OrangeScape

PDF Generation

Kissflow PM Detailed Spec (Spec)
Orangescape Technologies

2020 Version 1.0 Internal Confidential

Document Version	Squad	Date	Details	Prepared By	Approved By
1.0	Platform	27-01-2021	Initial Draft	Dinesh V	

[Notes: Do not remove any sections]

Table of Content

1. Introduction

1.1 References

Name	Link
Kickoff document - PDF Generation	https://docs.google.com/document/d/1CC0j6

2. Specifications

1.

The user will have an option to navigate to the template page from the process home page.

a.
When the user clicks on hamburger icon in process, he/she should see Documents as a tab

b.
When the user navigate to the documents page, he/she should see an option to create a new document

2.

The user should be able to create a new document from the documents page

a.
When the user clicks on "new document", he/she should be able to give the name for the new document. After naming the document, he/she should see a WYSIWYG editor.

3.

The user should be able to copy paste documents from MS Word/ Google Sheet.

a.
When the user copy/paste the document, the document should hold the formatting of the MS Word/Google Spreadsheet.

4.

The user should be able to add variables to the document and also add Jinja template code for looping and formatting.

a.
The flow fields will be listed in the left nav and the user can drag and drop the fields into the document which will be shown as document variables.

5.

The user should be able to copy paste or upload images inside the document(logos and headers)

a.
The image size should be less than 10MB.

b.
   We should support PNG, JPEG, GIF, TIFF, SVG types.

6.
   The user should be able to save the document and rename the document.

7.
   In the Documents page, the user should be able to open/rename/archive existing documents.

   a.
      When the user archives a document and if the document is used in integration or print then it should not allow the user to archive the document.

8.
   In integration, the user should be able to add a new action called "Generate and Send PDF".

   a.
      The user should be able to choose the process and choose the documents that are created as part of the process.

   b.
      The user should be able to specify the name of the generated document. The name can be dynamic as well.

   c.
      The user should be able to configure the email receiver, subject and body of the email. The generated document will be sent to the receiver who is configured in the action.

   d.
      The email action is akin to the existing email action in integration. All the options that are part of email action will be applicable to this action as well.

   e.
      The generated document will also be added to the instance for future reference.

   f.
      At any point in time, the user can open the item and see the documents that are generated for that item.

   g.
      The documents are accessible from the reports as well. The user should be able to add a field called Documents as a column which will have all the documents that are generated for that item.

9.
   While printing the document, the user can choose the templates that are created as part of the process.

   a.
      Discuss this requirement.

3. Risk/Impact Analysis

Mobile

No

Notifications

No

Search

No

Integration

Refer 2.8

API

No

Security and Compliance

No

Audit

Yes

Billing

No

Filter Framework

No

Formula implication

No

Delegation Behaviour

No

Documentation requirements

Yes

Event instrumentation(product dash)

Yes

Tours/Onboarding

No