

# GOLD DEMO ORG SOLUTION

## DEMO STORY & HOW TO DEMO

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## BEFORE DEMO

- **Explore prospect requirements**

It's better to know a list of requirements or what prospects expect to see before the demo. From that, you can select the solutions which fit their requirements.

- **Select the solution for demo**

Since GDO is built for "demo purpose", most likely, to cover all the requirements, we need to show more than one solution in the demo. You don't have to show all the solutions.

Commonly, the demo process will be:

- ❖ Showing solution 1 for the fastest doc-gen experience.
- ❖ Following with solution 2 for the advanced add-on features of Dynamo.
- ❖ And 3, 4, 5, 6, 7 depends on their requirements.

- **Prepare the demo presentation (optional)**

Prepare 2 slides summary of what you are going to show in the demo and how the solutions match their requirements.

## DETAILED INSTRUCTION

### 1. Simple Quotation

**Template Used:** Miltos Simple Quotation

**Main Object:** Opportunity

**Use Case:** Quotes

**Purpose of the demo:** To show core document generation functionality in a sleek and effective way in a minimal number of clicks. Looking under the hood on this template shows how cleverly we handle features such as conditional text, formatting, and images.

**Template Format(s):** HTML

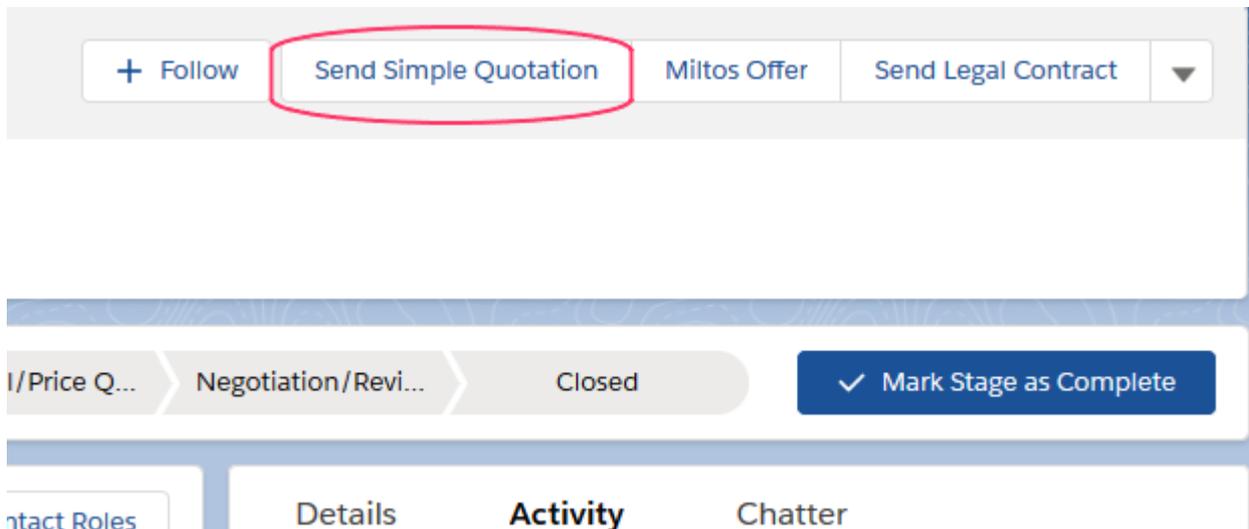
**Output Format(s):** PDF, Email

**Key Features:** Dynamic Images, Related List, Automatically Saved to Opportunity Record, Send Email PDF, Email Template

**What It Does:**

Generates a PDF quote that displays Opportunity Products with product images. Sends emails within Salesforce with a defined email template.

### How It Works – HOW TO DEMO



On an **Opportunity** of your choice, click **Send Simple Quotation** button:

- Documill Dynamo merges data from Opportunity, Account, Primary Contact, and related Opportunity Products into an online document.
- Product images are merged for each line item.
- The document is automatically saved to the Opportunity record (under **Files**).

Users preview the PDF quote inside Salesforce. Once users click **Send** button, the PDF quote is automatically attached to the email. Email template and Opportunity's Primary Contact address will be pre-populated. Users can edit the email if wished and send the email out. The sent email and the document can be logged in Salesforce under record **Activity**.

#### Note:

- In the email step, explain to prospects that the default contact email is demo data. You will edit the recipient address in the **To** box with a real address (your Miltos Gmail) and send. Open Gmail to show prospects how the email will look from the recipient perspective.
- Once the document is sent, Dynamo will return to PDF preview with a green message on top "The document has been sent". Click **Exit** and return to Opportunity.

## 2. Advanced Offer with Collaboration Module

**Template Used:** Miltos Offer

**Main Object:** Opportunity

**Use Case:** Quotes, Offers

**Purpose in the demo:** To show pre-form options, beautiful-looking cover page, post merge edits inside browser, drag-n-drop clauses, optionally selected attachment, how much value that can add and how the final version sent is the one saved back to Salesforce. Also, a nice intro to the workflow of document **commenting** and **approval** which is integrated with Salesforce Chatter (beyond and separate from Salesforce approval).

**Template Format(s):** HTML

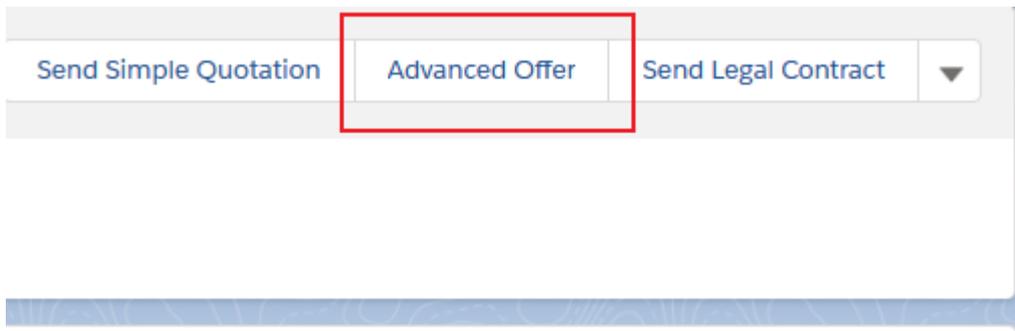
**Output Format(s):** PDF, Email

**Key Features:** Dynamic Images, Related List, Optional SFDC PDF Attachment, Conditional Text, Editable Content, Saved to Opportunity Record, Send Email PDF, Email Template, Saved versions to Custom Object (Dynamo Document), Comment and Approval Workflow

### **What It Does:**

Generates a PDF document that displays Opportunity Products with product images and descriptions. Allows users to edit text, select and arrange attachments. Allows internal commenting and approval before sending out.

### **How It Works – HOW TO DEMO**



***For a visual demonstration, please follow these 2 videos:***

- ✓ [Documill Dynamo Demo](#)
- ✓ [Documill Dynamo Collaboration Module](#)

*For written explanation:*

On an **Opportunity** of your choice, click **Advanced Offer** button:

- Documill Dynamo displays a list of options that can configure or be included in the document.

- Documill Dynamo merges data from Opportunity, Account, Primary Contact, and related Opportunity Products into an online document. Product images are merged for each line item.
- The document is displayed right inside Salesforce, first in the “Preview” mode, users can preview the PDF with cover page, margin content (headers, footer...) and decide if further editing is needed.
- Hit **Select Attachments** to manually select appendix document(s) to be added to the main document.
- Hit **Edit** button and customize the texts in the editable areas (light yellow background/ the editable areas can be set upon template creation) and experience **Dynamo Drag-n-Drop Clause**. Upon clicking **Save** button, the document will be saved to the Salesforce record, under **Files**.
- The **Send Email** button is not shown until the document is **Approved** (due to the set Workflow of this example).

### **Collaboration Module:**

- In the **Comment** mode, comments can be added by internal Salesforce users, user names can be mentioned. **Note: for the Demo to work, mention yourself so that you will receive notifications. Comments need to be linked/ pointed to a specific location in the document for it to 'work'.** Notifications are sent via **Chatter** (and SF/ email notifications too). In Chatter, under each specific post, clicking **Open Document** will link users to the specific document and the specific comment mentioned.
- Upon clicking **Request Approval** button, users can select the Approver in need (**it's again yourself in this example**). The Approver will receive Chatter notification with **Open Document** link to go to the document. The Approver can comment, approve or reject the document. Again, the document creator will be notified accordingly via **Chatter**.

Once users click **Send** button, the final document is automatically attached to the email. Email template and Opportunity's Primary Contact address will be pre-populated. Email details can be edited before sending out. The sent email and the document can be logged in Salesforce under record **Activity**.

**Note:**

- In the email step, explain to prospect that the default contact email is demo data. You will edit the recipient address in the **To** box with a real address (your Gmail) and send. Open Gmail to show prospects how email will look from the recipient perspective.
- You don't have to send email again if the email function has been shown before, because the experience is the same. We recommend demoing the email function selectively. Because you can send only max 15 emails a day.
- Once the document is saved or sent, Dynamo will return to PDF preview with a message on top "The document has been sent" / "The document has been saved". Click **Exit** and return to the Opportunity.

### 3. Legal Contract

**Template Used:** Legal Contract

**Main Object:** Opportunity

**Use Case:** Contract, SOW

**Purpose in the Demo:** To extend Dynamo use cases to other legal and expanded text-heavy documents. To showcase clause library functionality and the ability to have documents in draft and final versions in Salesforce.

**Template Format(s):** HTML

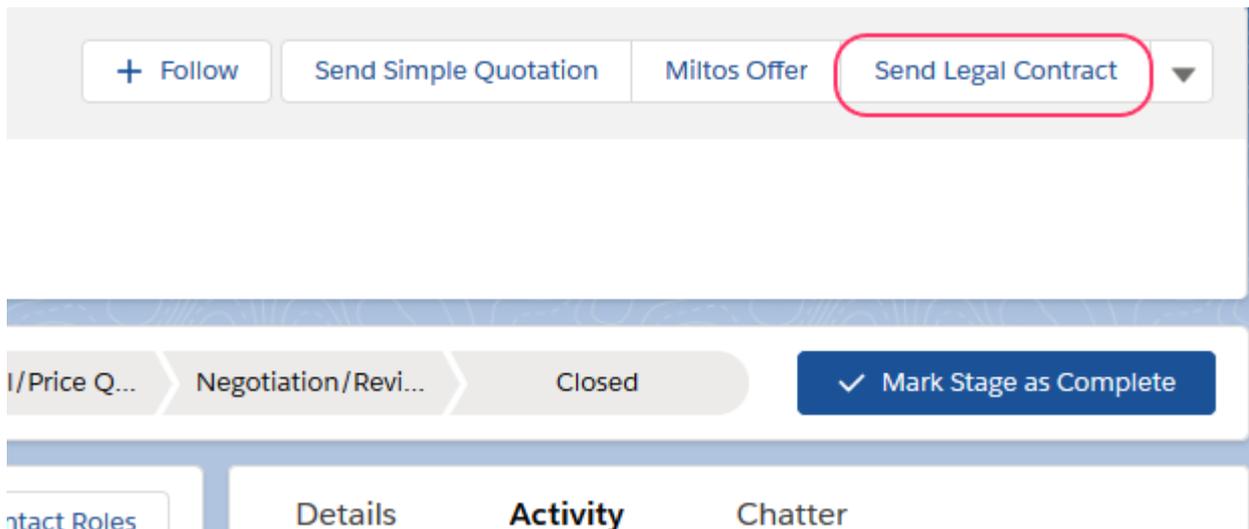
**Output Format(s):** PDF, Email

**Key Features:** Related List, Editable Content, Drag-n-drop Clauses, Saved to Opportunity Record, Version Control, Send Email PDF, Email Template

**What It Does:**

Generates a contract with Opportunity Products and Standard Terms & Conditions. Allows users to drag and drop different terms from Documill Dynamo Clauses. Keeps the edited text from previous version for revision or to continue the work in progress.

## How It Works – HOW TO DEMO



On an **Opportunity** of your choice, click **Send Legal Contract** button:

Documill Dynamo merges data from Opportunity, Account, Primary Contact and related Opportunity Products to generate a Legal Contract.

If the Opportunity Amount is equal or less than 40 000, the contract will be approved automatically. The signature image of the Opportunity Owner is populated.

The contract is displayed right inside Salesforce. Users can customize the texts in the editable areas (light yellow background).

Users can use clauses (ready-made block of texts) stored in Salesforce to edit content in the contract.

- Users can search for clauses with keywords or filters them based on categories.
- Users can drag and drop clauses to the editable areas.
- Rich text content of the clauses will be populated in the editable areas for further editing if necessary.

Upon clicking **Save** button, users can preview the final PDF with edited text, save the contract to Opportunity record (under **Files**), or proceed to **Send** email.

Once users click **Send** button, the final document is automatically attached to the email. Email template and Opportunity's Primary Contact address will be pre-populated. Email details can be edited before sending out. The sent email and the document can be logged in Salesforce under record **Activity**.

## 4. Automate Invoice

**Template Used:** Automate Invoice

**Main Object:** Opportunity

**Use Case:** Invoice automation, document automation

**Purpose in the Demo:** To show the workflow automation capacity by using Salesforce Workflow Rules (Outbound Message) with Dynamo API

**Template Format(s):** HTML

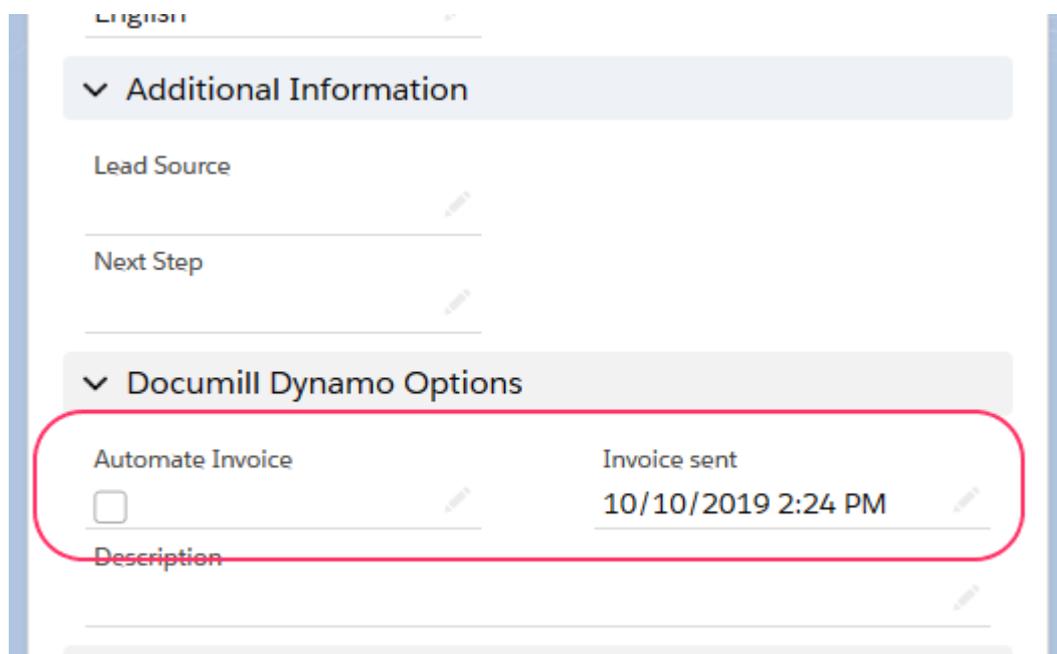
**Output Format(s):** PDF, Email

**Key Features:** Workflow Automation, API, Related List, Email template

**What It Does:**

Automatically sends an invoice to **Primary Contact** when the workflow is triggered. Updates the time stamp after the invoice has sent, also automatically.

**How It Works – HOW TO DEMO**



The screenshot shows a Salesforce record page for an Opportunity. The 'Additional Information' section is expanded, showing fields for 'Lead Source' and 'Next Step'. Below this, the 'Documill Dynamo Options' section is expanded, showing a table with two columns: 'Automate Invoice' and 'Invoice sent'. The 'Automate Invoice' checkbox is checked, and the 'Invoice sent' field displays the timestamp '10/10/2019 2:24 PM'. A red rounded rectangle highlights the 'Automate Invoice' checkbox and the 'Invoice sent' timestamp.

| Automate Invoice                    | Invoice sent       |
|-------------------------------------|--------------------|
| <input checked="" type="checkbox"/> | 10/10/2019 2:24 PM |

On an **Opportunity** of your choice, under Opportunity **Details** >> **Documill Dynamo Options** section >> edit the **Automate Invoice** and check the box >> click **Save**.

The checkbox will be reset to unchecked immediately, but an invoice will be generated and emailed to the specified address. In practice, the email address will be Primary Contact email. But for demo purpose, the invoice is sent to **User Email**. Open your Gmail account to show the invoice has been sent with an email template.

Once you receive the email, refresh the Opportunity object to see:

- **Invoice sent** field has been updated with the current date & time
- The invoice is attached to the record (under **Files**)

**Note:**

There may be a little time delay, about 1 minute, (usually depends on the internet) to send the email.

## 5. Strategic Account Plan

**Template Used:** Account Report

**Main Object:** Account

**Use Case:** Reports, Plans

**Purpose in the Demo:** To show neat nested queries/ nested tables and to get the customer thinking about different ways they can apply Dynamo in their organization.

**Template Format(s):** HTML

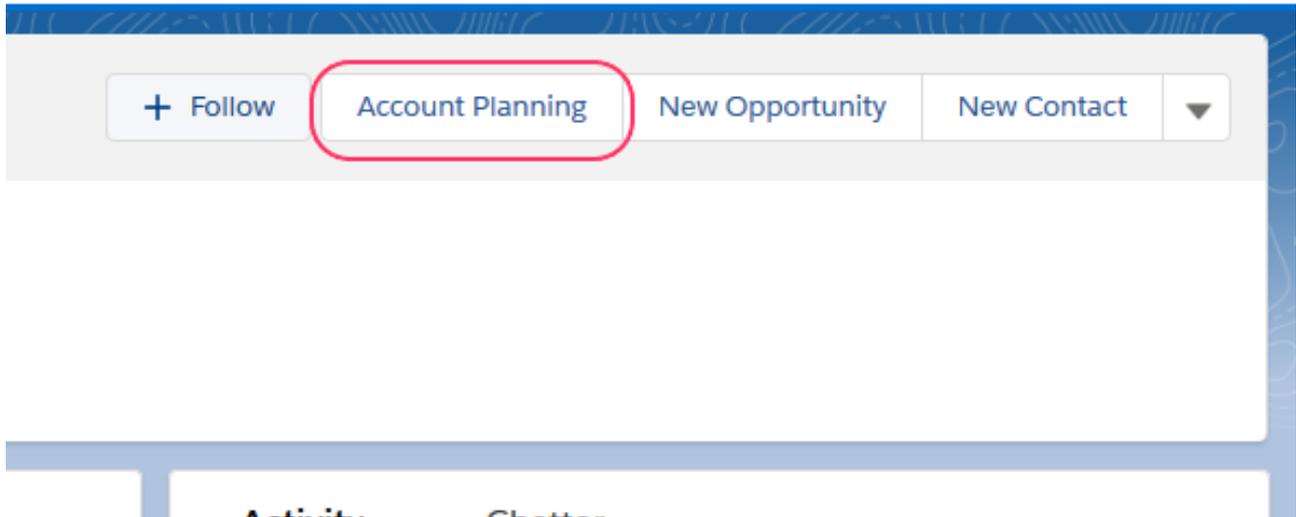
**Output Format(s):** PDF, Email

**Key Features:** Related List, SOQL, Grouped Data, Data calculation, Custom Format, Editable Content

**What It Does:**

Provides a 360-degree view of an account. Generates an Account report with all data relates to the Account. Allows users to add interpretation to each section of the report.

## How It Works – HOW TO DEMO



On an **Account** of your choice, click **Account Planning** button, Dynamo:

- Merges data from Account, Contact, Opportunity, Opportunity Product and Case to the online document
- Presents all the available contacts of the account
- Groups and presents list of Opportunities based on the Opportunity Stage with grand total of each group. The Grand Total has a different currency format than the line item
- Groups and presents the product sold/ projected to be sold to the account. Sort the product based on Product Family, calculate the amount sold/ projected to be sold of each product across the Opportunities
- Presents a list of Cases related to the Account

At the end of each part, there is a section for users to take notes on, for example, their organizational level or decision-making process, reason for deal lost, planning for on-going opportunities, etc.

Upon clicking **Preview**, users can preview the final PDF with edited text and margin content (headers, footers...). Clicking **Save** button will save the document to the Account record (under **Files**).

Once users click **Send** button, the final document is automatically attached to the email. Email template and Contact address will be pre-populated. Email details can be edited before sending out. The sent email and the document can be logged in Salesforce under record **Activity**.

## 6. Case Response

**Template Used:** Case response

**Main Object:** Case

**Use Case:** Customer Communication, Case Response via email, Customer Support

**Purpose in the demo:** To showcase customer communication can be automated with Dynamo. To show automated content based on case information in Salesforce. To show the help of Dynamo Drag-n-drop clauses as the help texts for service agents.

**Template Format(s):** HTML

**Output Format(s):** PDF, Email

**Key Features:** SOQL, Add images, Custom Format, Editable Content, E-signature placeholder

**What It Does:**

Generates a case response with data taken from Case and Case Comments which can be input by assigned service agent, can be filtered depending on Case Type, can be filtered to offer an attached voucher. Case response can be sent out as a PDF for official purposes (this Demo example) or as an email response.

The screenshot displays a Salesforce Case record for "Starting generator after electrical failure". The interface includes a header with the case title and actions like "Follow", "Case Response", "Edit", and "View Case Hierarchy". Below the header, a table shows case metadata: Priority (High), Status (New), and Case Number (00001005). The main content area is divided into a "Feed" and "Details" section. The "Feed" section, under the "Related" tab, contains three activity cards: "Open Activities (0)", "Activity History (0)", and "Case Comments (1)". The "Case Comments (1)" card is expanded, showing a table with one comment from user "Antoni Bob" on 8/29/2019 at 1:58 PM. The comment text reads: "To fix this you need to first look at its reaction and report to us carefully, then when we have received enough information, then we shall proceed with this. As you still have the Guarantee Service Package until 2020, we will fix it for you with no cost at all. Please advise us when you will be available so we can go and fix it for you." The "Details" section on the right lists various case attributes: Case Owner (Antoni Bob), Contact Phone ((512) 757-6000), Case Number (00001005), Contact Email (rose@edge.com), Contact Name (Rose Gonzalez), Account Name (Edge Communications), Discount Voucher (2%), and Product (Hammer Drill). An "Additional Information" section is also visible, listing Status (New), Type (Problem), Case Origin, and Phone.

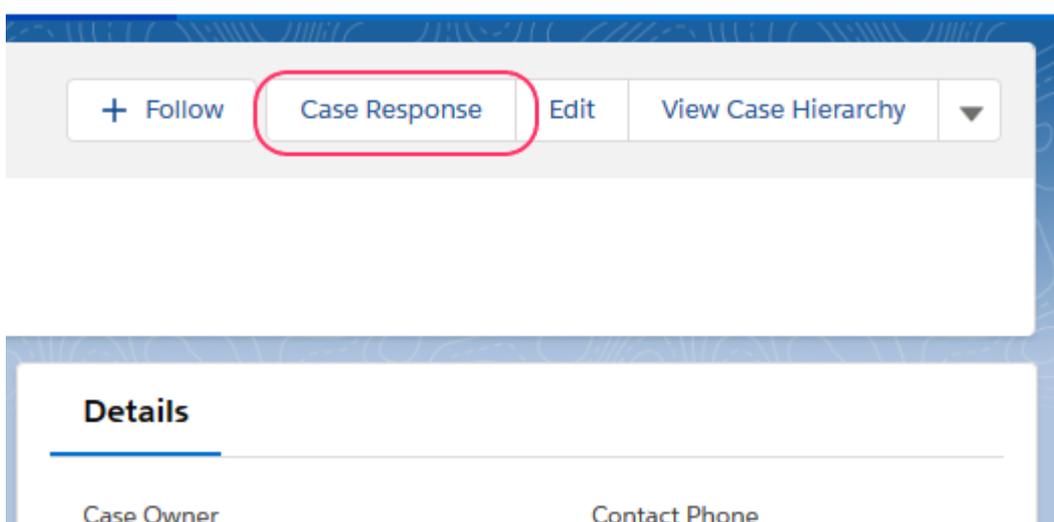
| PRIORITY | STATUS | CASE NUMBER |
|----------|--------|-------------|
| High     | New    | 00001005    |

| USER       | CREATED DATE      | COMMENT   |
|------------|-------------------|---|
| Antoni Bob | 8/29/2019 1:58 PM | To fix this you need to first look at its reaction and report to us carefully, then when we have received enough information, then we shall proceed with this. As you still have the Guarantee Service Package until 2020, we will fix it for you with no cost at all. Please advise us when you will be available so we can go and fix it for you. |

| Case Owner       | Contact Phone       |
|------------------|---------------------|
| Antoni Bob       | (512) 757-6000      |
| Case Number      | Contact Email       |
| 00001005         | rose@edge.com       |
| Contact Name     | Rose Gonzalez       |
| Account Name     | Edge Communications |
| Discount Voucher | 2%                  |
| Product          | Hammer Drill        |

| Status      | Type                  |
|-------------|-----------------------|
| New         | Problem               |
| Case Origin | Case Reason           |
| Phone       | Complex functionality |

## How It Works – HOW TO DEMO



From **Cases** object, select a **Case** of your choice, upon clicking **Case Response** button, Dynamo merges data from Case Details, Comments... and generates a case response document on the defined template layout. Users can further edit the document or add help text clauses.

If there is a **Discount Voucher** number under the case, the voucher will show with the generated document, otherwise, it won't, based on the condition set of this example.

Upon clicking **Preview**, users can preview the final PDF with edited text and margin content (headers, footers...). Clicking **Save** button will save the document to the Case record (under **Files**).

Once users click **Send** button, the final document is automatically attached to the email. Email template and Contact address will be pre-populated. Email details can be edited before sending out. The sent email and the document can be logged in Salesforce under record **Activity**.

## 7. Field Service Report

**Template Used:** Field Service Report

**Main Object:** Work Orders

**Use Case:** Advanced Field Service Report, Timesheet

**Purpose in the demo:** To show a nicely organized Field Service Report. Dynamo is able to pull data from many levels deep even more than the 3<sup>rd</sup> level data of Related List, images, etc. To showcase the advanced capabilities that Dynamo is able to accomplish beyond Salesforce standard.

**Template Format(s):** HTML

**Output Format(s):** PDF, Email

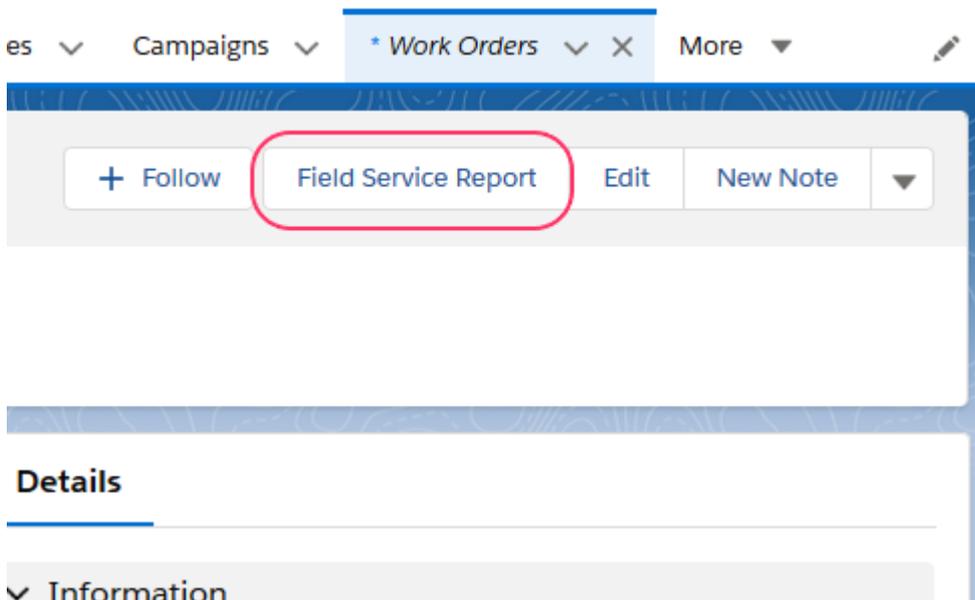
**Key Features:** SOQL, Dynamic Images, Custom Format, Editable Content, Cover Page, 3<sup>rd</sup> level Related List

**What It Does:**

Generates a Field Service Report for each Work Order with data taken from Work Orders, Work Order Line Item and Service Appointments. Can query images from these record's related list to present in the document after a field service agent has uploaded them to Salesforce.

**How It Works – HOW TO DEMO**

From **App Launcher**, search for **Work Orders** object.



On a **Work Order** of your choice, upon clicking **Field Service Report** button, Dynamo:

- merges data from Work Order, Work Order Line Item, Service Appointment and Case to the online document.
- Groups and presents multiple Work Order Line Item ordered by created date with information of each line item including images and appointments.
- Presents list of Service Appointments with status and duration that is looked up with Work Types

**Work Order Line Item Number 00000001**

Status: New  
Priority: Low  
Start date: 22.10.2019 12:0  
Due date: 24.10.2019 12:0

**Work Details:** Replace broken wire with new one

**Service Appointments:**

| Service Appointment | Work Type           | Status    | Duration   |
|---------------------|---------------------|-----------|------------|
| A-0001              | Replacement Service | Scheduled | 3 Hours    |
| A-0003              | Replacement Service | Canceled  | 60 Minutes |

**Images**



Going to **Preview**, users will see the final document with edited texts, cover page, margin content (header, footers...). Users can either **Save** the report to the Work Order record (under **Files**). Or upon clicking **Send** button, the final document is automatically attached to the email. Email template and Contact address will be pre-populated. Email details can be edited before sending out. The sent email and the document can be logged in Salesforce under record **Activity**.

**END OF GDO INSTRUCTIONS – LAST UPDATES 11.2019**