

OPROARTS Live for Force.com Tutorial

February 2013

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- Set the Authentication ID

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- Place an output button in Object's Detail page
- Place an output button in List View page

3 . Uninstall OPROARTS Live for Force.com

- Uninstall the application

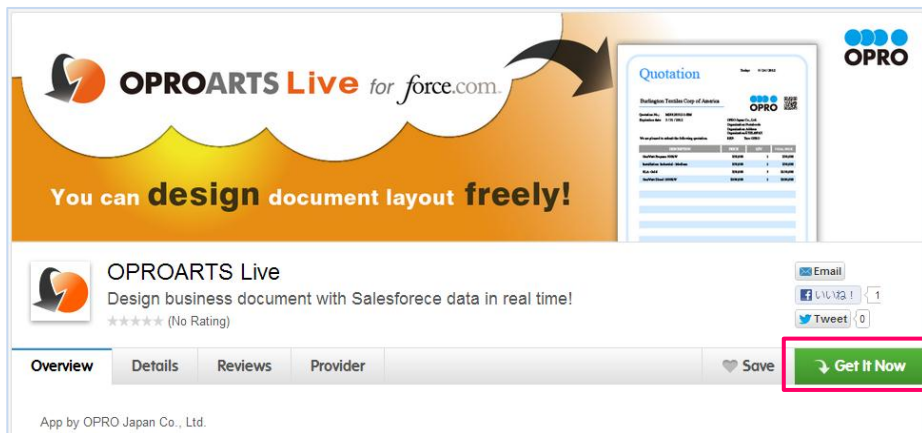


1 . Install OPROARTS Live for Force.com

- Install the application
- Set the Authentication ID

Install the application

- 1 Go to below URL and click 'Get it Now'
<https://sites.secure.force.com/appexchange/listingDetail?listingId=a0N30000009wgmWEAQ>



OPROARTS Live for force.com.

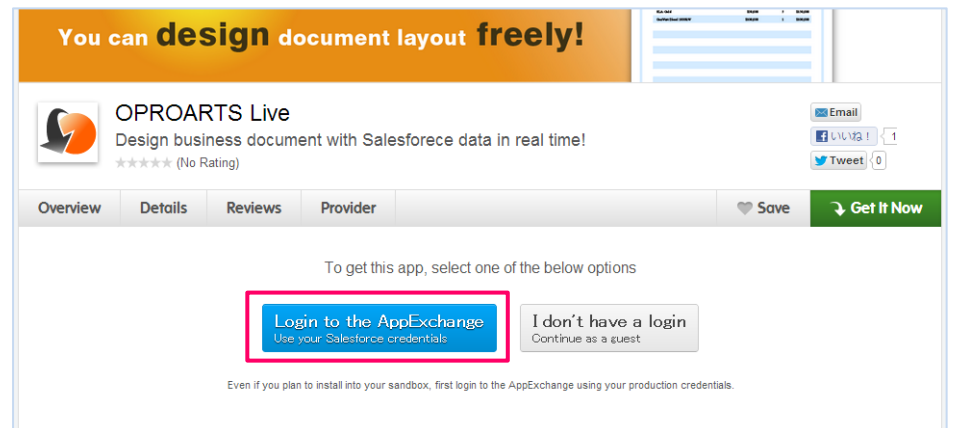
You can **design document layout freely!**

OPROARTS Live
Design business document with Salesforce data in real time!
★★★★ (No Rating)

Overview Details Reviews Provider Save **Get It Now**

App by OPRO Japan Co., Ltd.

- 2 Click 'Login to the AppExchange'



You can **design document layout freely!**

OPROARTS Live
Design business document with Salesforce data in real time!
★★★★ (No Rating)

Overview Details Reviews Provider Save **Get It Now**

To get this app, select one of the below options

Login to the AppExchange
Use your Salesforce credentials

I don't have a login
Continue as a guest

Even if you plan to install into your sandbox, first login to the AppExchange using your production credentials.

- 3 Login with the user which has **Admin credential** to install OPROARTS Live and select a place to install the application.

- 4 Check 'I have read and agree to the terms and conditions' and click 'Confirm and Install!'

WHAT YOU ARE INSTALLING	WHERE YOU ARE INSTALLING
PACKAGE OPROARTS Live	ORGANIZATION Demo
VERSION OPROARTS Live (1.06.20121129a / 1.6.0)	EDITION Developer Edition
SUBSCRIPTION Free Trial	USER NAME sf029_demo_a@demo.opro.net
DURATION 90 Days	
NUMBER OF SUBSCRIBERS Site-wide	
<input checked="" type="checkbox"/> I have read and agree to the terms and conditions .	
Cancel Install Back to previous step	Confirm and Install!

- 5 Click 'Continue' in Package Install Details, and follow next steps for the installation. You will receive a mail once installation is completed.

Package Installation Details Help for this Page ?

Package Name	OPROARTS Live
Version Name	1.06.20121129a
Version Number	1.6
Publisher	日本オプロ株式会社
Description	OPROARTS is the cloud document output service provided by OPRO Japan. http://www.opro.net/

[Continue](#) [Cancel](#)

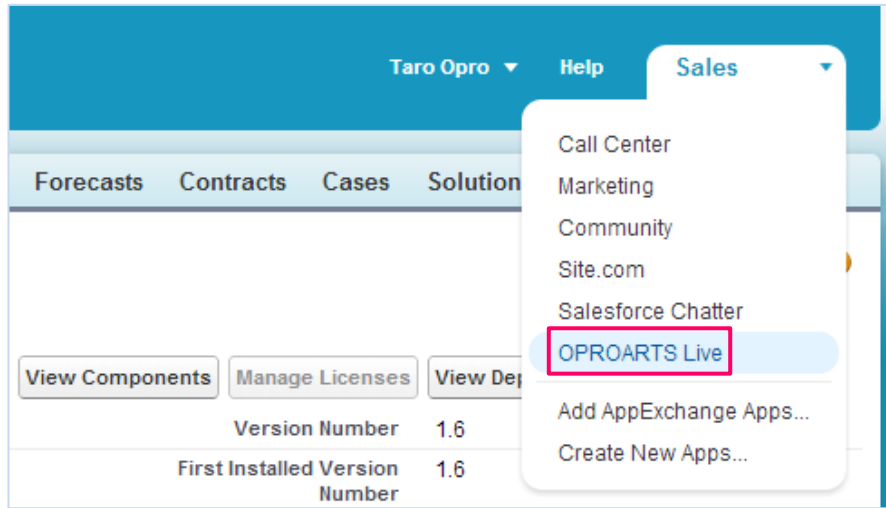
Package Components

▼ Fields (6)

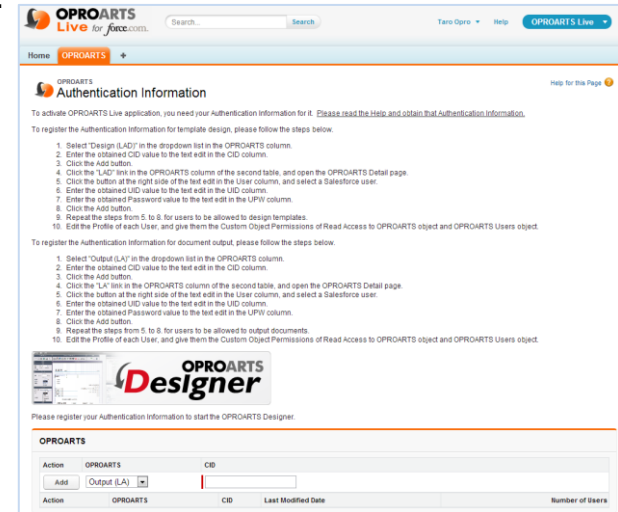
Action	Component Name	Parent Object	Component Type	Installation Notes
Create	User	OproartsUser__c	Custom Field	This is a brand new component.

Set the Authentication ID

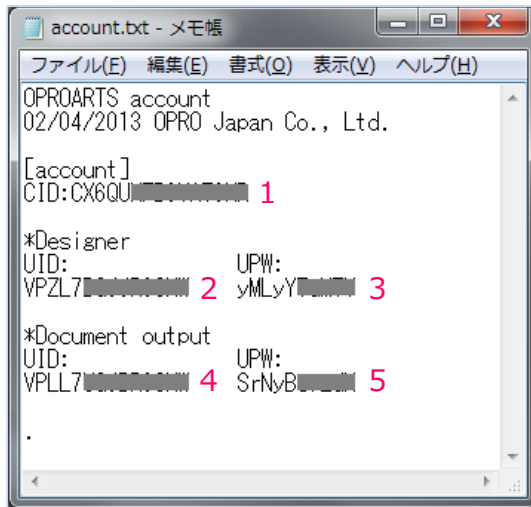
- 6 When receive a mail, go to the application list on top right, and select 'OPROARTS Live'



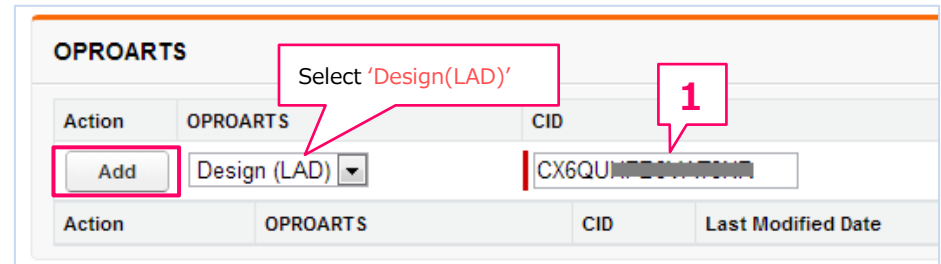
- 7 Follow the 'Authentication Information' details and set the Authentication ID. Authentication ID will be sent to you by OPRO.



- 8 Authentication Information sent by OPRO will look like as shown below.



- 9 Set the ID for Designer. Select 'Design(LAD)' from OPROARTS drop down, and enter '1' - CID in CID column, and click 'Add'.



- 10** Click 'LAD' and enter '2' – UID, '3' – UPW and click Add.
 * A Designer is allowed one user for one UID.

OPROARTS

Action	OPROARTS	CID
Add	Output (LA)	
Action	OPROARTS	CID
Edit Del	LAD	CX6QU

OPROARTS
 LAD (CID: CX6QU)

« Back to List: OPROARTS

OPROARTS Users

Select the user who will use OPROARTS Designer.

Action	User	UID	UPW
Add	Taro Opro	VPZL7	yMLyY
Action	User	UID	Last Modified Date

- 11** Next, we set ID for Output.
 Return to the Authentication page, select 'Output (LA)' from OPROARTS drop down, enter '1' – CID and click Add.

OPROARTS

Select Output (LA)

1

Action	OPROARTS	CID
Add	Output (LA)	CX6QU
Action	OPROARTS	CID
Edit Del	LAD	CX6QU
		Last M
		2/3/20

- 12** Click 'LA', enter '4' – UID, '5' – UPW, and click Add.

OPROARTS

Action	OPROARTS	CID
Add	Output (LA)	
Action	OPROARTS	CID
Edit Del	LA	CX6QU
Edit Del	LAD	CX6QU

OPROARTS
 LA (CID: CX6QU)

« Back to List: OPROARTS

OPROARTS Users

Select the user who will output documents.

Action	User	UID	UPW
Add	Taro Opro	VPZL7	SrNyB
Action	User	UID	Last Modified Date

- 13** Too add another user, repeat previous setting (Process '12').
 *Copy and paste '4' – UID and '5' – UPW.

OPROARTS
 LA (CID: CX6QU)

« Back to List: OPROARTS

OPROARTS Users

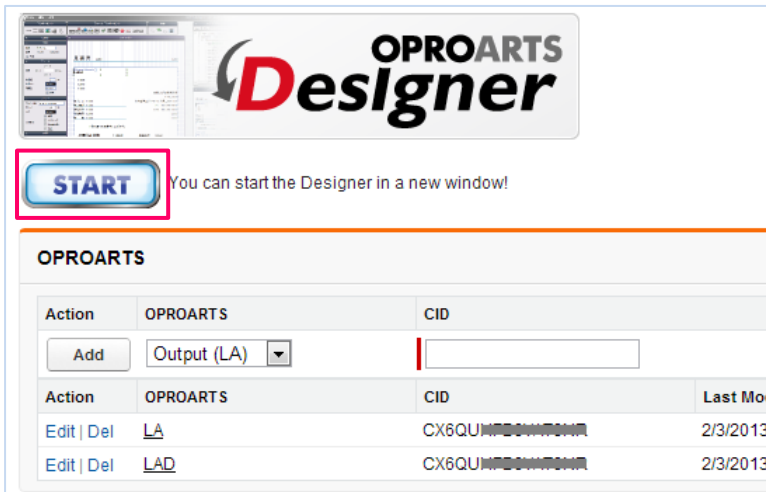
Action	User	UID	UPW
Add	Jiro Opro	VPZL7	SrNyB
Action	User	UID	Last Modified Date
Edit Del	Taro Opro	VPZL7	2/3/2013 9:32 PM

2. Output PDF using sample template

- Create the template by OPROARTS Designer
- Place an output button in Object's Detail page
- Place an output button in List View page

Create the template by OPROARTS Designer

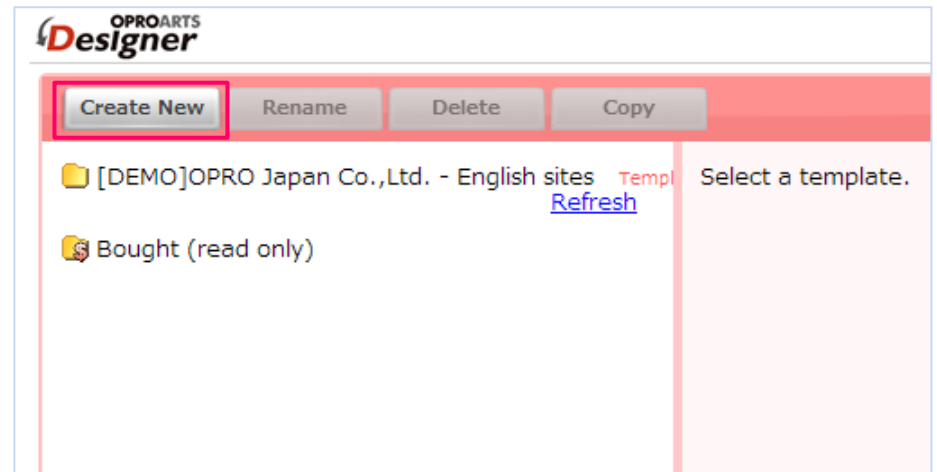
- 1 Once Authentication ID setting is done, login to OPROARTS Designer by clicking 'START'



The screenshot shows the OPROARTS Designer interface. At the top, there is a logo for "OPROARTS Designer" and a smaller inset image of the software's main window. Below the logo, a blue button labeled "START" is highlighted with a red rectangular box. To the right of the button, the text reads "You can start the Designer in a new window!". Below this, there is a section titled "OPROARTS" containing a table with columns for "Action", "OPROARTS", "CID", and "Last Mod".

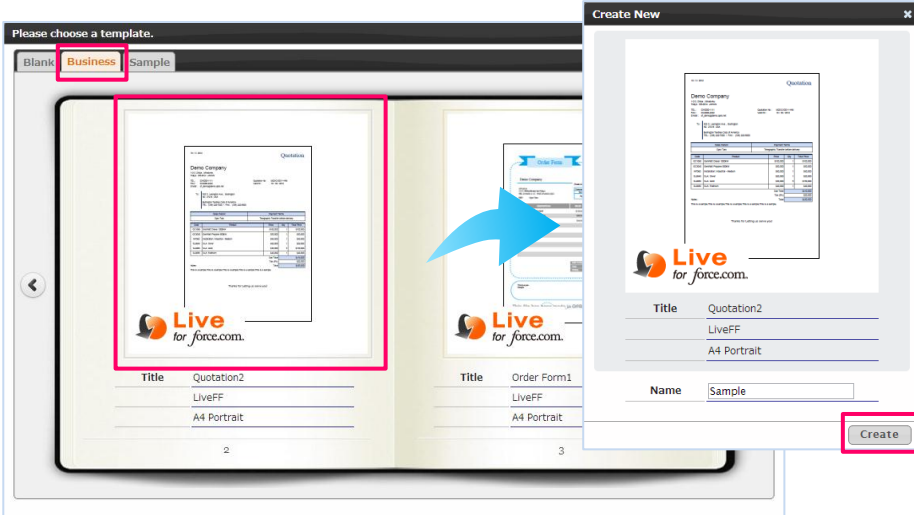
Action	OPROARTS	CID	Last Mod
Add	Output (LA) ▾		
Edit Del	LA	CX6QUMFQDWHFQNR	2/3/2013
Edit Del	LAD	CX6QUMFQDWHFQNR	2/3/2013

- 2 Click 'Create New' tab.

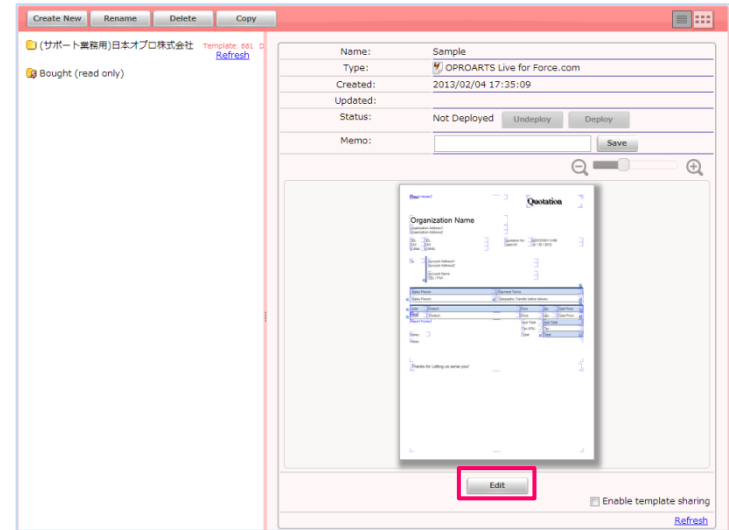


The screenshot shows the OPROARTS Designer interface. At the top, there is a logo for "OPROARTS Designer". Below the logo, there is a red header bar with four buttons: "Create New", "Rename", "Delete", and "Copy". The "Create New" button is highlighted with a red rectangular box. Below the header bar, there is a list of templates. The first item is "[DEMO]OPRO Japan Co.,Ltd. - English sites" with a folder icon and a "Templ" label. To its right, the text "Select a template." is displayed. Below this item, there is a "Refresh" link. The second item is "\$ Bought (read only)" with a dollar sign icon.

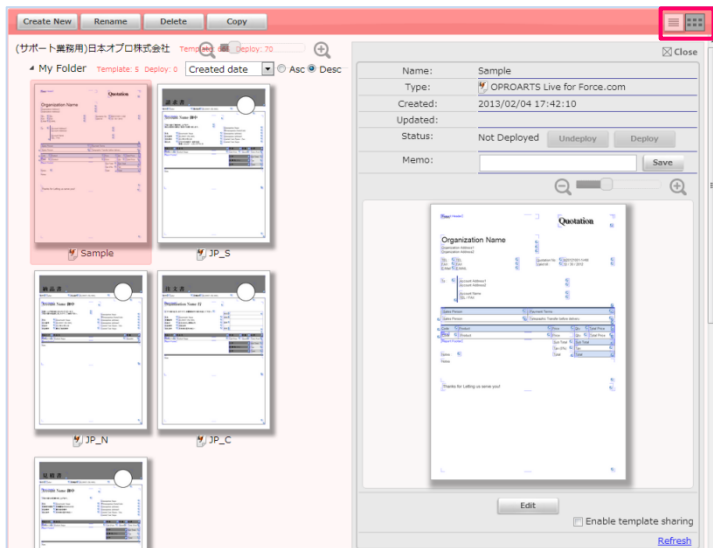
- 3 Select template 'Quotation2' from 'Business' tab of template selection tab, and click 'Create'.



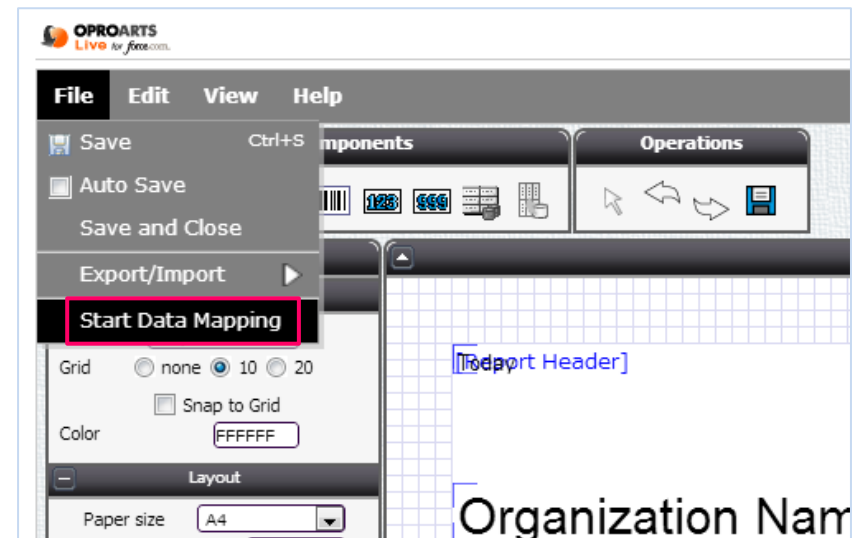
- 4 Click 'Edit' button shown in the center of Designer screen.



Note Use right top mark to switch thumbnail and list view.



- 5 Click 'Start Data Mapping' from File menu.



- 6 Select 'Use current session', click 'Login', and 'Yes' for 'Restore mappings' window.

Restore mappings

Mapping information already exists!
Do you want to restore?

Mapping Information will not be fully restored depending on:
- Changes of report design
- Permissions of Salesforce login user
Please check details after clicking Yes.

Use current session
 Login

User Name
Password
Security Token

Access to the Sandbox
 Save login information

Login

Yes No

- 7 Click 'Save' button once mapping is restored.

1st 2nd 3rd 4th 5th 6th Completed

Mapping is completed

Mapping

Mapping is completed. Click Save.
When generating report document, based on saved mapping and user privilege, retrieve data from Salesforce.com and apply values to dynamic fields.

+ Field Mapping Mapping saved in Field Mapping Window is sh
+ Save Saving is done for each CID(OPROARTS Live)

Operation after clicking Save

When Saving process is completed, template and mapping definition's deployment wizard will execute. After deployment, report output will be enable.

Design Viewer

Report template image created in Designer is displayed. Zoom in/out of image from View menu. Resize the window to display with your desired size.

+ Highlight display Available components for current step are hic

Back Save

- 8 Click 'Deployment' button in 'Template Deployment Wizard'.

Template Deployment Wizard

Deployment of Template

Deploy template to OPROARTS Server. Template deploys to 'CID(OPROARTS' authenticated information) and 'Template Name' as key. After deployment, document can be generated by OPROARTS server.
By clicking Deploy button, [Sample] Deploy template.

Preview

Place Create button

Deployment

- 9 Check record list and click 'Preview', PDF document will be downloaded.

Template Deployment Wizard

Deployment of Template

Deploy template to OPROARTS Server. Template deploys to 'CID(OPROARTS' authenticated information) and 'Template Name' as key. After deployment, document can be generated by OPROARTS server.
By clicking Deploy button, [Sample] Deploy template.

Deployment

Preview

When click Preview button, document with record data which is selected in table is generated.

	Opportunity ID	Account ID.Acc	Account ID.Bill	Account ID.Bill	Account ID.Bill	Account ID.Bill	Account ID.Bill
<input type="checkbox"/>	006d0000006D4prA	オアロポット産業株式会社中央区北十条西1-札幌市	北海道	000-0000			
<input checked="" type="checkbox"/>	006d0000008F7NeA	Technora Japan Co GardenTower 6F, N Hinc-shi	Tokyo	131-0065	Japan		

Place Create button

Preview

Place an output button in Object's Detail page

- 10** Click 'Generate' in the 'Template Deployment Wizard'
*Sample template is mapped to Opportunity information, therefore an Output button will be displayed in Opportunity.

Place Create button

Create document Creation button on Salesforce.com when preview is OK. Button can be created in 'Detail' and 'List View'. Specify optional process on execution.
Click Create button will generate and display Visualforce source of Create document button.

Attach document

Attach the generated document to object: Yes No

Save to Activity History

Save the generated document to Activity History: Yes No

File name

File name to save in Attach and Activity History:

Position of button

Page type to place document output button: List page Detail page

Generate

- 11** Copy the displayed OPROARTS Live for Force.com API sample.

```
OPROARTS ~ salesforc x OPROARTS2.0 x OPROARTS Designer x API Sample x  
https://designer.oproarts.com/OPROARTSConsole/makeLiveAPISample.do  
// This is a usage sample of OPROARTS Live for Force.com API generated by OPROARTS Live server.  
// Refer details from https://www2.opro.net/jsp_arts/support.html  
// As For Visualforce information, refer to http://www.salesforce.com/us/developer/docs/pages/index.htm  
// ---- BEGIN ----  
{!REQUIRESRIPT("https://s.oproarts.com/js/live_ff-1.00.js")}  
OPROARTS.Live_FF.action({  
  // tp: Specify deployed template name. Multiple selection also supported.  
  // This parameter can not be skipped.  
  tp: 'Sample'  
},  
// Use this to embed font. Specify true or false  
// Available when fm parameter is "PDF". Embeddable fonts should be used.  
fe:false,  
// createsAttach: Specify to attach or not to attach the generated document to object. Specify true or false.  
// Do not use this parameter as true when object can not be attached.  
createsAttach:false,  
// createsTask: Specify to save or not to save the generated document in activity & history. Specify true or false.  
// Do not use this parameter as true when object can not be saved in activity & history.  
createsTask:false,  
// title: Specify name to save in attach/activity & history & download.  
title:"",  
// objectId: Specify report object's ID.  
objectId: '{!USENOCODE(Opportunity.Id)}',  
// Parameters required for OPROARTS Live for Force.com API  
// Do not edit these parameters.  
api: '{!USENOCODE($Organization.Id)}', '{!USENOCODE($User.Id)}', '{!USENOCODE($Api.Session_ID)}', '{!USENOCODE($Api.Partner_Server_URL_220)}'  
});pdf();  
// Call method of document generation format. Specify 'pdf()' or 'opr()' or 'print()'.  
// Please install OPRO X Browser before calling opr() or print() method.  
// ---- END ----
```

- 12** Go to Setup/Customize/**Opportunities**/Buttons and Links and click 'New' in Custom Buttons and Links.

Customize

- Tab Names and Labels
- Home
- Activities
- Campaigns
- Leads
- Accounts
- Contacts
- Opportunities**
 - Fields
 - Validation Rules
 - Triggers
 - Contact Roles
 - Competitors
 - Page Layouts
 - Field Sets
 - Search Layouts
 - Buttons and Links**
 - Sales Processes

Edit	Delete	Delete	<input type="checkbox"/>
Edit	Clone	Clone	<input type="checkbox"/>
Edit	Add to Campaign	AddInfluence	<input type="checkbox"/>
Edit	New	New	<input type="checkbox"/>

Custom Buttons and Links **New** Default Custom

No custom buttons or links defined

13 Set as below and click 'Save'.

Custom Button or Link Edit [Save] [Quick Save] [Preview] [Cancel]

Label: Quotation Output
 Name: Quotation
 Description:
 Display Type: **Detail Page Button** (View example)
 Behavior: Execute JavaScript (View Behavior Options)
 Content Source: OnClick JavaScript

Select Field Type: Opportunity | Insert Field: -- Insert Merge Field -- | Insert Operator:
 // Refer details from https://www2.opro.net/jp_arts/support.html
 // As for Visualforce information, refer to http://www.salesforce.com/us/developer/docs/pages/index.htm
 // ---- BEGIN ----
 {!REQUIRESCRIPT("https://s.oproarts.com/js/live_ff-1.00.js")}
 OPROARTS.Live.iframe.action({
 // tp: Specify deployed template name. Multiple selection also supported.
 // This parameter can not be skipped.
 tp: 'Sample'
 })
 }

Label

Example : Quotation Output

Name

Example : Quotation

Display Type

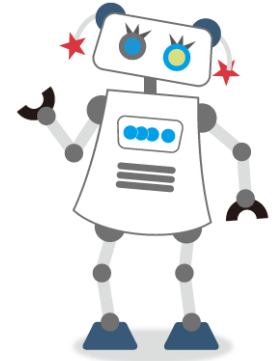
Select 'Detail Page Buttons'

Behavior

Select 'Execute JavaScript'

Details

Paste the details copied in Process '12'



14 Go to Setup/Customize/Opportunities/Page Layouts, and Click 'Edit' of the layout you want to display the button.

App Setup

- Customize
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts
 - Contacts
 - Opportunities**
 - Fields
 - Validation Rules
 - Triggers
 - Contact Roles
 - Competitors
 - Page Layouts**
 - Field Sets

Opportunity Page Layout

This page allows you to create different page layouts to display Opportunity. After creating page layouts, click the Page Layout Assignment button to...

Action	Page Layout Name	Created By
Edit Del	Opportunity (Marketing) Layout	Taro Opro, 1/30/2013
Edit Del	Opportunity (Sales) Layout	Taro Opro, 1/30/2013
Edit Del	Opportunity (Support) Layout	Taro Opro, 1/30/2013
Edit Del	Opportunity Layout	Taro Opro, 1/30/2013

15 Click Buttons menu in Layout change screen, drag and drop the created button in Process '13' to 'Custom Buttons' section.

Opportunity Layout

Buttons menu: Clone, Sharing, Delete, Submit for Approval, Edit. Quotation Output

Opportunity Sample

Highlights Panel

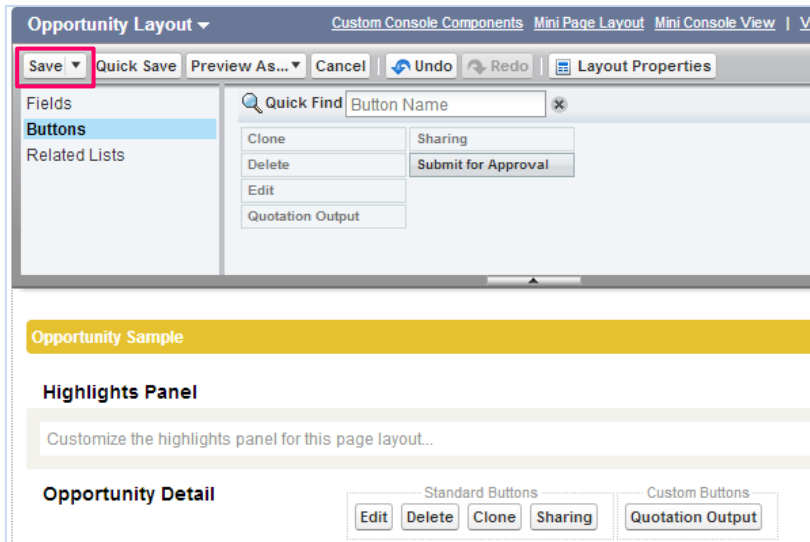
Customize the highlights panel for this page layout..

Opportunity Detail

Standard Buttons: Edit, Delete, Clone, Sharing. Custom Buttons: Custom Button: Quotation Output

Opportunity Information (Header visible on edit only)
 Opportunity Owner: Sample User | Amount: \$123.45

16 Save Layout by clicking 'Save'.

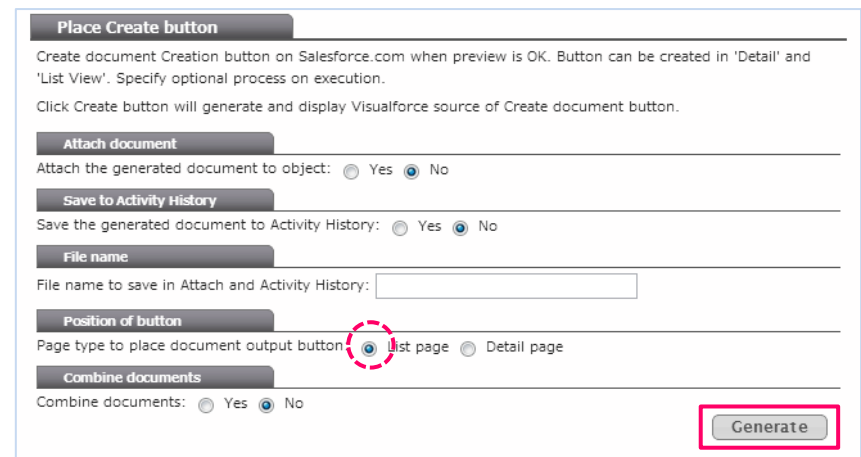


17 Confirm the button is shown in Opportunity detail page.



Place an output button in List View page

18 Click 'Generate' in the 'Template Deployment Wizard' after selecting 'List Page' in Position of button, and copy OPROARTS Live for Force.com API sample.



19 Follow Process '13', access edit screen of Custom button or Custom link, set as below and click 'Save'.

Custom Button or Link Edit [Save] [Quick Save] [Preview] [Cancel]

Label: Quotation Package Output

Name: QuotationPackage

Description: [Text Area]

Display Type:

- Detail Page Link [View example](#)
- Detail Page Button [View example](#)
- List Button [View example](#)

 Display Checkboxes (for Multi-Record Selection)

Behavior: Execute JavaScript [View Behavior Options](#)

Content Source: OnClick JavaScript

Select Field Type: Opportunity | Insert Field: -- Insert Merge Field -- | Insert Operator: [Dropdown]

```
// This is a usage sample of OPROARTS Live for Force.com API generated by OPROARTS Live server.
//
// Refer details from https://www2.opro.net/jp_arts/support.html
// As for Visualforce information, refer to http://www.salesforce.com/us/developer/docs/pages/index.htm
//
//----BEGIN ----
@REQUIRESSCRIPT("https://s.oproarts.com/js/live_if-1.00.js")
OPROARTS.Live.F.action({
  // tp: Specify deployed template name. Multiple selections also supported.
  // This parameter can not be skipped.
  tp: 'Sample'
})
```

Label

Example : Quotation Package Output

Name

Example : QuotationPackage

Display Type

Select 'List Buttons'

Behavior

Select 'Execute JavaScript'

Details

Paste the details copied in '18'

20 Go to Setup/Customize/Opportunities/ Search Layouts, click Edit of Opportunities List View.

App Setup

- Customize
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts
 - Contacts
 - Opportunities**
 - Fields
 - Validation Rules
 - Triggers
 - Contact Roles
 - Competitors
 - Page Layouts
 - Field Sets
 - Search Layouts**
 - Buttons and Links

Opportunity Search Layouts

Search layouts allow you to select the standard and custom fields that are displayed in search results.

- Search Results Columns for search and tagging. [View example](#)
- Lookup Dialogs that pop up when you click the magnifying glass on Lookup Phone Dialogs that pop up when you click the magnifying glass on.
- Recently viewed, modified, and created records lists displayed on tab home.
- Search Results Filter Fields for search. [View example](#)

Search layouts also allow you to select the standard and custom buttons that are displayed on the search results page.

- Search Results for search and tagging.
- List Views for filtering records. [View example](#)

Action	Layout	Columns Displayed
Edit	Search Results	Opportunity Name, Account Name, Account Site, Stage, Close Date, Opportunity Owner Alias
Edit	Lookup Dialogs	Opportunity Name, Account Name, Account Site
Edit	Lookup Phone Dialogs	Opportunity Name, Account Name, Account Site
Edit	Opportunities Tab	Opportunity Name, Account Name, Close Date
Edit	Opportunities List View	N/A
Edit	Search Filter Fields	

21 Select the Button created in Process '19', add the Button and Save.

Custom Buttons

Available Buttons: Quotation Package Output

Selected Buttons: --None--

[Add] [Remove] [Save]

Custom Buttons

Available Buttons: --None--

Selected Buttons: Quotation Package Output

[Add] [Remove] [Up] [Down] [Save] [Cancel]

22 Confirm the created Button is shown in List View page.

The screenshot shows a CRM interface for 'All Opportunities'. At the top, there is a search bar with the text 'All Opportunities' and a dropdown arrow, followed by links for 'Edit | Delete | Create N'. Below this is a toolbar with a 'New Opportunity' button, a 'Quotation Package Output' button (highlighted with a red dashed box), and a refresh icon. Below the toolbar is a table with columns for 'Action', 'Opportunity Name', and 'Account Name'. The table contains two rows of data.

<input type="checkbox"/>	Action	Opportunity Name ↑	Account Name
<input type="checkbox"/>	Edit Del ✓	S.S. Colombia aviatio...	S.S. Colombia aviation
<input type="checkbox"/>	Edit Del ✓	Technora Japan Co. L...	Technora Japan Co. Ltd.

3 . Uninstall OPROARTS Live for Force.com

- Uninstall the application

Uninstall the application

- 1 Go to Setup/Installed Packages, click 'Uninstall' of OPROARTS Live.

Action	Package Name	Publisher	Version Number	Namespace Prefix
Uninstall	OPROARTS Live	日本オブジェクト株式会社	1.6	OPROARTS020

Description
OPROARTS is the cloud document output service provided by OPROARTS.
<http://www.opro.net/>

Data from Uninstalled Packages

No uninstalled package data archives

- 2 In package uninstall screen, check 'Yes, I want to uninstall this package and permanently delete all associated components' and click 'Uninstall' button. After completion of uninstallation, you will receive confirmation mail.

Custom Object	Records (Approximate)
OPROARTS	2
OPROARTSユーザ	2

Yes, I want to uninstall this package and permanently delete all associated components

[Uninstall](#)

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