the following fields:

- **File Name**: For **File Name**, click **Choose File** to navigate to the document template file on your local computer. After selecting the file, it will appear in the **File Name** and **Document Name** fields (the Document Name field value can be edited if desired):



- **Document Name**: The name of the Document (this defaults to the file name of the Document being uploaded but can be edited).

- **Template**: This checkbox needs to be ticked so Sugar understands this document is a template. When this checkbox is ticked, the **DOCUMENT MODULE** field will display.



- **DOCUMENT MODULE**: Set this to the module that you are merging data from.

**Note**: This drop-down field must be visible. If it is not, please be sure:

- the **Template?** field checkbox is ticked

- this field was configured to be in the **Documents** module layouts. For details, see wDocs Administration.



- **Publish Date**: The date the document is published (this defaults to the current date).

**Note**: For all other non-required fields, please refer to Sugar documentation.



**FOR LABEL MERGING?** : This field should be ticked to specify the template is to be used for the Generate Labels action.

**USE REVISIONS**: If this field is ticked (field is ticked by default) and there is already a merged document with the same name, adds a new revision document to that document record.

After the fields are set, click the **Save** button and the document template will be ready for use. For information on merging, please the topic: Merge a Document Template.

**Document Name Prefix:**  This field can be set up to include a certain prefix that will be added to merged documents, once the merge is complete. The prefix must be added between quotation marks.

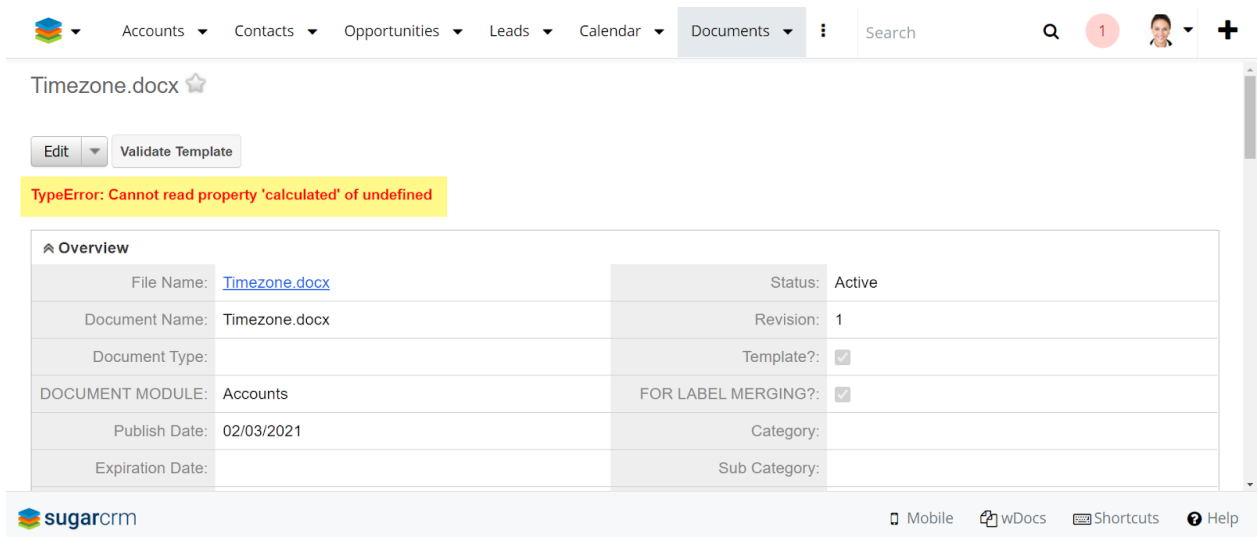Starting with **wDocs v. 4.37**, a **Validate** button has been implemented in the **Documents** module, in the **Record View,** after a new wDocs template is uploaded to the module**.**



An error message will be displayed if the uploaded template contains syntax errors:

The "**no error**" text will be displayed if the template uploaded is correct: 

**Note**: This feature is only available for **Admin Users**.

## Merge a Document Template

For this example and instructions, we will initiate a merge from Sugar's **Contacts** module using a Microsoft Word document template uploaded in the example in the topic: [Upload the Document to Sugar](#).

# Merging a Document

In Sugar, navigate to the record that will be merged and have that record open in the **Record View** (or DetailView as applicable).

In the **Actions** menu, select:

1. **Merge Document**
   - Selects the template from Sugar's Documents module and returns the merged document into a **Word** document (**docx** format).
   - Selects the template from Sugar's Documents module and returns the merged document into an Excel document (**xlsx** format).
2. **Merge Document to PDF** - Selects the template from Sugar's Documents module and returns the merged document into a PDF document.
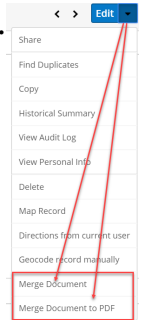   - Selects the template from Sugar's Documents module and returns the merged document into a **PDF** document.
   - Selects the template from Sugar's Documents module and returns

the merged document into an Excel document (**xlsx** format).



3. **Multi-record merge documents** (from a module's ListView) - Choices are: **Merge Document (Word)**, **Merge Document to PDF**, and **Generate Labels**:
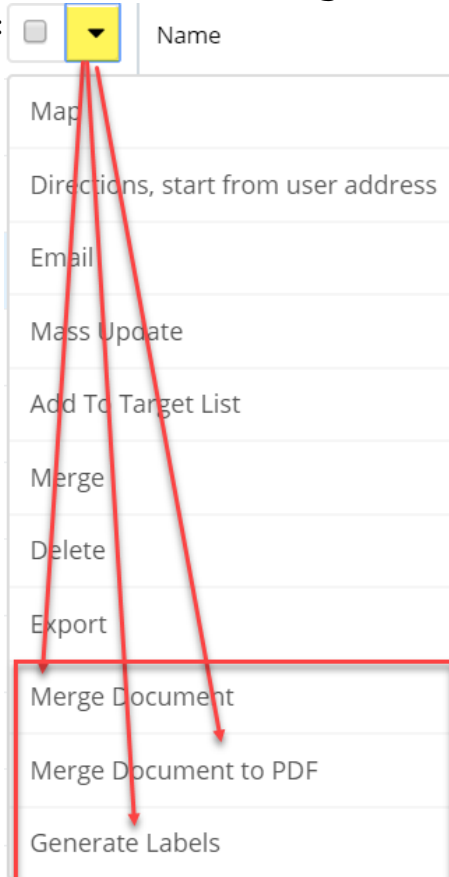


4. **Subpanel Merge documents** - From the subpanel's Actions menu, choices are: **Merge Document (Word)**, **Merge Document to PDF**, and **Generate Labels**:
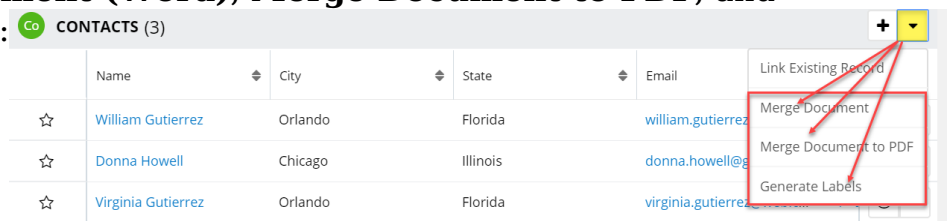


After selecting your merge type of choice, select the record (or records) where you want the merge to be generated from, located in the record's **Contacts** subpanel.
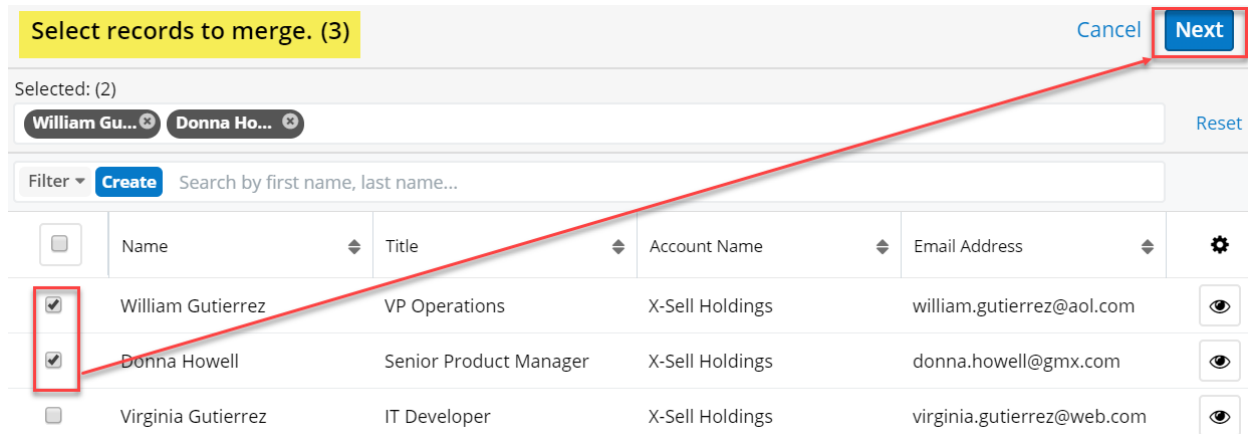
After selecting the Contacts where you want the merge to be generated from, click **Next** and select a template from the "**Search and Select Documents**" drawer that opens.
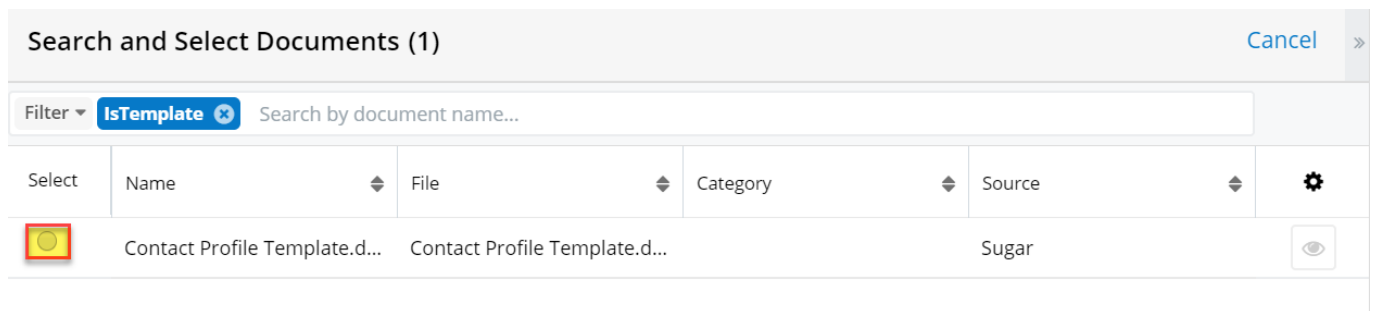


The merge process will begin and these actions will occur:

1. The merged document will be linked in Sugar to the module record that the merge was generated from and located in the record's Documents subpanel.
2. A dialog will open displaying the merged wDocs List. This dialog displays the status of merged documents and appears at the bottom of the page. Each user will have his own wDocs List populated with his merged documents.
3. The file name will be a concatenation Record name and Template name.

**Example:**

Record name = "W Systems"

Template name (the Document name will be used and not the file name) = "Account's profile"

The resulting file name will be "W Systems Account's profile.docx" (or .pdf if the doc was generated as a pdf).
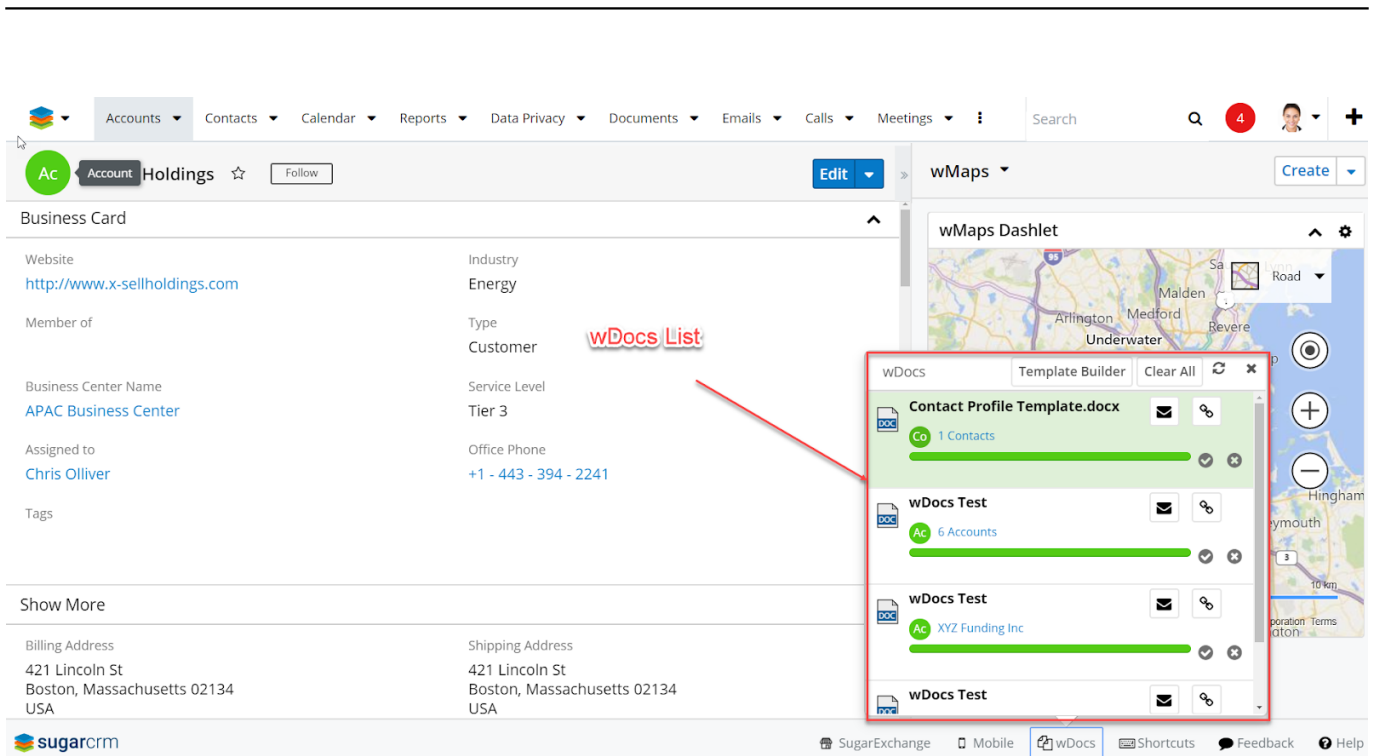
Starting with **wDocs 4.25**, users can send the documents merged with wDocs that are also available in the wDocs widget to DocuSign, for signature.
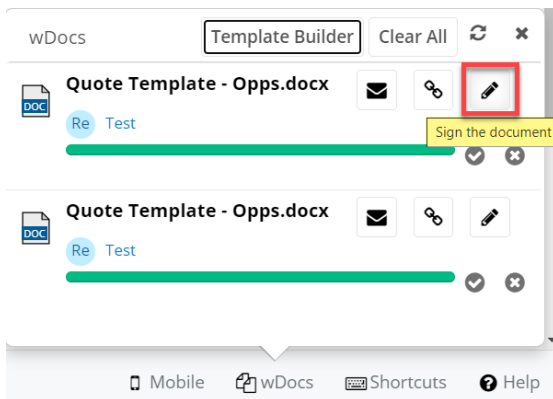


**Note**: To use this feature, [Sugar Connector to DocuSign](#) must be installed in your Sugar instance and you must be logged into your DocuSign account.

Starting with **wDocs 4.36** , a default **Flex Relate Field** type has been implemented. When merging a document from a record that has a related parent in the Flex Relate field, the document will be linked to the parent record's **Document Subpanel** as well.

## Example Results

For our example, this is the resulting document contents after merging:

Company details:

| | | |
|---|---|---|
| | Name: | X-Sell Holdings |
| | Industry: | Energy |
| | Address | Boston |
| | | USA |
| | | 02134 |
| | | Massachusetts |
| | | 421 Lincoln St |
| Primary Email: | sales@x-sellholdings.com | |
| Office Phone: | +1 - 443 - 394 - 2241 | |
| Website: | http://www.x-sellholdings.com | |

Starting with **wDocs 4.05 version** , users can merge documents based on Sugar Logic formulas, available for Calculated fields. This allows the user to merge numeric data into a template document, by using the formula directive: **{!formula...}** .

**For example**:

Discounted Price: **{!formula value='subtract($discount_price, multiply($discount_price, divide($discount_amount, 100)))' format='currency'}** .

This new feature is especially useful for currency-based modules such as **Quotes** .

1. Upload a Math Formula-based document template to the **Documents** module and save it as a template.

{!formula value='concat($name, "-",$quote_stage)} – TEST DOCUMENT

| Product Name | Price | Discounted Price | Quantity | Total Price |
|---|---|---|---|---|
| {#products} {name} | {discount_price} | {!formula value='subtract($discount_price, multiply($discount_price, divide($discount_amount, 100)))' format='currency'} | {quantity} | {!formula value='multiply($quantity, subtract($discount_price,multiply($discount_price, divide($discount_amount, 100))))' format='float'} {/products} |

1. Go to the **Quotes** module and open a record in **Record View**.
2. From the **Actions** menu next to the **Edit** button, select **Merge Document/Merge to PDF**.



1. Once the action is pressed, the **Search and Select Documents** drawer with document templates will open. Select your Math Formula document

template.



1. Once the document template is selected, it will be added to the Merge Queue.



1. When the merge action is complete, the finished document will be available in the **wDocs widget**, in Sugar's footer.



**Note**: The same template can also be used for **Multirecord Merge actions**, in **List View**.

## Share Link Functionality

wDocs users can easily send notifications with a link to the generated documents by using the **Share Link Functionality**.



By pressing the "**Send Notification with the Download Link**" button, the "**Search and Select Users**" drawer with wDocs users opens. Users can select one or more records to send the notification to.

Select the users you want to send the document to, and push the **Select** button. The selected users will receive via email a notification.



Clicking the link attached in the notification will take you to the **Notifications** module in Sugar.



**Note**: The "**Send Notification with the Download Link**" button appears only for successfully merged documents.

## Send Document as Attachment

The wDocs widget also has a " **Send Document as Attachment** " button.
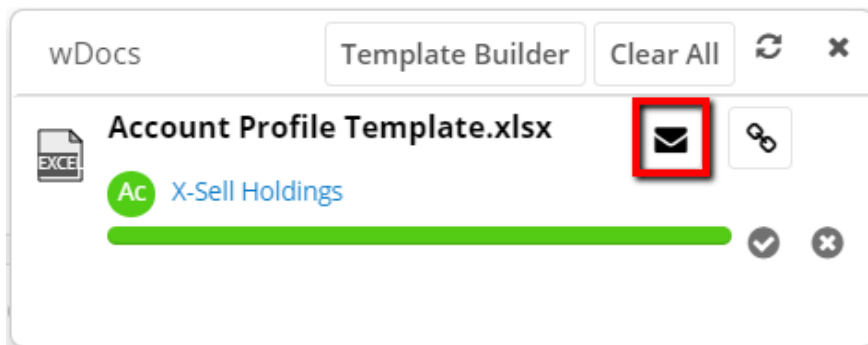


When pressing the "**Send Document as Attachment**", an email panel opens. To select the recipient(s), click the Address Book button at the end of the To field.

**Note**: In **Record View**, the **To:** field will be auto-populated with all email addresses associated with the record.
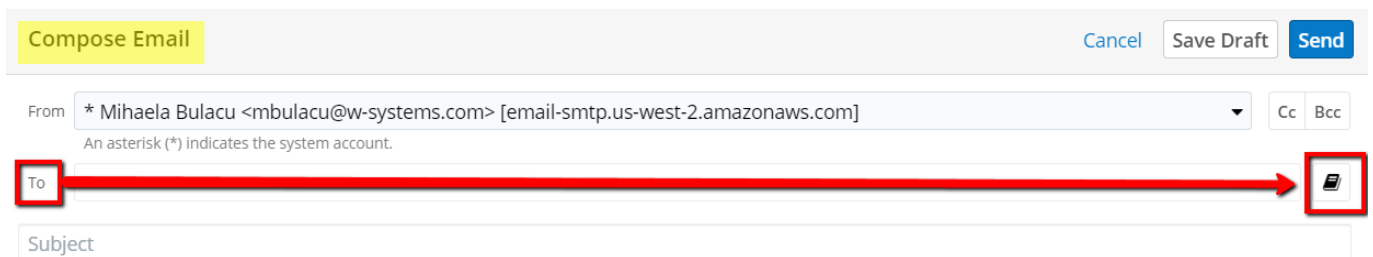


Search and select the user or users to whom you want to send the merged attachment.
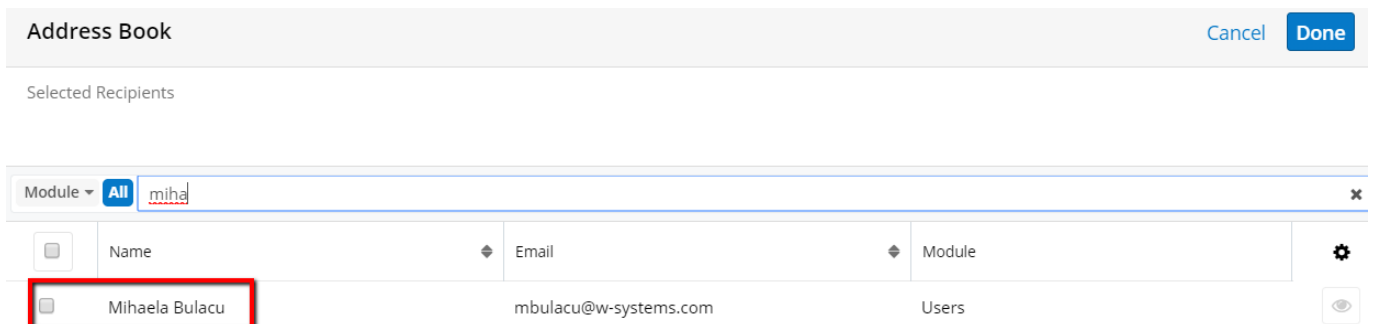


Press **Done**, compose and send the email. The recipient(s) will receive an email with the merged document attached.

Recipients can download, view and edit the received document.

Merged documents sent with the **Send Document as Attachment** function will be automatically added to the **Email** subpanel in **Record View**.

## Loading Emails from a Previewed Account from the Drilldown Drawer

Starting with the May 2020 update, users can now send merged documents as attachments from the previewed account of any drilldown chart.
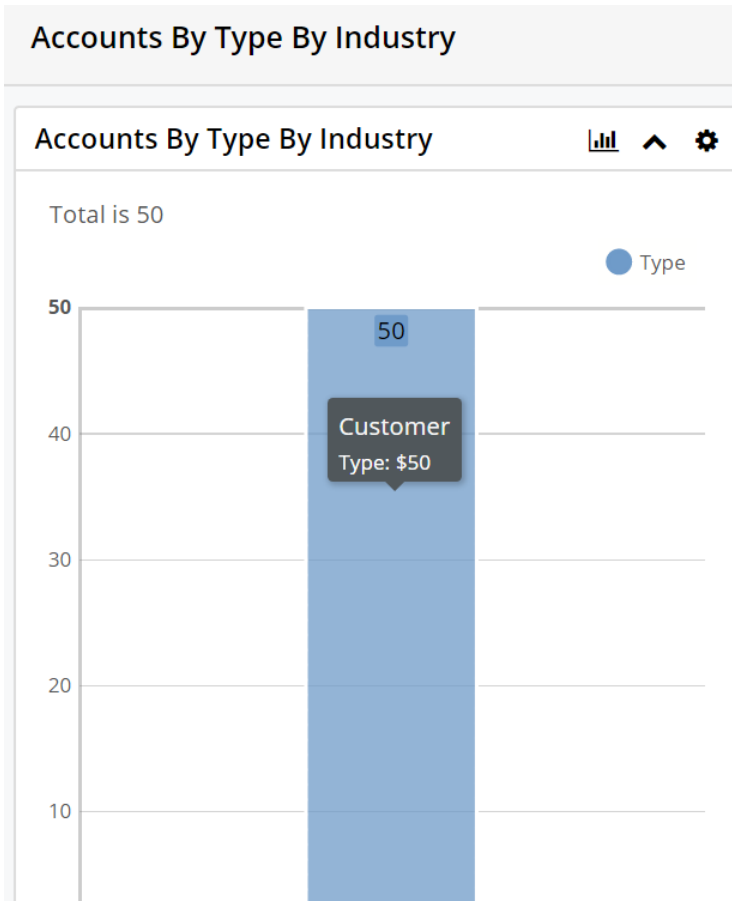
Once the **Drill Down Drawer** opens, click on the **Preview** button. After the Account record preview opens, you can click on the **Send Document As Attachment** button in the wDocs widget, available in the Sugar footer.



Once the button is pressed, the email drawer will be open.
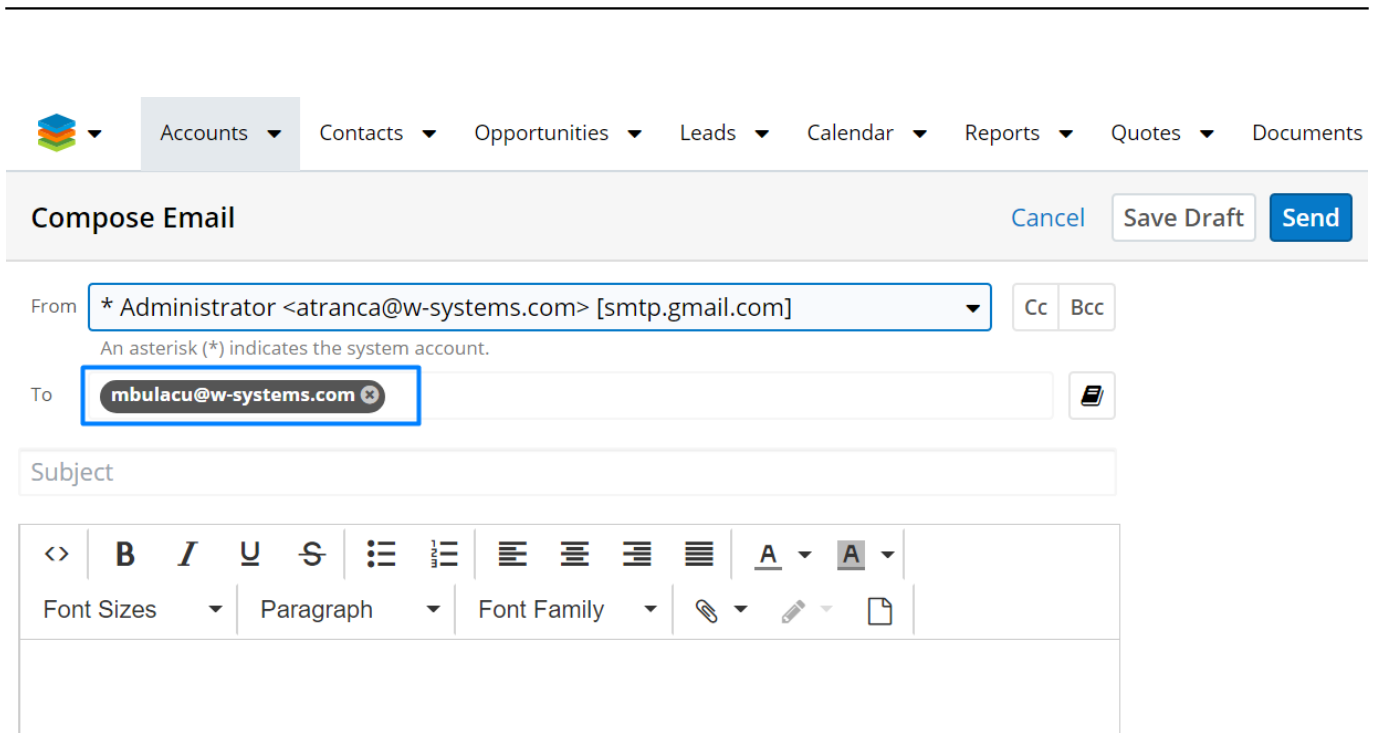
The **To:** field is auto populated with the Email address associated with the **Account Record** opened in **Preview**.

# Template Error Handling

If there is an error in the template format, an error will be displayed:
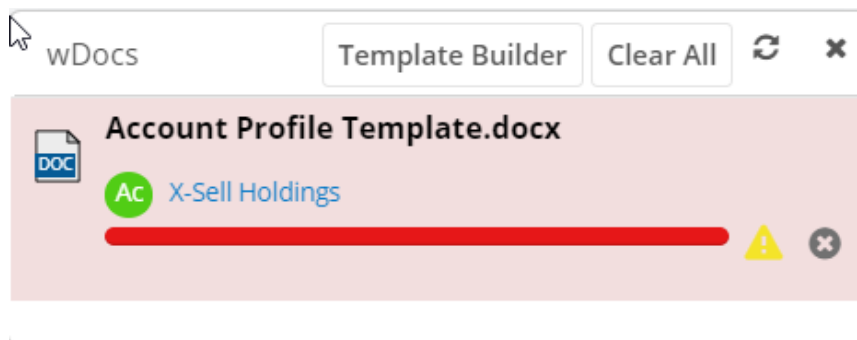


The following reasons will generate a template error and will prevent the document from being merged:

- Unopened tag ( "{" )
- Unclosed tag ( "}" )
- Generate labels: Missing close tag ("/") for the parent tag
- Generate labels: Missing open tag for the child tag ("{#record1}") and also for the parent tag
- Generate labels: Missing close tag for the child tag ("{/record1}") and also for the parent tag
- The tags are added with "copy and paste" (this can be avoided by copying

from "Notepad" and then pasting into the document).
- The document is saved when the user has the cursor inside tags
- The user decides to change an attribute to a condition without rewriting the tag:

Example: {do_not_call} and then he just adds the '?#' in front of the field name without rewriting the entire tag : {?#do_not_call}

# Document Revisions

## Document Template Revisions

When merging a document, the last version of the document template saved is used. Use the "**Create**" button on the **Document Revisions** panel to upload a newer version of the document template to the same Documents module record (it will be given a revision number):

**⌃ Overview**

| | |
|---|---|
| File Name: | Contact Profile Template.docx |
| Document Name: | Contact Profile Template.docx |
| Document Type: | |
| FOR LABEL MERGING: | ☐ |
| USE REVISIONS: | ☑ |
| IS MERGED: | ☑ |
| Publish Date: | 2020-01-15 |
| Expiration Date: | |
| Description: | |
| Related Document: | |
| Assigned to: | Jen Smith |

**⌃ Revision Details**

| | |
|---|---|
| Revision Created By: | Jen Smith |

**⌃ Document Revisions**

Create

| File ⇕ | Revision ⇕ | Date Created ⇕ | Created by ⇕ |
|---|---|---|---|
| Contact Profile Template.docx | 2 | 2020-01-15 11:56 | Jen Smith |
| Contact Profile Template.docx | 3 | 2020-01-15 11:59 | Jen Smith |
| Contact Profile Template.docx | 4 | 2020-01-15 11:59 | Jen Smith |
| Contact Profile Template.docx | 5 | 2020-01-15 11:59 | Jen Smith |

## Merged Document Revisions

The document module has a custom property labeled "USE REVISIONS" that has been added as a checkbox when wDocs was installed. This "USE REVISIONS" checkbox will be visible once the "Template?" checkbox is ticked (this displays the field for use with templates).

By default, the "**USE REVISIONS**" field is ticked:



If "**USE REVISIONS**" is ticked and there is already a document with the same name, a new revision will be added to that Documents module record.

If "USE REVISIONS" is not ticked, a new Documents module record is created.

## Save Merged Documents
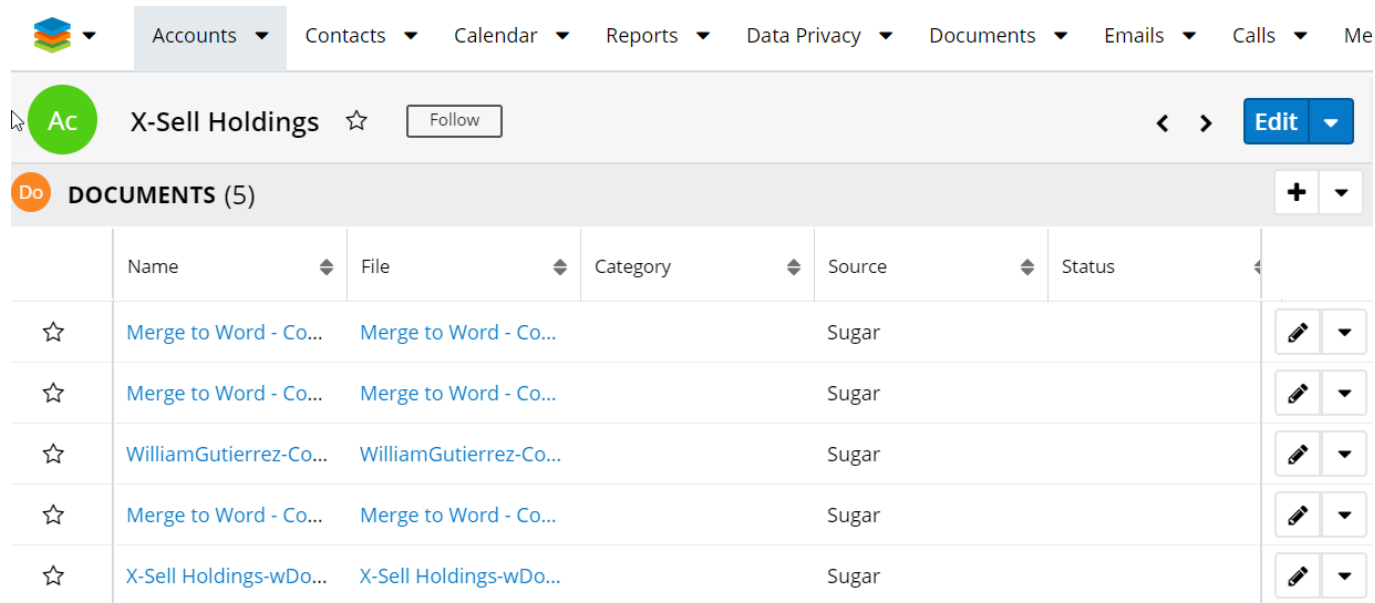
The new merged document is saved as a new linked document.

When a user merges the document, the new linked document is created and related to the current record.

Upon successfully adding the document, the green Sugar alert is shown with text 'Successfully created document: [document file name]'. The document file name will be a hyperlink to the file and when clicked, the document record view is opened and the user will be able to proceed with downloading the document.

**The new merged document is related to the current record**: A relationship is created between the new document and the record for which the document was

generated (even if it was a single record merge or multirecord merge from subpanel; but not from the ListView):



# Multirecord Merge

The multirecord merge can be triggered by three (3) actions available in **Actions** menu on a ListView:

- Merge Document
- Merge Document to PDF
- Merge Document to Excel
- Generate Labels

## Multirecord Merge Document

**Merge Document**: This will merge the selected records into a single Word or Excel document, each record starting on its own page. To run this merge:

1. From a ListView, select records and then open the Actions menu and select: Merge Document

Delete

Export

Merge Document

Merge Document to PDF

Generate Labels
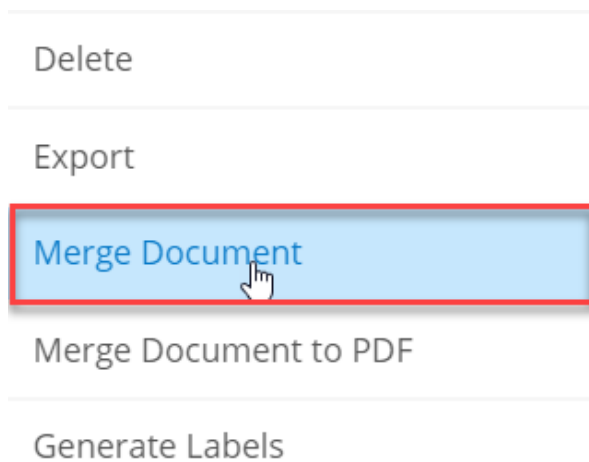
2. The "Search and Select Documents" drawer will open containing documents for the module you are using (e.g., if the RecordView of the Accounts module is displayed, then you will see the Documents that were created for the Accounts module and are saved as a "Template").
3. The selected records will be merged into a new single document. The document's name will be:

'MERGE' + " " + [template name] + " " + [datetime] + file extension

Example: MERGE wDocs_testing 5-4-2017, 6-48-10 PM.docx

**Note**: The template name is the document name and not the file name.

## Multirecord Merge PDF Document

Similar to the "**Merge Document**" action above. However, this will merge the selected records in a single **PDF** document, each record starting on its own page.

## Multirecord Merge Excel Document

The user is able to generate a document to Excel from a list view when using any of the following actions:

- Merge Document
- Merge Document to PDF

Once the merge action is selected, the Select Documents drawer opens and all available templates relevant for the current module are displayed including the templates in xlsx format.

Once the .xlsx template document is chosen, the generated document will have the same format.

# Generate Labels

The **Generate Labels** option is one of the use cases for multimerge which can produce labels from a list. This can be used for label documents or documents with tables.

The "Generate Labels" documents should start with **#records** tag and ends by closing the parent tag using: **/records** .

Then, each record has its own child tags that are opened and closed within the parent tag. The child tags are: **{#record} {/record}** .

Inside the child tags we can add any information we want to extract (each field name inside curly braces):

| | |
|---|---|
| {#records}{#record}**{name}**<br><br>{billing_address_street}<br><br>{billing_address_city},{billing_address_state}<br><br>{billing_address_postalcode}<br><br>{/record} | {#record}**{name}**<br><br>{billing_address_street}<br><br>{billing_address_city},{billing_address_state}<br><br>{billing_address_postalcode}<br><br>{/record}{/records} |

**Note**: Please note that when creating the template, add the start tags and the first field on the same line (i.e., do not press <Enter>), otherwise the generated document will be created with an empty line for each start tag written on individual line.

Example (suggested method):

Create the template with the first field on the "same" line as the opening tags:

**{#records}{#record}{name}**

{city}

{/record}{/records}

Avoid doing the following so that blank lines are not inserted into the merged document. The following will add 2 empty lines on the first column and 1 on the second - see the screenshot below):

**{#records}**

**{#record}**

{name}

{city}

{/record}{/records}

| | |
|---|---|
| **W Systems QA**<br>Stefan cel MAre<br>Craiova,Dolj<br>2312312 | **Constrata Trust LLC**<br>345 Sugar Blvd.<br>Los Angeles,NY<br>42203 |
| **Southern Realty**<br>123 Anywhere Street<br>Los Angeles,CA<br>40559 | **White Cross Co**<br>67321 West Siam St.<br>Alabama,CA<br>48566 |
| **Powder Suppliers**<br>48920 San Carlos Ave<br>San Jose,CA<br>31329 | **5D Investments**<br>1715 Scott Dr<br>Ohio,CA<br>47393 |

**Supported field types for "Generate Labels":**

- Decimal

- TextField
- TextArea
- Address
- Checkbox – without using formatting
- Date
- Encrypt
- Float
- Integer
- Datetime
- Email
- Phone
- Dropdown
- Multiselect
- Name
- Currency
- Radio

Fields that can typically be formatted (i.e., multiselect, datetime, or checkbox) are **not** supported with formatting by the Generate Labels functionality.

The user can generate labels from a module's ListView:
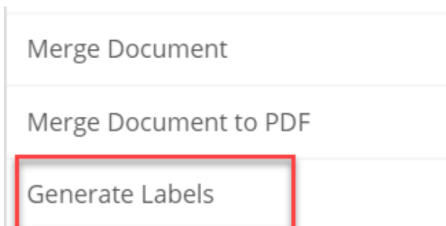


...and also from a subpanel:
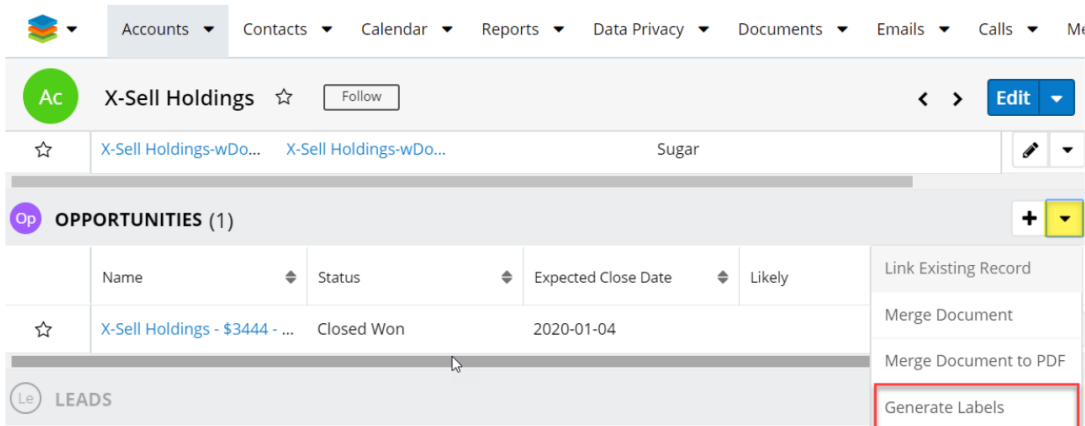


Once a template document is created, a Document module record needs to be created for it (please see: <u>Upload the Document to Sugar</u>for details) having this

criteria:

- **Template?** checkbox is ticked
- **DOCUMENT MODULE** is chosen
- The **For Label Merging** checkbox is ticked (**Note**: Use only when the document will be used for generating labels (i.e., using the **Generate Labels** action). If a label document is created and this is NOT ticked, the document will be incorrectly shown in the "Search and Select Documents" drawer as available for merging with Word and as PDFs.

When the **Generate Labels** action is used, the "Search and Select Documents" drawer will open and display the template documents marked "FOR LABEL MERGING" for the module you are currently using.

Using this template:

| {#records}{#record}{name}<br><br>{billing_address_street}<br><br>{billing_address_city},{billing_address_state}<br><br>{billing_address_postalcode}<br><br>{/record} | {#record}{name}<br><br>{billing_address_street}<br><br>{billing_address_city},{billing_address_state}<br><br>{billing_address_postalcode}<br><br>{/record}{/records} |
|---|---|

The following will be rendered:

The merged document's name for **Generate Labels** is similar to the name for multirecord merge document (Word and PDF):

"MERGE LABELS" + " " + [template name] + " " + [datetime] + file extension

Example: MERGE LABELS TestAddress 2/15/2017, 10:38:27 AM.docx

# Subpanel Merge

For details of these **Actions**, refer to these topics:

- Merge Document
- Merge Document to PDF
- Merge Document to Excel
- Generate Labels

# Subpanel Record Selection

This feature is available for subpanel merge actions:

- [Merge Document](#)
- [Merge Document to PDF](#)
- [Merge Document to Excel](#)
- [Generate Labels](#)

The "record selection" capability is useful when a user needs to select specific records from a subpanel to be included in the document instead of merging them "all" (i.e., merging a subset of records).
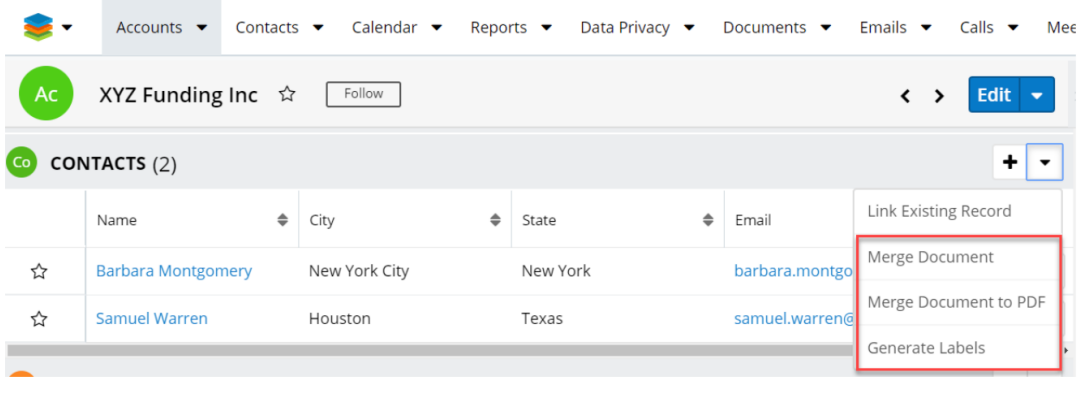


After selecting a command from the Actions menu (shown above), the drawer with related records is opened to choose from:
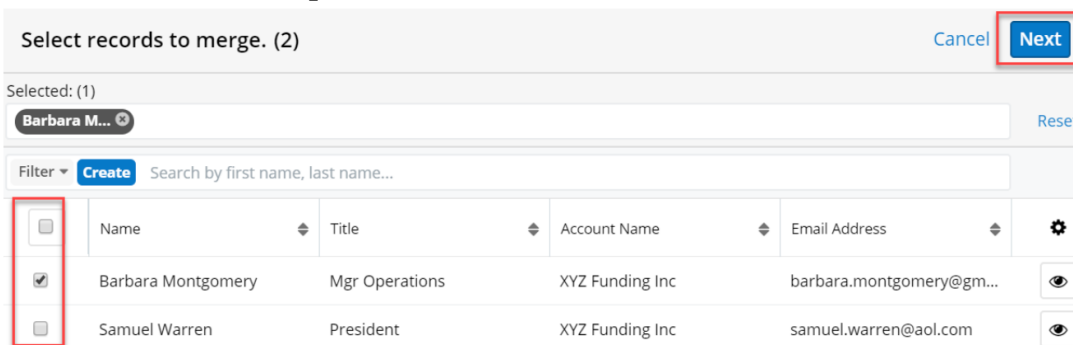


In the "Select records to merge" drawer, the user can build a filter for narrowing down the selection from the available records:
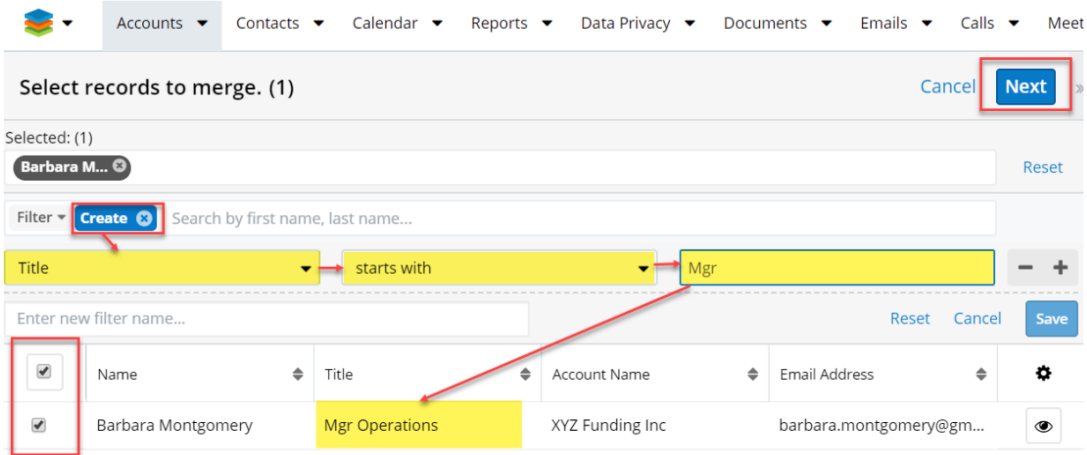
**Note**: If there is only "one" record present in the subpanel, wDocs will not display the drawer for selecting the records to be merged.

With at least one record selected, a user can use the **Next** button that will lead them to the drawer with available templates for that module:
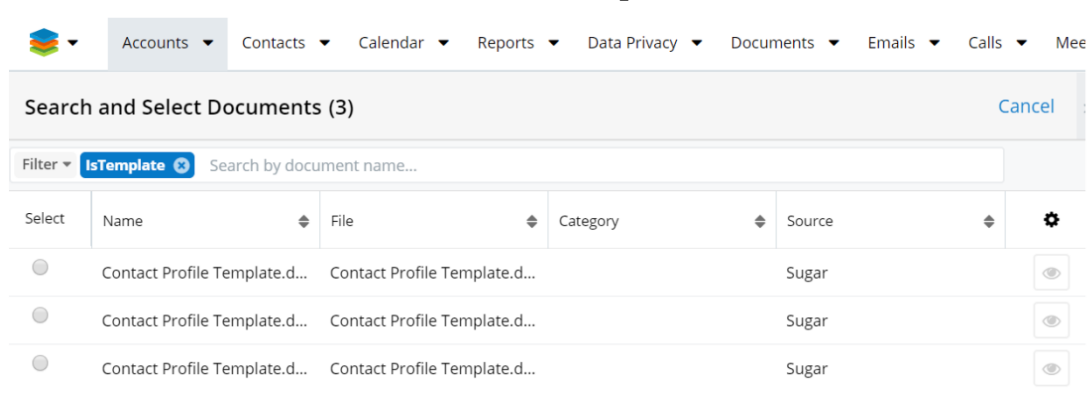


The merged document will contain only the records selected in the previous steps.

# Advanced Workflow Merge Action

The **wDocs Merge** action type will merge the document ( **Excel** , **Word** or **PDF** ) of a Sugar record according to the **Process Definition** settings.

After creating a new Process Definition record, follow these steps to add a "wDocs Merge" action to the process definition:

1. Drag an "**Action**" onto the grid and then right-click on the Action icon and the select: **Action Type > wDocs Merge**:
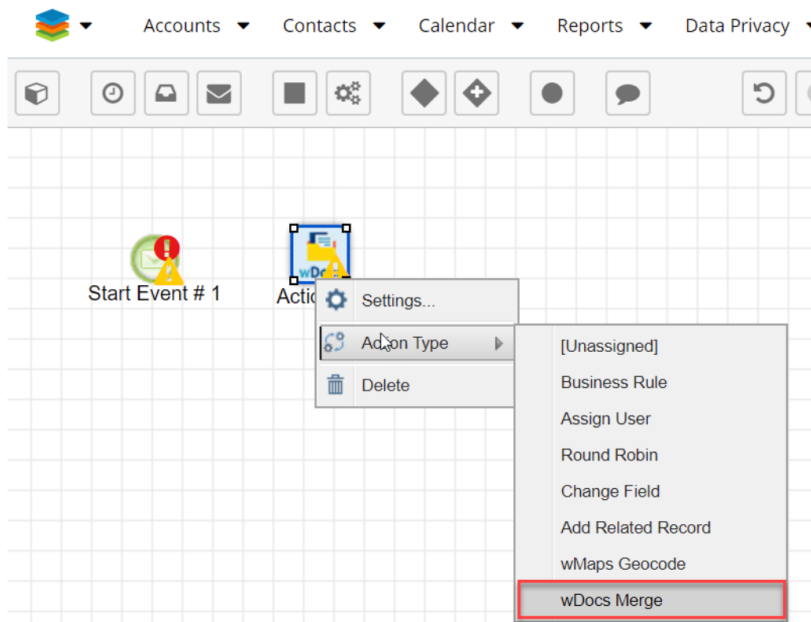
2. The Action's icon will change to:



3. Right-click on the icon and choose **Settings**:
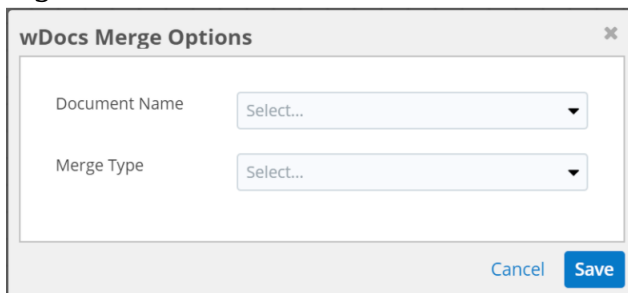


4. Click on the **Document Name** drop-down to select a template from the available documents.

   **Note**: Only those documents marked as templates for the module chosen on the Process Definition will be listed here:
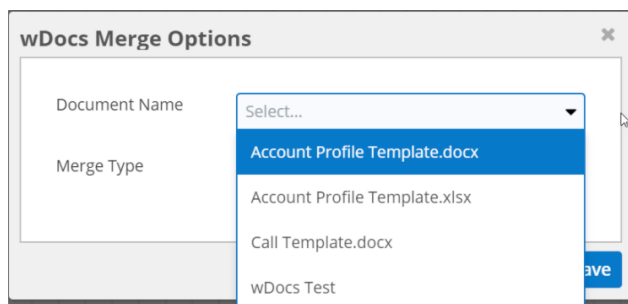


5. Documents will be merged when the current process definition is triggered. This happens when the conditions defined on the **Start Event** are met (right-click on the **Start Event** and choose **Settings**):
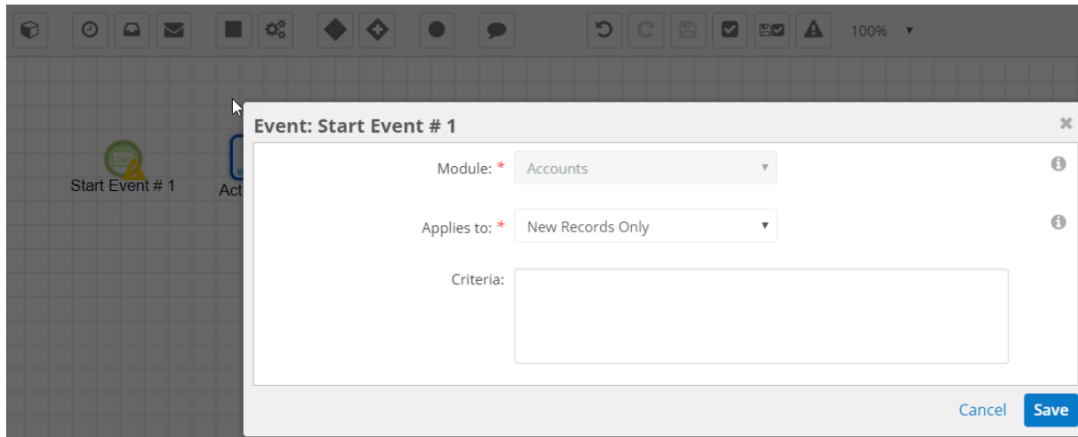
Users can also define processes that allow them to send the merged documents as emails.



- Drag an "**Action**" onto the grid and then right-click on the Action icon and the select: **Action Type > wDocs Merge**:
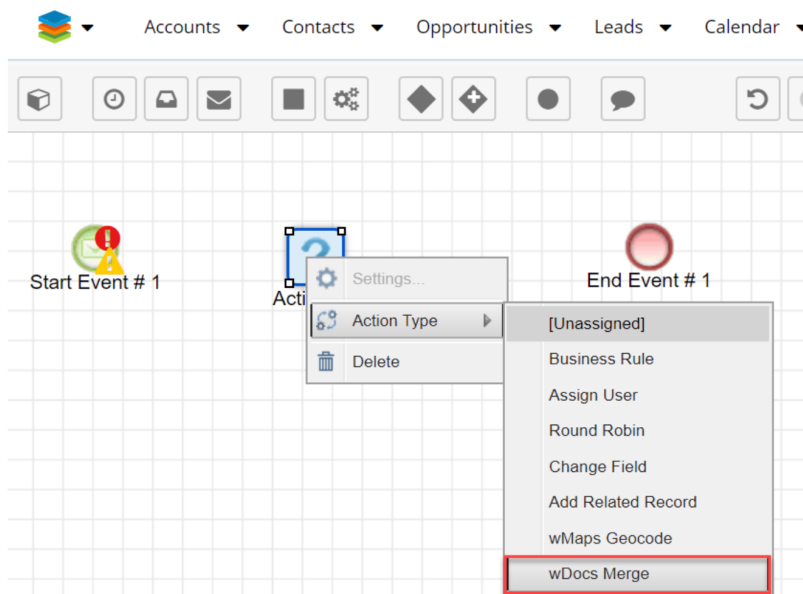
- Right-click on the **wDocs** icon and choose **Settings**:
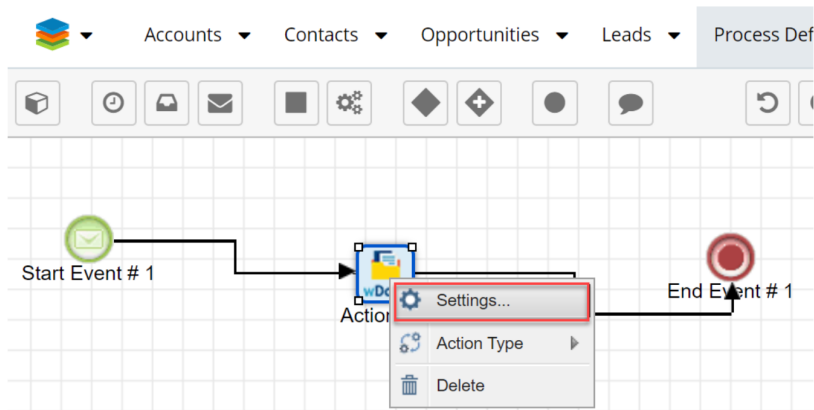


- Click on the **Document Name** drop-down to select a template from the available documents.
- Make sure to set the **Merge Type** field to the document type that you wish to be emailed to the user.
- Set up an email template to be used when sending the document from the **Email Template** field.
- Set up the sender and recipient of the email from the From and To fields available in this view. Save your configuration.



Choose what happens at the end of the process.
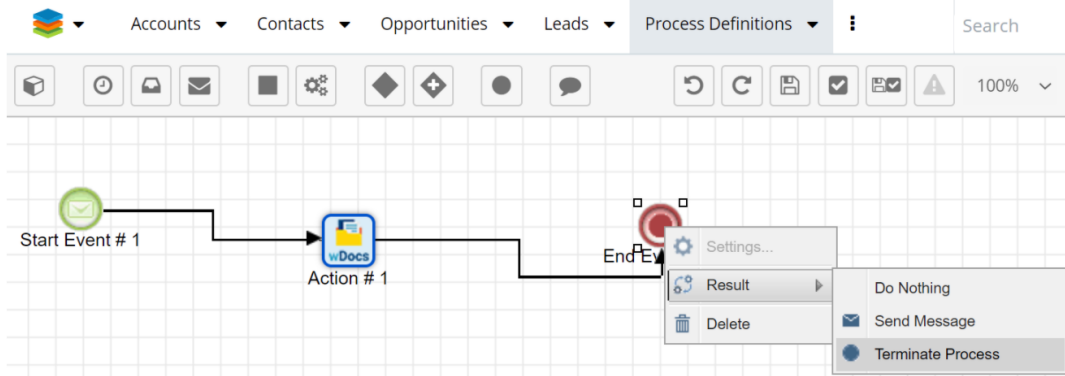
# wDocs Template Builder

wDocs allows users to easily create template documents through its **Template Builder** . Users can find it at the top of the wDocs widget.
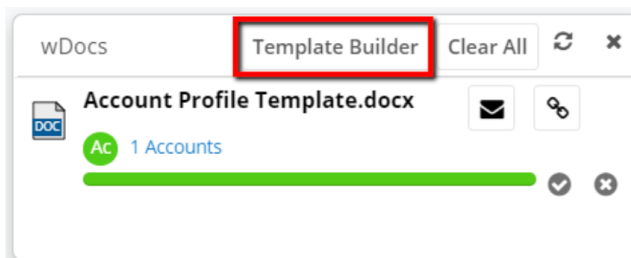


## wDocs Template Builder Icons
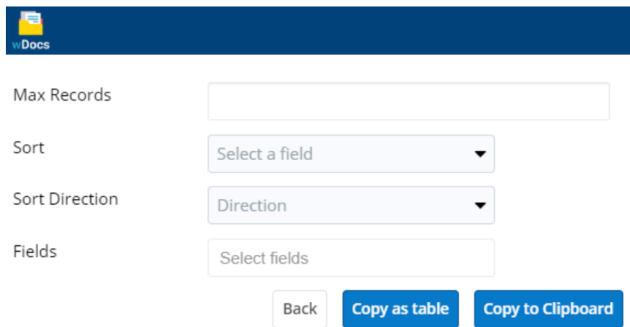
All fields and relationships in Template Builder have an icon to their right.
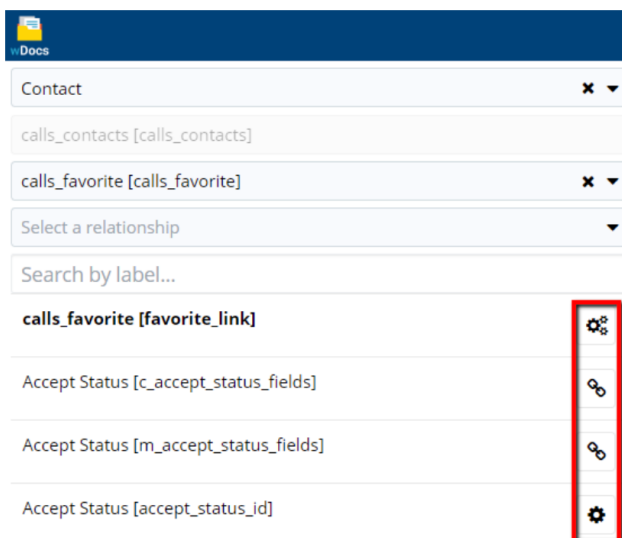
- **Relationships** have a specific icon resembling 3 connected gears. ⚙

- **Relate Fields** have a specific icon resembling a chain. 🔗

- **All the other fields** have a single-gear icon. ⚙

# Relationships

Clicking on the relationships icon opens a new window. Here, users can add attributes to the selected relationship.



In the new window are available 3 buttons: **Back**, **Copy as table** and **Copy to Clipboard** .

- **Copy to Clipboard**. Pressing the button with at least a field selected will automatically copy the corresponding syntax to the clipboard, allowing the user to paste it into their Word document to create their template.
- **Copy as Table**. Pressing the button with fields selected will automatically copy the table to clipboard, and exit back to list view. The user can now go to their Word document and paste the fields. This is how a syntax copied this way should look when pasted into a Word document.

| Subject | Assigned To | Start Date | Description |
|---|---|---|---|
| {#calls max_num='10' sort ='created_by:asc'} {name} | {assigned_user_na me} | {date_start} | {description}{/call s} |

- **Back**. Pressing the Back button will simply take the user to the previous

window of the Template Builder.

## Copy to Clipboard Different Field Types

wDocs allows users to copy to clipboard different field types.

- Relate, Flex Relate, Radio, Dropdown, Encrypt, TextField and TextArea.

Users can customize each field by pressing the icon to their right. This opens a new window, where users can give fields different attributes.

- **Capitalize**. If the **Capitalize** checkbox is ticked, it will capitalize the value of the field.
- **Case**. Users can choose from the **Case** dropdown menu between two values: **Upper** and **Lower**.
- **Padding**. By using the integer field, users can pad the string with empty spaces.
- **Barcode**. When the Barcode checkbox is ticked, additional attributes for the barcode become visible.
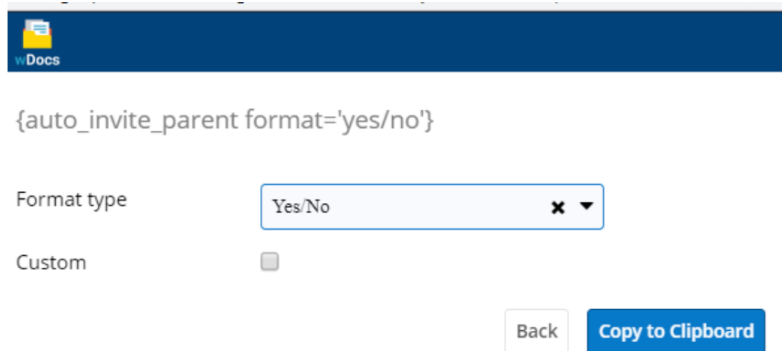


See the Barcodes section for more information on configuration and usage.

- **Checkbox**. The checkbox field allows users to attribute additional characteristics to the field. The **Format Type** field is a dropdown field with the following options: **True/False, ☐ or ☑; 1/0 ; Yes/No; On/Off**. Once the user selects the desired format type, its corresponding syntax will be

copied to the clipboard.
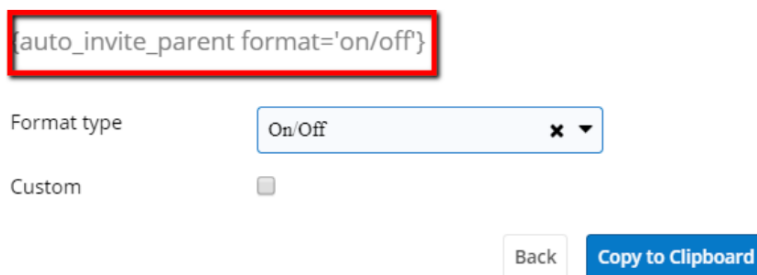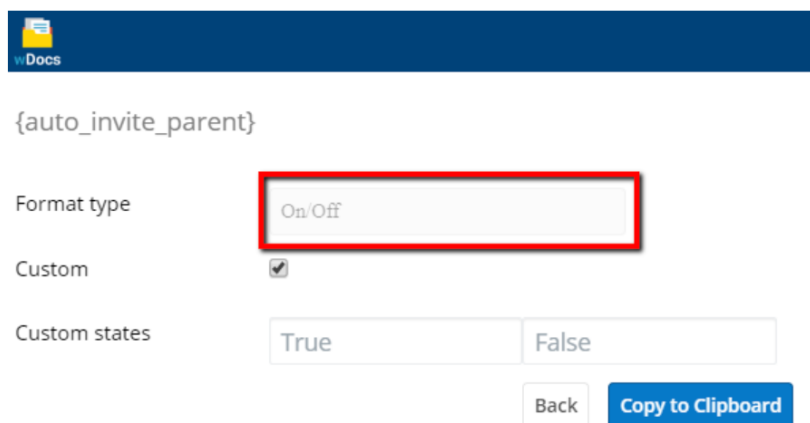




- **Custom**. Users can choose the **Format Type** from the dropdown, or they can tick the **Custom** checkbox and define their own values. Once the Custom checkbox is ticked, the Format Type field becomes read-only.



- **Datetime**. Users can choose how the date and time will be displayed by choosing an option from the **Format Type** dropdown field or by ticking the **Custom Date** checkbox. When adding custom date formats, users can see how the date will look like beneath the Custom Date field. Use the Help link for more date and time formatting tips.
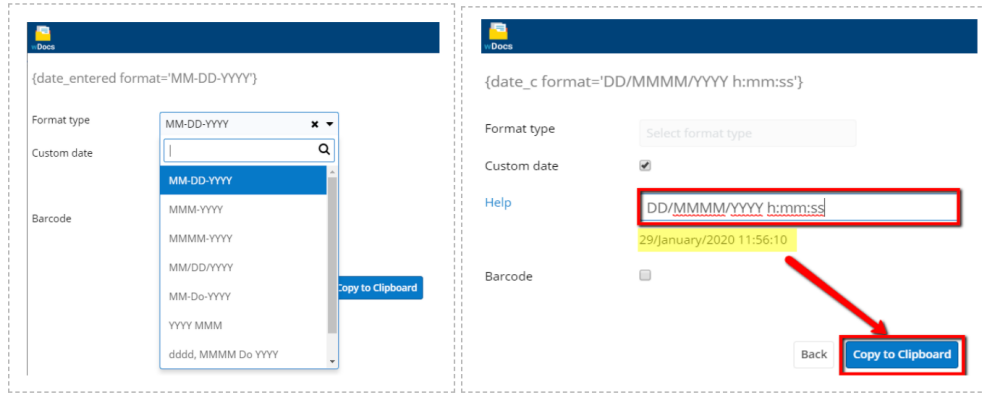
**Note**: When checking the Custom Date box, the Format Type field becomes read-only.

- **Barcode**. See the [Barcode](#) section for configuration and usage tips.
- **Date**. Users can choose the format in which the date will be displayed. the Format Type dropdown field from several formatting options.
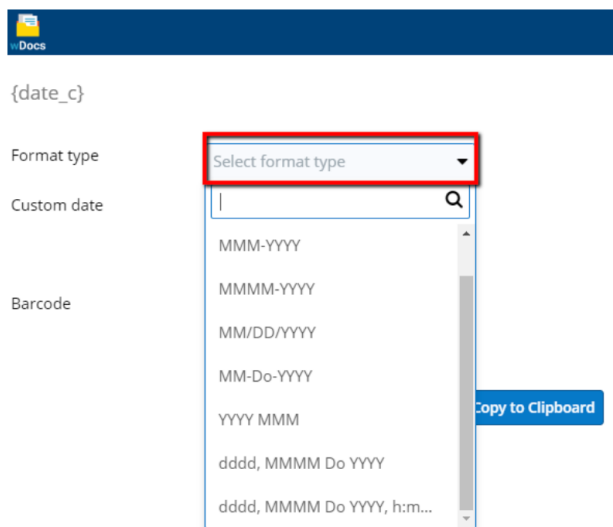


The **Custom Date** checkbox allows users to customize their date format when ticked. Use the Help link for more date formatting tips.

- **Multiselect**. The Multiselect field type can be customized by using the **Format Type** dropdown field. Users can set the value to Bullet or Number. The **Sort Direction** dropdown field allows users to set the sorting order between **Ascending** and **Descending**. To use the **Barcode** functionality with the Multiselect field type, visit the [Barcode](#) section.



- Currency, Decimal, Float, Integer, Phone

For the **Field Types** above are available only the [Padding](#) and [Barcode](#) attributes.

- Image

For the **Image Field Type** is available only the **Scale** attribute.

- URL

For the **URL Field Type** are available the following [attributes](#): Capitalize , Case, Padding and [Barcode](#).

## How to create a template using wDocs' Template Builder

In order to create a simple template you should do the following:

1. Open the template builder -> Press on **Fields/ Relationships** Tab.



   **Note**: Starting with version **4.39** , the **Fields/Relationships** tab of the Template Builder is already tagged.

2. Select a module : e.g Opportunities and search for the Name field using "Search for label" option.
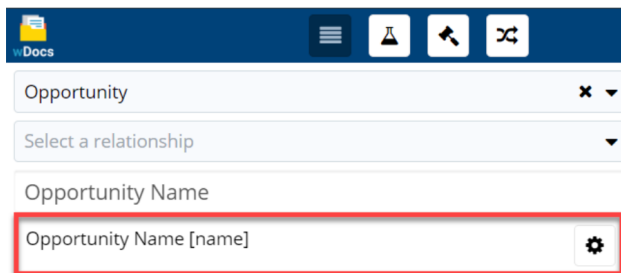


3. Press the gear icon
   ✿ and select the desired attributes.

4. Copy the syntax created by pressing "Copy to Clipboard".
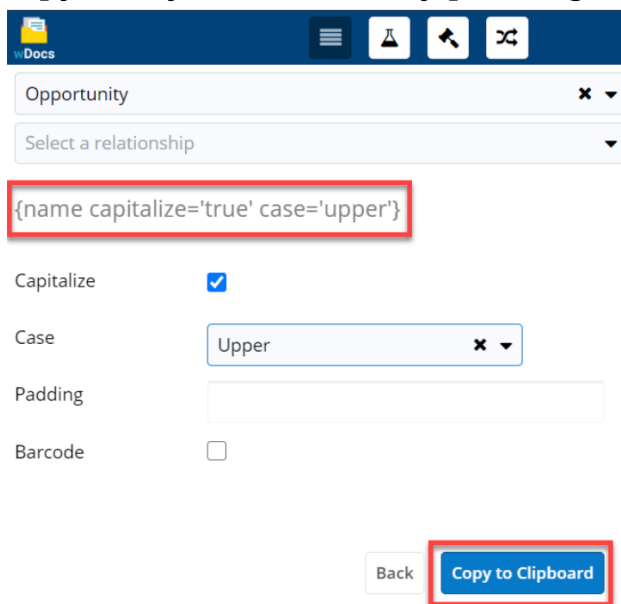


5. Paste the syntax in a word document.
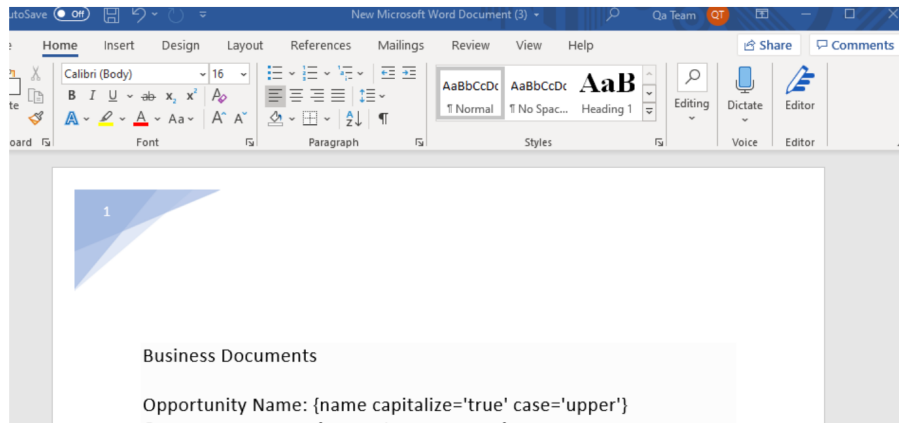
6. Select Account Name {account_name} (related field) and press on the icon.

**Relate fields** have the following icon: 🔗
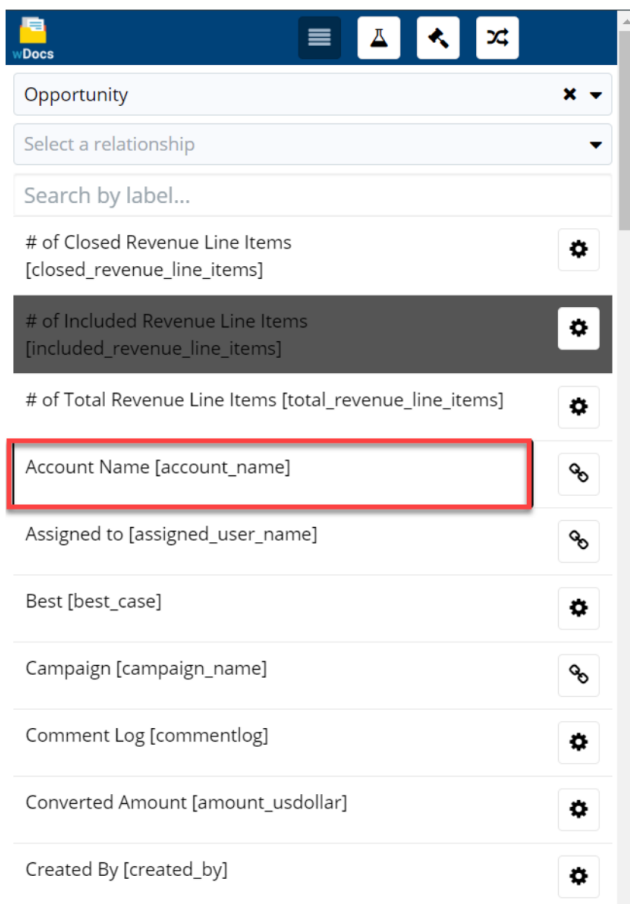


7. Choose a field in "Relate field" : {name}
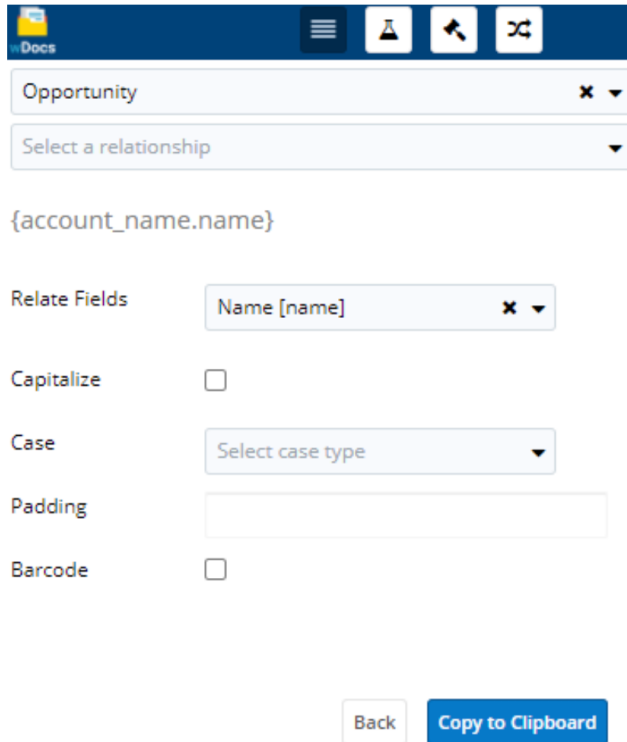
8. Select the desired attributes.
9. Press Copy to Clipboard and paste the syntax in a Word document.
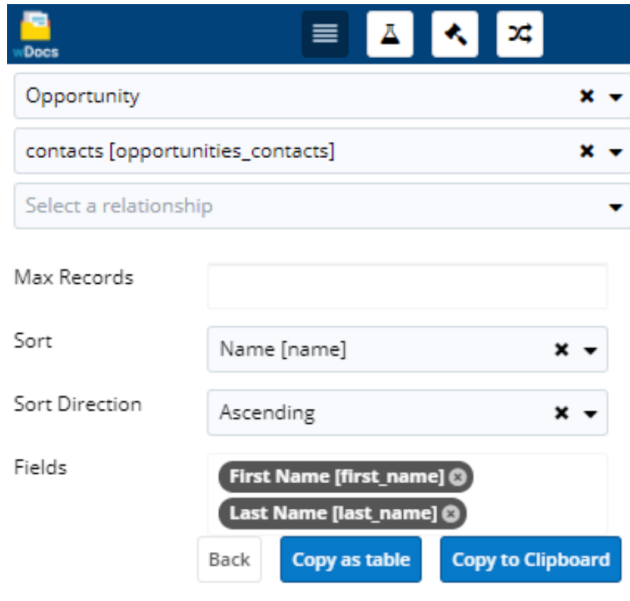
The syntax should look like the following: **{account_name.name}**

10. Select a relationship : **contacts[opportunities_contacts]**
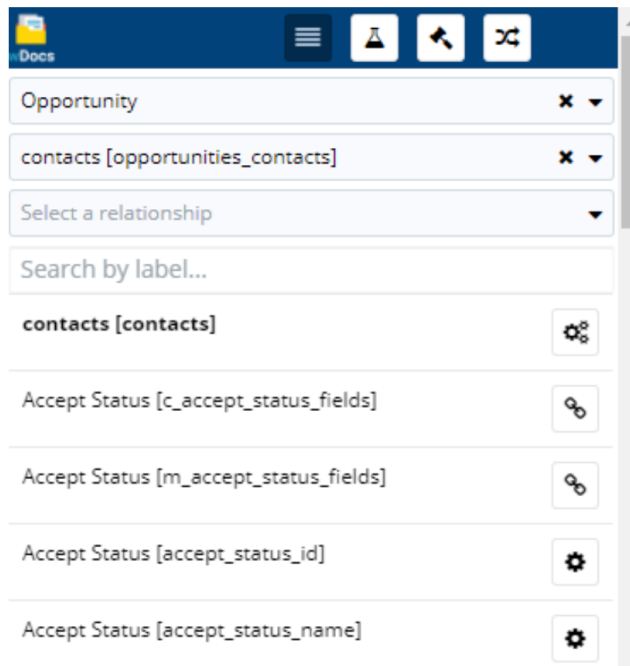
11. Press the gear icon

 and choose the fields you want to be displayed in the document.
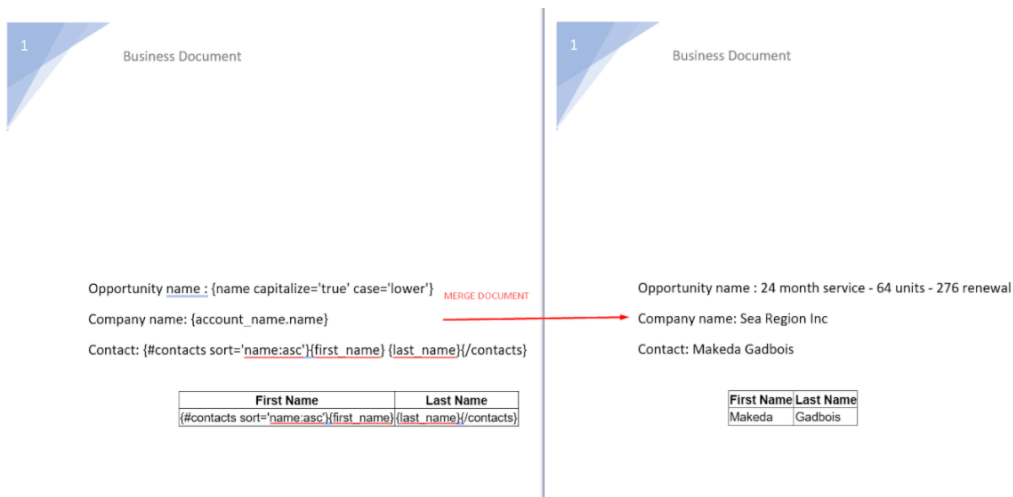


12. Press "Copy to Clipboard" or you can choose "Copy as table" (to be displayed as a table)
13. Paste the syntax in a Word document.

The syntax should look like the following: **{#contacts sort='name:asc'}{first_name} {last_name}{/contacts}**



**Note:** Starting with version 4.39, a tag option for image field scaling has been added to Relate Fields. This option allows you to insert images to your templates and set the scale to a dimension you prefer. (Only available for the Quoted Line Items Module)
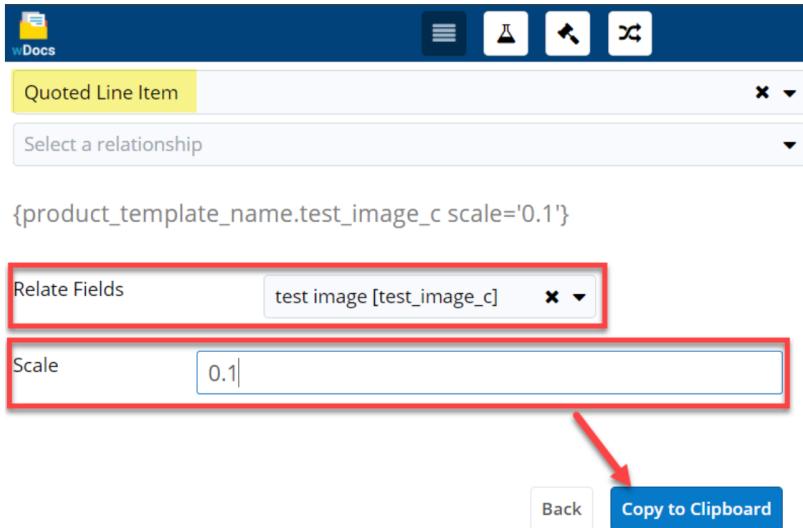
## How to use Formulas with wDocs' Template Builder

Open the template builder -> Press on **Formulas** icon and choose the desired module: e.g. Account

In the **Formula** field, the user has the ability to select the same formula functions available in Studio.
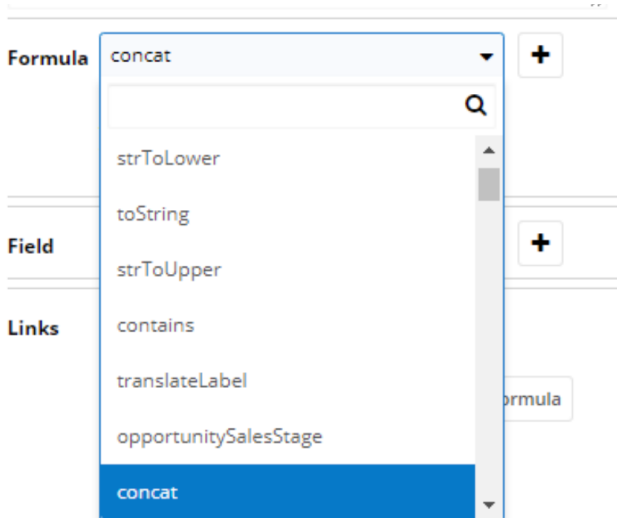


**Workflow :**

1. Choose a module : Accounts
2. Select in the Formula field : **concat** and press "+"
3. In the Field, search for "name" and press "+".
   **Note** :* After each selected field, the user should add a comma.

4. Select a second field : "industry".
5. Close the parentheses and press on "Validate ".
   **Note** :* If it's a complex formula all open parentheses will have to be closed at the end.
6. Copy formula and paste it into a Word doc. The syntax should look like this: **{!formula value='concat($name,$industry)'}.**
   Note that, if the user want to add a space, should add manually " ". The syntax should look like this : **{!formula value='concat($name, " ", $industry)'}**
7. Create a template with the above document and perform a merge action from an existing account.
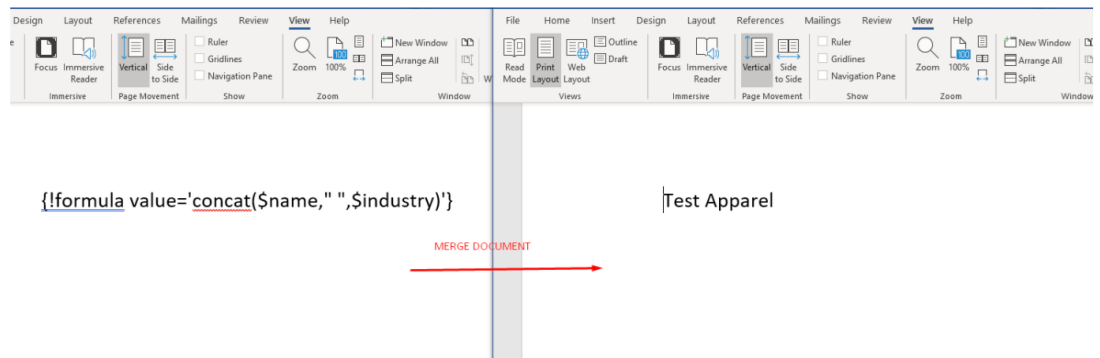


The **Links** field is a dropdown field type with all the related modules.
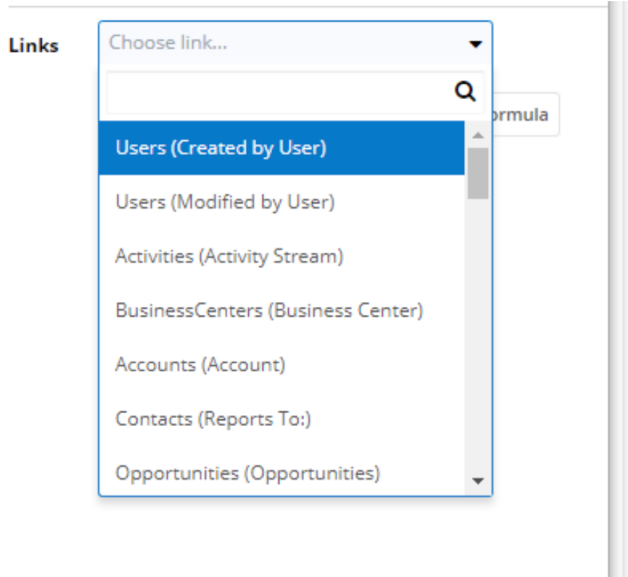


**Workflow:**

1. Choose a module: Accounts.
2. Select in the Formula field: **concat** and press "+".
3. In the Links field Select "Users (Create by)" Module.

4. Select a field from the selected Module: First Name and press "+".



Make sure that you insert a comma after the first syntax is created.
5. Choose a field from the main module selected ( Accounts) : Name and press "+".
6. Close the parentheses and press on "Validate".



7. Copy formula and paste it into a Word doc. The syntax should look like this: **{!formula value='concat(related($created_by_link, "first_name"),$name)'}**
Note that, if the user want to add a space, should add manually **" "**. The syntax should look like : **{!formula value='concat(related($created_by_link, "first_name")," ", $name)'}**

8. Create a template with the above document and perform a merge action from an existing account.



{!formula value='concat(related($created_by_link, "first_name")," ", $name)'}

Silvia Test

MERGE DOCUMENT

Formulas can also be used to perform mathematical calculations : add, subtract, multiply, divide.
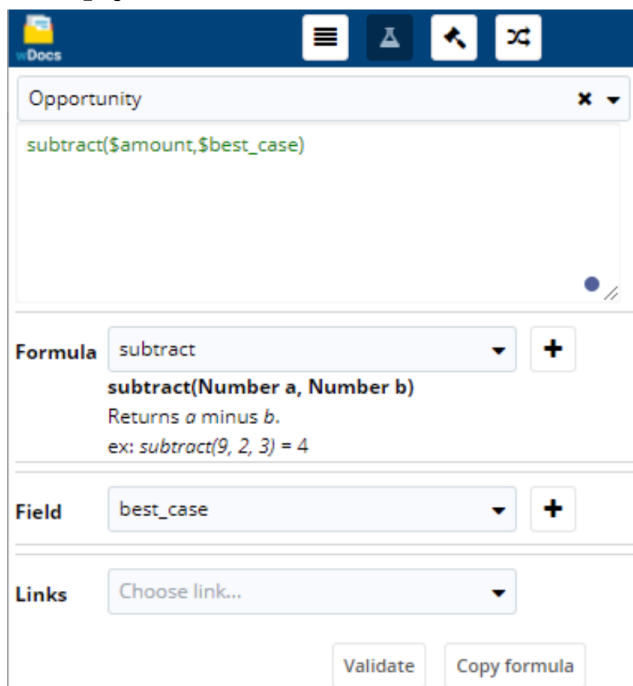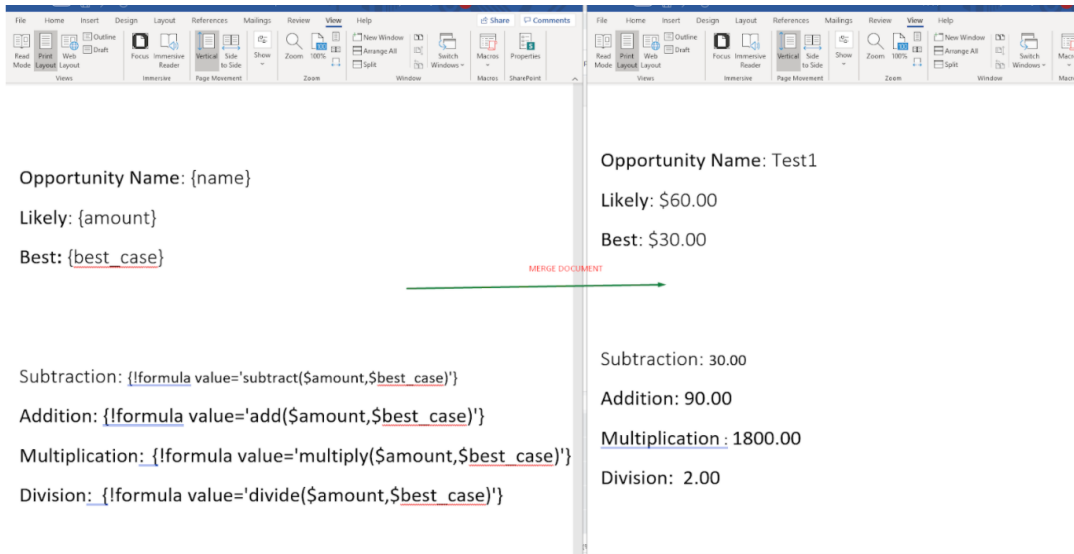
# How to use Directives with wDocs' Template Builder

Open the Template Builder -> Press on **Directives** icon and choose the desired module: e.g Accounts.

Once you pick a module from wDocs Template Builder a new dropdown field is available with the following options: **Date, List, Table.**
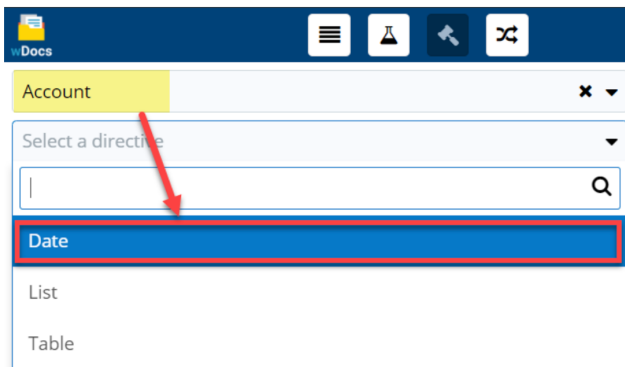


**Workflow:**

**I. Date**

1. Choose a module: Accounts.
2. Select **Date** and add a custom date format (Use https://momentjs.com/, for example) or you can use an existing date format.

3. After the desired date format is selected, press Copy to Clipboard
4. Paste the syntax into a Word document

The syntax should look like the following: **{!date format='MMM-DD-YY'}**.

## II. List

1. Choose a module: Opportunities.
2. Select **List** and add a relationship with another module : Contacts.
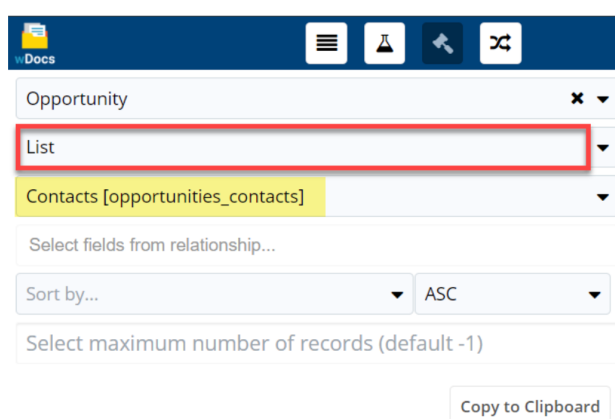


3. Select the desired fields from the relationship. The records can be sorted by any items ASC or DESC.
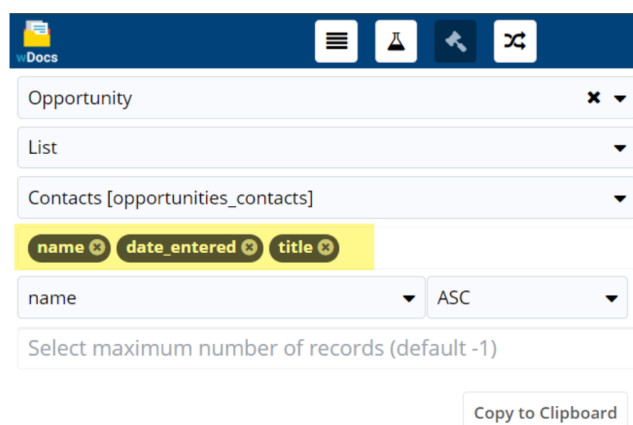


4. Press Copy to Clipboard and paste it to a Word Document. The syntax should look like the following: **{!list bind='#contacts' columns='name,date_entered,title' sort='name:asc' max_num='-1'}**
5. Create a template with the above document and perform a merge action from an existing record.
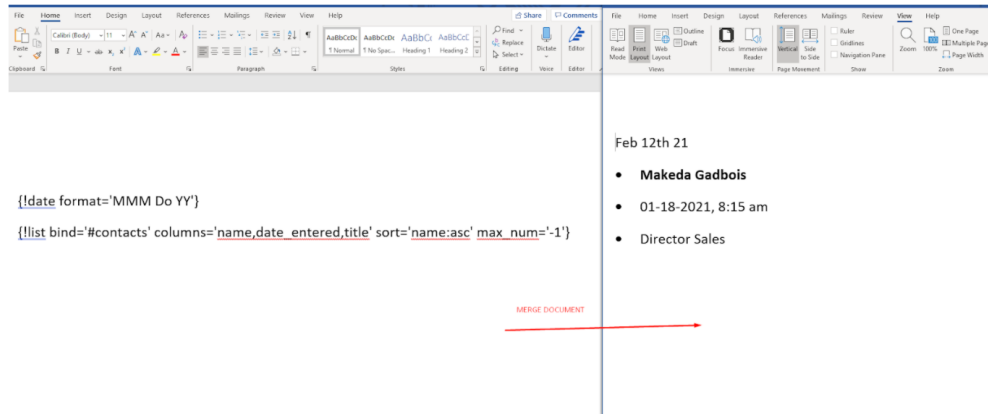
## III. Table

1. Choose a module: Opportunities.
2. Select **Table** and add a relationship with another module: Contacts.
3. Choose the desired fields from the relationship
4. Select a color for the table header
5. The records can be sorted by ASC or DESC values.
6. Press Copy to Clipboard and pass the syntax in a Word document

The syntax should look like the following:

**{!tablebind='#contacts'columns='name,phone_work,email1,primary_address_city' sort='name:desc' max_num='5' header='Name,Office Phone,Email Address,Primary Address City' header-color='beige'}**

| Name | Office Phone | Email Address | Primary Address City |
|------|-------------|---------------|---------------------|
| Ocie Ormond | (996) 329-1865 | hr36@example.net | San Mateo |
| Dwana Motz | (847) 564-5692 | info.sales.phone@example.cn | Salt Lake City |
| Ronna Mccluney | (682) 616-6092 | vegan.qa.beans@example.info | Sunnyvale |
| Cari Galang | (478) 999-6144 | vegan.hr.hr@example.co.jp | Santa Monica |
| Laquita Boman | (117) 054-4410 | beans.phone@example.net | Santa Fe |

## How to use Conditionals with wDocs' Template Builder

Open the Template Builder -> Press on **Conditionals** icon and choose the desired module : e.g. Opportunities.

## Equality operators used in conditional:

- = (attribution)

- == (equal)

- != (not equal)

- < (less than)

- <= (less than or equal to)

- > (greater than)

- >= (greater than or equal)

## Workflow:

1. Choose a module : Opportunities.

2. Select description field ( use "**$**" to search fields) from "If" section.
3. Add the operator "==" and add a variable ( e.g Test_Opp).
   Note *: If you use a string always use quotation marks.



4. Add a result if the condition is true : {name}.
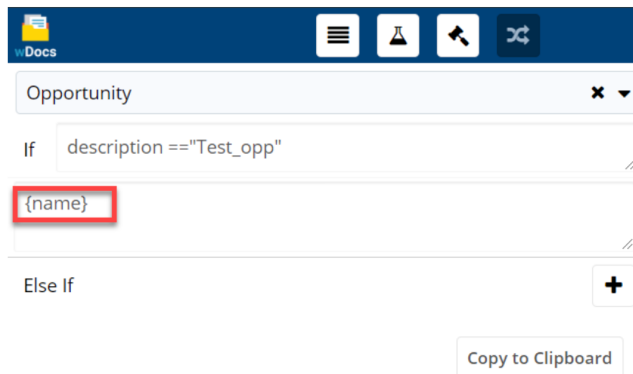


5. Press "+" to add a second condition ( Else If).
6. Add the operator "==" and add a variable ( e.g Test_Opp1).
7. Add a result if the condition is true : {amount}.
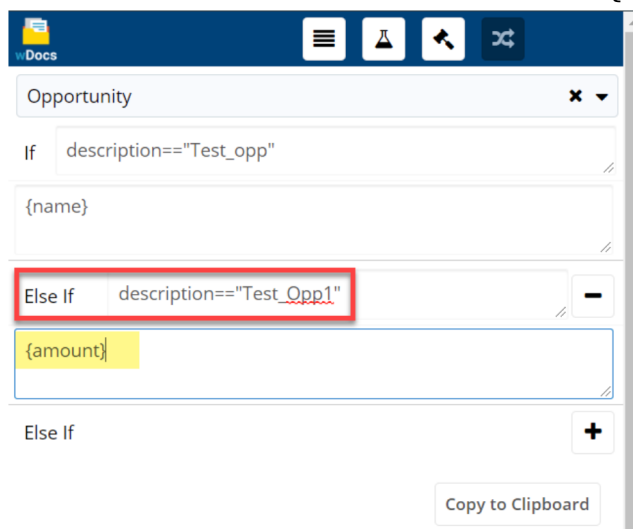


8. Copy to Clipboard and paste the syntax in a Word Document.

The syntax should look like this:

**{if description=="Test_Opp"} {name} {elseif description =="Test_Opp1"} {amount} {else} {endif}**

9. Create a template with the above document and perform a merge action from an existing record.
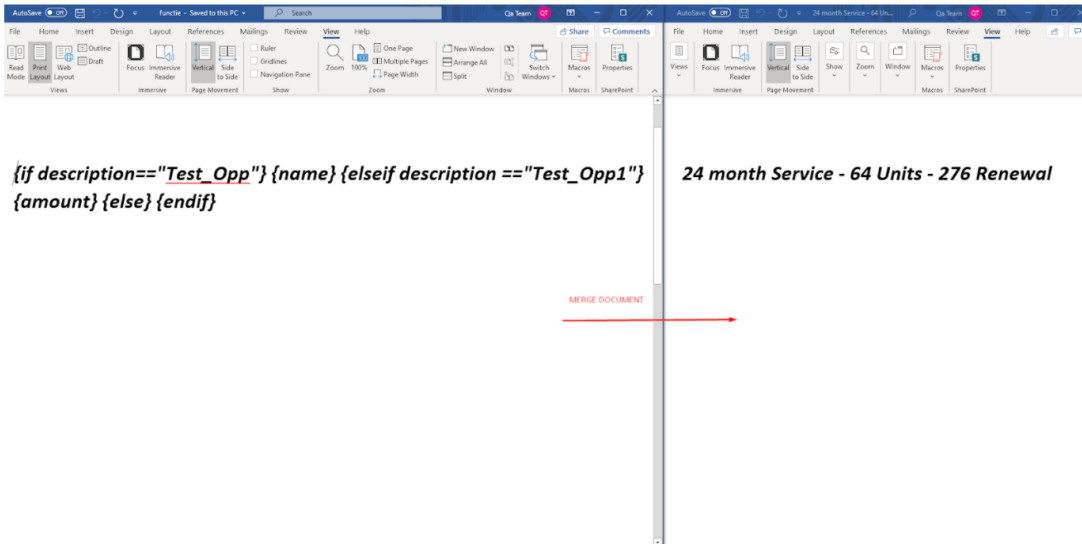


Once the Template Builder button is pressed, a new window opens. Click on the **Select a module** dropdown field to see all the modules for which the wDocs' Template Builder is available.
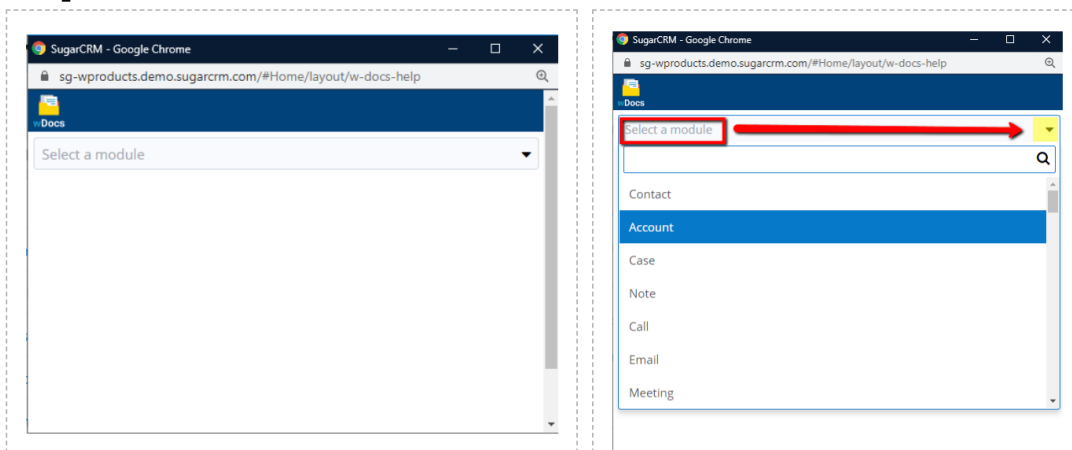


When choosing a module, all the fields available for the module in Studio are listed in the template builder.
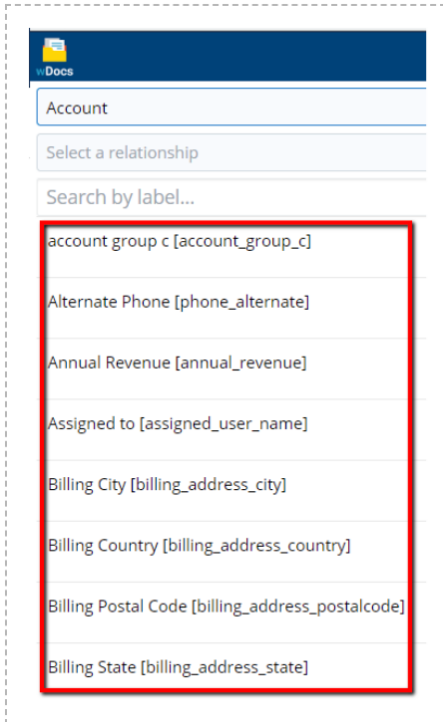
Clicking on any of the fields from the list automatically copies its corresponding syntax.

After the module is selected, the **Select a relationship** dropdown menu is displayed. The dropdown includes the same relationships available for each module in **Studio**.
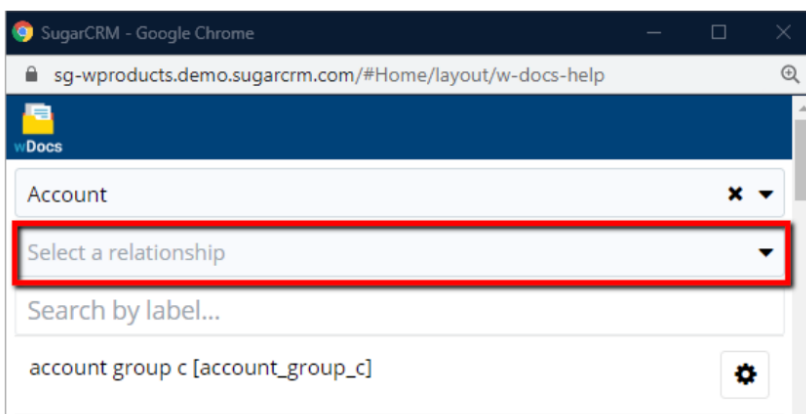


The first relationship chosen is related to the account selected. After selecting the first relationship, a second relationship dropdown opens. From here, the user can choose to associate details to the first relationship chosen. By default, only the fields in relationship with the previous one are displayed in the dropdown.
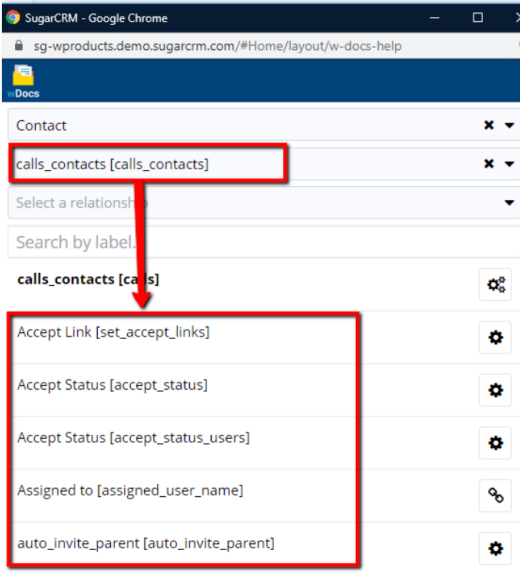
When clicking on a relationship's name in the list, the syntax attributed to it, is automatically copied to clipboard. Users can paste the syntax in a Word document to easily build their templates.
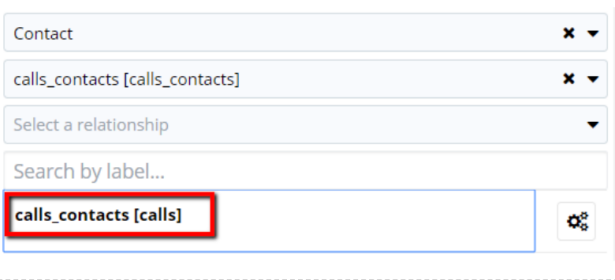


**Note**: Choosing a second (or third, fourth, etc.) will disable the previous relationship.
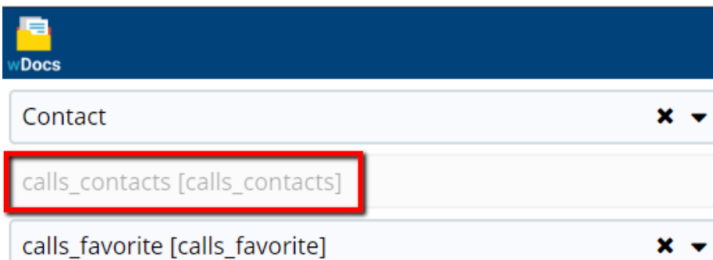


Starting with wDocs 4.25, we updated the wDocs Template Builder to include extended functionalities: Formulas, Directives and Conditionals.
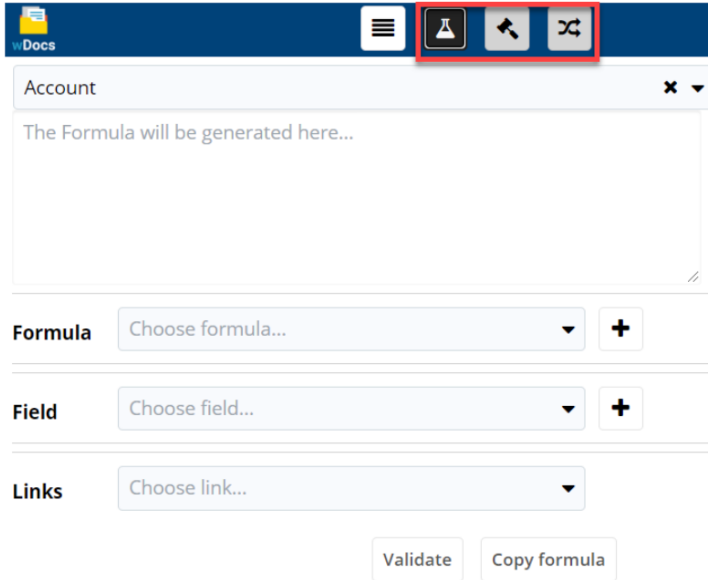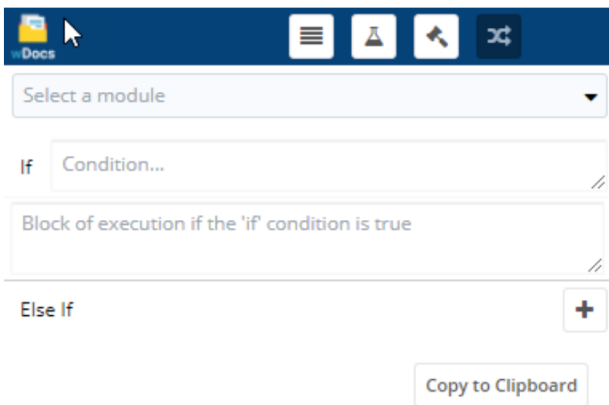
## Formulas

The **Formula** functionality allows you to build templates using Sugar Logic formulas. Users can choose Formulas, Fields and related module fields and copy those to the workspace. Users can also use the following shortcuts directly into the workspace: **@ for formulas** and **$ for fields** to generate formula-based templates.
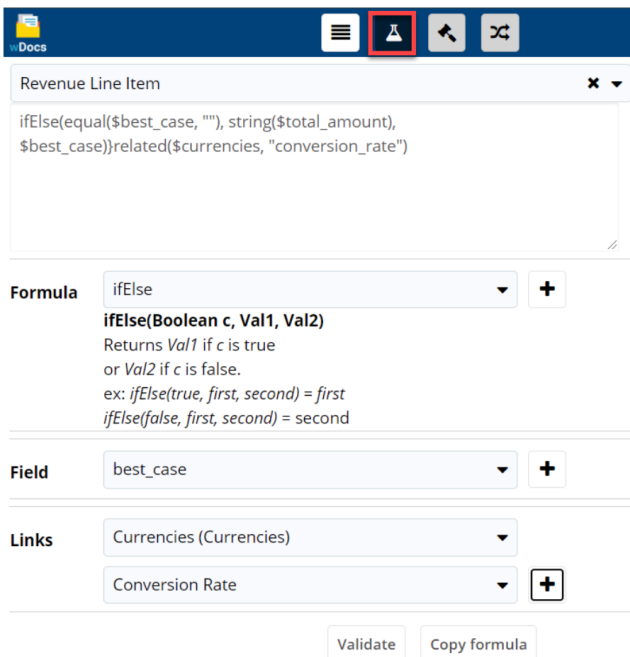


Starting with version **4.26**, **Conditional Examples** were added to the wDocs

Template Builder:





**Note**: By default, when iterating product bundles through a Quote (Quote Groups from the Quotes module), an empty quote bundle would be added. To avoid this, please insert a new **If conditional** to your template: {if name.length > 0} .

Collections and conditionals must be written on separate lines to ensure proper merge results, so please follow this good practice rule.

# Directives

The **Directives** functionality allows you to choose your preferred module and customize the following:
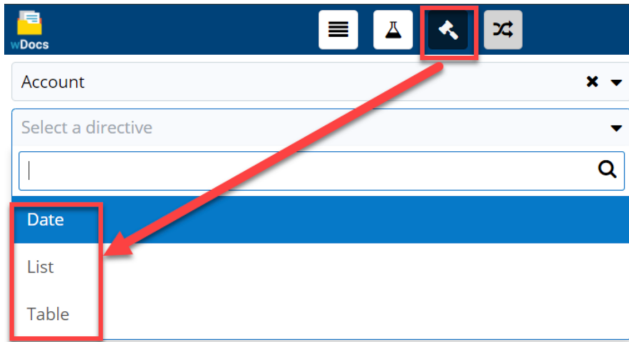
Selecting any of the three options above will generate directive templates that will extract Sugar data and compile it into custom date formats, lists and tables, according to the user's specifications.

- **Date**
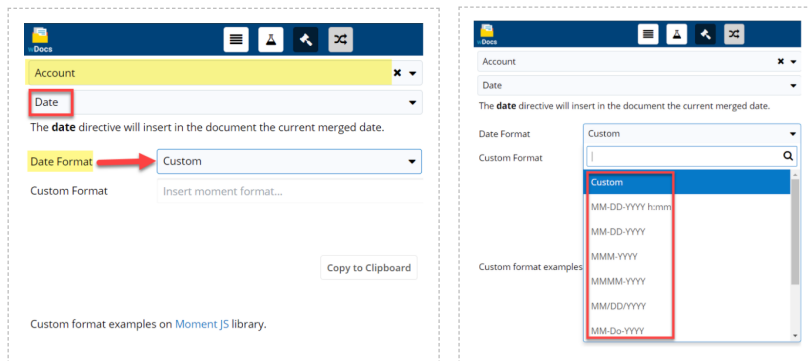


By default, the value of the date directive is set to **Custom**. Users can select the preferred date format from the dropdown menu next to the **Custom Format** field.

- **List**

The **List** directive allows you to build and customize lists for your document templates. After selecting the main module, users can select the related module and fields, how to sort the list items, and set the number of total records that will be extracted from Sugar.
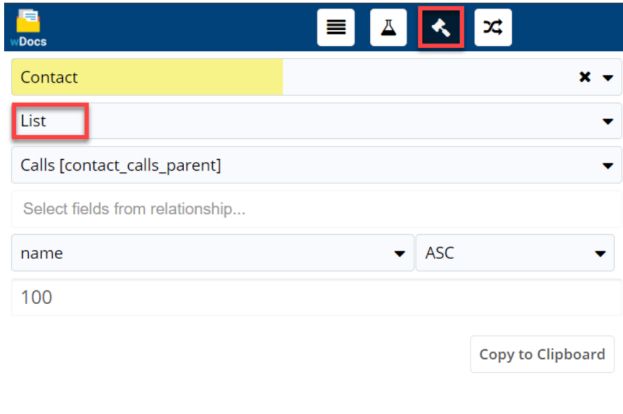
**Note**: By default, the maximum number of records will be set to **-1**. Leaving the value to -1 will extract all Sugar records that match your selection.
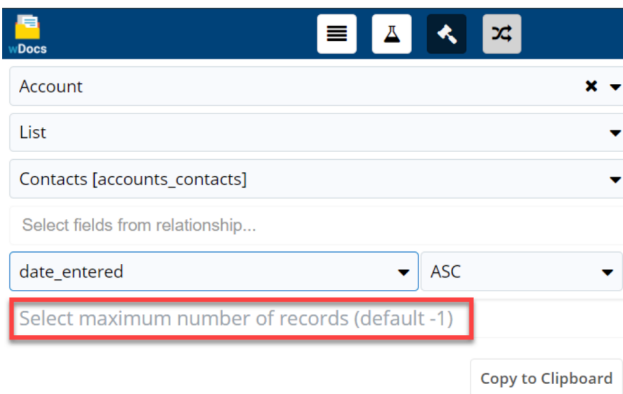


- **Table**

The **Table** directive type allows you to build tables for your document templates. After selecting the main module, users can select the related module and fields, customize the table header, and how to sort the data in the table.
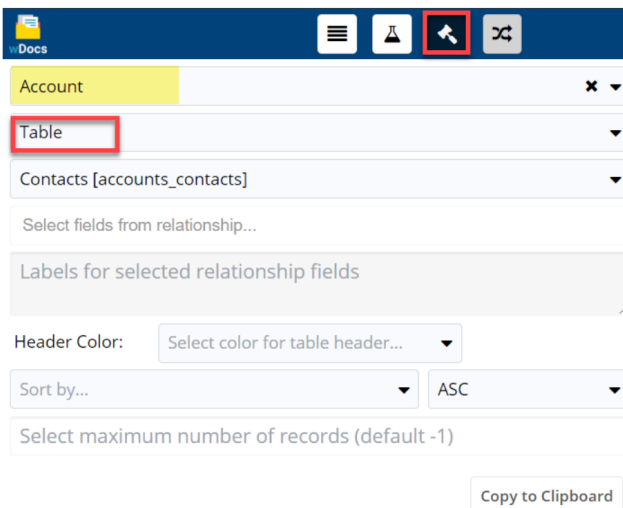
**Note**: By default, the maximum number of records will be set to **-1**. Leaving the value to -1 will extract all Sugar records that match your selection.

## Conditionals

The **Conditionals** functionality allows you to add condition-based logic to your templates. In the example below, the resulting document will return "Test Passed" if the amount field value is lower than 500, and "Test Failed" if the amount field value is higher than 500.



**Note**: By default, when iterating product bundles through a Quote (Quote Groups from the Quotes module), an empty quote bundle would be added. To avoid this, please insert a new **If conditional** to your template: {if name.length > 0} .

Collections and conditionals must be written on separate lines to ensure proper merge results, so please follow this good practice rule.

## Example of a Quote Profile Template

| Quantity | Line Item | Part Number | Unit Price | Discount | Product Image | Line Item Total |
|----------|-----------|-------------|------------|----------|---------------|-----------------|
| 2.00 | Reflective Mirror Widget | 2.0 | $260.00 | 0.00% |  | $520.00 |

| | |
|---|---|
| Discounted Subtotal: | $520.00 |
| Tax: | $42.90 |
| Shipping: | $0.00 |
| **Grand Total** | $562.90 |

| Quantity | Line Item | Part Number | Unit Price | Discount | Product Image | Line Item Total |
|----------|-----------|-------------|------------|----------|---------------|-----------------|
| 10.00 | 3 Year Service | LMNO9876543210 | $544.50 | 0.00% |  | $5,445.00 |
| 1.00 | 48 Month Service | PQRS0123456789 | $984.00 | 0.00% |  | $984.00 |
| 1.00 | Reflective Mirror Widget | 2.0 | $266.50 | 0.00% |  | $266.50 |

| Quantity | Line Item | Part Number | Unit Price | Discount | Product Image | Line Item Total |
|----------|-----------|-------------|------------|----------|---------------|-----------------|
| 1.00 | Lettie Gadget | Ink Conglomerate Inc 107280XYZ987 | $831.00 | 0.00% |  | $831.00 |
| 1.00 | Twila Gadget | Smallville Resources Inc 460035XYZ987 | $513.00 | 0.00% |  | $513.00 |

| Quantity | Line Item | Part Number | Unit Price | Discount | Product Image | Line Item Total |
|----------|-----------|-------------|------------|----------|---------------|-----------------|
| 1.00 | Wynona Gadget | JBC Banking Inc 209794XYZ987 | $813.78 | 0.00% |  | $813.78 |

| | |
|---|---|
| Group total: | $813.78 |

| Quantity | Line Item | Part Number | Unit Price | Discount | Product Image | Line Item Total |
|---|---|---|---|---|---|---|
| 10.00 | 3 Year Service | LMNO9876543210 | $544.50 | 0.00% | | $5,445.00 |
| 1.00 | 48 Month Service | PQRS0123456789 | $984.00 | 0.00% | | $984.00 |
| 1.00 | Reflective Mirror Widget | 2.0 | $266.50 | 0.00% | | $266.50 |

Group total: $6,695.50

| Quantity | Line Item | Part Number | Unit Price | Discount | Product Image | Line Item Total |
|---|---|---|---|---|---|---|
| 1.00 | Lettie Gadget | Ink Conglomerate Inc 107280XYZ987 | $831.00 | 0.00% | | $831.00 |
| 1.00 | Twila Gadget | Smallville Resources Inc 460035XYZ987 | $513.00 | 0.00% | | $513.00 |

# Appendix

## Building wDocs Templates - In-Depth Information

### Attributes

Certain field types support attributes:

- {#contacts} – opening tag for Contacts loop; {/contacts} – closing tag for Contacts loop
- sort='name:desc' – orders the records by name in descending order
- max_num='5' – returns maximum of 5 records when more than 5 are exist

Please note that the attributes need to be written without any blank spaces within the syntax:

- This is the **correct** syntax for writing the attribute: **max_num='5'**
- This is the **incorrect** syntax for writing the attribute because it contains spaces: **max_num = '5'**

**Note**: Having spaces in an attribute's syntax will lead to the template not being processed.

**Examples Using Attributes**

**Merge syntax (Contact loop):**

Loop through contacts of an Account:{#contacts}

{name} / {phone_work} / {title}{/contacts}

**Merge results (Contact loop):**

Loop through contacts of an Account:

Betty Hubert / (591) 748-9028 / VP Sales

Brandi Steel / (701) 098-6189 / President

Clarence Leis / (876) 041-3994 / Senior Product Manager

Jonathan Smithwick / (444) 181-0891 / President

**Merge syntax with additional sorting attribute "sort" (descending order):**

Loop through contacts of an Account:{#contacts sort='name:desc'}

{name} / {phone_work} / {title}{/contacts}

**Merge results with additional sorting attribute "sort" (descending order):**

Loop through contacts of an Account:

Brandi Steel / (701) 098-6189 / President

Jonathan Smithwick / (444) 181-0891 / President

Clarence Leis / (876) 041-3994 / Senior Product Manager

Betty Hubert / (591) 748-9028 / VP Sales

**Merge syntax with additional sorting attribute "sort" (ascending order):**

Loop through contacts of an Account:{#contacts sort='name'}

{name} / {phone_work} / {title}{/contacts}

**Merge results with additional sorting attribute "sort" (ascending order):**

Loop through contacts of an Account:

Betty Hubert / (591) 748-9028 / VP Sales

Clarence Leis / (876) 041-3994 / Senior Product Manager

Jonathan Smithwick / (444) 181-0891 / President

Brandi Steel / (701) 098-6189 / President

**Merge syntax with additional maximum attribute "max_num" (set to return max. of 2 records):**

Loop through contacts of an Account:{#contacts max_num='2'}

{name} / {phone_work} / {title}{/contacts}

**Merge results with additional maximum attribute "max_num" (set to return max. of 2 records):**

Loop through contacts of an Account:

Betty Hubert / (591) 748-9028 / VP Sales

Brandi Steel / (701) 098-6189 / President

**Merge syntax with additional loop attribute "trimStart" "trimEnd" (set symbol after each record):**

Loop through contacts of an Account: {#contacts trimStart="/n" , trimEnd=","}

**Merge results with additional loop attribute "trimStart" "trimEnd" (set symbol after each record):**

Loop through contacts of an Account:

Betty Hubert , Brandi Steel


**Relate Fields**

The **Relate**  fields can be used in order to retrieve information from the related records. In the following example, the assigned user of the contact record being merged is "Sarah Smith". On Sarah's employee record, the "Reports to" field contains "Jane Fitzpatrick". This example shows the syntax and resulting merge for retrieving the related employee information:

For the " **assigned_user_name** " field, any field from the "Users" module can be appended to return that value from the associated user. Here are examples:

{assigned_user_name.phone_work} will return the user's work phone number.

{assigned_user_name.phone_mobile} will return the user's mobile phone number.

{assigned_user_name.department} will return the user's department.

**Merge syntax:**

Employee {assigned_user_name.name} reports to {assigned_user_name.reports_to_name}.

**Merge results:**

Employee Sarah Smith reports to Jane Fitzpatrick.

**Custom Modules**

You can merge any custom relationship by including the relationship name. This example will loop through the "field1" and "field2" fields of a quoted line items custom module:

{#ucc_quotes_ucc_quoted_line_items_1}

{field1} {field2}

{/ucc_quotes_ucc_quoted_line_items_1}

Custom modules can be used like any other modules.

- normal fields on a custom module {custom_module_field}
- relate fields on a custom module {relate_field_name.field_name}
- collections on a custom module
  {#relationship_name}{field_name}{/relationship_name}

As you can see, there is no difference between a custom module and a normal module.

**Formatting Fields**

This is a list of supported formatting for certain field types:

**Examples - Formatting (MultiSelect fields):**

**Merge syntax:**

Number Asc:

{test_multi_c format='number' order='asc'}

Number Desc:

{test_multi_c format='number' order='desc'}

Bullet Asc:

{test_multi_c order='asc' format='bullet'}

Bullet Desc:

{test_multi_c order='desc' format='bullet'}

**Merge results:**

Number Asc:

1. Analyst
2. Competitor
3. Investor
4. Prospect
5. Reseller

Number Desc:

1. Reseller
2. Prospect
3. Investor
4. Competitor
5. Analyst

Bullet Asc:

- Analyst
- Competitor
- Investor
- Prospect
- Reseller

Bullet Desc:

- Reseller
- Prospect
- Investor
- Competitor
- Analyst

## Examples - Formatting (Date fields):

## Merge syntax:

{date_entered format='MMM Do, YYYY'}

{date_entered format='MM/DD/YY'}

{date_entered format='M-D-YY'}

**Note**: Any other format found here can be used: http://momentjs.com

## Merge results:

Sep 20th, 2013

09/20/13

9-20-13

## Examples - Formatting (Datetime fields):

## Merge syntax:

{date_entered format='dddd, MMMM Do YYYY, hh:mm:ss A'}

{date_entered format='ddd, MMM Do, YYYY, hh:mm:ss a'}

{date_entered format='ddd, MM/DD/YY, h:m:ss A'}

{date_entered format='dd, MM-DD-YY, h:m:ss a'}

{date_modified format='dddd, MMMM Do YYYY, hh:mm:ss A'}

{date_modified format='ddd, MMM Do, YYYY, hh:mm:ss a'}

{date_modified format='ddd, MM/DD/YY, h:mm:ss A'}

{date_modified format='dd, MM-DD-YY, h:mm:ss a'}

**Merge results:**

Friday, September 20th 2013, 06:10:00 PM

Fri, Sep 20th, 2013, 06:10:00 pm

Fri, 09/20/13, 6:10:00 PM

Fr, 09-20-13, 6:10:00 pm

Thursday, February 11th 2016, 12:01:00 PM

Thu, Feb 11th, 2016, 12:01:00 pm

Thu, 02/11/16, 12:01:00 PM

Th, 02-11-16, 12:01:00 pm

**Examples - Formatting (case / capitalization):**

**Note**: The "Department" value in Sugar when this merge took place = "sales and SUPPORT"

**Merge syntax:**

{department case='upper'}

{department case='lower'}

{department capitalize='true'}

**Note**: Capitalize set to 'false' will have no effect on the string. Capitalize is only meant for cases where you want to assure yourself that the string will start with an uppercase letter.

**Merge results:**

SALES AND SUPPORT

sales and support

Sales and SUPPORT << Only the first letter of entire field value is capitalized <<

**Examples - Formatting (padding):**

Padding a field takes the field value returned and adds a predefined number of leading spaces. If the returned field value is "TEST" and the pad value is "10", the resulting string will be: " TEST" (i.e., six (6) spaces will be added so the total number of characters in the merge result becomes "10".

**Note**: If the pad number defined is less that the field value being merged, the value being merged will not be padded. In this example, the email address being merged (brandiengage@gmail.com) is 22 characters in length.

**Merge syntax:**

{email1 pad='35'} << pad formatting <<

{email1 pad='30'} << pad formatting <<

{email1 pad='25'} << pad formatting <<

{email1 pad='20'} << pad formatting <<

**Merge results:**

 brandiengage@gmail.com << pad formatting (padded "13" spaces) <<

 brandiengage@gmail.com << pad formatting (padded "8" spaces) <<

 brandiengage@gmail.com << pad formatting (padded "3" spaces) <<

brandiengage@gmail.com << pad formatting (padded "0" spaces) <<

**Note**:

1.Formats on 'multiselect' fields:
The 'PAD' attribute is not compatible with the attributes specific for multiselect fields: 'sort' and 'format' because padding text adds empty spaces at the beginning of the text string (do not use pad and sort/format on the same multiselect field).

2.PAD and Capitalize:
When these are used together, be sure to capitalize the text "before" padding the text because the PAD modifies the value by adding empty spaces in front of the text string and the "space" is not what is desired to be capitalized.

**Examples - Pre-formatted fields:**

Sugar's has pre-defined date/time, and currency formatting. For merging these fields into a template, only the field name needs to be placed within the curly braces.

**For date/time, the formatting is: {MM-DD-YYY h:mm a}**

**Merged with Contacts module:**

**Merge syntax:**

Birthday: {birthdate}

Date entered: {date_entered}

Date modified: {date_modified}

**Merge results:**

Birthday: 05-31-1968, 12:00 am

Date entered: 09-20-2013, 6:10 pm

Date modified: 02-11-2016, 12:01 pm

**For currency, the formatting is configured using the user's profile setting for "Preferred Currency".**

**Merged with Opportunities module:**

**Merge syntax:**

Likely: {amount}

Converted Amount: {amount_usdollar}

Best: {best_case}

Worst: {worst_case}

**Merge results (User profile "Preferred Currency" setting: USD $):**

Likely: $11,265.00

Converted Amount: $11,265.00

Best: $12,154.00

Worst: $10,376.00

**Merge results (User profile "Preferred Currency" setting: EUR €):**

Likely: €11,265.00

Converted Amount: €11,265.00

Best: €12,154.00

Worst: €10,376.00

**Examples - Formatting (Checkbox fields):**

**Merge syntax:**

{checkbox_name format='boolean'}

{checkbox_name format='unicode_symbols'}

{checkbox_name format='number'}

boolean - The merged result will be: "true" if checkbox is ticked; "false" if not ticked

unicode_symbols - The merged result will be: ☐ if checkbox is ticked; ☐ if not ticked

number - The merged result will be: "1" if checkbox is ticked; "0" if not ticked

**Merge results (when checkbox is ticked):**

true

☐

1

**Merge results (when checkbox is not ticked):**

false

☐

0

**Examples - Formatting (Image fields):**

Support for different image types: JPEG, GIF, PNG ,BMP.

**Merge syntax:**

{image_c}

**Merge results:**



**TintMCEFieldType (field type):**

The following formats used inside the Tiny MCE field will be supported:

- Bold
- Italic
- Underline
- Font color
- Highlight color
- Font size
- Lists: bullets and numbers

The syntax for the Tiny MCE field :

{TinyMCE_fieldname format='docx'}

**Examples - Formatting (Email fields):**

The emails can be generated in two ways:

- Using {email1},{email2},{email3} if you want to generate specific email addresses
- Using loops in order to generate all email addresses for a record.

{#email}{email_address}

{/email}

Following are four (4) examples of using a loop to return all email addresses for a contact and how they can be listed after being merged:

**Example 1 - Returning email addresses in a single line (with a comma and space between each)**

**Merge syntax:**

{#email}{email_address}, {/email}

End of list!

**Merge results:**

brandiengage@gmail.com, brandiengage2@gmail.com, brandiengage3@gmail.com,

End of list!

## Example 2 - Returning email addresses on new lines (blank line after last email address)

**Merge syntax:**

{#email}{email_address}

{/email}

End of list!

**Merge results:**

brandiengage@gmail.com

brandiengage2@gmail.com

brandiengage3@gmail.com

End of list!

## Example 3 - Returning email addresses on new lines (first line is blank)

**Merge syntax:**

{#email}

{email_address}{/email}

End of list!

**Merge results** (note the first line is blank) **:**

brandiengage@gmail.com

brandiengage2@gmail.com

brandiengage3@gmail.com

End of list!

## Example 4 - Returning email addresses on new lines (no blank lines)

**Merge syntax:**

Merge example #4:{#email}

{email_address}{/email}

End of list!

**Merge results:**

Merge example #4:

brandiengage@gmail.com

brandiengage2@gmail.com

brandiengage3@gmail.com

End of list!

**Examples - Formatting (URL fields):**

A URL field can be converted into a hyperlink having text or the URL itself, the hyperlink is clickable):
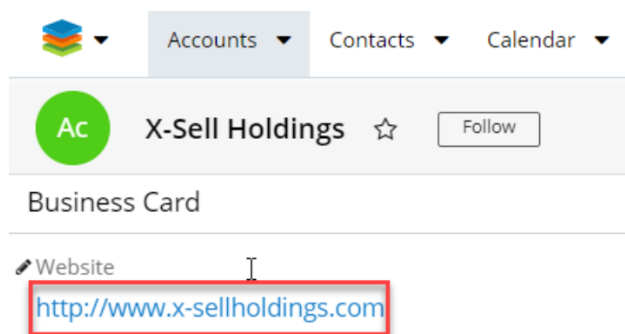


**Merge syntax:**

Merged document (Ctrl + Click to follow link):

{website format='url' text='Go to Web page!'}

{website format='url' text='http://www.360vacations.com'}

**Merge results:**

Merged document (Ctrl + Click to follow link):

Go to Web page!

[http://www.360vacations.com](http://www.360vacations.com)

**Time Zone Support**

The user's time zone is taken into consideration when merging wDocs datetime fields.

Sugar displays dates using the browser's time zone. If your time zone is "UTC" and the browser's is GMT+3 then it will display dates with the GMT+3 time zone.

**Note**: You can use the **moment()** function in your browser's development tools to get the computer's local time zone.

# Collections and Inner Collections

## Collections (loops)

Information that can be merged into a document is not limited to a specific module record's fields. You can extract information from the relationships by using loops:

- {#contacts} – opening tag for Contacts loop
- {/contacts} – closing tag for Contacts loop

**Note**: The subpanel name can be determined from **data-subpanel-link** when "inspecting" an element using a browser's development tools (<F12> in most browsers open the tools):
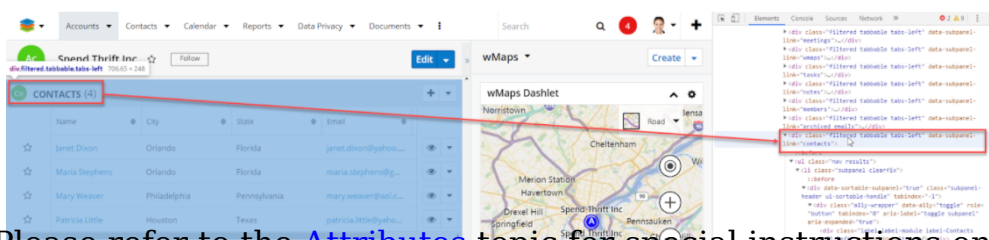


Please refer to the [Attributes](#) topic for special instructions on syntax usage to avoid merge errors.

The following example will create a table of 5 Contact records ordered by first

name descending, each record will have the salutation, first_name, last_name, title, city, primary email and phone displayed:

{#contacts sort='first_name:desc' max_num='5'}

 {salutation} {first_name} {last_name}

 {title}

 {primary_address_city}

 {email1}

 {phone_office}

{/contacts}

## Inner Collections

An inner collection is the child collection generated for each parent that is part of a collection. The syntax is the same:

{#parent_collection}

{parent_collection_field}

 {#child_collection}

 {child_collection_field}

 {/child_collection}

{/parent_collection}

Example for a template document created for Accounts module:

Account's name: {name}

Opportunities:

{#opportunities}{name}

 {#contacts}

{first_name}{last_name}

{/contacts}

{/opportunities}

The template above will generate all account's opportunities and all related Contacts for each Opportunity.

Improvements made to wDocs allows the support of adding infinite inner collections.

## Filter Collections

This is support for adding a search filter to the collection being merged.

Following are the steps and an example for using this feature:

- Create a new filter on a list view or use an existing filter.

- Add the following syntax in the template document:

{#opportunities filter="My Opportunities"}

{/opportunities}

The generated document should contain all Opportunities assigned to current users due to the filter selected.

## ELSEIF Conditions

Support is available for conditionally inserting data during a merge. Here is an example:

{if $condition}

Test

{elseif $condition}

Test2

{else}

Test3

{endif}

**Examples** :

1. {if amount>5000}
   Amount is >5000$
   {elseif and amount!=0 && amount<5000}
   Amount is < 5000$
   {else}
   Amount is 0
   {endif}
2. {if (do_not_call)}
   {phone_mobile}
   {endif}
3. {if
   (dp_business_purpose.filter(item=>item.includes("Marketing")).length>0)}
   {dp_business_purpose}
   {else}
   'NOPE'
   {endif}

**If you`re using conditions inside a table:**

If the condition applies to the entire table row, and it is evaluated to " **false",**  the table row will be deleted. In order for wDocs to delete the entire row, you have to place the {if $condition} tag in the row's first table cell and the {endif} in the last table cell of the current row.

**Example** :

+---------------------+------+--------+--+---------+

| | | | | |

+---------------------+------+--------+--+---------+

| {if $condition} Text1 | Test | {name} | | {endif} |

+---------------------+------+--------+--+---------+

If you do not want the table row deleted then don't place the {if} in the first table cell. Or don't place the {endif} in the last table cell. This way if the condition evaluates to false all the text inside the tags will not display anymore.

# Directives

wDocs supports commands or instructions for the wDocs parser named directives. Directives specify how the parser should process the current input.

They change the appearance or the behavior of a component.

Directives have to be declared inside curly braces and preceded by an exclamation sign. ({!directive_name})

**Note**: Directives work **ONLY** for **WORD** and **PDF** merge. Excel merge is **NOT** supported.

Directive: table_header

The table_header directive can suppress the table header if there's no data in the table.

**Usage**

**Name** : !table_header

**Attributes:**

**hide_no_data** -> possible values: 'true' or 'false'

 **bind** -> specifies the context of the directive. In the example below the directive works on the calls collection.

If false is selected for the hide_no_data attribute then the table will not be affected.

If true is selected for the hide_no_data attribute then the table will be hidden if it has no data.

| {!table_header hide_no_data='true' bind='#calls'} **Call Subject** | **Date Entered** | **Assigned User** |
|---|---|---|
| {#calls}{name} | {date_entered} | {assigned_user_name}{/calls} |

## 1. Directive: table

The table directive inserts a table in the generated document.

**Usage**

**Name** : !table

**Attributes:**

**header** -> specify the column names for the table;

**columns** -> specify the sugar fields you want to insert into the table;

**bind** -> the context, collection of the table. (data to retrieve from sugar);

**sort** -> sort the table by a field_name (sort='field_name:asc' or sort='field_name:desc');

**max_num** -> the maximum number of records to retrieve from the collection;

**header-color** -> any color name. If not specified the color of the header will be gray;

```
{!table header-color='fuchsia' header='Name,City,Email'
columns='name,primary_address_city,email1' bind='#contacts' sort='name:asc' max_num='2'}
```

| Name | City | Email |
|---|---|---|
| Coretta Basler | Sunnyvale | beans.the.qa@example.tv |
| Edra Crepeau | San Francisco | support.im.section@example.de |

## 2. Directive: list

The list directive is used for rapid prototyping. It displays a collection in a list form.

**Usage:**

**Name** : !list

**Attributes:**

**columns** -> specify the sugar fields you want to insert into the table;

**bind** -> the context, collection of the list. (data to retrieve from sugar);

**sort** -> sort the table by a field_name (sort='field_name:asc' or sort='field_name:desc');

**max_num** -> the maximum number of records to retrieve from the collection.

## 3. Directive: date

It inserts the current merge date in the document

**Usage:**

**Name** : !date

**Attributes** :

 **format** ->any date format. It defaults to : MM-DD-YYYY, h:mm

### 4. Directive: Math Functions

The new Math Functions are available starting with wDocs 4.05, and use [Sugar Logic](#), available for Calculated fields.

To use the formula evaluator on wDocs, you need to input the formula directive:
**{!formula ...}**

{!formula value='concat($name, "-",$quote_stage)} – TEST DOCUMENT

| Product Name | Price | Discounted Price | Quantity | Total Price |
|---|---|---|---|---|
| {#products} {name} | {discount_price} | {!formula value='subtract($discount_price, multiply($discount_price, divide($discount_amount, 100)))' format='currency'} | {quantity} | {!formula value='multiply($quantity, subtract($discount_price,multiply($discount_price, divide($discount_amount, 100))))' format='float'} {/products} |

# Barcodes

wDocs allows barcode field formatting. {field_name format='barcode'} is mandatory for the field to be formatted as a barcode.

**Reference** :  [https://github.com/lindell/JsBarcode/wiki/Options](https://github.com/lindell/JsBarcode/wiki/Options) 

### 1. Barcode format

{field_name format='barcode' **barcode-format='EAN13'** }

{field_name format='barcode' **barcode-format='CODE39'** }



1234567890128

**Available barcode formats:**

- CODE128 - default
- CODE39
- EAN13, EAN8, EAN5, EAN2
- ITF, ITF-14
- MSI, MSI10, MSI11, MSI1010, MSI1110
- Pharmacode
- Codabar

## 2. Barcode width

By default, the barcode width for a single bar is set to 2. You can customize it by using the formatting: {field_name format='barcode' **barcode-width='2'** }



Smallest width



Wider barcode

## 3. Barcode height

By default, the barcode height is set to 100. Users can customize it by using the following formatting: {field_name format='barcode' **barcode-height='150'** }. Replace the
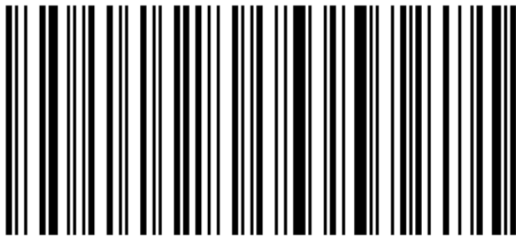
Tall barcode

{field_name format='barcode' **barcode-height='25'** }

Short barcode

## 4. Barcode text

By default, the barcode text is undefined. Users can override the text that is displayed by using the function: {field_name format='barcode' **barcode-text='Hi!'** }

Hi!

## 5. Barcode font options

With font options, users can add bold or italic text to the barcode.

{field_name format='barcode' **barcode-font-options='bold/italic/bold italic'** }

Bold text



Italic text



Both options

## 6. Barcode Font

Barcode font in wDocs is set by default to "center". Users can customize it (left / center / right) by using the formatting: {field_name format='barcode' **barcode-textAlign='left'** }



Left text

## 7. Barcode Text Position

By default, the text position is set to "bottom". Users can set the vertical position of the text to either bottom or top.

{field_name format='barcode' **barcode-textPosition='top'** }



Top text

## 8. Barcode Text Margin

By default, the barcode text margin is set to 2. Users can change the text margin to a number they prefer by using the syntax {field_name format='barcode' **barcode-textMargin='25'** }.



9. Barcode Font Size

By default, the barcode font size is set to 20. Users can use the following formatting to change it:

{field_name format='barcode' barcode-fontSize='40'}



10. Barcode Background

Users can change the barcode background to any color they prefer, by using the formatting: {field_name format='barcode' **barcode-background='#ccffff'** }. Users can change to any color they like, by changing the hex color code.



11. Barcode Line Color

By default, the barcode line color is set to black. Users can customize the line and text color by using the formatting: {field_name format='barcode' **barcode-lineColor='#990000'** }

Red lines

## 12. Barcode Margins

wDocs supports three formatting styles for barcode margins:

- Bigger margins: {field_name format='barcode' barcode-margin='30' **barcode-background='#dddddd'**};



Bigger margins

- Top margin: {field_name format='barcode' barcode-marginTop='30' **barcode-background='#dddddd'**}
- Left margin: {field_name format='barcode' barcode-marginLeft='30' **barcode-background='#dddddd'**}



Left/Top margin

## Sample Merge Documents

- [Merge Sample Document (Form Letter)](#)
- [Merge Sample Document (Account Profile)](#)
- [Merge Sample Document (Opportunity Profile)](#)

# Merge Sample Document (Form Letter)

This is an example of a **Form Letter**  template. The details we've provided in this

example show how to get specific "Contact" module information from the Contacts module record as well as the assigned user of the contact record (merged in the signature line). Below this example is the resulting document showing its contents after merging.

Feel free to copy and paste all or parts of this template to experiment with or use in your own templates.

This template was created using Microsoft Word.

**Merge template contents:**



2/18/16

{first_name} {last_name}

{title}

{account_name.name}

{primary_address_street}

{primary_address_city}, {primary_address_state} {primary_address_postalcode}

Email: {email1}

Dear {first_name},

Best Regards,

{assigned_user_name.name}

W-Systems

**Resulting merged document contents:**

1/15/20

Janet Dixon
Director Operations
Spend Thrift Inc
7 Martin St
Orlando, Florida 32712
Email: janet.dixon@yahoo.com


Dear Janet,

Best Regards,

Jim Brennan
W-Systems



**See also:**

- [Merge Sample Document (Account Profile)](#)
- [Merge Sample Document (Opportunity Profile)](#)


# Merge Sample Document (Account Profile)

This is an example of an **Account Profile** template. The details we've provided in this example show how to get specific "Account" module information along with how to loop through records residing the account record's related Contacts, Opportunities, Meetings, and Cases module records. Within each of the tables in the template, specific fields from each module can be merged into the final document. Below this example is the resulting document showing its contents after merging.

Feel free to copy and paste all or parts of this template to experiment with or use in your own templates.

This template was created using Microsoft Word.

**Merge template contents:**

**Account Name:{name}**

| Location: | |
|---|---|
| **City:** | {billing_address_city} |
| **Country:** | {billing_address_country} |
| **Postal Code:** | {billing_address_postalcode} |
| **State:** | {billing_address_state} |
| **Street:** | {billing_address_street} |

**General Details:**

**Date Created:** {date_entered format='d,Mo/D/Y, kk:mm:ss,a'}

**Date Modified:** {date_modified}

**Created By:** {created_by_name}

**Primary Email:** {email1}

**Secondary email:** {email2}

**Emails-multienum:**

{email}

**Emails-multienum-same line:** {email}

**Team**: {#teams} {name}

{/teams}

**Assigned To:** {assigned_user_name.first_name}

Title: {assigned_user_name.title}

Mobile: {assigned_user_name.phone_mobile}

Status: {assigned_user_name.status}

Email: {assigned_user_name.email}

**Office Phone:** {phone_office}

**Account Type:** {account_type}

**Industry:** {industry}

**Website:** {website}

**Website fornat:** {website format='Click me!'}

**Description:** {description}

**Calls**

| Subject | Status | Start Date | End Date | Assigned User |
|---------|--------|------------|----------|---------------|
| {#calls}{name} | {status} | {date_start} | {date_end} | {assigned_user_name}{/calls} |

**Meetings**

| Subject | Status | Start Date | End Date | Assigned User |
|---------|--------|------------|----------|---------------|
| {#meetings}{name} | {status} | {date_start} | {date_end} | {assigned_user_name}{/meetings} |

**Tasks**

| Subject | Status | Contact name | End Date | Assigned User |
|---------|--------|--------------|----------|---------------|
| {#tasks}{name} | {status} | {contact_name} | {date_due} | {assigned_user_name}{/tasks} |

**Notes**

| Subject | Last Modified | Date created | Contact Name | Assigned User |
|---------|---------------|--------------|--------------|---------------|
| {#notes}{name} | {date_modified} | {date_entered} | {contact_name} | {assigned_user_name}{/notes} |

**Emails**

| | | | | |
|---|---|---|---|---|

| From | Subject | Status | Date | Assigned User |
|---|---|---|---|---|
| {#emails}{from_collection} | {name} | {state} | {date_sent} | {assigned_user_name}{/emails} |

**Contacts**

| Name | City | State | Email | Office Phone |
|---|---|---|---|---|
| {#contacts}{name} | {primary_address_city} | {primary_address_state} | {email1} | {phone_work}{/contacts} |

**Opportunities**

{#opportunities}Opportunities

| Name | Sales Stage | Expected Close Date | Assigned User | Probability |
|---|---|---|---|---|
| {name} | {sales_stage} | {date_closed} | {assigned_user_name} | {probability} |
| **Contacts** | | | | |
| **First_name** | **Last name** | **Primary Email** | **Phone** | **Call?** |
| {#contacts max_num='10' sort='first_name:desc'} {salutation}{first_name} | {last_name} | {email1} | {phone_mobile} | {do_not_call}{/contacts}{/opportunities} |

**Cases**

| Num. | Subject | Status | Priority | Assigned User |
|---|---|---|---|---|
| {#cases}{case_number} | {name} | {status} | {priority} | {assigned_user_name}{/cases} |

**Documents**

| Num. | File | Source | Status | Publish Date |
|---|---|---|---|---|
| {#documents}{document_name} | {filename} | {doc_type} | {status_id} | {active_date}{/documents} |

**Member Organizations**

| Name | City | Country | Phone | Website |
|---|---|---|---|---|
| {#members}{name} | {billing_address_city} | {billing_address_country} | {phone_office} | {website}{/members} |
| **Leads** | | | | |
| **Name** | **Referred By** | **Lead source** | **Office Phone** | **Email** |
| {#leads}{name} | {refered_by} | {lead_source} | {phone_work} | {email}{/leads} |

**Revenue Line Items**

| Revenue Line Item | Opportunity Name | Account Name | Sales stage | Product Template Name |
|---|---|---|---|---|
| {#revenuelineitems}{name} | {opportunity_name} | {account_name} | {sales_stage} | {product_template_name}{/revenuelineitems} |

**Quotes**

| Name | Converted Amount | Quote Stage | Valid Until | Assigned User |
|---|---|---|---|---|
| {#quotes}{name} | {total_usdollar} | {quote_stage} | {date_quote_expected_closed} | {assigned_user_name}{/quotes} |

**Campaign Log**

| Campaign | Activity Type | Activity Date | Related |
|----------|---------------|---------------|---------|
| {#campaigns}{campaign_name1} | {activity_type} | {activity_date} | {related_name}{/campaigns} |

## Resulting merged document contents:

W-Systems

**Account Name:** White Cross Co

| Location: | |
|-----------|---|
| City: | Orlando |
| Country: | USA |
| Postal Code: | 32806 |
| State: | Florida |
| Street: | 784 Gatlin Ave |

**General Details:**

**Date Created:**        3,1st/8/2020, 13:12:48,pm

**Date Modified:**       01-08-2020, 1:12 pm

**Created By:**          Jen Smith

**Primary Email:**       support@whitecrossco.com

**Secondary email:**

**Emails-multienum**

- support@whitecrossco.com

- support@whitecrossco.com

| Team | West |
| --- | --- |

| **Assigned To:** | Sally | |
| --- | --- | --- |
| | Title: | Senior Account Rep |
| | Mobile: | |
| | Status: | Active |

W-Systems

W-Systems

- sally@example.com
- reply.sally@example.com
- alias.sally@example.com

| **Office Phone:** | +1 - 745 - 661 - 4190 |
| --- | --- |
| **Account Type:** | Customer |
| **Industry:** | Biotechnology |
| **Website:** | http://www.whitecrossco.com |

| | |
|---|---|
| **Office Phone:** | +1 - 745 - 661 - 4190 |
| **Account Type:** | Customer |
| **Industry:** | Biotechnology |
| **Website:** | http://www.whitecrossco.com |

[Click me!](Click me!)

| | |
|---|---|
| **Description:** | This customer bought several licenses for our latest released product a couple of |
| weeks ago. | |

| Calls | | | | |
|---|---|---|---|---|
| **Subject** | **Status** | **Start Date** | **End Date** | **Assigned User** |
| Bad time, will call back | Scheduled | 08-08-2019, 5:45 pm | 08-08-2019, 6:15 pm | Sally Bronsen |
| Left a message | Scheduled | 01-31-2020, 6:15 pm | 01-31-2020, 6:45 pm | Sally Bronsen |
| Get more information on the proposed deal | Scheduled | 07-19-2019, 1:00 pm | 07-19-2019, 1:30 pm | Sally Bronsen |
| Get more information on the proposed deal | Scheduled | 05-11-2020, 6:45 am | 05-11-2020, 7:15 am | Sally Bronsen |
| Bad time, will call back | Scheduled | 01-09-2020, 8:45 am | 01-09-2020, 9:15 am | Sally Bronsen |
| Get more information on the proposed deal | Scheduled | 05-06-2020, 10:15 am | 05-06-2020, 10:45 am | Sally Bronsen |
| Bad time, will call back | Scheduled | 07-02-2020, 5:15 pm | 07-02-2020, 5:45 pm | Sally Bronsen |

| Meetings | | | | |
|---|---|---|---|---|
| **Subject** | **Status** | **Start Date** | **End Date** | **Assigned User** |

| Subject | Status | | | Assigned User |
|---|---|---|---|---|
| Follow-up on proposal | Canceled | 05-05-2020, 9:45 am | 05-05-2020, 11:30 am | Sally Bronsen |
| Discuss pricing | Scheduled | 06-11-2020, 2:00 pm | 06-11-2020, 2:15 pm | Sally Bronsen |

| Tasks | | | | |
|---|---|---|---|---|
| **Subject** | **Status** | **Contact name** | **End Date** | **Assigned User** |
| Get demo feedback | Deferred | Jacob Dixon | 10-07-2020, 3:15 pm | Sally Bronsen |
| Send proposal | Completed | Jacob Dixon | 03-09-2020, 6:30 am | Sally Bronsen |
| Assemble catalogs | Not Started | Larry Carroll | 11-08-2019, 4:45 pm | Sally Bronsen |
| Send local user group information | Completed | Larry Carroll | 03-02-2020, 6:45 am | Sally Bronsen |

| Notes | | | | |
|---|---|---|---|---|
| **Subject** | **Last Modified** | **Date created** | **Contact Name** | **Assigned User** |
| More Account Information | 01-08-2020, 1:12 pm | 01-08-2020, 1:12 pm | Jacob Dixon | Sally Bronsen |
| Attended the Gartner Customer 360 Summit 2016 | 01-08-2020, 1:12 pm | 01-08-2020, 1:12 pm | Jacob Dixon | Sally Bronsen |
| Call Information | 01-08-2020, 1:12 pm | 01-08-2020, 1:12 pm | Larry Carroll | Sally Bronsen |
| More Account Information | 01-08-2020, 1:12 pm | 01-08-2020, 1:12 pm | Larry Carroll | Sally Bronsen |
| Call Information | 01-08-2020, 1:12 pm | 01-08-2020, 1:12 pm | Larry Carroll | Sally Bronsen |

| Emails | | | | |
|---|---|---|---|---|
| **From** | **Subject** | **Status** | **Date** | **Assigned User** |
| Sally Bronsen | Review needs | Archived | 01-08-2020, 1:16 pm | Sally Bronsen |
| Sally Bronsen | Demo | Archived | 01-08-2020, 1:16 pm | Sally Bronsen |

| Contacts | | | | |
|---|---|---|---|---|
| Name | City | State | Email | Office Phone |
| Jacob Dixon | New York City | New York | jacob.dixon@yahoo.com | +1 - 613 - 121 - 1296 |
| Larry Carroll | Orlando | Florida | larry.carroll@gmx.com | +1 - 693 - 350 - 2011 |

| Cases | | | | |
|---|---|---|---|---|
| Num. | Subject | Status | Priority | Assigned User |
| 993 | Use the WPS (Push Button) Feature to Connect to a Wireless Network | Assigned | High | Charles James |
| 992 | Can't See the Clock on My Smart Speaker | Assigned | Medium | Regina Lazlow |
| 991 | Error: 1107, 2123, 3218, 5010 or 7003 Appears During the Network Setup | New | High | Charles James |
| 990 | Can't Access the Videos, Music, or other Content from Apps on my Android TV | Assigned | Low | Regina Lazlow |
| 989 | Can't See the Clock on My Smart Speaker | Assigned | High | Charles James |
| 988 | Error: 1107, 2123, 3218, 5010 or 7003 Appears During the Network Setup | Duplicate | Medium | Regina Lazlow |
| 987 | Use the WPS (Push Button) | Duplicate | Medium | Charles James |

| Documents | | | | |
|---|---|---|---|---|
| Num. | File | Source | Status | Publish Date |
| White Cross Co-wDocs Test.docx | White Cross Co-wDocs Test.docx | Sugar | | 01-16-2020 |
| White Cross Co-wDocs Test.docx | White Cross Co-wDocs Test.docx | Sugar | | 01-16-2020 |
| JacobDixon-Contact Profile Template.docx | JacobDixon-Contact Profile Template.docx | Sugar | | 01-15-2020 |
| Merge to Word - Contact Profile Template 01-15-2020, 11:39 am.docx | Merge to Word - Contact Profile Template 01-15-2020, 11:39 am.docx | Sugar | | 01-15-2020 |

| Member Organizations | | | | |
|---|---|---|---|---|
| Name | City | Country | Phone | Website |
| Leads | | | | |
| Name | Referred By | Lead source | Office Phone | Email |

| Revenue Line Items | | | | |
|---|---|---|---|---|
| Revenue Line Item | Opportunity Name | Account Name | Sales stage | Product Template Name |

| Quotes | | | | |
|---|---|---|---|---|
| Name | Converted Amount | Quote Stage | Valid Until | Assigned User |

| Campaign Log | | | |
|---|---|---|---|
| Campaign | Activity Type | Activity Date | Related |

**See Also:**

-
-

# Merge Sample Document (Opportunity Profile)

This is an example of an **Opportunity Profile** template. The details we've provided in this example show how to get specific "Opportunity" module information along with how to get information from the opportunity record's associated Accounts module and the assigned user. Below this example is the resulting document showing its contents after merging.

Feel free to copy and paste all or parts of this template to experiment with or use in your own templates.

This template was created using Microsoft Word.

**Merge template contents:**

**Opportunity Profile**

**Opportunity Module Information:**

Opportunity Name: {name}

Likely: {amount}

Best: {best_case}

Worst: {worst_case}

Expected Close Date: {date_closed}

Last Modified: {date_modified}

Date Created: {date_entered}

**Assigned User Profile Information :**

First Name: {assigned_user_name.first_name}

Last Name: {assigned_user_name.last_name}

Work Phone: {assigned_user_name.phone_work}

**Accounts Module Inf ormation:**

**Note**: For the related "Account" name, these both work:

{accounts.name}

{account_name.name}

**Account Module Field Information :**

Office Phone: {account_name.phone_office}

Type: {account_name.account_type}

Industry: {account_name.industry}

**Account Module Billing Address Information :**

City: {account_name.billing_address_city}

State: {account_name.billing_address_state}

Zip: {account_name.billing_address_postalcode}

**Suppressing blank lines in a table (blank address fields)**

**Billing Account Information**

| {billing_address_street} |
| --- |
| {if billing_address_street_2}{billing_address_street_2}{endif} |
| {if billing_address_street_3}{billing_address_street_3}{endif} |
| {if billing_address_city}{billing_address_city}{endif} |
| {if billing_address_postalcode}{billing_address_postalcode}{endif} |

When merging a similar document, fields with no information on them will not be displayed in the merged document.



**Note**: Line breaks have been introduced to formulas. Users can add an extra parameter after each field in Sugar formulas ("\n") and wDocs will format them using line breaks. Unfortunately, the "\n" will be visible on the sugar record view as a string. The line breaks will appear only after merging the template.
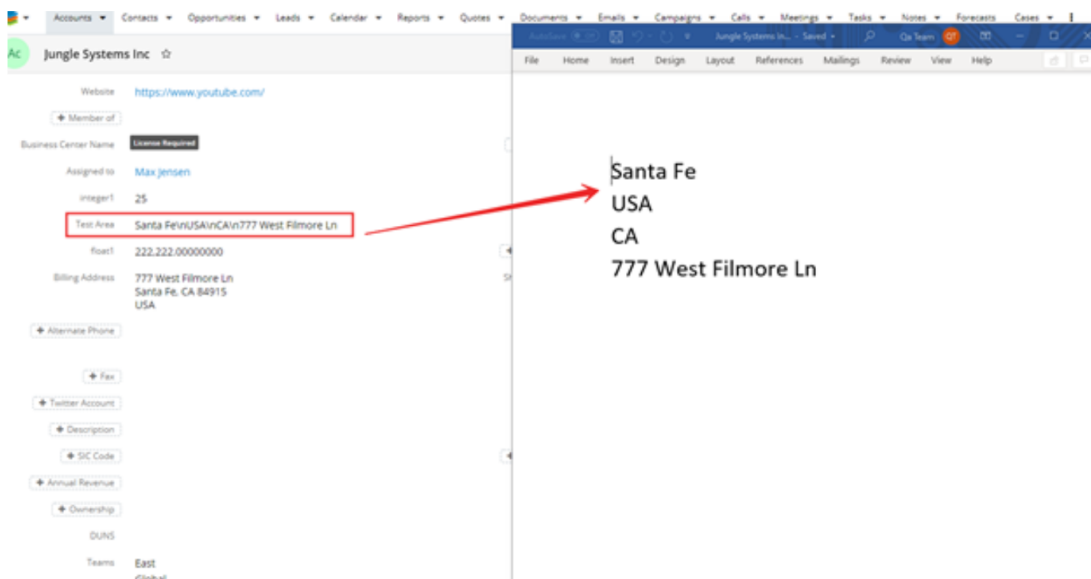
## Resulting merged document contents:

Opportunity Profile

**Opportunity Module Information:**
Opportunity Name:      Slender Broadband Inc - $5315 - New - 211 Units

Likely:      $2,534.00
Best:      $3,135.00
Worst:      $1,933.00
Expected Close Date: 11-28-2020

Last Modified:      01-08-2020, 1:19 pm
Date Created:      01-08-2020, 1:12 pm

**Assigned User Profile Information**
First Name:      Sarah
Last Name:      Smith
Work Phone:

**Accounts Module Information:**
NOTE: For the related "Account" name, these both work:
Slender Broadband Inc - $5315 - New - 211 Units
Slender Broadband Inc

**Account Module Field Information**
Office Phone:      +1 - 908 - 569 - 8883
Type:            Customer
Industry:      Transportation

**Account Module Billing Address Information**
City:      San Francisco
State:      California
Zip:      94103

## See Also:

- Merge Sample Document (Form Letter)
- Merge Sample Document (Account Profile)

**Last Modified:** 2022-06-01 17:55:24