# OPROARTS Live for Force.com Tutorial

**1. Install OPROARTS Live for Force.com**

・Install the application

・Set the Authentication ID

**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

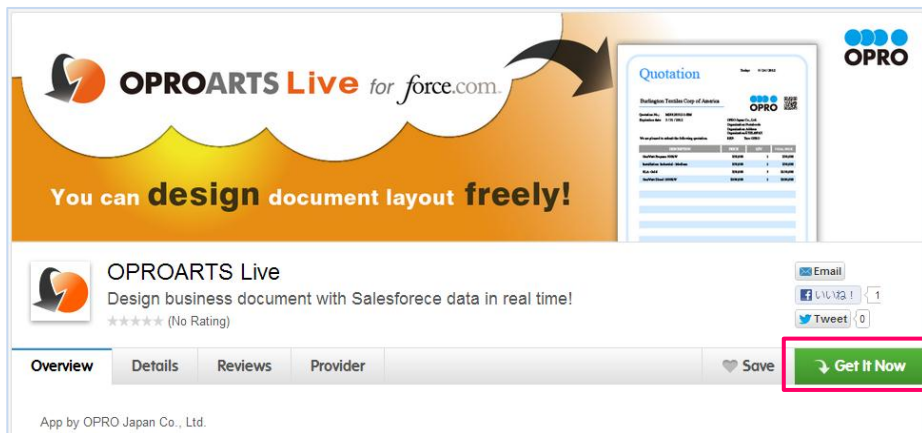**3. Uninstall OPROARTS Live for Force.com**

・Uninstall the application

OPRO

# 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'
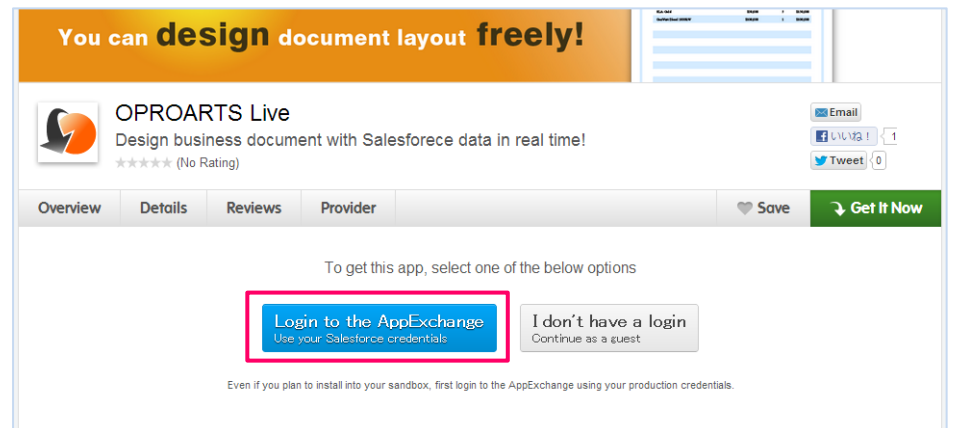https://sites.secure.force.com/appexchange/listingDetail?listingId=a0N30000009wgmWEAQ



**2** Click 'Login to the AppExchange'

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

User Name

Password

☐ Remember User Name

Login  Forgot your password?

Don't have an account? Sign up for free.

...rovider                    ♡ Save   ➜ Get It Now

How would you like to continue?

☁ **Install in production**
Includes active, trial or developer orgs

🔲 **Install in sandbox**
Test in a copy of your production org

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**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                                ORGANIZATION
OPROARTS Live                          Demo

VERSION                                EDITION
OPROARTS Live (1.06.20121129a / 1.6.0) Developer Edition

SUBSCRIPTION                           USER NAME
Free Trial                             sf029_demo_a@demo.opro.net

DURATION
90 Days

NUMBER OF SUBSCRIBERS
Site-wide

☑ I have read and agree to the terms and conditions .

Cancel Install | Back to previous step              **Confirm and Install!**

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**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       日本オブロ株式会社
Description     OPROARTS is the cloud document output service provided by OPRO Japan. http://www.opro.net/
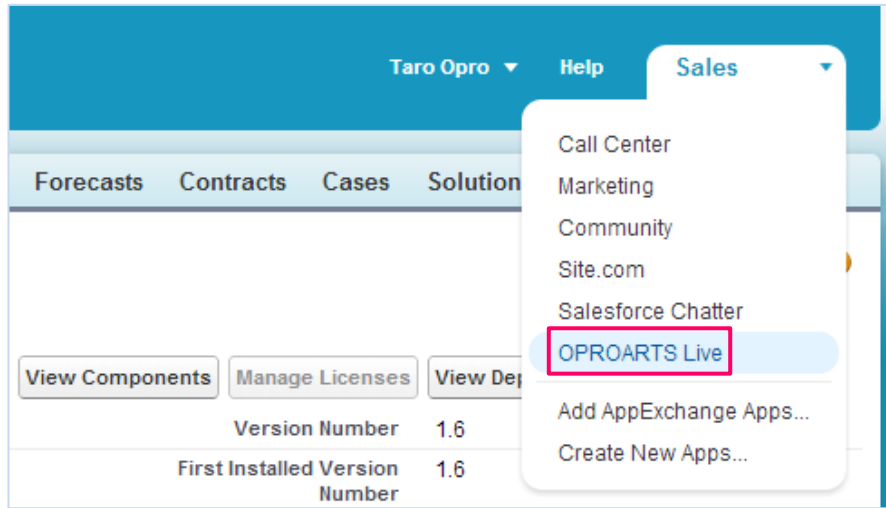
**Continue** Cancel

**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. |

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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.
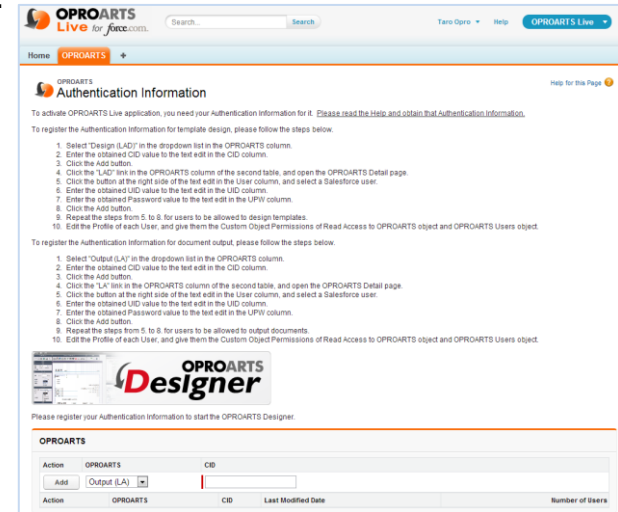


**8** Authentication Information sent by OPRO will look like as shown below.
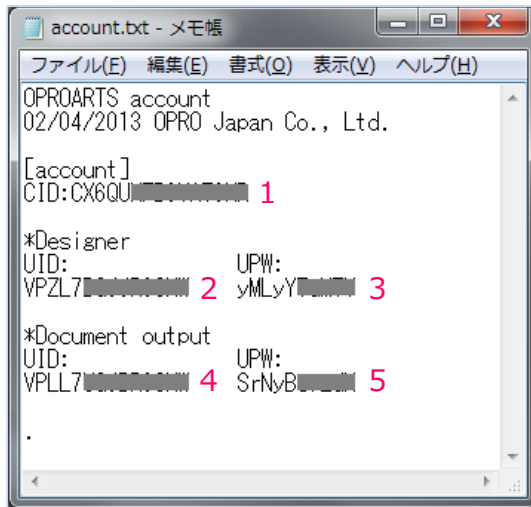


**9** Set the ID for Designer.
Select 'Design(LAD)' from OPROARTS drop down, and enter '1' – CID in CID column, and click 'Add'.
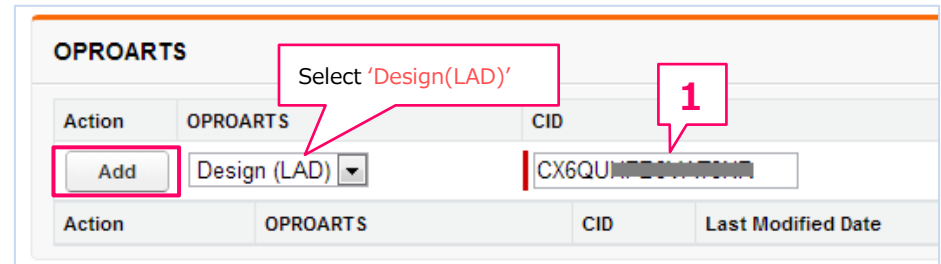
**10** Click 'LAD' and enter '2' – UID, '3' – UPW and click Add.
\* A Designer is allowed one user for one UID.

Select the user who will use OPROARTS Designer.

**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.

Select Output (LA)

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

Select the user who will output documents.

**13** Too add another user, repeat previous setting (Process '12').
\*Copy and paste '4' – UID and '5' – UPW.
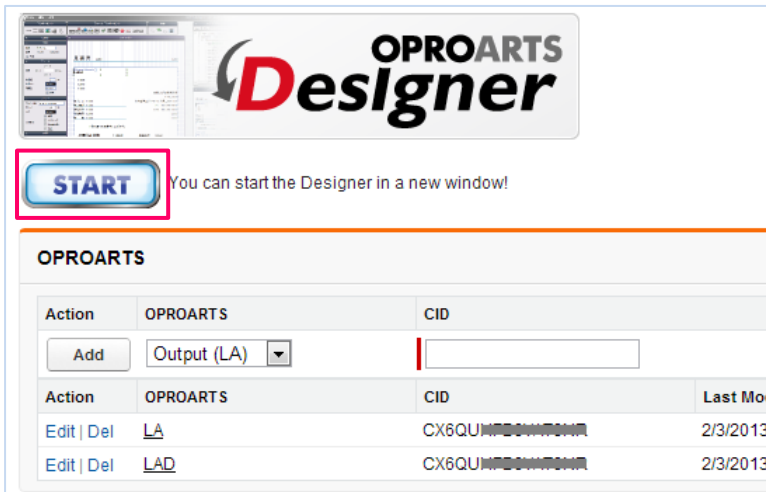
## 2. **Output PDF using sample template**

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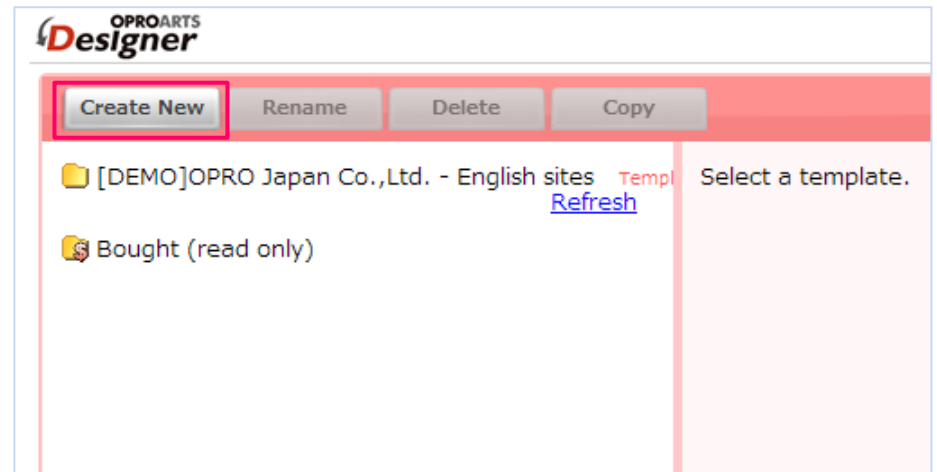
**1** Once Authentication ID setting is done, login to OPROARTS Designer by clicking 'START'



**2** Click 'Create New' tab.

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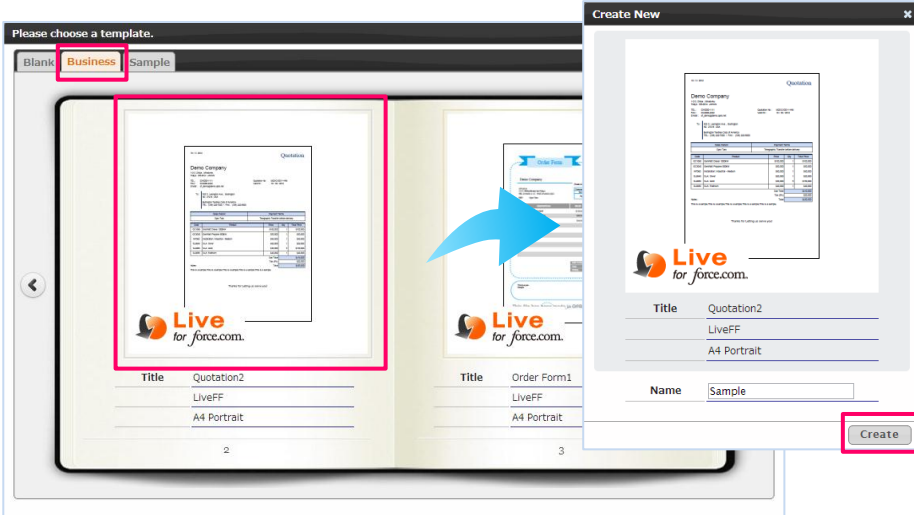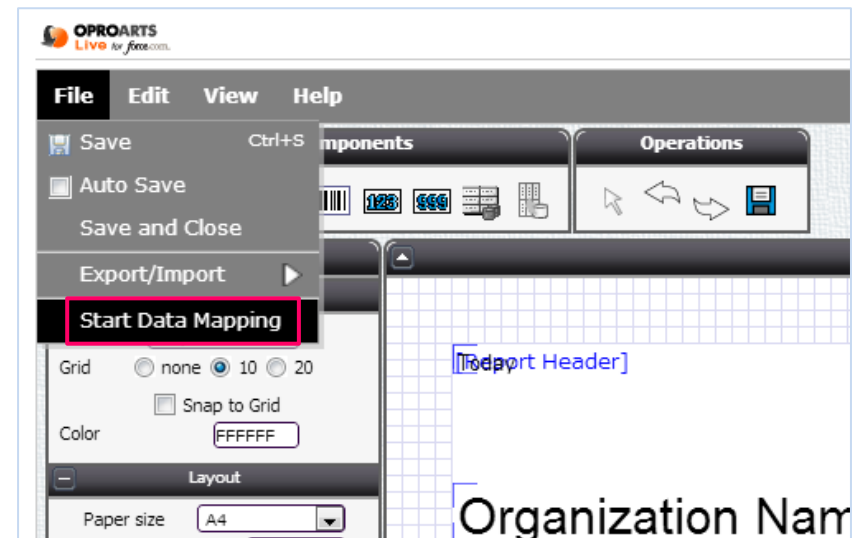


**4**    Click 'Edit' button shown in the center of Designer screen.
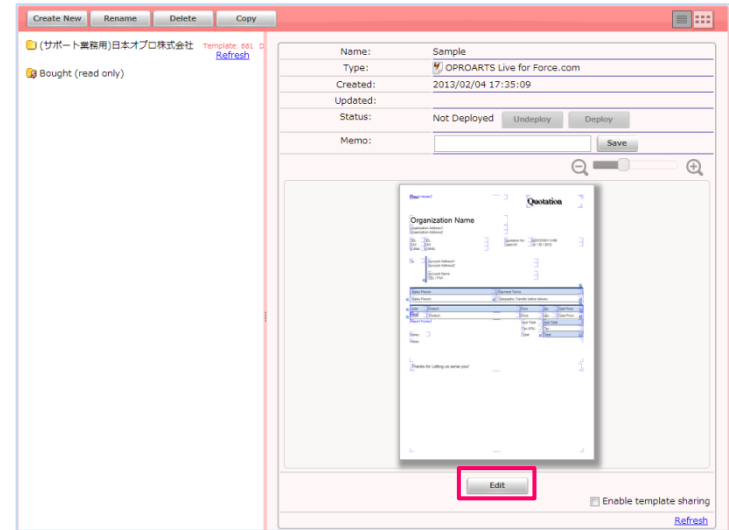


**Note** Use right top mark to switch thumbnail and list view.
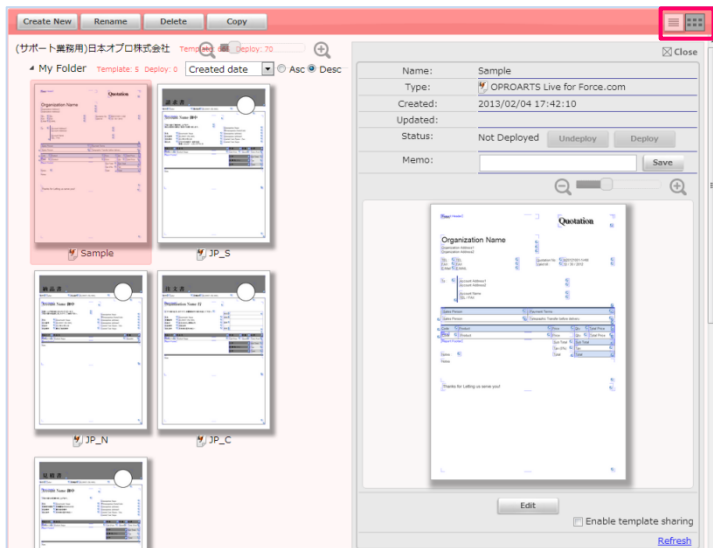


**5**    Click 'Start Data Mapping' from File menu.

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



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



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



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

## 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 ]

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

```
// 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 ----
{!REQUIRESCRIPT("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:'{!JSENCODE(Opportunity.Id)}',

    // Parameters required for OPROARTS Live for Force.com API
    // Do not edit these parameters.
    api:['{!JSENCODE($Organization.Id)}','{!JSENCODE($User.Id)}','{!JSENCODE($Api.Session_ID)}','{!JSENCODE($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 ----
```

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**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 | |
| Edit | Clone | Clone | |
| Edit | Add to Campaign | AddInfluence | |
| Edit | New | New | |

**Custom Buttons and Links**  [ New ] Default Custom

No custom buttons or links defined

**13** Set as below and click 'Save'.



**Label**
  Example : Quotation Output
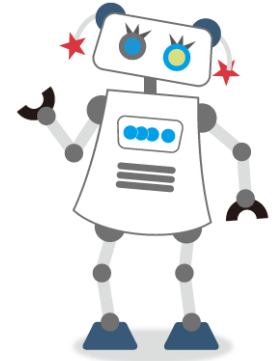**Name**
  Example : Quotation
**Display Type**
  Select 'Detail Page Buttons''
**Behavior**
  Select 'Execute JavaScript'
**Details**
  Paste the details copied in Process '12'

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



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

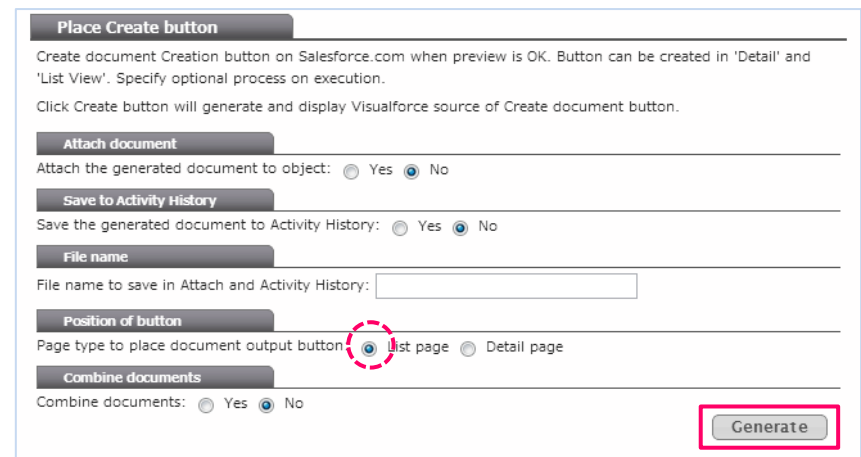**16** Save Layout by clicking 'Save'.
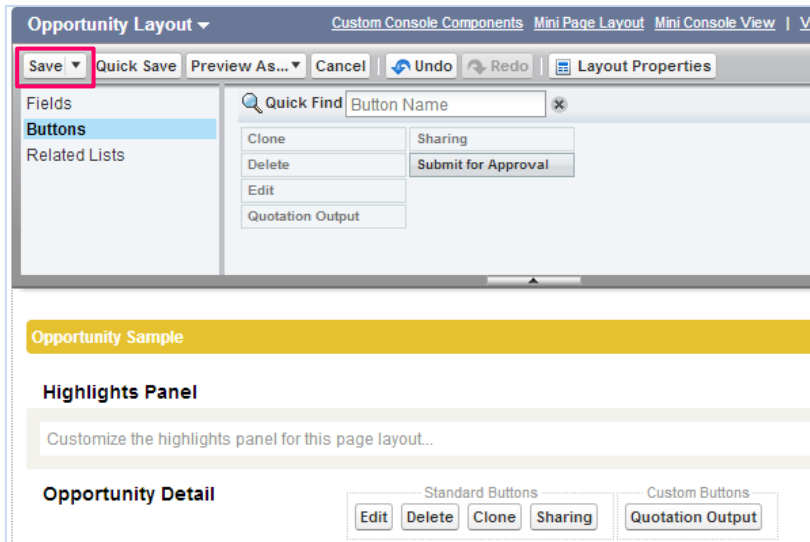


**17** Confirm the button is shown in Opportunity detail page.



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.



**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

**Combine documents**
Combine documents: ○ Yes ● No

[Generate]

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



**Label**
Example : Quotation Package Output
**Name**
Example : QuotationPackge
**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.



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

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

# ３. Uninstall OPROARTS Live for Force.com

・Uninstall the application

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



**2** In package uninstall scree, 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.