Product Document

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Dynamic Rich Text Editor	Release Date: 2024-07-30

Highlight

Elevate Your Salesforce Experience With The Dynamic Rich Text Editor. Create Dynamic, Branded Content, Export Documents As PDFs Or Google Docs, And Customize Toolbars—all Seamlessly Integrated Into Salesforce With No External Plugins And VF Page Required.

Documentation

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1. Introduction

Welcome to the **Dynamic Rich Text Editor** by **CodeyLabs**, a powerful tool designed to enhance your Salesforce experience by enabling dynamic content creation, seamless integration, and professional document branding. This document serves as a comprehensive guide to help you get started and make the most of the editor's features.

2. Installation

Prerequisites

- **Salesforce user permissions**: Ensure you have the necessary permissions to install managed packages in your Salesforce org.
- **Salesforce edition**: The Dynamic Rich Text Editor is compatible with Salesforce Enterprise, Unlimited or Developer Editions.

Steps to Install

1. **Access the CodeyLabs Site:**
   - Navigate to All Products Page.
   - Search for "Dynamic Rich Text Editor" and push more details.

2. **Initiate Installation:**
   - Click on the "Get It Now" button.
   - Select your target Salesforce environment (Production or Sandbox).
   - Follow the prompts to log in to your Salesforce account.

3. **Install Package:**
   - Choose the "Install for All Users" option for the setup.
   - Review the package components and click "Next."
   - Agree to the terms and conditions and click "Install."

4. **Verify Installation:**
   - Navigate to the Installed Packages section in Salesforce Setup.
   - Confirm that "Dynamic Rich Text Editor" appears in the list of installed packages.
   - In Setup, Go To Permission Sets, And Assign Dynamic Rich Text Editor Admin User Permission set to the users.

3. Configuration

Configure Rich Text Buttons/Document Templates and Sections

Step 1: Access the Rich Text Buttons Tab

Navigate to the App Launcher:
- Click on the App Launcher (grid icon) located in the top-left corner of your Salesforce interface.
- Search for "Rich Text Buttons" to quickly locate the tab.
- Click on the Rich Text Buttons tab to open it.

Step 2: Create a New Rich Text Button

Click on New:
- In the Rich Text Buttons tab, click on the New button to create a new button.

Fill in the Details:
- Template Name: Enter a unique name for the template.
- Display Order: Specify the display order for the button.
- Deactivate: Initially mark the button as Deactivate.

Define SLDS Icon Name:
- To display the button on the Rich Text Editor, define the SLDS icon name in the format iconcategory:buttonname (e.g., utility:save).
- Uncheck the Deactivated checkbox to activate the button.

Set Button Category:
- Provide a Category if you want the Rich Text Editor to show only specific category buttons.

Step 3: Configure Document Sections

Navigate to the Related Tab:
- Go to the Related tab on the Rich Text Button record to add related document sections.

Add a New Document Section:
- Click New to create a new document section.

Define Document Section Details:
- Type: Choose either Paragraph or Table.
- Paragraph Type: Retrieves the HTML content field value to render.
- Table Type: Renders data dynamically based on defined values in the SOQL Query, Table Config JSON, and Table Style JSON.

Configure Table Type Sections:
- SOQL Query: Write a query to retrieve data related to the current record. Use {pv0} as a placeholder for the current record ID.
- Table Config JSON: Define the JSON in the format "headername" : "fieldfromquery" for direct fields, or "headername" : { "relationshipinquery" : "fieldnamefromquery" } for one-level relationships.
- Table Style JSON: Customize the table's appearance using styles such as "colname" : { "style" : "background-color:red;", "thstyle" : "background-color:white;" }.
- Png Image Relative URL: Use this to replace the {{img}} merge context with a static PNG image in the document.

Additional Options:
- Show Table Header: Enable this option to display the table header as defined in the SOQL query and Table Config JSON.
- Merge Context for Static Values: Use merge contexts like {{}} : "Created Date:" for displaying column names alongside static values.

Step 4: Activate Document Sections

Mark as Active:
- Once the document section is configured, mark it as Active to include it in document generation.

<u>Accessing the Editor</u>

App Builder Integration:
- Navigate to a record page in Salesforce.
- Click on the "Edit Page" button to enter the App Builder.

Add the Dynamic Rich Text Editor:
- In the App Builder, locate the Dynamic Rich Text Editor component.
- Drag and drop the component onto the desired section of the page layout.

Configure Component Properties:
- Define the following properties in the component settings panel:
    - Field API Name: Specify the API name of the rich text field to replace.
    - Show Label Checkbox: Toggle the visibility of the field label.
    - Field Label: Set a label for the field as it will appear in the editor.
    - Field Level Help: Provide guidance or notes for users interacting with the field.

PDF Configuration:
- Adjust PDF width and height according to the placement of the editor on the page.

Template Management:
- Set a default template ID in the component settings to load dynamic content automatically upon editor initialization.

Optional Settings:
- Enable or disable optional buttons via the "Don't Show Optional Buttons" checkbox.
- Set the editor to read-only mode if needed.

4. Features and Usage

- **Dynamic Content Templates**
  - **Purpose**: Streamline document creation with pre-defined templates that automatically populate content in the editor.
  - **Usage**: Click the "Templates" button in the toolbar to select and apply a template.
- **Seamless Salesforce Integration**
  - **Purpose**: Embed the editor directly within Salesforce records without requiring external integrations.
  - **Usage**: Utilize the App Builder to add the editor to any standard or custom object page layout.
- **PDF & Google Doc Exports**
  - **Purpose**: Facilitate easy document sharing by exporting content as PDFs or Google Docs.
  - **Usage**: Click the export icon in the toolbar and select the desired format to download.
- **Customizable Toolbars**
  - **Purpose**: Enhance productivity by personalizing the editor toolbar with frequently used tools and buttons.
  - **Usage**: Access toolbar settings to add, remove, or rearrange buttons to match your workflow.
- **Professional Branding**
  - **Purpose**: Ensure all documents align with your company's branding and present a professional appearance.
  - **Usage**: Customize content styles to reflect your brand's colors, fonts, and design elements.
- **No External Integrations Required**
  - **Purpose**: Simplify setup and maintenance with a fully integrated solution that works natively within Salesforce.
  - **Usage**: Leverage the editor's features without additional software or plugins.

5. Troubleshooting

Common Issues
- **Editor Not Displaying:**
  - Solution: Verify component placement in the App Builder and ensure the package is installed correctly.
- **Templates Not Loading:**
  - Solution: Check the default template ID configuration and confirm template availability in the system.
- **Export Failures:**
  - Solution: Ensure that the browser allows pop-ups and that export settings are correctly configured.

Technical Support

For further assistance, contact CodeyLabs support at **codeylabs@gmail.com**.

6. FAQs

Q: Can the editor be used with custom objects?
A: Yes, the Dynamic Rich Text Editor can be applied to any standard or custom object within Salesforce.

Q: How do I update templates?
A: Templates can be managed and updated via the template settings in the editor component.

Q: Is there a limit to the number of custom buttons in the toolbar?
A: No, you can add as many custom buttons as needed to optimize your workflow.

Q: Can I make the editor read-only for specific users?
A: Yes, you can configure the editor to be read-only based on user roles or specific requirements.

Q: What types of documents can be generated with the editor?
A: The editor can generate a variety of documents, such as Quotes, Orders, Invoices, and more. It allows for the customization and branding of each document to ensure consistency with your company's visual identity.

Q: What customization options are available for the generated documents?
A: The editor allows you to customize both the dynamic content pulled from Salesforce and any static HTML content you add. You can apply custom styles, colors, and logos to ensure the documents reflect your company's branding accurately.

Q: Is the Dynamic Rich Text Editor an external tool or a native Salesforce component?
A: The Dynamic Rich Text Editor is a native Salesforce component. It operates within Salesforce without the need for any external integrations and no VF page usage, making it easy to set up and use.

Q: Can I revert to default settings if needed?
A: Yes, you can revert to default settings by adjusting the configuration options in the editor or modifying or removing custom rich text button or document templates. This flexibility ensures that you can easily switch back to default settings if your branding needs change.

7. Support

For support inquiries or further assistance, please contact our support team:
Email: codeylabs@gmail.com
Phone: +91-982-847-6820
Website: https://www.codeylabs.com/support.html

8. Appendix

System Requirements
- Enterprise, Unlimited and Developer - Salesforce edition support
- Supported web browsers: Chrome, Firefox, Safari, Edge

Release Notes
- Version 5.4.0: Initial release of the Dynamic Rich Text Editor with core features and seamless Salesforce integration.

About CodeyLabs

CodeyLabs is a pioneer brand dedicated to enhancing the Salesforce ecosystem through innovative and customizable solutions. Our mission is to empower businesses by transforming their Salesforce experience, ensuring it aligns perfectly with their brand and operational needs. We specialize in delivering tailored solutions that optimize user interaction and streamline workflows. Committed to innovation and customer satisfaction, CodeyLabs delivers exceptional value, enhances productivity, and fosters a seamless user experience. Join us on the journey to revolutionize your Salesforce platform and unlock its full potential.

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