KSL FOR SALESFORCE®

User Guide

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naelan

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1. Introduction

KSL for Salesforce® is a software solution improving the daily work of your sales teams by offering a corporate solution to create any client communication. This application is dedicated to organizations that wish to provide their teams a centralized business solution for generating and redacting commercial and transactional e-mails and documents and share and secure content.

The KSL software solution offers a variety of features that allow Salesforce® users to produce documents and e-mails on the two key processes in Customer Relationship:

- CUSTOMERS ACQUISITION
- CUSTOMER RELATIONSHIP MANAGEMENT

On these two processes, the solution allows to generate all types of documents and e-mails:

- RFIs, RFPs, commercial responses
- Quotes, technical briefs, letters of engagement
- Contracts
- Statements, invoices
- Customer relationship mails
- Personalized e-mail responses
- Pay slips, social reports
- E-mailings
- Etc.

There are four main use cases for KSL from Salesforce®:

- Generating PDF documents
- Create and personalize documents interactively
- Create and personalize responses by e-mail*
- Create and personalize e-mailings*

** From the version 1.6 of KSL plug-in*

KSL provides powerful tools to create your templates:

- KSL Administration and its view Content Repository, allowing to create the shared resources used by your document and e-mail templates and the e-mail templates
- KSL Studio, a design tool for creating document templates

The following chapters present these use cases and tools.

2. Generate a PDF document with KSL

2.1. Use case of the automatic PDF generation

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If you are in relation with clients, partners or prospects, you certainly have to quickly generate personalized documents and send them. These documents must be personalized, with a professional content and with a perfect formatting.

KSL for Salesforce® has been designed to response to this need.

2.2. Generate a document in PDF format

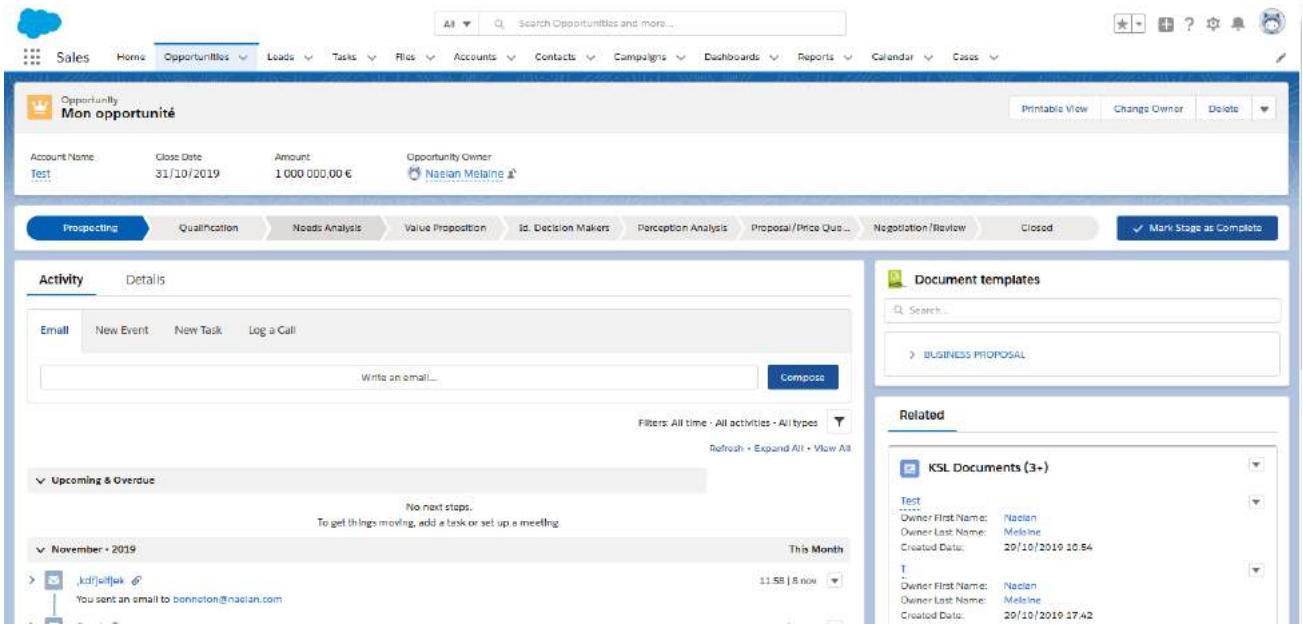
KSL covers this need by proposing an original approach to allow the user to:

- Generate a quality document automatically in one click
- Get a personalized document from Salesforce data
- Send the document in one click
- Archive the document in Salesforce®

From a contact, an account, an opportunity, or any other Salesforce® object, you can access document templates from the Document Templates view.

This view allows you to access the document templates that your administrator has made available to you, and that fit your context.

Let's take the example of an opportunity; in this example, a list of document templates appears on the right side of the opportunity window:



If the number of templates is important, a tree view can be displayed in which the templates are classified. A search input box above the templates allows you to search for the templates that fit your needs.

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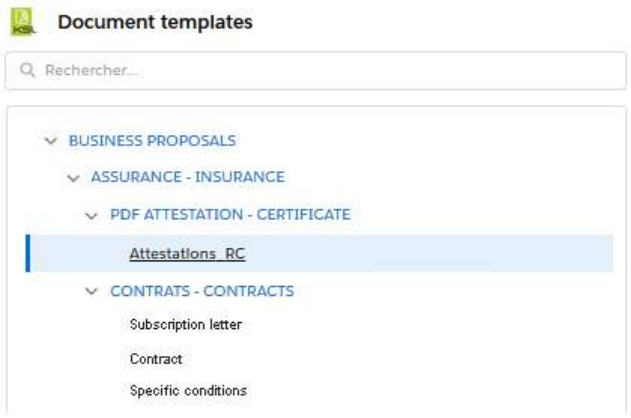
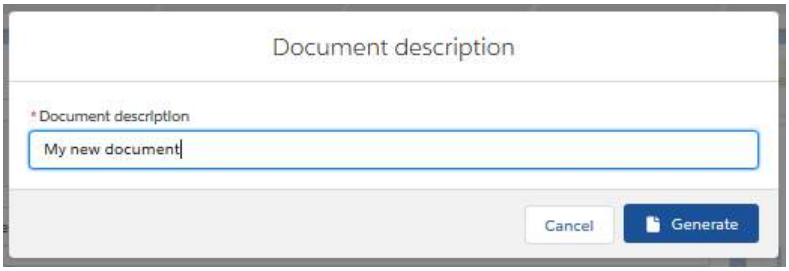
Note

- *On an object which presents steps (like the opportunity), it is possible that the list is conditioned on the step in progress, to present only the appropriate templates. The visible tree structure can therefore vary, depending on the step.*

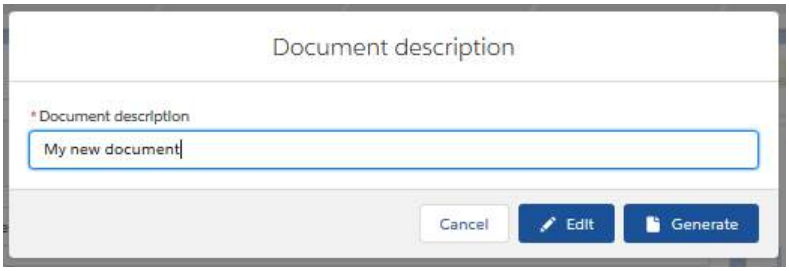


Select the document template by clicking on its label; a window appears.



Enter the Description of the document (50 characters maximum) and click on the Generate button to produce the document in PDF format.

Note: If the document template is to be modified interactively, a second Edit button is available next to the Generate button.



The action Generate produces a PDF document from the chosen template and with the data of your opportunity.

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The PDF document appears in a new tab of your browser.

This document is automatically linked to your opportunity: a PDF preview of the KSL document is available in the opportunity.

See chapter Access created KSL documents for more details.

3. Create an interactive document with KSL

3.1. Use case of the interactive creation of documents

The automatic creation of a PDF document is not always sufficient; certain types of documents such as contracts or RFPs, or even client letters, require an interactive modification of the document by the user.

This document must have a perfect formatting and must therefore be doubly personalized:

- Automatic personalization which allows you to have a document including data fields coming from Salesforce and a content adapted to these data
- Interactive personalization you can do on the document content

KSL covers this need by proposing an original approach designed to allow the user to:

- Generate a quality document automatically in one click and including personalized data from Salesforce
- Edit this document in a Salesforce® view, without the need for a third-party tool like MS Word®
- Generate a PDF version of this document in one click
- Archive and assign a version number to this document and send it
- Re-edit the document if necessary to create a new version

3.2. Create interactively a document

From a contact, an account, an opportunity or any other Salesforce object, you can access the document templates from the KSL Document templates component.

This view allows you to access the templates of documents that your administrator has made available to you, which correspond to your context.

Take the example of an opportunity; in this example, a list of document templates appears on the right side of the opportunity:

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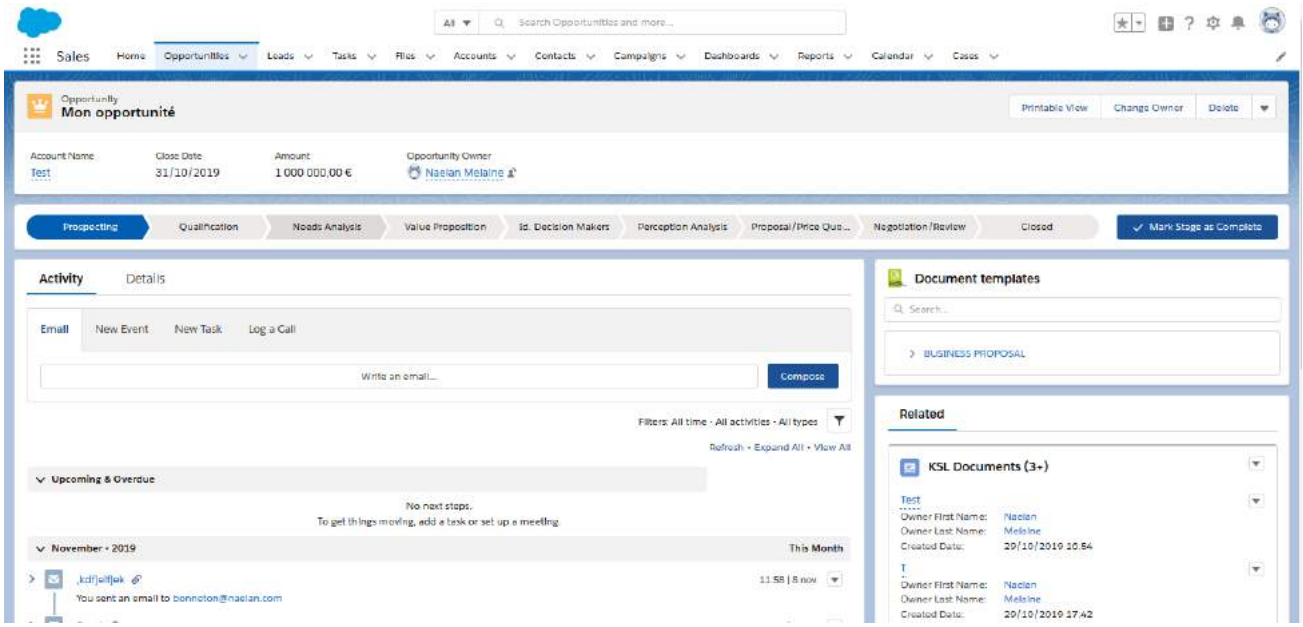
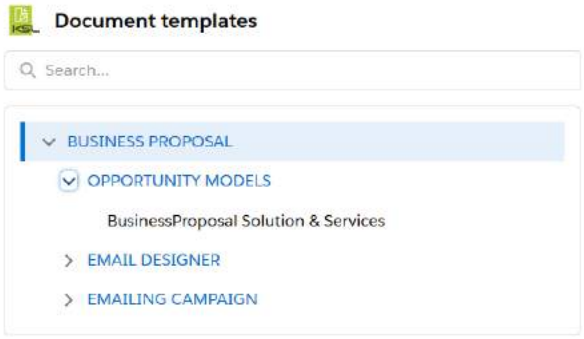
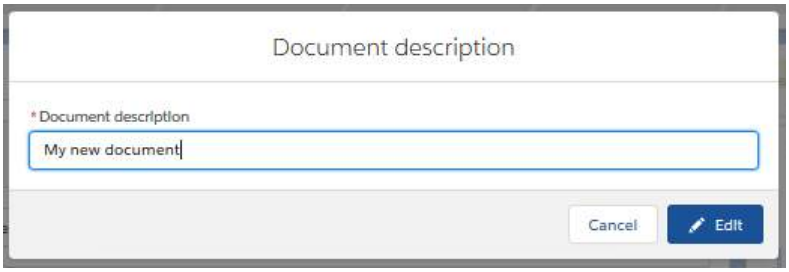


If the number of templates is important, a tree view can be displayed in which the templates are classified. An input box above the templates allows you to search for the templates that fit your needs.



Select the document template by clicking on its label; a window appears.



Enter the Document description (up to 50 characters.) and click Edit button: for modifying interactively the document.

Note: if the document template was also planned to be automatically generated in PDF without modification, a second button Generate is proposed next to the Edit button.

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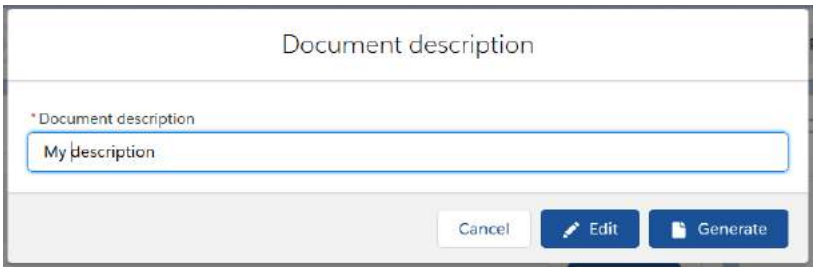
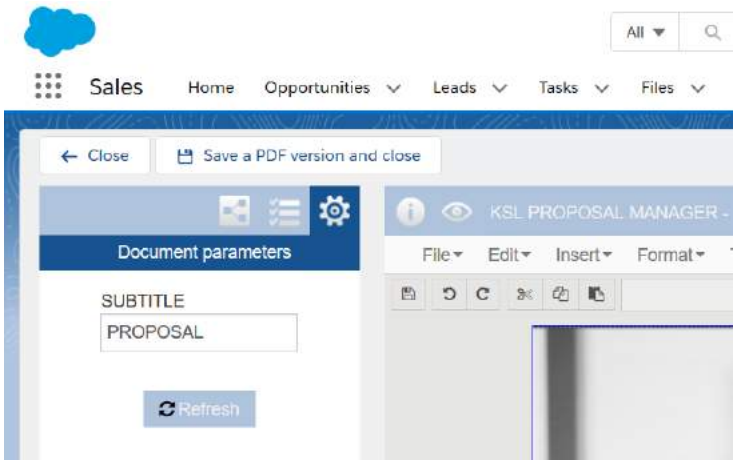


The Edit action creates an interactive document based on the selected template and data of your opportunity and modifiable document is displayed in the interactive KSL editor.



The KSL interactive editor is a powerful application that adapts to Salesforce data, to the template and to your KSL user profile. See for more details in KSL Interactive User Guide.

Example of a document edited in the interactive editor of KSL:

After saving your document, click on one of the two proposed buttons:

- Close:
  - Te modified document est accessible from your opportunity, bu no PDF is created
  - You can later edit again the document to continue its interactive modification
- Save a PDF version and close:
  - A PDF document is created and is displayed in a new browser window
  - The modified document and its PDF version are accessible from your opportunity
  - You can later edit again the document to continue its interactive modification.and create a new PDF version

See also the chapter View the document created by KSL for more details.

4. View the document created by KSL

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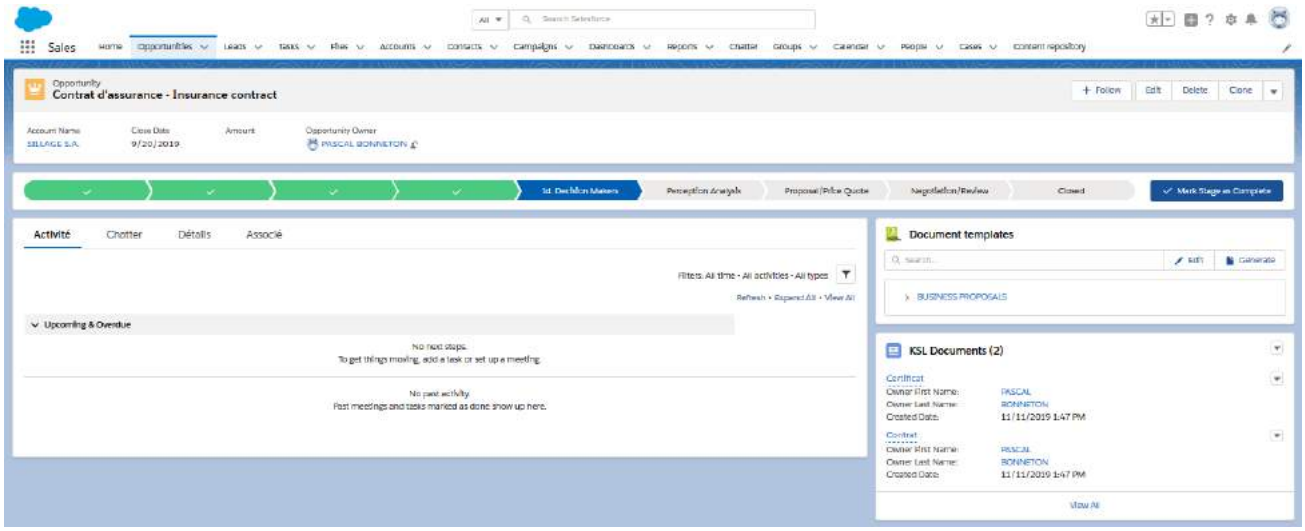
The document created by KSL is automatically linked to the object from which you created it. For example, if a document is created from one of your opportunities, it will be linked to the opportunity object. And one opportunity may has several KSL documents.

4.1. Display the documents of an opportunity

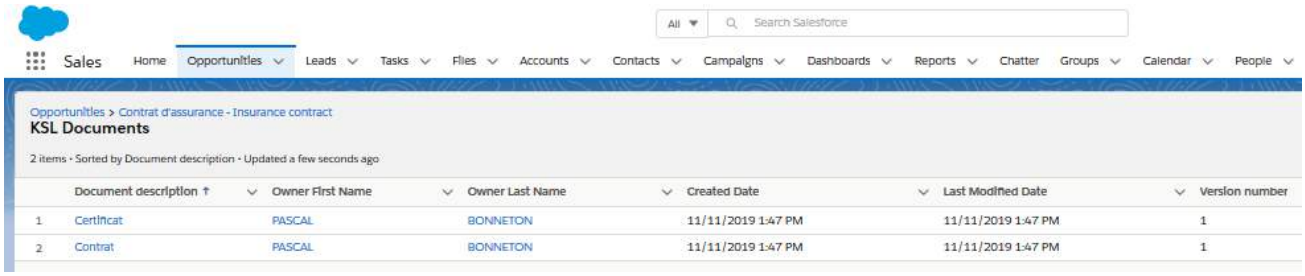
The documents attached to an object can be accessed by the KSL Documents view, displayed at the right of the opportunity view (the compact view of KSL documents).



This compact view list the latest documents created from the opportunity with the following information:

- The Description of the document, information you gave after selecting the template
- The owner of the document which is the user who created the document with the Owner Lastname and Owner Firstname information
- The Created Date which is the date and time of the document creation

The View all button provides access to a complete view (list view) that lists all the documents of the opportunity.



This list view presents the list of documents linked to the opportunity with the following columns:

- The Description of the document, you gave after selecting the model
- The owner of the document that created the document with the Owner Last Name and Owner First

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Name details

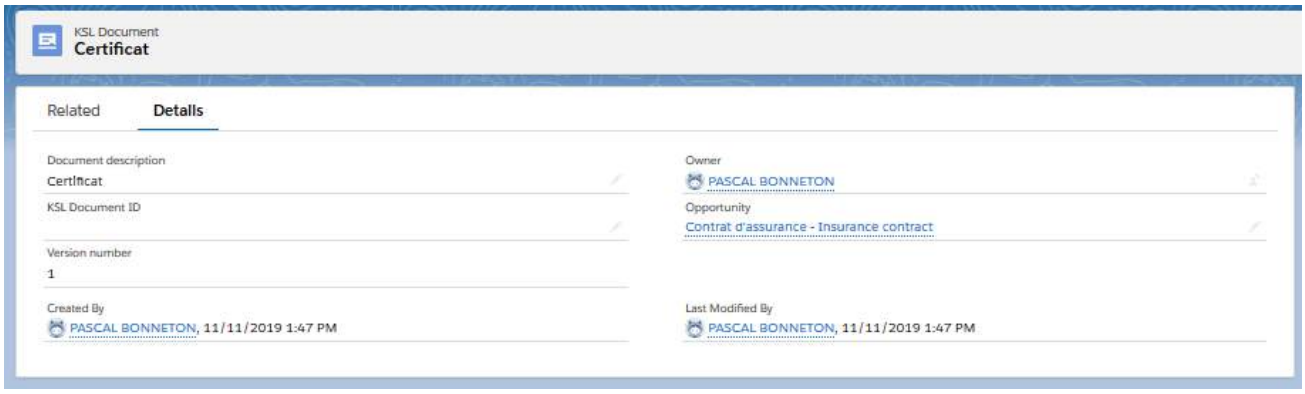
- The Created Date which is the date and time of the document creation
- The Last Modified Date which is the date and time of the last modification (equal to the date/time of creation when the document has been created)
- The Version number of the document (when created, this number is 1)

4.2. Access to KSL documents

Accessing to a KSL document is possible from the compact view or from the list view of KSL Documents. When you select one of the documents in these views, a page appears displaying the KSL document.

The fields of this view must not be updated manually. However, they remain modifiable but only by an administrator.

This page presents the interactive KSL document in Salesforce®.



In this object, you will find the Details tab with the following fields:

- Document description: document description in Salesforce®
- KSL Document ID: unique identifier of the interactive document in the remote KSL server
- Version number : the most recent version of the document (also equal to the number of PDF documents versions available for this document)
- Owner: the owner and creator of the document
- Opportunity : the opportunity from which you created the document

The Related tab lists all the linked PDF versions of the document.

- An only one version "1" for a document generated directly in PDF (not via an interactive document)
- From 0 to N versions for PDF created from an editable interactive document

In this object, you will find the following fields:

- Document description: document description in Salesforce®
- KSL Document: unique identifier of the PDF document in the remote KSL server

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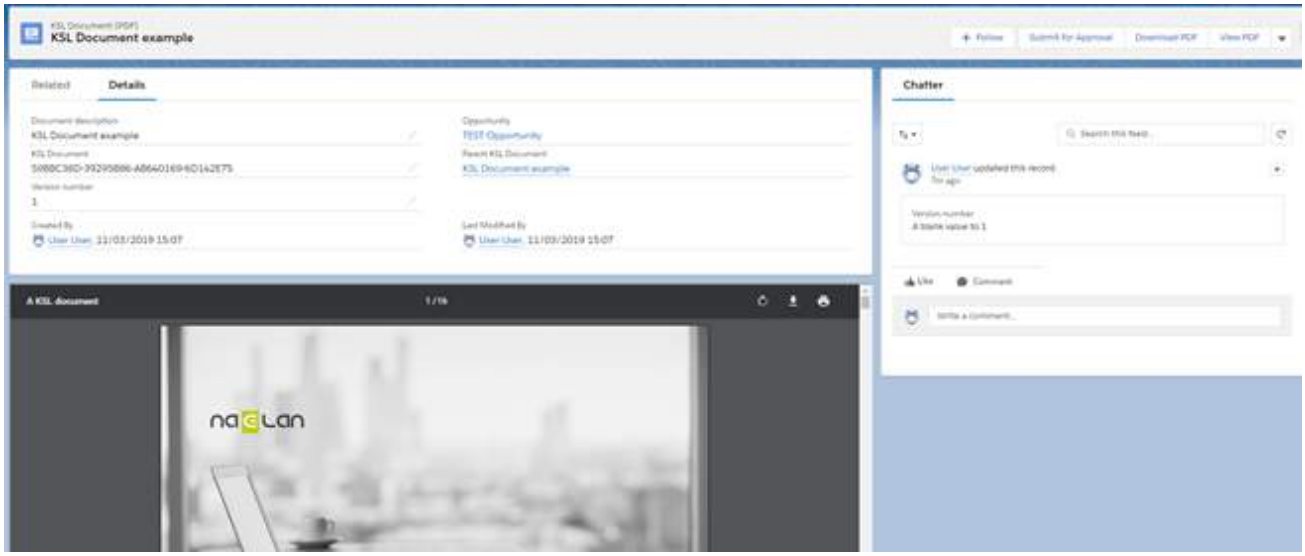
- Version number : the PDF document version
- Owner: the owner and creator of the document
- Opportunity : the opportunity from which you created the document

The PDF document is displayed below the details.



5. Actions on a document created by KSL

5.1. Action available on a PDF version of the document

Several actions are available when viewing a PDF document created by KSL. These actions that can be customized by your administrator, are listed below:

- Send by e-mail: to send the document as an attachment of a new e-mail
- Submit for approval: you can create a validation process and submit the KSL document using this button. You will find some examples of the validation process that you will be able to implement in section 7. Examples of validation circuits
- Download PDF: to download the PDF file
- View PDF: to view the PDF document in a new tab
- Delete: to delete the PDF document and its Salesforce® record. This action is available via the ▼ icon

5.2. Actions specific for sending the document by e-mail

The Send by e-mail button opens a new e-mail window with the PDF document as an attachment.

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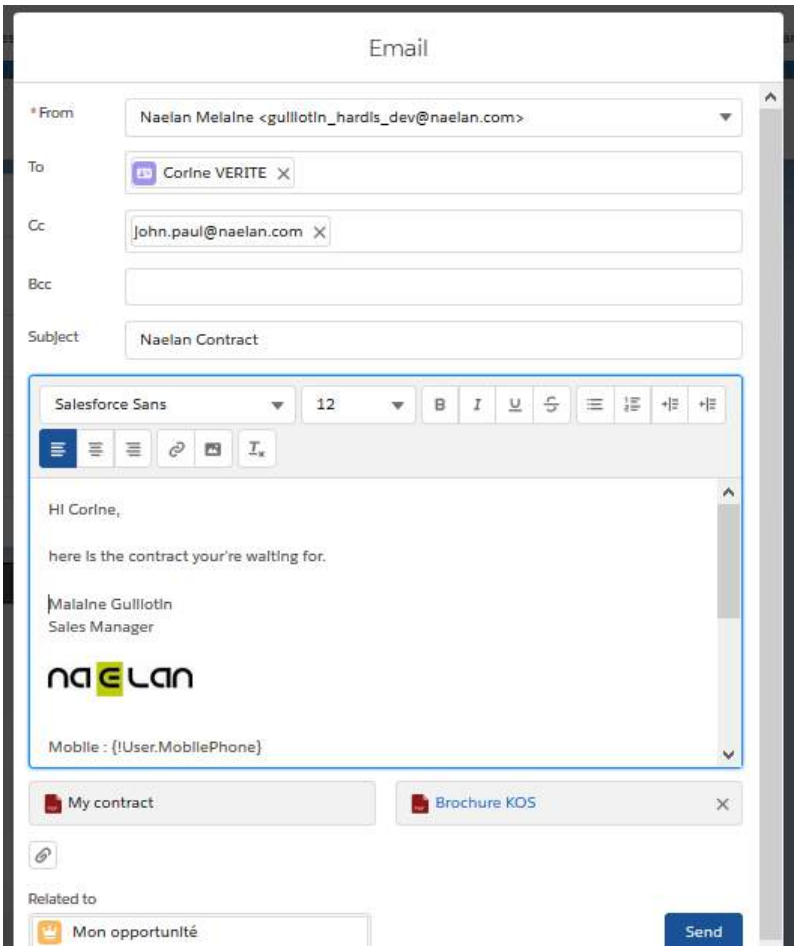

The e-mail is displayed in a KSL window which allows to finish and send the e-mail. This window has the same characteristics of a standard Salesforce email:

- The recipients fields (To, Cc and Bcc) allowing to select recipients in Salesforce® contacts or directly enter an e-mail address (example: john.paul@naelan .com)
- A subject field
- A body field where your e-mail signature is automatically inserted (if the signature was set in your profile)
- Additional attachments stored from Salesforce®
- Additional downloaded attachments from your workstation
- A Send button to send the e-mail

After being sent, the e-mail is saved as an activity in Salesforce activity associated with the opportunity that allowed the creation of the document. You can also forward the e-mail later to other recipients

Note:

- *The KSL e-mail component does not allow to automatically fill in the fields of the e-mail and in particular the fields Cc and Bcc; these fields are therefore empty when the e-mail is created; only the From field is automatically filled.*

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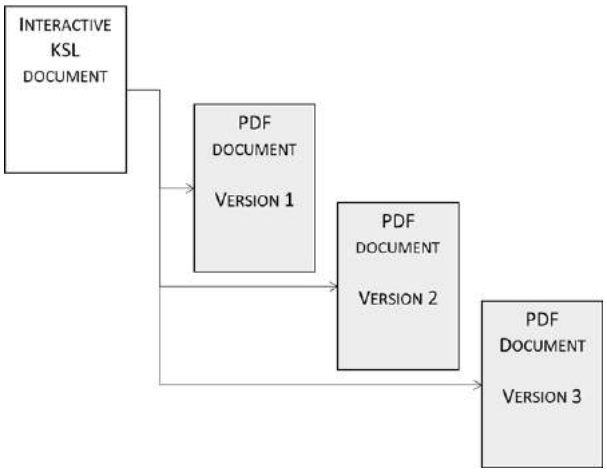
5.3. Action available on an interactive document

A KSL interactive document may generate several PDF versions (example: a contract may have been modified several times and several PDF versions can exist).



An interactive document is a document in the KSL format which is modifiable and allows to create PDF versions of the document you will send to your customers: this interactive document is an internal document.

The editable interactive version always corresponds to the most recent content: as a result, most of the time it corresponds to the editable version of your latest PDF version.

Several actions are available for this type of document. These actions can be customized by your administrator:

- Edit: open the document in a modification mode in the interactive KSL editor
- Submit for approval: submit the KSL document in a Salesforce® workflow
- Delete: delete the interactive document and the corresponding records in Salesforce®. If the interactive document is associated with one or more PDFs, they are also deleted.

6. Create response by e-mail with KSL

6.1. Use case of the creation of responses by e-mail

Some tasks performed by teams managing customer relationships, require repeated responses by e-mail .

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In this context, it is particularly effective for a company to create a customized response library that users can select and personalize in self-service. This library allows them to save time, to be more precise and clear with their interlocutors, while communicating in a very personalized way.

These e-mail responses must have a perfect formatting and be responsive to be read on any type of device (PC or mobile) and with a doubly personalized content:

- Automatic personalization which allows you to have an e-mail including data field of the customer coming from Salesforce®
- Interactive personalization for you to adapt the response before sending the e-mail

KSL covers this need by proposing an original approach designed to allow the user to:

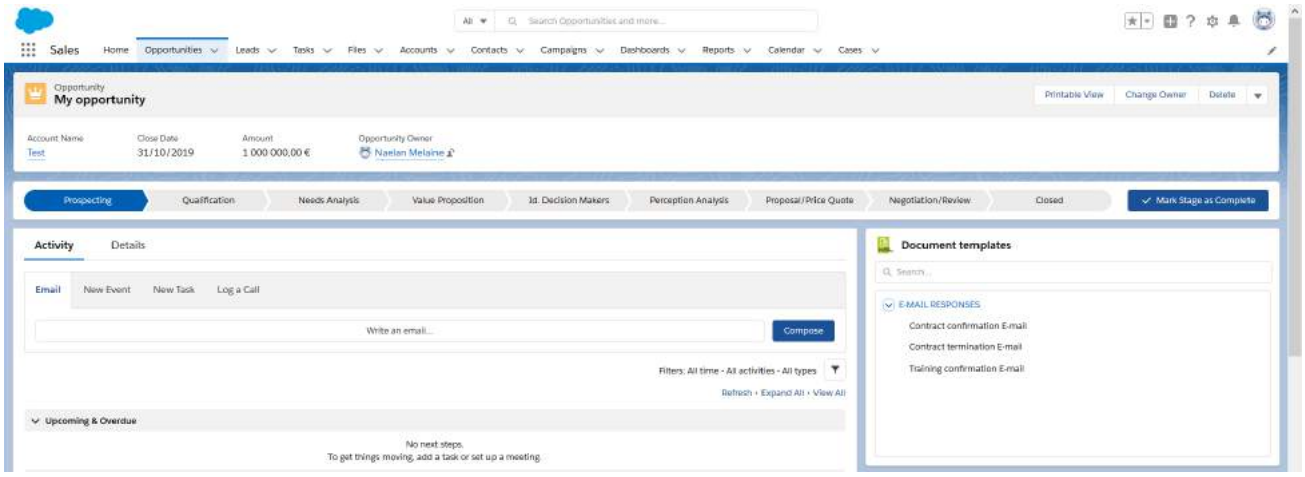
- Automatically generate a quality and personalized e-mail including Salesforce® data
- Personalize the e-mail body
- Send the e-mail and create an activity in the Salesforce® client view

6.2. Create a response by e-mail

From a case, a contact, an account, an opportunity, or any other Salesforce® object, you can access e-mail templates from the Document templates view.

This view allows you to access the e-mail templates that your administrator has made available to you, which correspond to the possible responses.

Take the example of an opportunity; in this example, the KSL Document templates view shows the e-mail templates on the right side of the opportunity:



Note:

- *If the number of e-mail templates is important, a tree view can be displayed in which the templates are*

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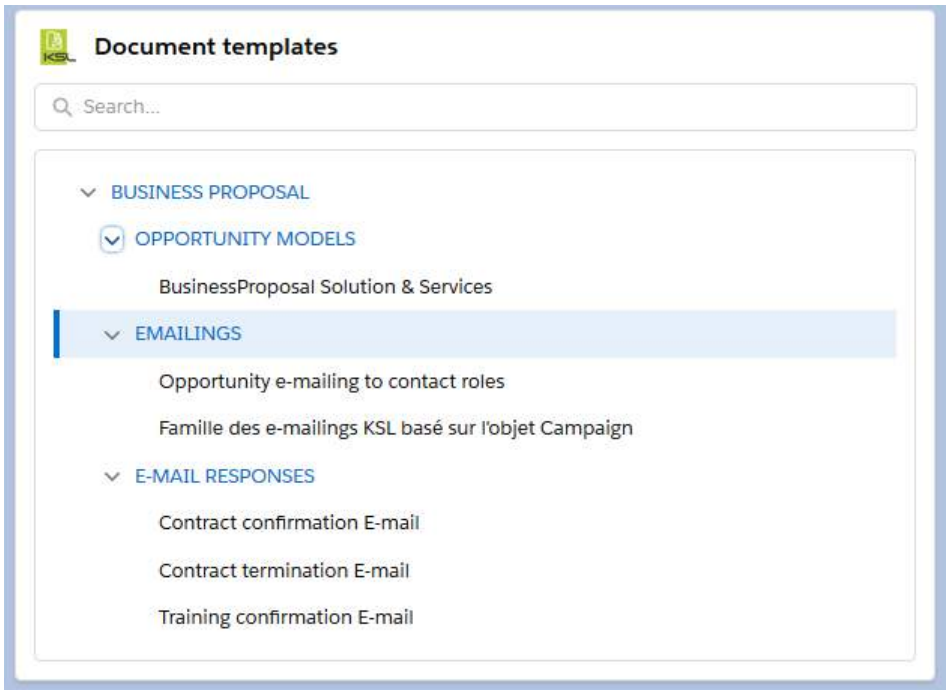
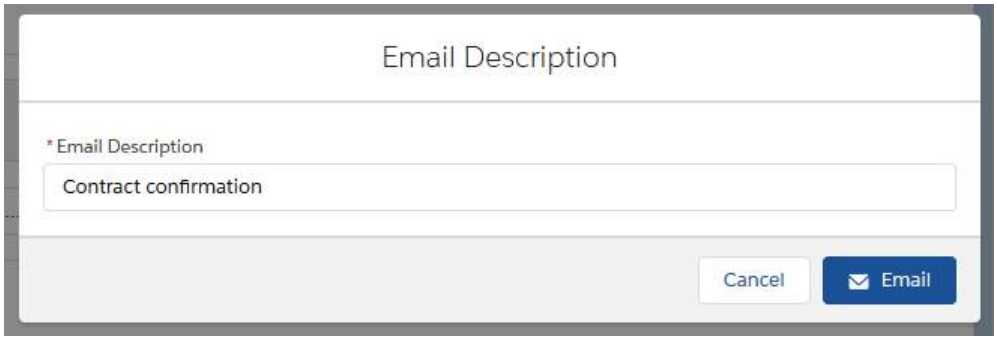
classify. An input box above the templates allows you to search for the templates that fit your needs.

- *This view can also include document and e-mail templates as below.*



Select the e-mail template by clicking on its label; a window appears.



Enter the Email Description (up to 50 characters) and click on the Email button to create and edit the e-mail.

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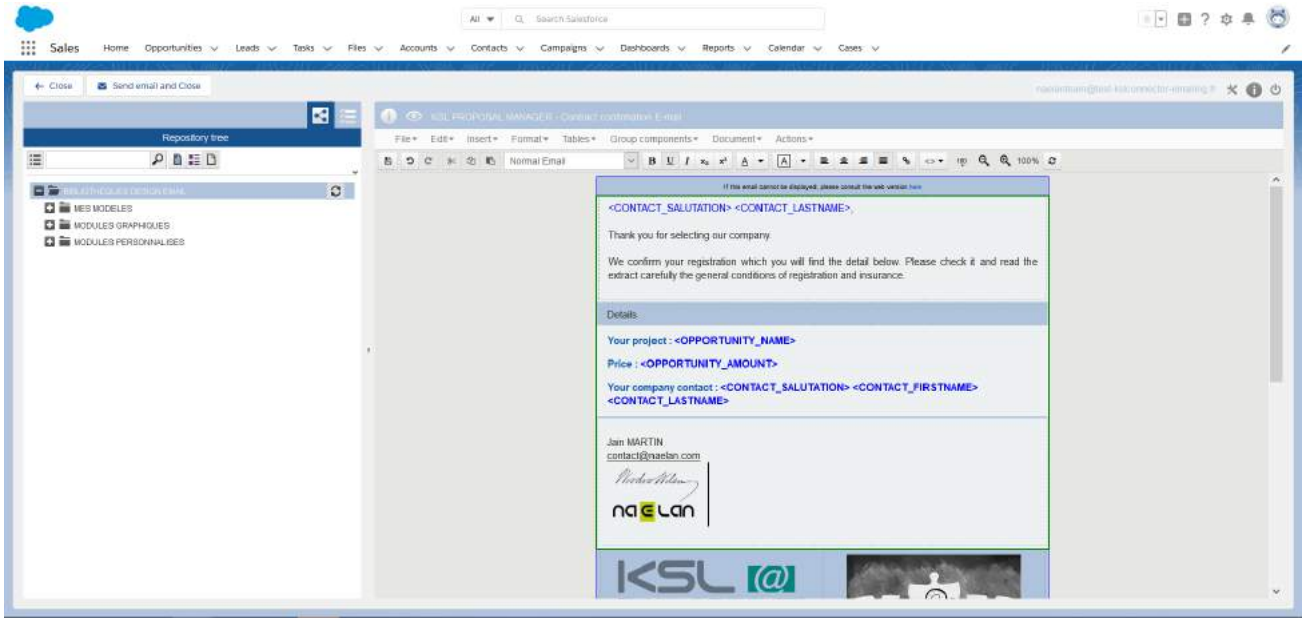


The KSL interactive editor is a powerful application that adapts to Salesforce data, to the model and to your KSL user profile.

Your e-mails can include:

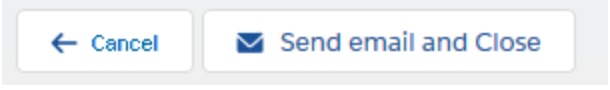
- Images and texts
- Tables
- Variable fields corresponding to the Salesforce data
- URL links allowing for example to insert web site addresses
- Dynamic URL allowing for example to insert addresses to personalized client web site

You can also drag and drop response blocks from the centralized content repository into the body of your e-mail. With a few clicks you can create complex and accurate answers without the need for a large number of e-mail templates.

See also the KSL Email Designer user guide for more information.

After saving your e-mail body with the button , click on one of the two proposed buttons:

- Cancel, if you wish to stop the creation of the e-mail
- Send e-mail and Close



The Send email and close button allows to create an e-mail from the body you have just personalized interactively and displays it in a KSL e-mail sending window.

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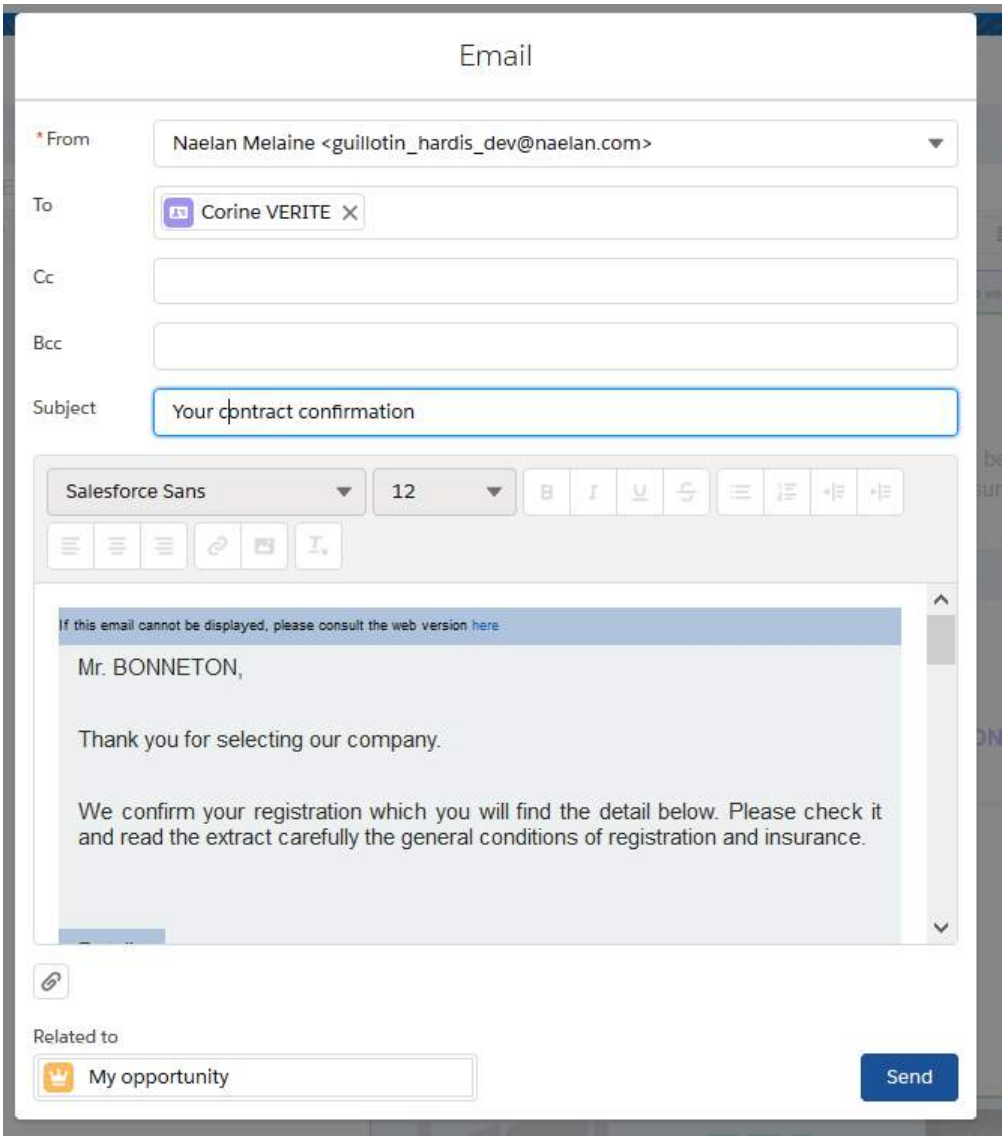

The e-mail is displayed in a KSL window which allows to finish and send the e-mail. This window has the characteristics of a standard Salesforce® email:

- The recipients fields (To, Cc and Bcc) allowing to select recipients in Salesforce® contacts or directly enter an e-mail address (example: john.paul@naelan .com)
- A subject field
- Additional attachments stored from Salesforce®
- Additional downloaded attachments from your workstation
- A Send button to send the e-mail

After being sent, the e-mail is saved as an activity in Salesforce® activity associated with the opportunity that allowed the creation of the document. You can also forward the e-mail later to other recipients

Note:

- *Once the interactive personalization one in the KSL editor, the body of the e-mail can not be modified in*

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the e-mail

- *The KSL e-mail component does not allow to automatically fill in the fields of the e-mail and in particular the fields Cc and Bcc; these fields are therefore empty when the e-mail is created; only the From field is automatically filled.*

7. Create e-mailings with KSL

7.1. Use case of the e-mailing creation

Companies usually have marketing automation tools to generate and manage leads. However, these tools are dedicated to marketing teams and provide little help to sales teams or customer support teams who need to communicate quickly to a list of customers, partners or prospects.

The creation of e-mailings by KSL makes it possible to answer this challenge with two objectives:

- Allow these operational teams to easily design e-mailings and send them
- Guaranty to the communication teams that these e-mailings will use validated contents and a graphic charter conforming to the image of the company

KSL allows you to create on demand any type of personalized e-mailing:

- Newsletters
- Information e-mails sent periodically
- Invitations to an event
- Targeted communication to prospect or customers
- Informational e-mail
- Etc.

These e-mailings must have a perfect and responsive formatting, in order for them to be read on any type of device (PC or mobile) and with a doubled content personalization:

- Automatic personalization which allows you to get an e-mailing including customer data fields coming from Salesforce®
- Interactive personalization you can do on e-mailing body and subject

KSL covers this need by proposing an original approach designed to allow you to:

- Create e-mailings
- Create and share e-mailing templates with colleagues
- Automatically generate quality, personalized emails from Salesforce® data
- Send the e-mail or send it to an external service provider chosen by your company
- Trace as a task each e-mailing in Salesforce

7.2. Create e-mailing

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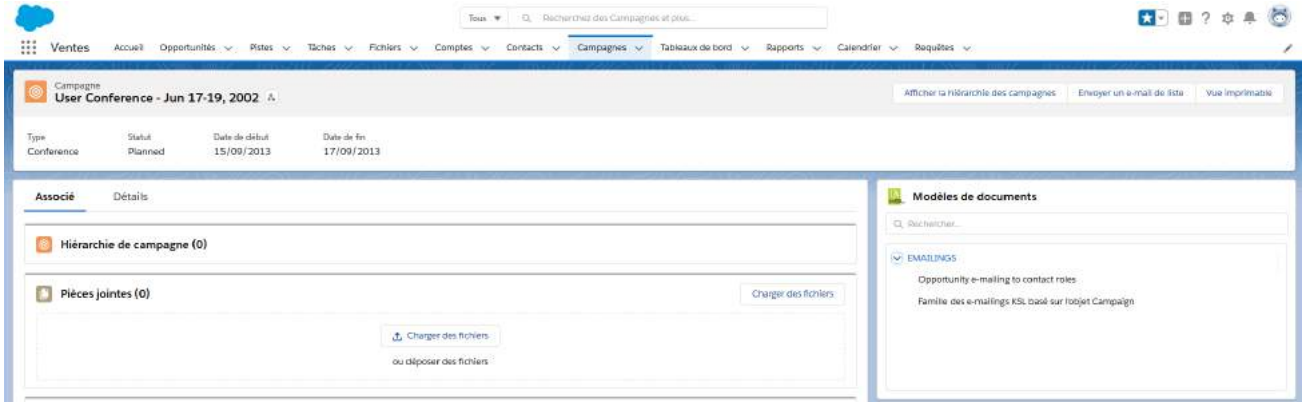
From a contact, a campaign, an opportunity, or any other Salesforce® object, you can access the e-mailing templates from the Document templates view.

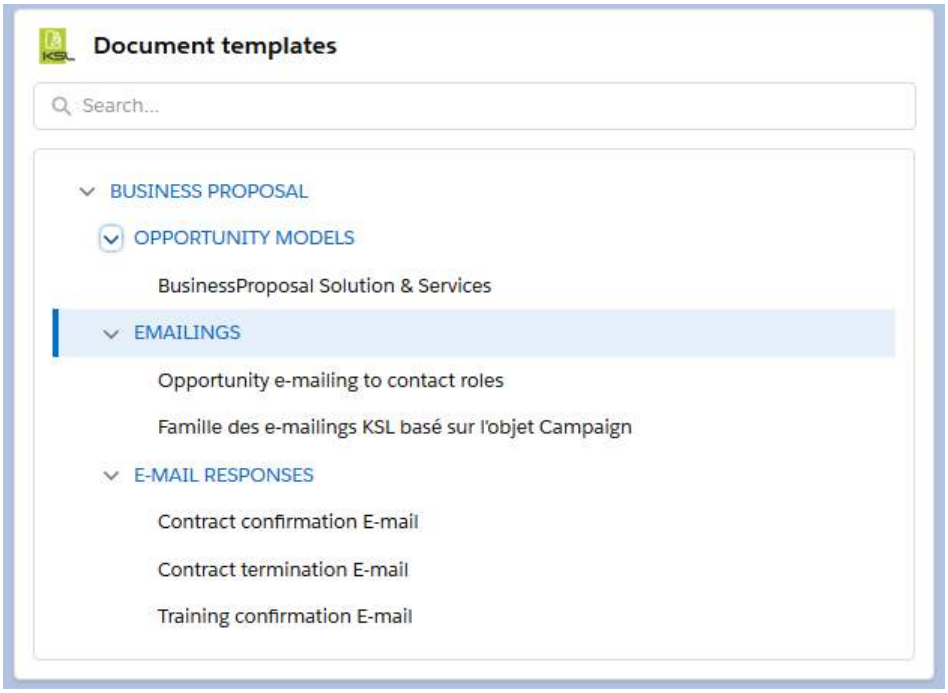
This view allows you to access templates of e-mailings that your marketing or your customer communication team has made available to you, and which correspond to your context. You will be able to create an e-mailing (mass sending) from these templates of e-mailing.

In this example, a list of e-mailing templates appears on the right side of a campaign.



Note:

- *If the number of e-mail templates is important, a tree view can be displayed in which the templates are sorted. An input box above the templates allows you to search for the templates that fit your needs.*
- *This view can also include document and e-mail templates as below.*



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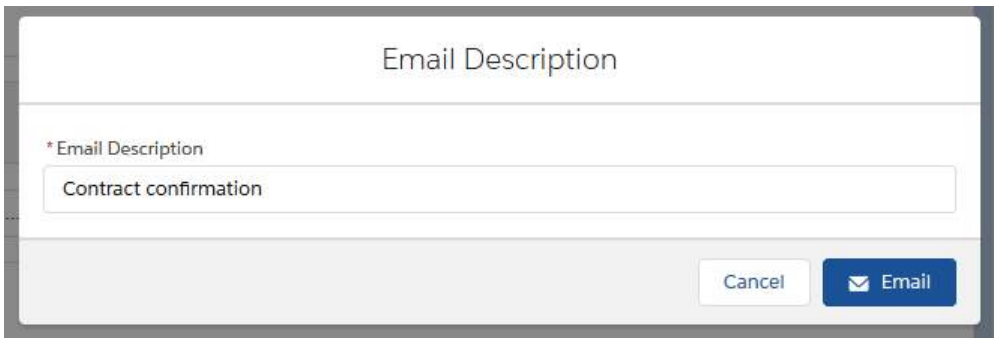
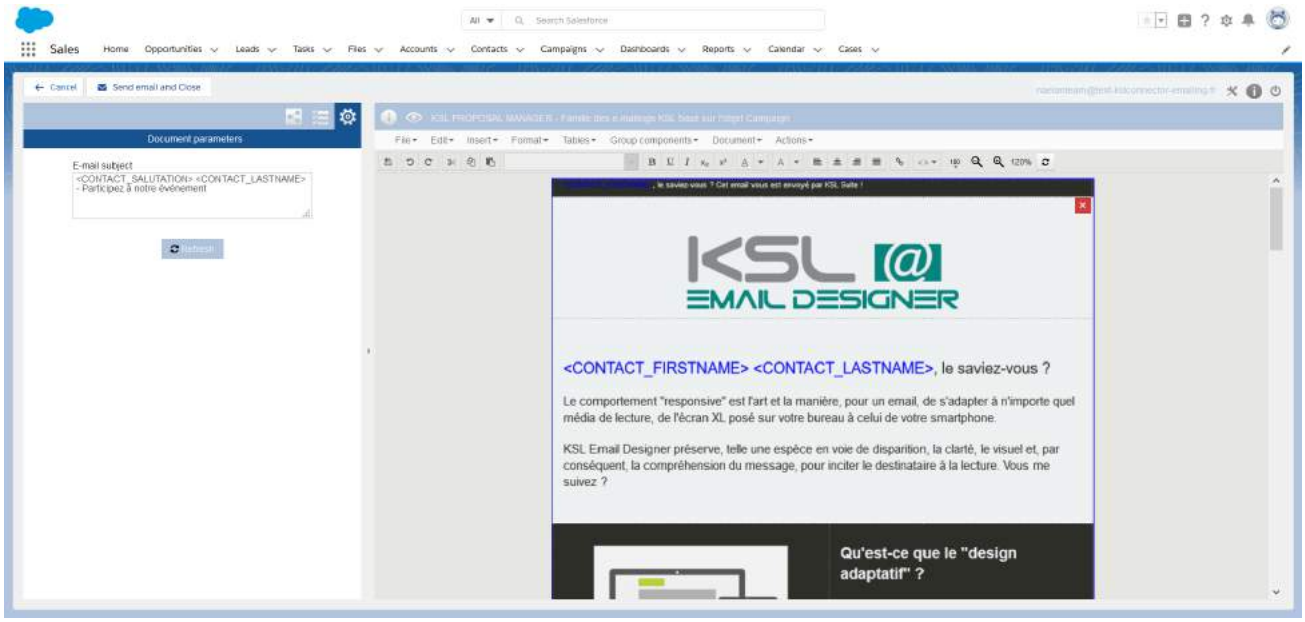
Select the e-mail template by clicking on its label; a window appears.



Enter the Email Description (up to 50 characters) and click on the Email button to create and edit the e-mail.



The KSL interactive editor is a powerful application that adapts to Salesforce data, to the model and to your KSL user profile.

Your e-mailing can include:

- Images and texts
- Tables
- Variable fields corresponding to the Salesforce data
- URL links allowing for example to insert web site addresses
- Dynamic URL allowing for example to insert each address to personalized client web site

From the tab accessible with the icon , you can drag and drop additional marketing banners, images and blocks from the centralized content repository into the body of your e-mailing. With a few clicks you can create nice and efficient e-mailing without the need of your marketing experts.

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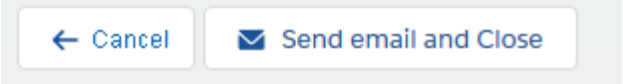
From the tab accessible with the icon , you can list the components used by the e-mail body.

From the tab accessible with the icon , you can access the different parameters of your e-mailing. Depending the template, you will be able to select the subject, the sending date/time, the send & track provider or the language of the content.

See also the KSL Email Designer user guide for more information.

The button Send email and Close allows to submit the e-mailing, with the body and subject you just created and Salesforce® data field.



After submission, a task is created for this e-mailing.

Note: Once the interactive personalization done in the KSL editor, the e-mailing is no longer modifiable.

Example of e-mailings:

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Design your e-mailing

Get responsive e-mail readable on any device

8. Multilingual or multi-brands document and e-mail templates

Any template for documents, e-mails and e-mailings can be implemented with the KSL variants mechanism, which allows you to create a template common to several languages, brands, sales networks, countries or agencies.

A template that uses this mechanism includes components (for example, a text zone) created for each language, brand, sales network, country, or agency.

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Example: Let's take a commercial proposal composed of 3 chapters and generated from an opportunity. It will be possible to create a specific chapter describing each reseller and the generation of the document will use automatically the content corresponding to the good reseller.

To implement this variant mechanism, it is necessary to define one or more variant criteria. These criteria automate the selection of the right content for a document or e-mail. In our example, the selection variant criterion will be the name of the reseller. The default criterion is the language that Salesforce sends.

Example:

The commercial proposal is composed of 3 chapters and generated from an opportunity:

- *Chapter 1: Description of the company*
- *Chapter 2: Description of the product proposed by the company*
- *Chapter 3: Reseller Description*

The translation criteria will be the reseller's name (a Salesforce field). And when generating the document, the reseller's name will be sent by Salesforce to KSL. The document will contain Chapter 1, Chapter 2 relating to this reseller and Chapter 3.

To implement this function relies on:

- Settings of the variant criteria (in our example the name of the reseller); this criterion is defined for your entire KSL project
- Content creation for each variant (for each reseller) from the application KSL Administration (Content Repository)
- Creation of document or e-mail templates which use these criteria and content

9. Design tools provided by KSL

KSL provides two powerful tools to design templates and content:

- The Salesforce KSL Administration application and its Content Repository view, allowing to create the shared resources used by your document and e-mail templates and to design e-mail templates
- KSL Studio, a Windows design tool for creating document templates

9.1. Content repository for shared resources creation

The KSL resources shared by the document and email templates are designed thanks to the Content repository view of the KSL Administration application. But your administrator is able to give you a direct access to this view from your standard Salesforce® application if necessary.

This application allows you to create the shared components (resources) used by your different documents and e-mails templates:

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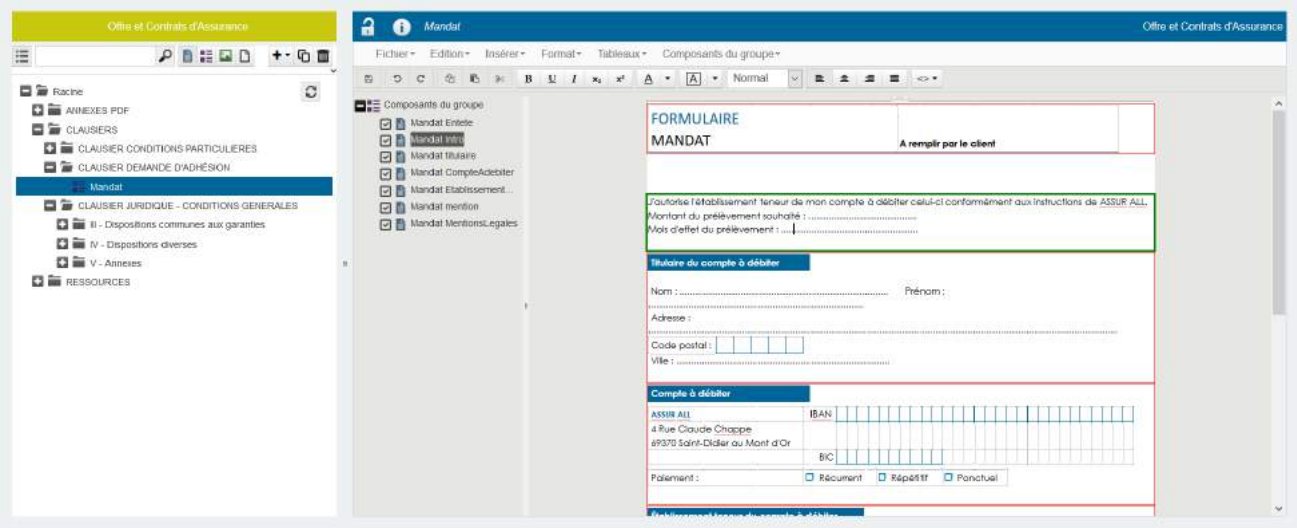
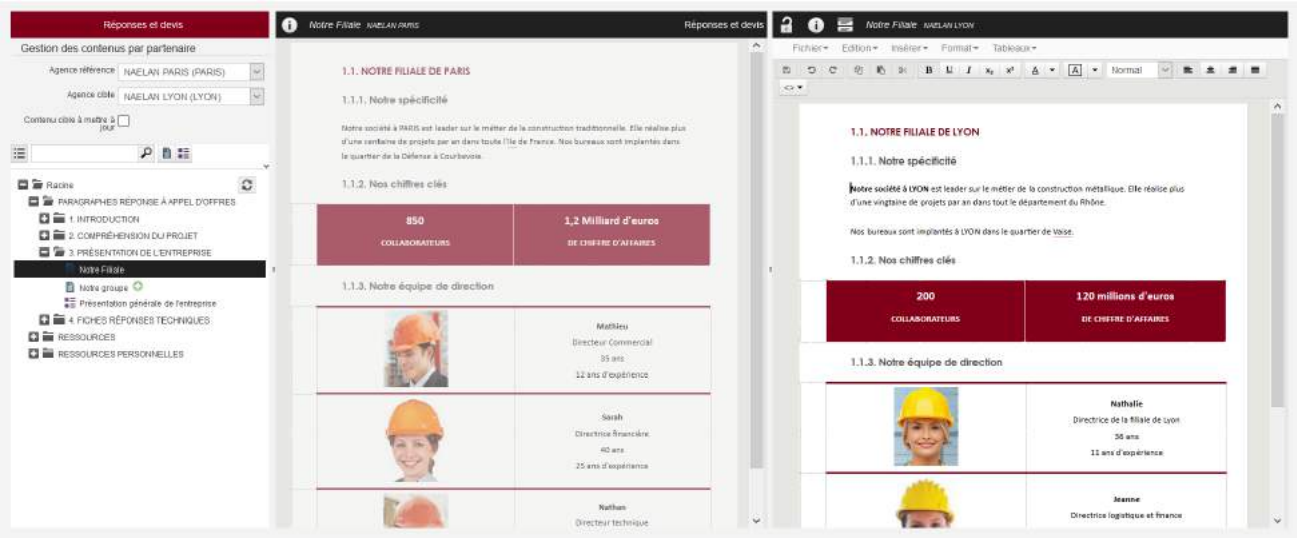
- Style sheets
- Text zones (in each language or brand if necessary)
- Groups of text zones (in each language or brand if necessary)
- Images
- External PDF documents
- E-mail and e-mailing templates

Example: creation of a group of text zones



Example: translation of text content (variant content use)



For more information, please see the KSL Office User Guide.

9.2. KSL Studio, design document templates

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The KSL Studio tool enables the design of advanced document templates for the generation of highly dynamic documents based on business data from Salesforce®.

KSL Studio allows the creation of dynamic and in some cases interactive document templates from components created by other KSL Studio designers or by business contributors using the Content Repository view.

To create models, KSL Studio relies on:

- A data schema generated from the KSL Administration application in Salesforce®
- Components created in the content repository by the Content repository application

KSL Studio makes it possible to generate complex documents in terms of data dynamism, conditioning and formatting and in particular:

- Conditions on the insertion of texts, pages, labels based on business Salesforce® data
- User input controlled by document templates during personalization
- Dynamic nested tables
- Conditions on the insertion of logos and images, but also of background pages
- Color management and style sheets

KSL Studio implements an optimized call of the components necessary for the generation of the documents, making it possible to limit the number of templates and to factorize the best use of the resources:

- Conditional call based on Salesforce® business data
- Dynamic call of images and background pages according to a business data (example: company code)
- Conditional and modular call of blocks of pages: details blocks, signature blocks...
- Conditional or dynamic call of text zones and marketing messages
- Conditional call of styles
- Application of display/date formats for amounts/date
- Etc.

These advanced graphical functions bring immediate benefits in this design phase:

- A productivity gain in the design of families of document, by modeling each common part once
- A easier maintenance, removing repeated modifications and their inherent risks of error
- A great flexibility in the production of documents, by a document generation driven by data

Example: document template design with KSL Studio

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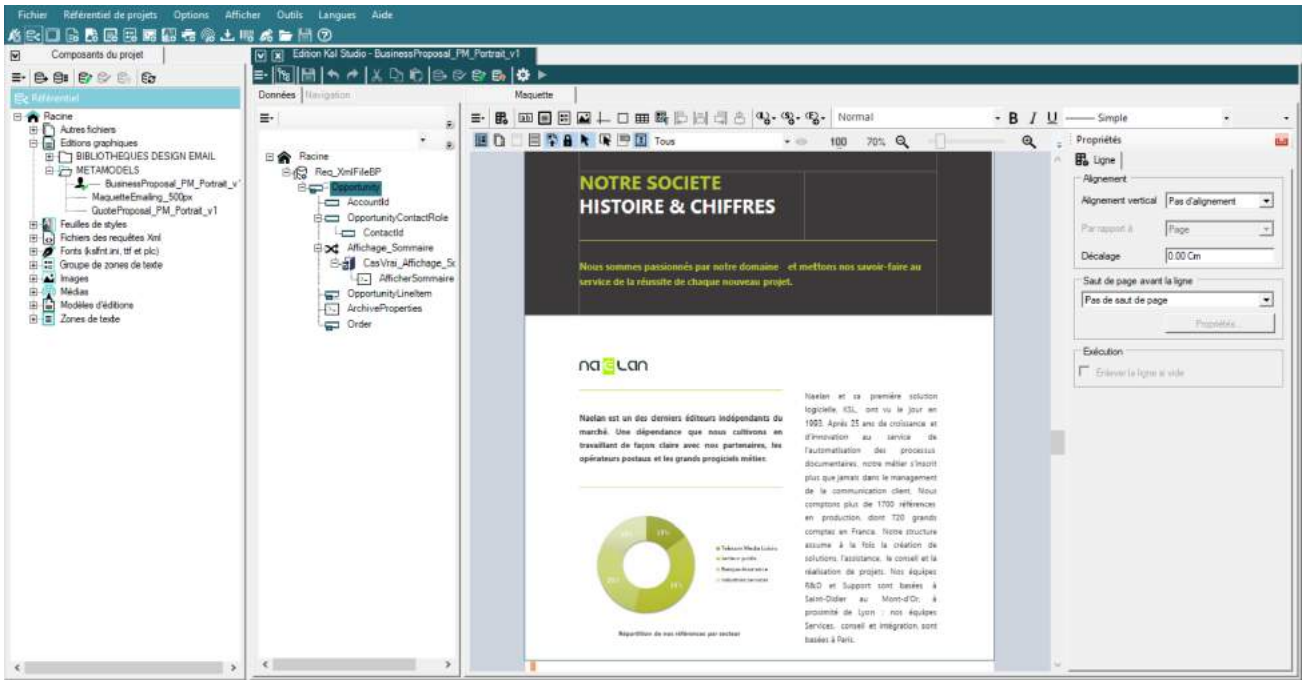

For more information, please see the KSL Studio Guide.

9.3. Content repository, for designing e-mail templates

E-mail templates are designed from the Content Repository view, which by default is accessible from the KSL Administration application. But, your administrator is able to give you access to this view from your standard Salesforce® application.

This application allows you to create e-mail templates but also the shared components used by your different templates:

- Style sheets
- Text zones (in each language or brand if necessary)
- Groups of text zones (in each language or brand if necessary)
- Images

It also allows to manage a list of URL links used by your different e-mail templates.

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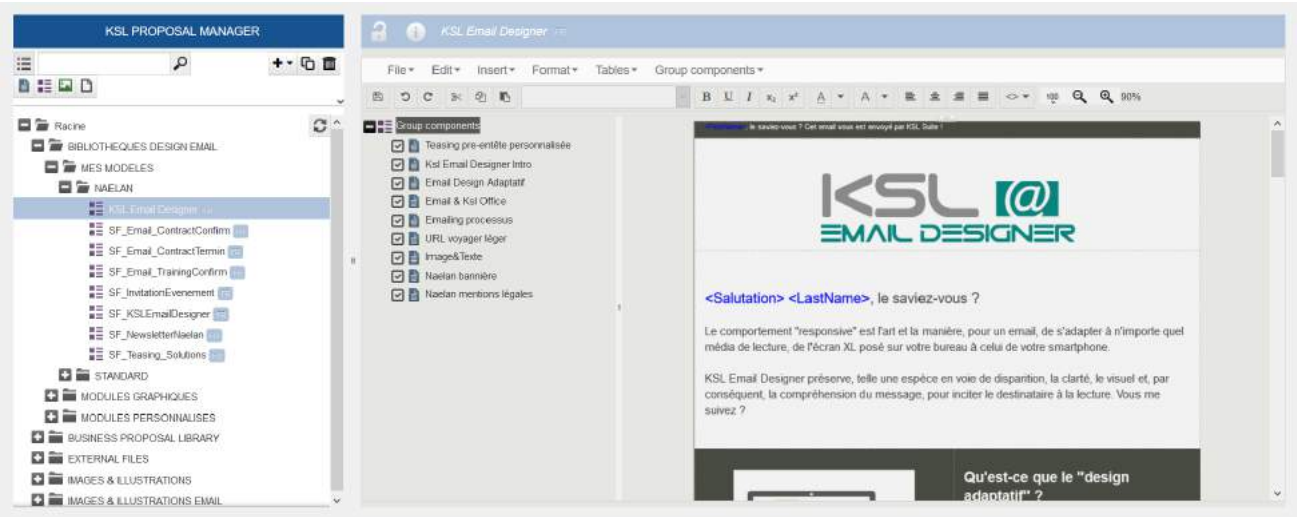

For more information, please see the KSL Email Designer Guide.

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