

# KSL FOR SALESFORCE USER GUIDE

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Unless otherwise stated, the companies, names and data used in our examples are fictitious ; any reconciliation with real companies or entities would be the result of coincidence.

## Typographic conventions

<i>Text file sample</i>	Code example or file settings
	Note, information
 Chapter, Guide	Reference to another guide or chapter
<i>Example</i>	Example, variable, code extract
Keyword, label	Keyword, application label, important item

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## 1. Introduction

KSL for Salesforce® is a software solution improving the daily work of 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®:

- Generate documents on demand
- Create and personalize documents interactively
- Create and personalize responses by e-mail
- Create and personalize e-mailings

KSL provides powerful tools to create templates:

- KSL Administration and its view Content Repository, allowing to create the shared resources used by 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 document on demand with KSL

### 2.1. Use case of the document generation in all formats

A company in relation with clients, partners or prospects need to quickly generate variable 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. It allows to generate all types of documents on demand, regardless of the format linked to the chosen template, PDF, docx, pptx, .zip, etc.

## 2.2. Generate a document on demand

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

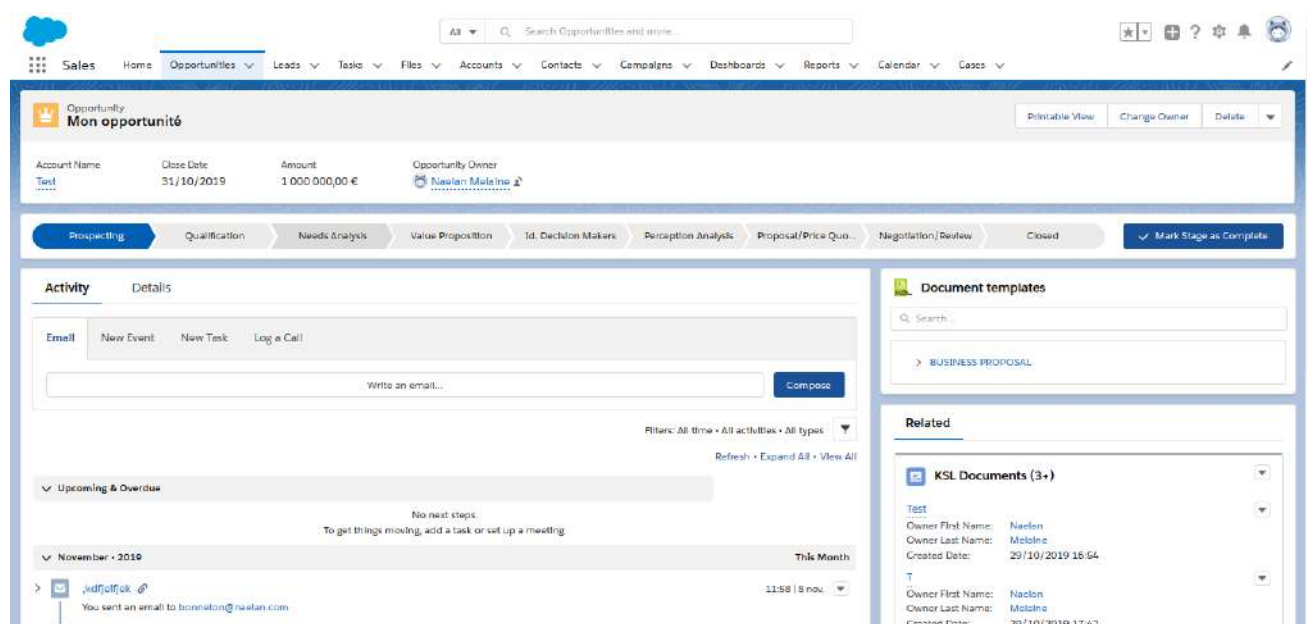
- Generate a quality document automatically in one click
- Get a personalized document from Salesforce data
- Send the document in one click
- Archive the document in Salesforce®

Thanks to KSL, document templates are provided to users from a Document Templates view, displayed from a contact, an account, an opportunity, a request or any other Salesforce® object.

 An alternative consists in creating an action button dedicated to a document template. For more details, refer to the chapter Create a KSL document from a quick action: the push-button.

This Document Templates view allows to access document templates that administrator has made available to users, and fitting a business 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 in the Document templates view:



The screenshot displays the Salesforce interface for an Opportunity record. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Calendar', and 'Cases'. The main content area shows the Opportunity details for 'Mon opportunité', including fields for Account Name, Close Date (31/10/2019), Amount (1 000 000,00 €), and Opportunity Owner (Naelan Mielaine). Below this is a stage selector with options like 'Prospecting', 'Qualification', 'Needs Analysis', 'Value Proposition', 'Id. Decision Makers', 'Perception Analysis', 'Proposal/Price Quo.', 'Negotiation/Review', and 'Closed'. The 'Activity' section shows a list of activities with a 'Compose' button. On the right side, the 'Document templates' view is active, displaying a search bar and a list of templates, including 'BUSINESS PROPOSAL'. Below this, the 'Related' section shows 'KSL Documents (3+)' with details for each document, such as Owner First Name, Owner Last Name, and Created Date.

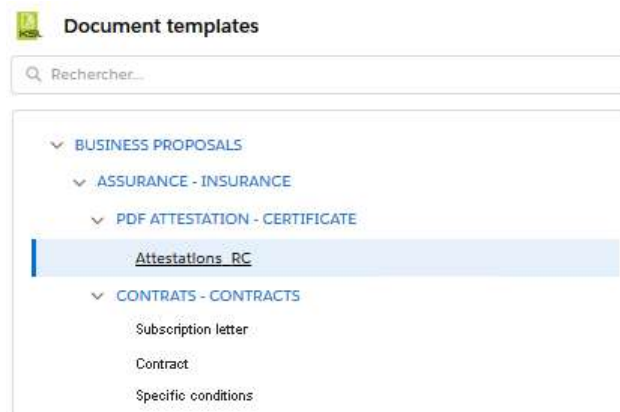
If the number of templates is important, a tree view can be displayed in which the templates are classified. A search input box above the templates allows to search for the templates that fit the needs.

The content of the Document templates view can be adapted to a context by the definition of several views conditioned by Salesforce fields:

- Each view can be displayed with a different title
- Each view can be set to display only the templates under a root node
- Each tree view can be folded or unfolded

When the unfolded option is set, all templates and nodes in the tree are displayed; this option is suitable for contexts where a small number of nodes and templates are proposed. When the folded option is set, only nodes in the tree are displayed and the user must manually unfold the nodes to access the models.

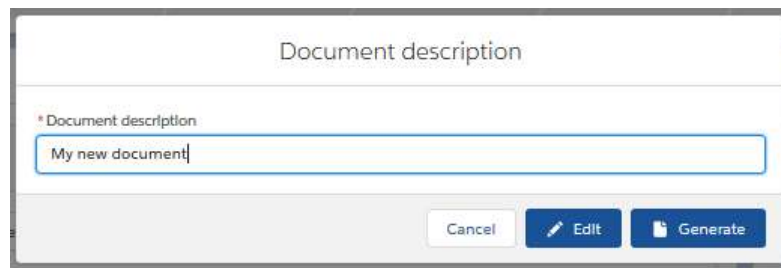
**i** Note that the display of the templates is also conditioned by the permissions of the users. A user role will potentially be able to access templates that other roles will not see.



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 final format. The default value of this field is the the name of the template.

**i** If the document template is to be modified interactively, an Edit button is available. A template can provide the two Edit and Generate button.



The action Generate produces a document from the chosen template and with the data of the object (e.g. an opportunity).

This document is automatically linked to the object: a preview of the KSL document is available in the associated page, by clicking on the list of documents.



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 to have a document including data fields coming from Salesforce and a content adapted to these data
- Interactive personalization that the user can apply on the document

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, the document templates are available from the KSL Document templates component.



This view allows a user to access the templates of documents that the administrator has made available to him, which correspond to his context.

*In the example below, a list of document templates appears on the right side of the opportunity object:*

If the number of templates is important, templates can be classified in a tree. An input box above the templates allows to search for the templates that fit the need.

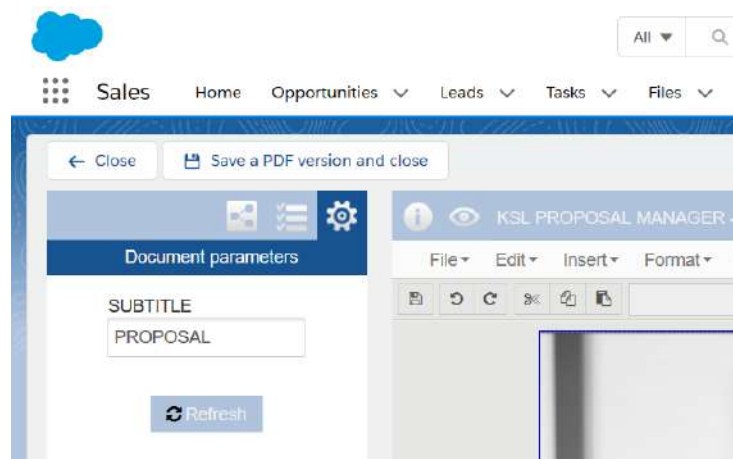
The content of the Document templates can be adapted to the context.  see above the possibility to adapt this view described in the previous chapter Generate a document on demand with KSL.

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. The default value of this field is the name of the template.

**i** If the document template is planned to be automatically generated in PDF without modification, a second button Generate is proposed next to the Edit button.

The Edit action creates an interactive document based on the selected template and data of the object 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 the KSL user profile. See also the KSL Interactive User Guide for more details.

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

- Close:
  - The modified document is available from the object, but no PDF is created

- The document can be edited later again 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 available from the object
  - The document can be edited later again to continue its interactive modification and to create a new PDF version



See also the chapter [View the document created by KSL](#) for more details.

## 4. Create a KSL document from a quick action: the push-button

It is possible to configure the launch of an edition commonly associated with an object on a quick action button. In which case the creation of the KSL document will be carried out with a single click, from the list of quick actions of the object, without going through the selection via the list of models.

In this context, the document launch is fully configured behind the action button:

- Targeted KSL document template
- Document name (which can be made variable using the opportunity name for example)
- Launch mode

For a commercial offer at the press of a button on the opportunity, for example, a click on the quick action button will allow to immediately obtain the document in the format defined for the template or to start personalizing the document, depending on the launch mode configured and authorized for the KSL document model.

## 5. Interactive document

An interactive document aims to give an user the control on the final interactive personalization of a composed and personalized document.

A interactive document can differ according each context:

- Light modification: e.g. choosing an alternative of text zone or adding a personalized text on the body of a mail,
- Medium modification: e.g. modifying text paragraphs but also adding a chapter, when redacting proposals or contracts of several pages
- Building a complete document: e.g. building a document from a "white page" and assembling existing blocks of paragraphs and chapters of the repository, when redacting specific contracts or RFPs.

An interactive document is accessible from Ksl Office; its launch can also be realized from a business application via the LaunchKid web service.

Note: The KSL interactive document editor is used in several commercial offers including KSL Proposal Manager, KSL Suite and KSL for Salesforce. Check with your sales representative for details on the usable functions of the publisher for the license you have acquired.

### 5.1. Document display

The interactive document does not appear as a final document, even if it is very close to it.

The difference lies mainly in the automatic page breaks, recalculated according to the components potentially deleted, added or moved.

If the document has a summary, the page number will not be indicated.

If you have defined an overlay, it is presented under the document but there may be a discrepancy between the content of the page and its overlay. This offset will disappear on the final document, so it is necessary to request the PDF preview of the final document before any distribution.

### 5.2. The personalizable components

Personalizable content concerns two types of component: text zones and the groups of text zones, each of these types with its own characteristics.

#### a. The Text zone, personalizing content

A text zone present in an interactive document allows:

- the modification of its content
- its logical or physical removal
- some alternative text zones, personalizable or not personalizable

Accessing to the personalization of a text zone obeys to the combination of several rules:

- the text zone is defined as Editable and / or Deletable in the document template in Ksl Studio (properties of the text zone)
- alternatives are defined in Ksl Studio on this text zone (properties of the text zone)
- the user must have edition rights on the document preview (rights defined in Ksl Admin)
- if the text zone is shareable (text zone stored in the repository), it can be set as "to be personalized" thanks to a check box in the Information view of the text zone in Ksl Office; this option informs the user on the need to modify its contents during the interactive personalization.

## b. The Group of text zones, customizing document structure and content

A group present in an interactive document authorizes:

- content personalization, which means that all or some of the text zones composing it are allowed to be modified by users
- its logical or physical removal
- the logical or physical removal of text zones, sub-groups or external files (Pdf) of the group
- moving text zones, sub-groups or external files in the group
- adding a new text zone, a new sub-group, a page break or an external document to the group
- providing to the user a choice between several alternative groups

Like text zones, accessing to the personalization of a group obeys to the combination of several rules:

- the group is defined as Editable and / or Deletable in the document template in Ksl Studio (properties of the group)
- alternatives are defined in Ksl Studio for this group (group properties)
- the user must have edition rights on preview (defined in Ksl Admin)

Within the group, text zones are subject to their own rules, defined on the group in the Ksl Office repository:

- allow to be split on page breaks
- authorize modification
- allow deletion

These last two issues make it possible to protect chosen contents (legal notice and other legal or sensitive texts for example), whatever the context of use. These rules have a priority over the properties of the component in the document template.

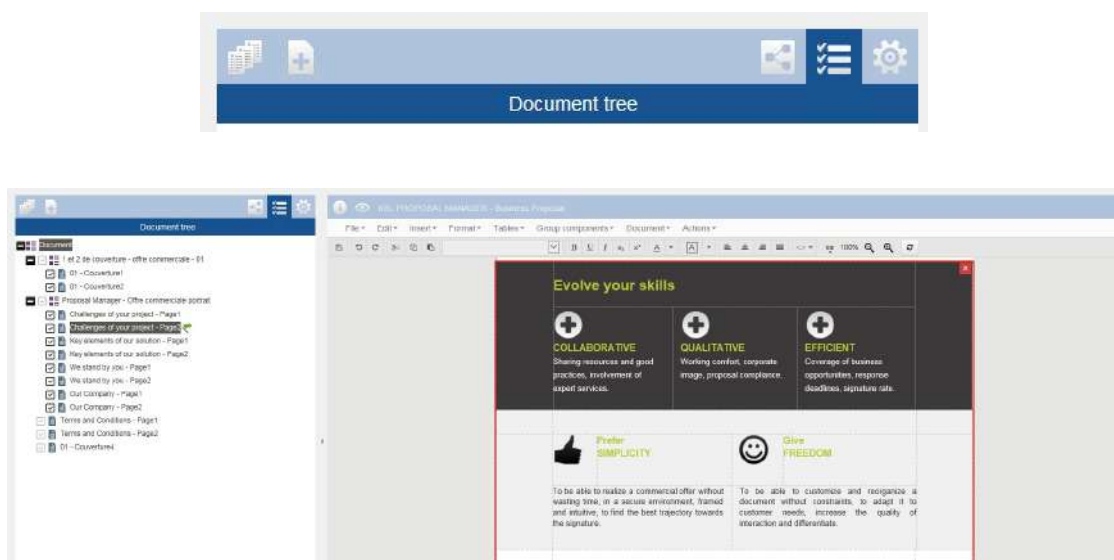
## 5.3. Save your document

The customizations of your document must be saved at regular intervals if you want to find them again when you reopen your document, or to avoid losing them if your interface is accidentally closed.

- the floppy disk on the toolbar of the text editor allows you to save your document
- some actions, such as archiving, automatically re-saves your document
- An automatic saving of your document can also be programmed: it is defined in the project options (KSL Admin) and will be triggered on a time interval also to be specified in these options. Note that too frequent automatic recording can be penalizing if you are working on an interactive document with a very large volume of content.

#### 5.4. The "Document tree" view

The list of customizable components is available in the Document tree view accessible from the toolbar of the interactive document.



This list allows:

- Navigate into the document and access to the list of potentially modifiable or deletable components. It really allows the user to spare time especially with long documents: with a simple click on the target content, the user accesses directly to the text on the right.
- Move text zones, sub-groups and external files within a group by drag & drop; the document is then automatically impacted in real time.

It also gives indications on the customization of the interactive document:



the personalizable component is a text zone



the personalizable component is a group

<input checked="" type="checkbox"/>	the component is deletable (logical removal)
<input type="checkbox"/>	the component has been removed (logical removal)
	the content of the component has been personalized; it can be a text personalization or the selection of an alternative to the component proposed by default
	the component has been added to the document, necessarily inside a group, and it has been personalized
	the component is "to be personalized", but has not been personalized yet
	The external PDF file encountered a uploading problem
	The external PDF file is protected and cannot be inserted
	the component has been added to the document, necessarily inside a group
	there is a new version of the component (not personalized) in the repository
	there is a comment on this component (visible in comment mode only)

Some examples:

<input checked="" type="checkbox"/> ComptePB - Cas général	The text zone is personalizable and deletable, but it has not been personalized
<input checked="" type="checkbox"/> Date d'effet - Sans refonte année N	The text zone is not deletable but it has been personalized
<input checked="" type="checkbox"/> Base résiliation - 3 mois	The text zone is not deletable ; it is "to personalized"
<input checked="" type="checkbox"/> Modalités de règlement	The text zone is not deletable and it has not been personalized, but it has a newer version in the repository
<input checked="" type="checkbox"/> Complément législation	The text zone has been added and it has been personalized. It is deletable
<input type="checkbox"/> <input checked="" type="checkbox"/> Groupe Législation&Réclamations	The group is personalizable but it is not deletable.
<input checked="" type="checkbox"/> 1.9. Législation traitement données personnelles	It is composed of 3 text zones with different personalization properties. The text zones can be moved inside the group.
<input checked="" type="checkbox"/> Complément législation	
<input checked="" type="checkbox"/> 1.10. Les réclamations	

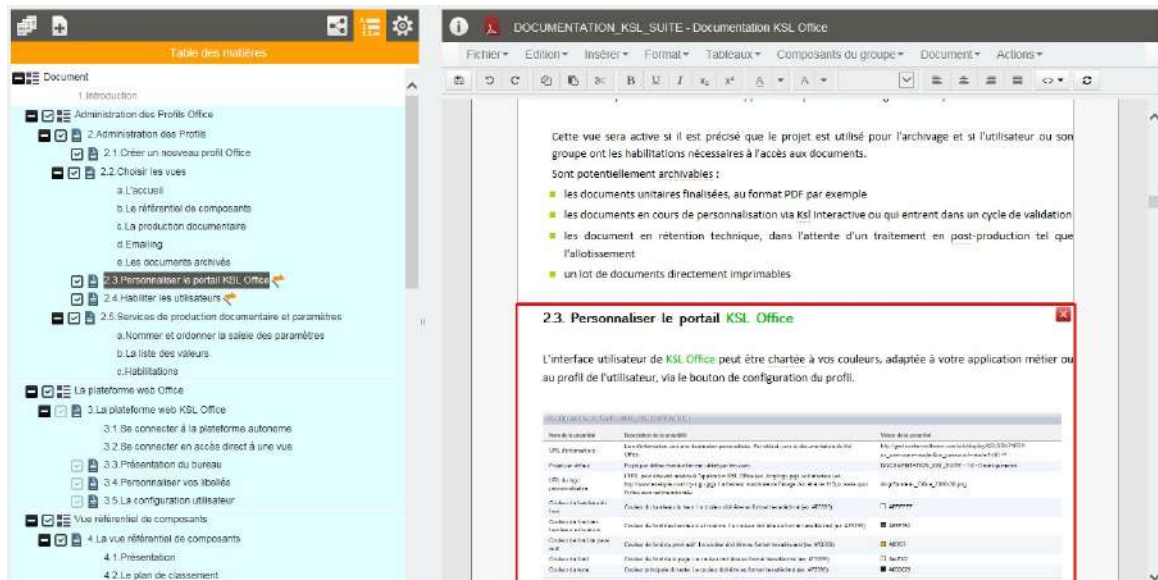
### 5.5. The "Table of contents" view

The list of personalizable components can be replaced by the "table of contents" view (configured at the project level in Ksl Admin). In this case, the access button changes:



This view strictly follows the hierarchy of the document and displays all the text levels of the document. It is organized as a summary.

This view is more functional than the list of Document tree and offers a synthetic view of the document; this view is particularly adapted to the context of long and highly structured document.



This view share the same characteristics, in terms of interactivity, as the Document tree:

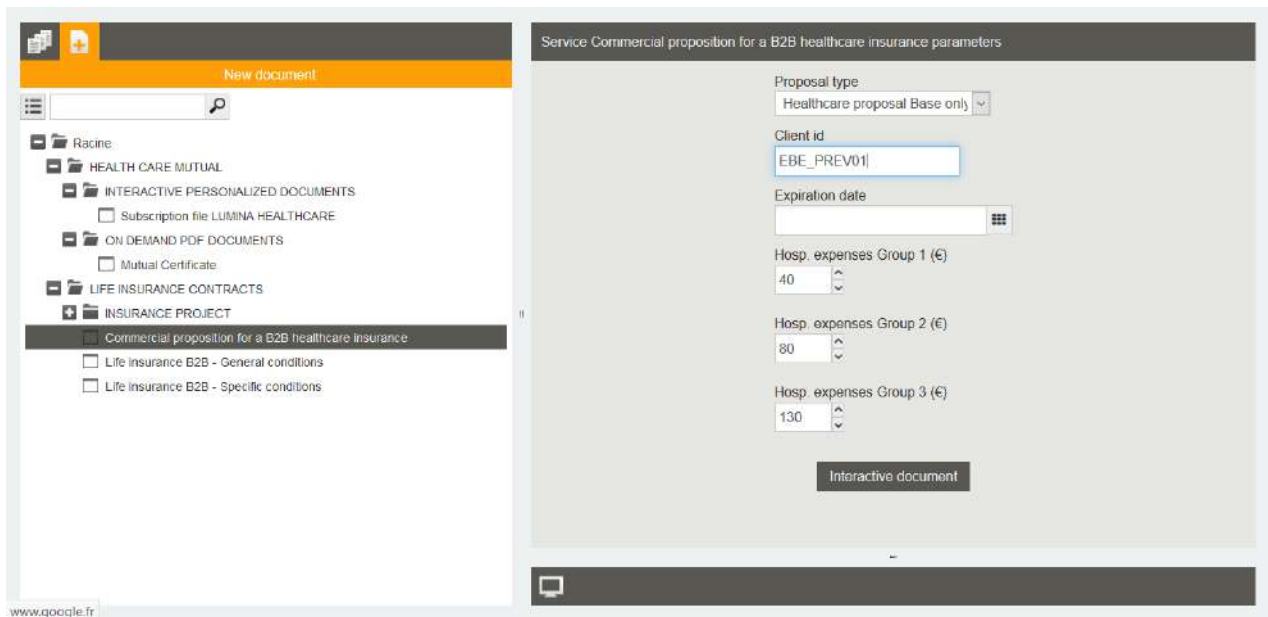
- Navigate in the list of personalizable components
- Status indicators
- Move components inside the groups

## 5.6. Personalize the document

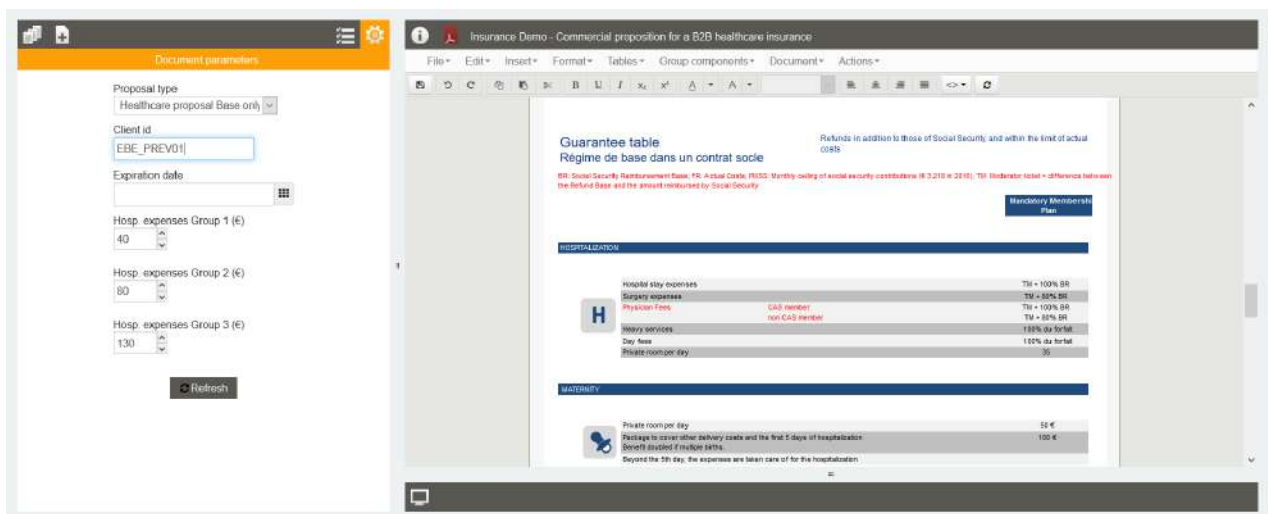
### a. The parameters

Launch the interactive document by selecting its service in the list of services of the Document production view. A view appears presenting the parameters of the service.





Click on the *Interactive document* button; the interactive document appears:



The parameters are still reachable and modifiable on the left side of the interactive view.

The "Refresh" button must be selected after any parameter change, whatever its nature, to take it into account and get an refreshed document on the right.

As a reminder, the parameters can influence the dynamic call of components, the assembly of these components, and the variability of the document by the selected data stream.

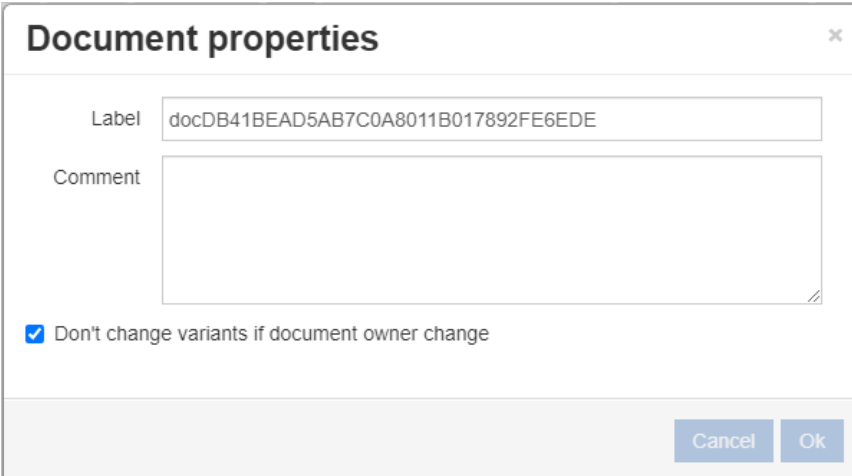
#### Note that..

*The value of the parameters is kept when the interactive document is sent to a Ksl workflow or when the document is archived. As long as the document is not permanently archived in its final version, the parameters are potentially modifiable on a "MODIFY" workflow action.*

## b. Selection of content variants

If your project contains content variants (multilingual, multi-agency, etc.) and if these content are present in your document template, the selection of variants is carried out according to the rules specified in KSL Admin; they are generally calculated from user properties or from elements in your business data, or even from your parameters.

One option directly impacts the recalculation of these variants in the event of a user change, and therefore potentially of the associated properties. It is available in the "Documents" menu bar, in the properties.



The screenshot shows a dialog box titled "Document properties". It has a close button (X) in the top right corner. The dialog contains the following elements:

- A "Label" text field containing the value "docDB41BEAD5AB7C0A8011B017892FE6EDE".
- A "Comment" text area.
- A checked checkbox with the label "Don't change variants if document owner change".
- "Cancel" and "OK" buttons at the bottom right.

The default value of this checkbox is initialized in the project options (KSL Admin).

### Example:

*If a document was generated by an employee associated with an agency for this agency, and it must be taken over by an employee of the National agency, in this case, the option checked will allow the agency's variants to be kept ; initial content is available on the document when it is reopened.*

*If the option is unchecked, the content associated with the National agency will replace the content associated with the initial agency.*

### Automatic update of the list of variants

If your interactive document has not been frozen, when it is reopened, it automatically inherits the repository updates, in particular the availability of new variants.

In the context of deleting a variant from the repository, however, it should be noted that

- if the latter has been voluntarily selected by the user, and is therefore no longer the default variant
- or if it has been personalized by the user

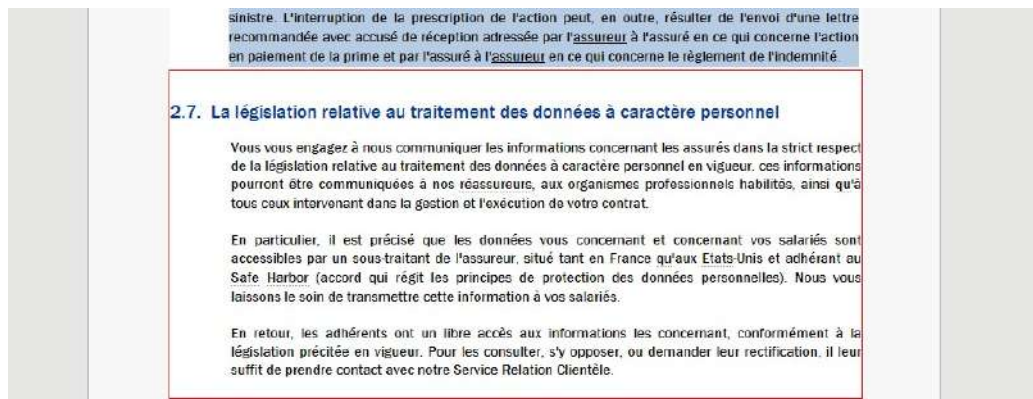
It will persist on the interactive document until the user replaces it with an existing variant.

In case in which the variant has been selected, it will be deleted only if the group from the repository change again.

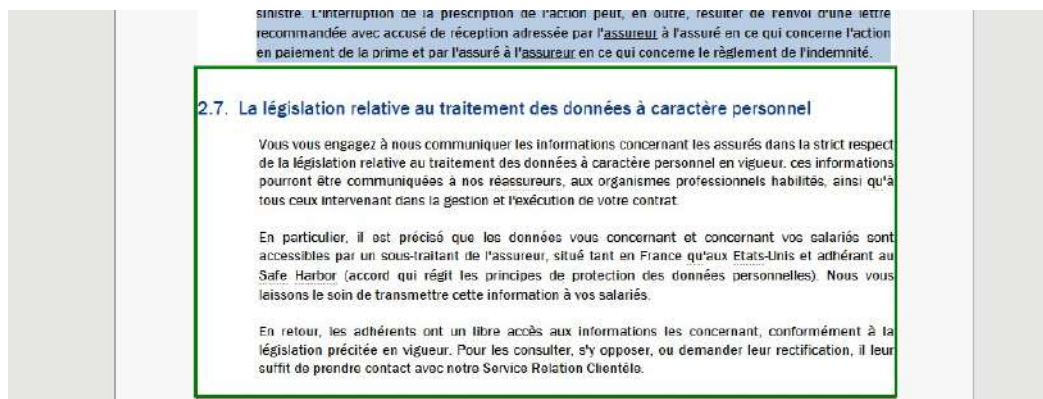
### c. The content personalization

Personalized text zones

A personalizable text zone has red borders in the document.



Double-click on the zone to personalize it; the borders becomes green and you have access to the usual text editor to edit the content.



A text zone with gray borders is an elements whose content is not editable but which has one or more of the following characteristics:

- Th text zone is potentially deletable
- Alternatives exist for this text zone
- The text zone can be potentially moved if in a group

Note that...

*The text editor toolbar and its menus can be restricted by the view configuration, with only minimal functions.*

*Content without any borders is "fixed" and, therefore, non-personalizable in the document.*


### Customize a partially frozen table

The text zone can contain a partially customizable table. It is recognizable thanks to the red indicators (prohibition to modify) on certain cells.

Rate A	Rate B	Rate C
1.5%	3.2%	5.1%

If you move your mouse over unauthorized cells, the prohibition indicator also appears on hover.

- You can edit the content of unlabeled cells only. Your input cursor only moves through editable cells, using the arrows or mouse.
- the graphic properties of the cells are not modifiable: change of border, frame, adaptation to the content...
- You cannot modify the structure of the table: add / remove rows or columns, merge or fraction of cells.
- This table cannot be deleted, and it cannot be replaced by other content.
- If your table is isolated in a text zone, you won't be able to add additional content in that text zone.
- It is possible to copy the partially frozen table; in this case, the copied table retains the same properties as the initial table. In this context, the copied table is not deletable; in case of error it is only possible to delete it via "undo" when it has just been created.
- Marked cells are not accessible and are not affected by the "Replace" function.

 Certaines conditions permettent de copier/coller un tableau partiellement figé. En cas d'erreur, seul le bouton annuler permettra de le supprimer. Il faut cependant être dans la session de modification ayant créé la copie.

### Adding items to a text zone

In a modifiable text zone, a user can insert:


- Texts and variables,
- Tables with a fixed number of lines and columns,
- Picture selected on the local desktop
- Picture selected in the repository,

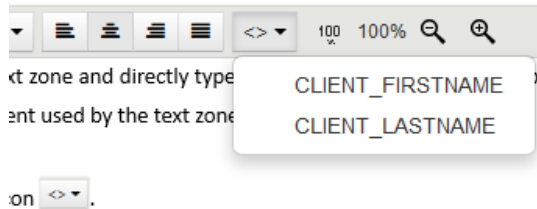
#### *Note that...*

*The insertion of these items is also detailed in the chapter describing the creation of text zone components in the repository.*

To add a text, position the cursor in the text zone and directly type the text. Note that the styles applied to

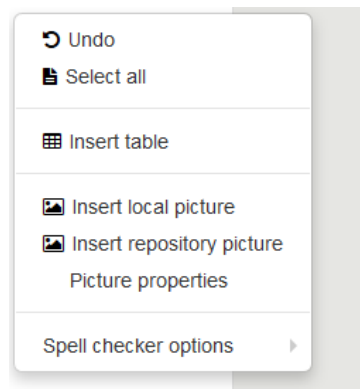
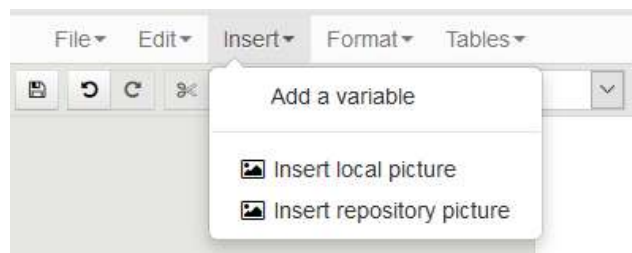
this text belong to the style sheet component used by the text zone.

Adding variables can be directly with the icon .



To insert a table, position the cursor in the text zone and select the option *Tables/ Insert/ Insert table* or by a right-click and *Insert table*.

To add a picture, use the toolbar, or a right-click, and select *Insert local picture* or *Insert repository picture*.



**Important note:**

*The size of picture taken with a Smartphone is increasingly important, greatly increasing the size of the documents using them. Before inserting many pictures in a document, be sure to optimize them to generate a final document with an acceptable size.*

*KSL is able to apply picture compression when generating the document, but this optimization can be not sufficient, and a pre-processing of the picture is often necessary. The parameters for this optimization are numerous and quite technical. You will find below the 3 basic rules that allow an acceptable optimization:*

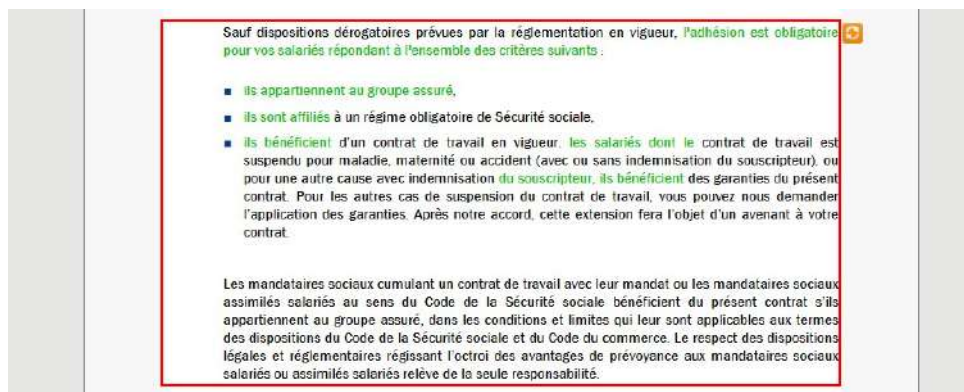
- *Rule 1: resize the picture, a resolution of maximum 30 pixels per centimeter is recommended for a good print quality of the document*


*Rule 2: adopt the correct picture format; the use of JPEG and especially PNG formats is recommended; vector pictures are also preferable to bitmaps pictures*

*Rule 3: adopt the suitable color setting; a decrease in the number of colors, or even the use of a grayscale picture, is likely to decrease the size of the picture*


Return to the text zone of the repository

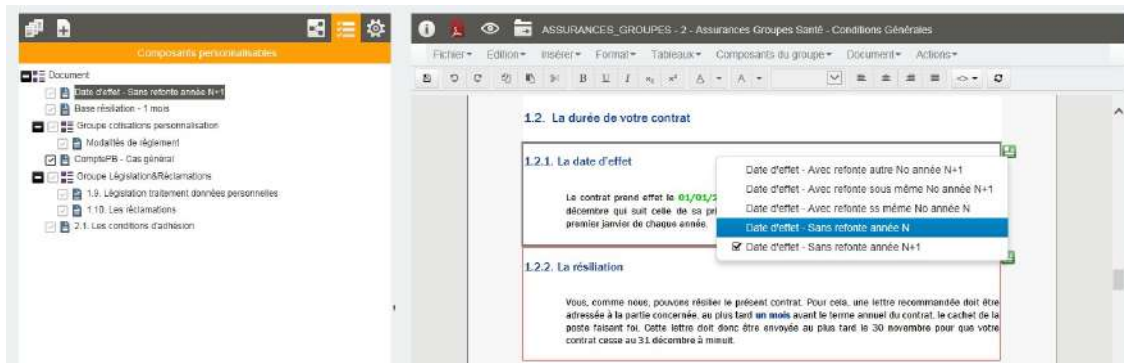
If the "Allow refreshing personalized text zones" parameter of the Document production view, is set to "Allow" in the profile view configuration configured in Ksl Admin, it is possible to replace a personalized text zone by its original content of the repository.



In this case, the icon  appears next to the personalized component. Click on this icon to replace the personalized content by the reference one.

#### d. The alternatives


A multiple choice menu can be defined for a text zone or a group of text zones. This choice is materialized by the icon .



Click on this "alternative" icon for displaying the list of alternatives for the current content and select the text zone or group of your choice. A return to the initial text zone or group is always possible in the context since as it is present in the list.

The content of a text zone with alternative can be personalizable (red borders) or not personalizable (gray borders).



When the update is allowed and the content of the current alternative has been personalized, the icon  is displayed next to the alternatives icon, for a possible return to the reference version of the presented content.

### Automatic update of alternatives list

When opening the interactive document, if a group has changed in the repository, its alternatives lists (on a text zone or a subgroup) will be updated automatically according to personalized components.

If the interactive document is not frozen, and the deleted alternative has not been personalized or the deleted alternative has not been voluntarily selected by the user,

- the alternatives list of the component will be replaced by that of the repository.

When the document is frozen, or there is a personalization or an alternative change on a non-frozen document:

- If the default alternative has not been modified in the repository, then the new alternatives will be added and the deleted alternatives will be removed from the alternatives list on the interactive document.
- If the default alternative has been modified in the repository (new alternative or alternative change), the new alternatives will be added and the deleted alternatives will be removed from the alternatives lists on the interactive document. However, the component tree of the interactive document will present the indicator for selecting an alternative other than the default one.
- If the default alternative has not been selected on the interactive document and it is removed from the list in the repository, it will simply be removed from the alternatives list on the interactive document.
- If the default alternative has been selected on the interactive document and it is removed from the list in the repository, it will be kept if the user changes the alternative. This component can be selected again on the document, as long as the list is not modified again in the repository, in which case it will be removed from the interactive document's alternative list the next time it is opened.

*Note that...*

For frozen interactive documents or custom groups, only the alternatives lists will be updated and not the content of the alternatives.

#### e. Remove the components

Text zones and groups are potentially deletable.

This deletion is an action which can be configured:

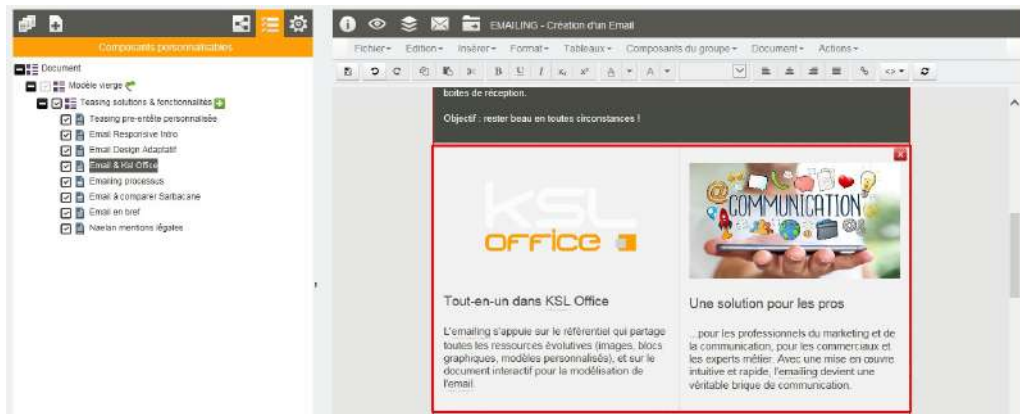
- in the properties of the text zone or group in the document template via Ksl Studio
- in the properties of the text zone in the group of the repository via Ksl Office

This action applies a logical or physical removal of the component of the document.

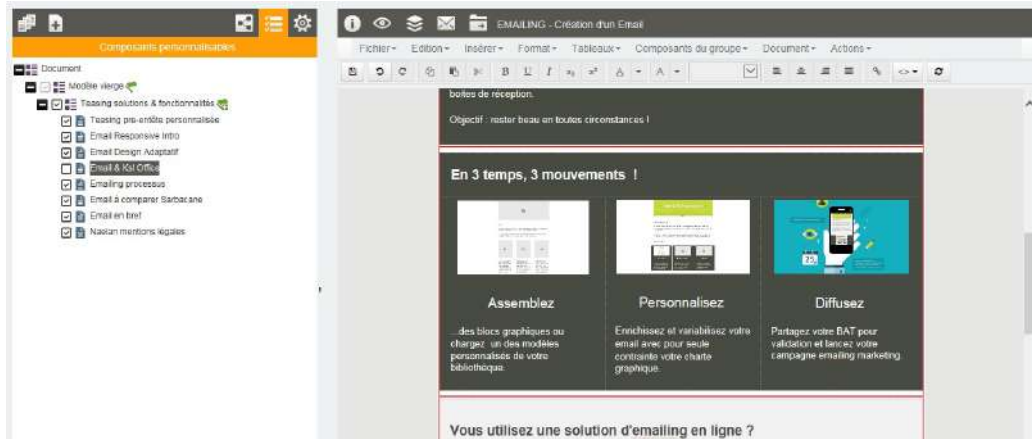
#### Logical removal

A red cross icon appears at the top right corner of deletable components.





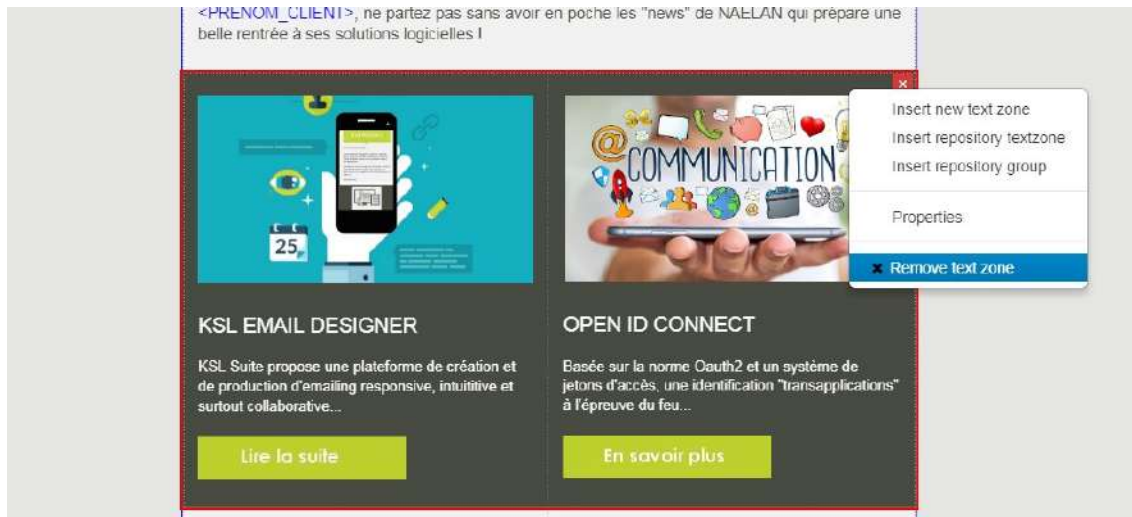
Click on this icon to remove the text zone of the document.



The component no longer exists in the document but it is still present, but unchecked, in the list of personalizable components (left window). Just check the component again in this list to make it reappear in the document.

Physical removal

Right click on the component in the document and select "Remove text box":



The text zone is permanently deleted from the document and from the list of components.

#### f. The variables

The value of each variable inserted in a text zone appear in green in the preview of the document.



This green content can not be modified but is potentially deletable, depending on the setting of the text zone.

It is not possible to declare new variables in an interactive document. Only the already declared variables can be inserted.

### 5.7. Build the document in a group

A personalizable group in an interactive document allows to build the document from components of the the repository, beyond just modifying content.

The group can be filled by default with a minimum of text zones, but it can also be presented empty to allow

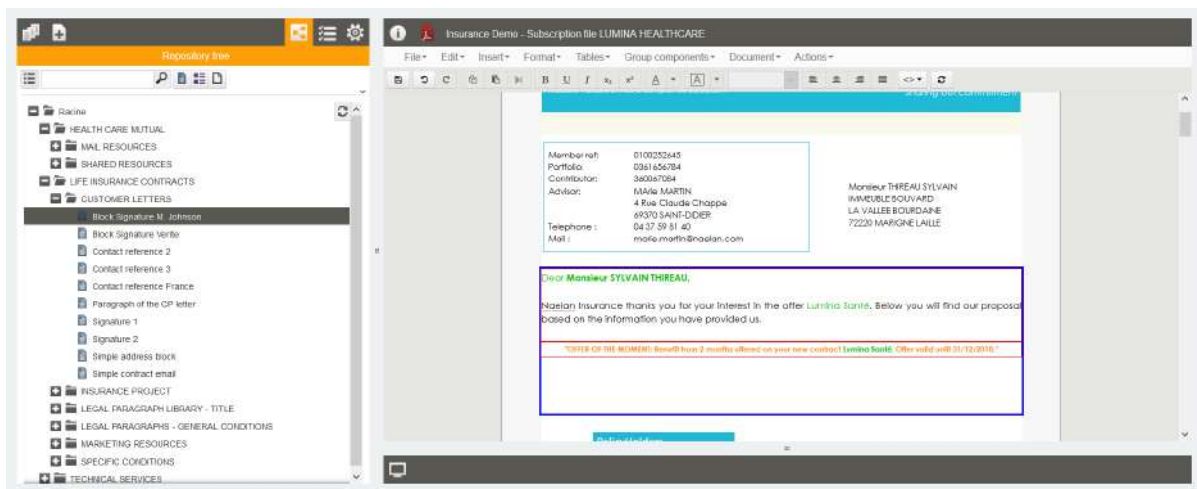
the user to insert and assemble components or create new components specific to his document.

To enrich a group, you need components like Text zones, Groups of text zones and External files, available in the repository. The components of the repository can be viewed and inserted from the Repository tree view, displayed on the left side of the screen.

Only components on which the user have access rights, appear in this view.

The repository tab is present on the interactive document interface only

- if the document has at least one customizable group
- and that the latter is authorized to move and add components



### a. Assembly the components

The assembly of the components in a group follows the same rules as the creation of a group in the repository:

- the text zones and groups in the repository can be inserted, either via a drag & drop from the repository tree to the group, or by right-clicking on the group, directly on the document. Adding a component via a right-click allows to preview the component before inserting it.
- text zones and local groups are created from the "Insert" menu or from the right-click menu
- the PDF file and the page break are inserted from the "Insert" menu or from the right-click menu

### b. Organize the components

Group components can be re-organized within the group only:

- on the document itself, by a drag & drop of the component to the target location

- from the list of customizable components, by a drag and drop of the component to the target location

The components added are potentially deletable, either logically or physically.

### c. Variant behavior within a group

Whatever the level of the group or sub-group where a text zone has been created, its variant corresponds to the value of the criterion of the master/root group, and not a sub-group one.

For example :

- The master group uses the "agency" variant criterion: i.e. some text zone exist only for the criterion "agency=national", and some others have the default variant 'national' but also some specific variants for agencies (agency=agency1, agency2...)
- This group contains a sub-group describing local customer references
- This sub-group will contains the "agency" variant of several text zones
- This sub-group will contain the default "national" content if the agency content does not exist

#### Note that...

*The maintenance of the master group in the repository adopts the same behavior.*

## 5.8. Search / replace

For the complete documentation, refer to the documentation of the text zone editor.

### Search

"search" is possible on all the content of the interactive document. Just select "search". It starts from the selected text zone.

### Replace

The "replace" only interacts with customizable text areas. It starts from the first customizable text zone.

"Search - Replace" passes through the header and the footer of the document

#### Note that

If the user is editing a text zone on the interactive document, search-replace will only be performed on this text zone.

You can always go back on "Replace all" using the Undo button on the toolbar.

## 5.9. Add appendices

It is possible to add PDF files to the interactive document, but only in a group authorized for modification, between two textzone, on the top or on the bottom of the group :

- by drag and drop from the repository plan or *Right clic/ Insert repository pdf*
- *Right clic/ Insert local pdf file* to insert a pdf available on your computer
- *Right clic/ Insert URL referencing PDF file* to access a PDF available on a web address ; the http and https prefixes are allowed.



Inserting a pdf document causes a page break on the current document.

It is integrated in the list of its components or in its summary view, according to the chosen presentation.

The appendix can be deleted physically or logically on the same principle as the internal components of the document.

### Automatic refresh of the download URL

If the URL of the appendix added to the document is modified in the repository, this update will be automatically reflected on the interactive document when it is updated or reopened if it is archived.

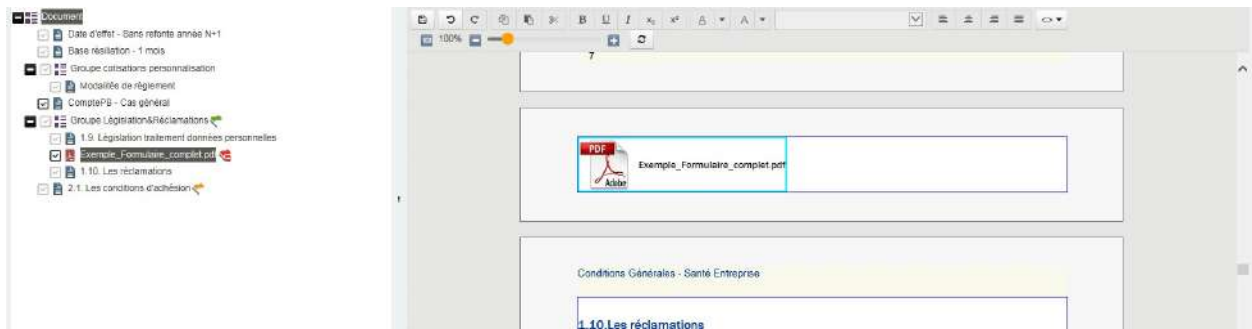
### Error management

This can happen when the browser is closed while the download is in progress, or the URL is pointing to an appendix that no longer exists.

In this context, only the logical link in the appendix is retained; the PDF file is not physically present on the server, so it can not be exploited to generate the global document.

The anomaly is detected when previewing the document in PDF format

- The interface proposes to re-download the files and gives a clear warning message by pointing the problem file
- By refreshing the document, on the summary (or the list of customizable components), a red flag appears next to the PDF concerned



To download the PDF again, on Document tree:

- Right click on the PDF (the component with a red flag)
- Select Properties, modify the URL (or not) then click on the Refresh button to restart the upload

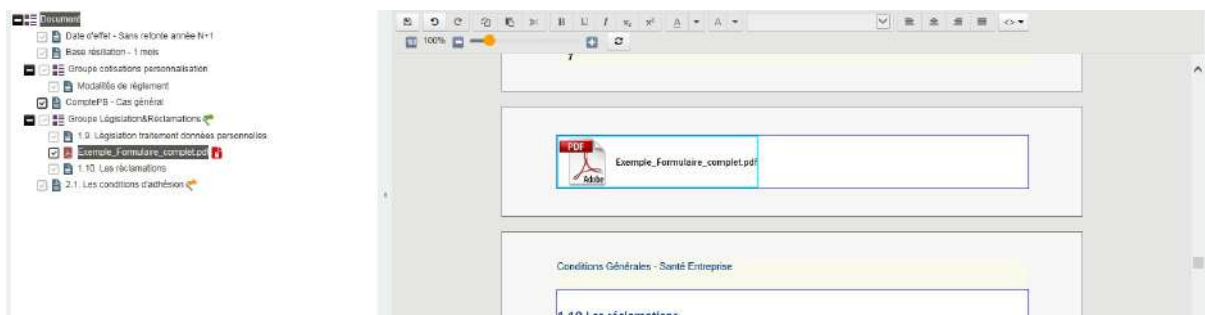
### Protected PDF

Only not protection PDF can be inserted in an interactive document.

A protected PDF creates errors during the assembly, renumbering or selection/deletion of certain pages. In case a PDF is protected, delete the PDF from the interactive document and replace it by not protected version to solve the problem.

The protection of the PDF file is detected:

- In the PDF preview of the interactive document, if it is a file already inserted in the interactive document on an earlier version of KSL Suite (without protection control), the interface displays a clear message. A Refresh action will show the "locked document" indicator next to the PDF component. It is not possible to generate the global PDF document until the file has been deleted or replaced.



- If the url of your external PDF file points to a protected file, it will also be detected during the PDF preview with a message "the URL ... is not a valid file". A Refresh action will bring up a red flag indicating the file is corrupted. You will need to point the URL to a new unprotected file.
- During the upload of the external PDF file, a message is given at the end of upload if the file is protected and the external PDF file is deleted.

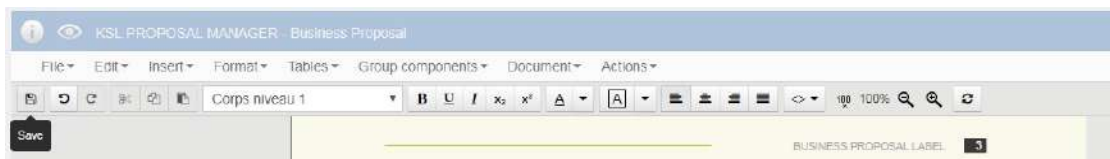
## 5.10. Actions on the document

The top bar of the interactive editor shows the action buttons configured for the interactive document.

### a. Save

This is the first action available in the toolbar of the editor.

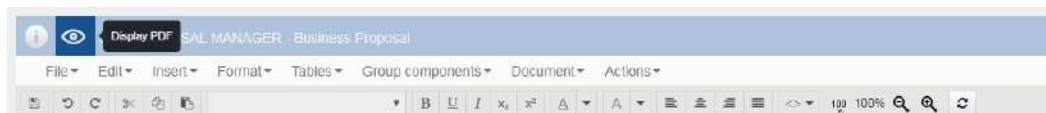
The document must be saved by the user regularly particularly if the personalization of the document is important.



The interactive document must also be saved before any other user action, including archiving or generating the final document in PDF format.

### b. View

The preview action allows to present the document in its final paginated format. Usually, the document is presented in PDF format, which gives a quick access to a local saving or printing.



If the document includes a large number of pages due to external PDF components, the number of pages can be very important, increasing the time necessary to get the final PDF document. To avoid this problem, it is possible to set an action to get the document without the external PDF files.

Some processes require previews in another format, e.g. word, to get a document in a format modified by external tools, or html for the bodies of responsive marketing or commercial emails. In these cases, a generic button is available ("eye" icon).

### c. Other actions

Several actions are available according to the context of use and can be added in the editor toolbar:

- overview of the document
- edit the interactive document
- archive the interactive document

- archive and manage the version and naming of the document in PDF format
- download the document for an attachment in an email
- send the document in the validation workflow
- etc.

These actions are chosen according to the users' needs. They can also be added to the interactive document according to the technical integration necessary with the external application which calls the Ksl interactive editor.

Example: some user actions can be added on a CRM external application as an alternative of Ksl Interactive actions:

- An external CRM application calls Ksl Interactive (and transmits customer data to Ksl),
- The Ksl interactive editor is only used to personalize the document,
- The external application gets the document after the personalization and provides some actions in its own users' interface to deliver, archive or forward the document for validation.



## 5.11. Comment on document's content


### a. Introduction

It is possible to add notes, in collaborative mode, when writing an interactive document or during its validation.


Writers and validators can issue instructions, changes to be made, respond to each other, by adding comments to personalizable textzone or to PDF appendices.

A comment is associated

- to a potentially customizable text box. Only non-customizable text areas are excluded,
- to a PDF file (or appendix) present or added in a group of text zones, provided that it is editable.

 A validator who does not have access to the personalization of a textzone content, can add a comment on the latter, whether it has been personalized beforehand or not.

### b. Switch on comment mode

 The action button is not necessarily visible on your interface. Its visibility depends on the configuration of the document production service.

Comment mode allows you to view and create comments on the interactive document. It will not be activated on a first drafting step, but can be activated on the supplement by a second writer or in a validation workflow.

Click the button, on the right of the top bar menu, to enable and disable the mode.



*Comment mode disable*



*Comment mode enable.*

It triggers the following actions :

- the document is shifted to the left (the latter is no longer centered) to leave room for comments, in visualization or in interaction
- the viewing the comments associated with the component when hovering over it
- on the selection of the component (text area or pdf), the permanent display of the button to create a new comment and the display of existing comments for supplementation or reply.
- on the change the content of a text zone : displaying existing comments and displaying when hovering

over the right corner of the component, the button to create a new comment.

- the viewing of two new buttons (on the left of the Comment's mode) for refine the browsing unread comment, unread reply, all comments selection by default.


The passage in "Comment mode" open the first document's comment, if it exist ; in the opposite case, you're free to choose any personalizable component, textzone or attachent to put on your comment.

If you're on a textzone (in selection or change), the focus stay on the current textzone.

 Document had to be saved before adding comment.

 Comment mode will be disabled on document refresh action.

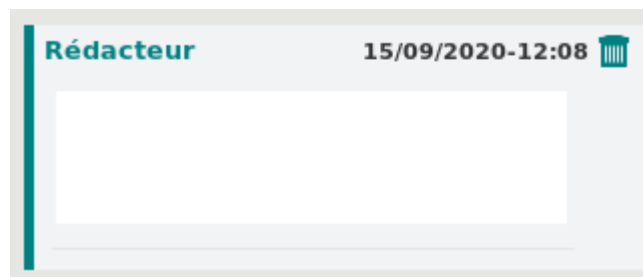
### c. Create a comment

To add new comment, select or hover over the component you want to comment on, and click on the Create Comment button  available at the top right of the component.

The Comment box appear to the right of the curret component.

Are displayed:

- the name of the user or his identifier if the latter is not entered.
- the date and time the comment was created




If the component already has comments, then a new comment creation window will be displayed after the last comment.

The comments for each component are displayed in ascending chronological order of creation. Each component cannot exceed 20 comment threads, one thread being a comment and its replies.

The comment is written in plain text, no style can be affixed, no image or link added, including in the context of a copy and paste.

It's possible to enter until 500 visibles characters, blank characters included.

#### d. Reply to a comment

Each comment has a Reply button  at the bottom right allowing a second speaker to reply to this comment.

An input window is then displayed under the comment with a slight indent to the right.

It is possible to associate several replies to the comment, coming from several editors or reviewers, including the comment writer. Each user is identified on his answer.

The number of replies to a comment is limited to 50

As for creation, are displayed:

- the name of the user or his identifier if the latter is not entered.
- the date and time the comment was created



Previous answers and comments cannot be modified (see next chapter)

#### e. Edit a comment or reply

It is possible to modify a comment or a reply to a comment only if:

- the user is the writer of the comment or reply
- No one responded to the comment or reply

The comment's timestamp is updated.



The creation and modification dates are saved.


The creation date is displayed by default if no modification has been made.

#### f. Delete a comment or reply

You can delete a comment or a reply to a comment only if:

- you are the writer of the comment or reply
- no one responded to the comment or reply in question

To delete a comment thread (a comment and its replies), it is necessary to be the writer of the comment.

To do this, you must click on the Delete button  at the top right of the comment or reply.

The content of a comment can be emptied, without the comment being explicitly deleted. In this case, it will be deleted as soon as the document is checked out.




This is indeed a physical deletion, no history of deletions is kept.

#### g. Read comments on a document

You can display the comments of a component

- When hovering over a component with the mouse,
- with the selection of the customizable component directly on the document,
- with the selection of the component via the tree of customizable components.



An indicator  (not clickable) is located on the tree of customizable components to indicate the presence of comments on the components.

It is updated in real time each time a comment is created or deleted.

#### h. Navigation



By default, navigation cycles through all comment threads.

Two options are available when comment mode is activated:

- Browse all new comments 
- Browse all new answers to my comments 


The two options are exclusive and cannot be active at the same time, but they can both be deactivated, in which case navigation again targets all comment threads.

To browse the comments, navigation arrows:

- Previous comment 
- Next comment 

are displayed on the right side of the comment thread.

The arrows disappear as soon as there is no more element to browse.

 Headers and footers are not included in smart navigation.

#### i. "Read" and "unread"


A comment or a reply are considered "unread" until they have been visible to the user, either

- when this user selects, and therefore views the comment or reply for the first time
- when navigating using the arrows from one comment thread to another, in the same context of first glance.

The "unread" comment or reply is visually highlighted with a more colorful background.

A reply or a comment goes from the "unread" state to the "read" state, for the current user

- if the latter fully visualizes the comment or the reply
- when it goes to the comment thread or the next / previous component (or other thread / component)
- and if the latter saves his document

 Browsing unread comments does not update the status in real time, so even if a comment has been seen while browsing, it may be browsed a second time.

#### j. Rules on special cases

##### Copy

Copying an archived interactive document will not imply copying any comments associated with it.

Indeed, the interactive document created, modeled from the old one, is available in the "current documents", and enters a new circuit of collaborative design or validation.

##### Variants & alternatives

If the text box alternative is changed, the comments do not disappear. They are associated with the object and not with its content.

The behavior is the same for the variants.

##### Updating


Refreshing a component does not change comments associated with that component. This update can take place on a document being drafted or validated.

##### Reusing a text box

When the same personalizable text zone is reused within a document, each copy has its own comments.

## Personalizable header and footers

Unlike the case of text zones in the body of the document, the comments associated with the personalizable elements of the header or footer are repeated on each page.

 The document must be refreshed or updated to show comments on text areas included in customizable headers repeated on several pages.

## 6. View the document created by KSL

The document created by KSL is automatically linked to the object from which it has been created. For example, if a document is created from an opportunity, it will be linked to the opportunity object. And an opportunity may have several KSL documents.

### 6.1. Display the documents attached to an object

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

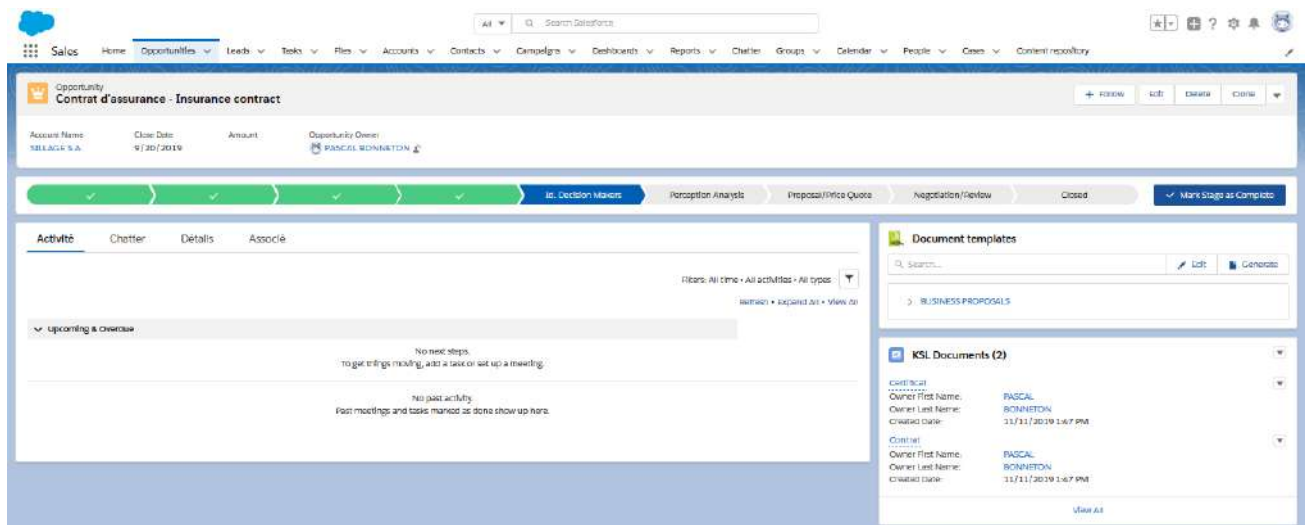


Figure above: the view displays an opportunity record with documents presented in the "KSL Documents" on the view on the right.

This compact view lists the latest documents created from the object with the following information:

- The Description of the document, information given 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 object.

	Document description ↑	Owner First Name	Owner Last Name	Created Date	Last Modified Date	Version number
1	Certhicat	PASCAL	BONNETON	11/11/2019 1:47 PM	11/11/2019 1:47 PM	1
2	Contrat	PASCAL	BONNETON	11/11/2019 1:47 PM	11/11/2019 1:47 PM	1

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

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

**i** Only a document created interactively with the Edit button can have a version number greater than 1 and a last modified date and time different from the creation date: in this case, each time the document is re-edited, the version number is incremented by 1 and the last modified date is updated.

## 6.2. Access to KSL documents

Accessing to a KSL document is possible from the compact view or from the list view of KSL Documents. When selecting one of the documents in these views, a page appears displaying the KSL document or a link to the document file for documents in other formats (e.g. Word).

**KSL Document**  
PDF Insurance certificate

View Send by email Delete

Source Record	Description	Version Number
Navigate to	Archived document	1

Related Details **Document**

Mutuelle Naelan Assurances  
4 Rue Claude Chappe  
69370 Saint-Didier au Mont d'Or  
France  
Tel: +33 4 37 59 81 40

Public Liability  
Contract number: 0000006858131304

DUPREY INC.  
RUE STEWENSON  
123 WASHINGTON  
USA

Activity

Email Log a Call New Task

Write an email... Compose

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

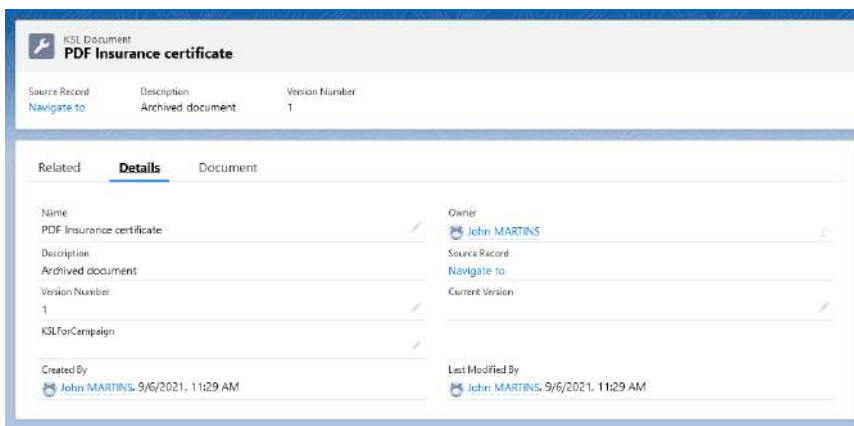
No next steps.  
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

The Details tab displays with the following fields:

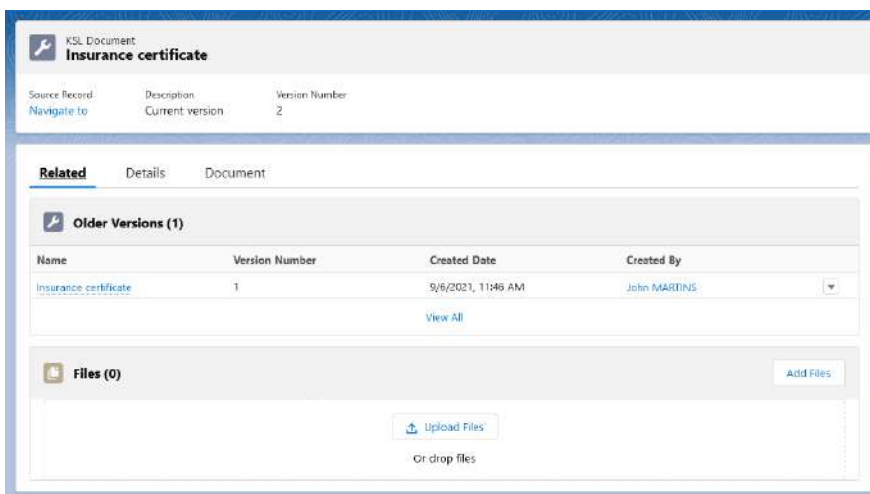
- Name: name of the document in Salesforce®

- Document description: document description in Salesforce®
- Version Number: the most recent version of the document ; equal to the number of PDF documents versions available for this document) or 1 for a document generated without any interactive personalization
- <Object>: name of object from which the document has been created
- Source record: link to the object from which the document has been created
- Owner: the owner and creator of the document
- Created By: name of the user who has created the document with the date/time of the creation
- Last Modified By: name of the last user who has modified the document with the date/time of the modification
- KSL Document ID: unique identifier of the interactive document in the remote KSL server



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

The Related tab lists all the old PDF versions of the document: from 0 to N for PDF created through an interactive document.

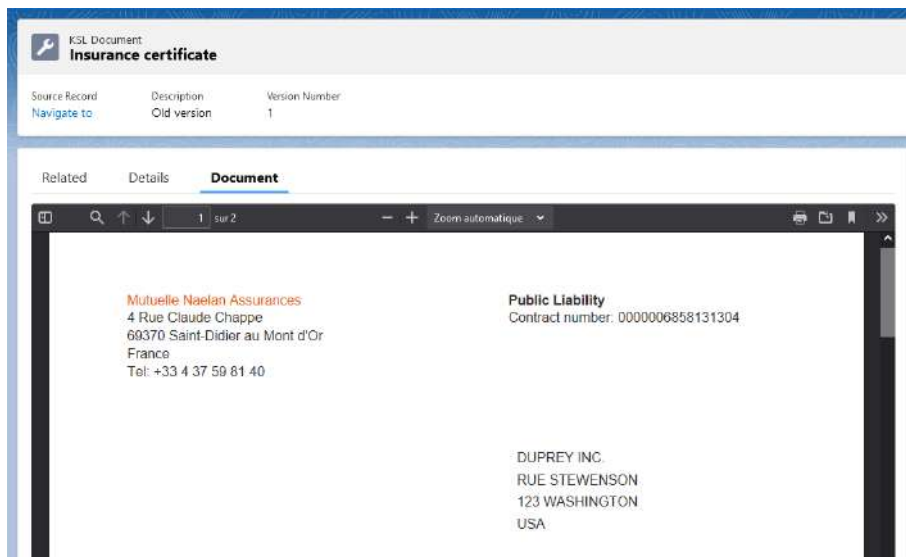




This Related tab provides the following information fields:

- Document description: document description in Salesforce®
- Version Number: the PDF document version
- Creation date: date/time of the document creation
- Created By: owner (creator) of the document
- KSL Document: unique identifier of the PDF document in the remote KSL server

Clicking the name of the document allows to display the old version of the document.



## 7. Actions on a document created by KSL

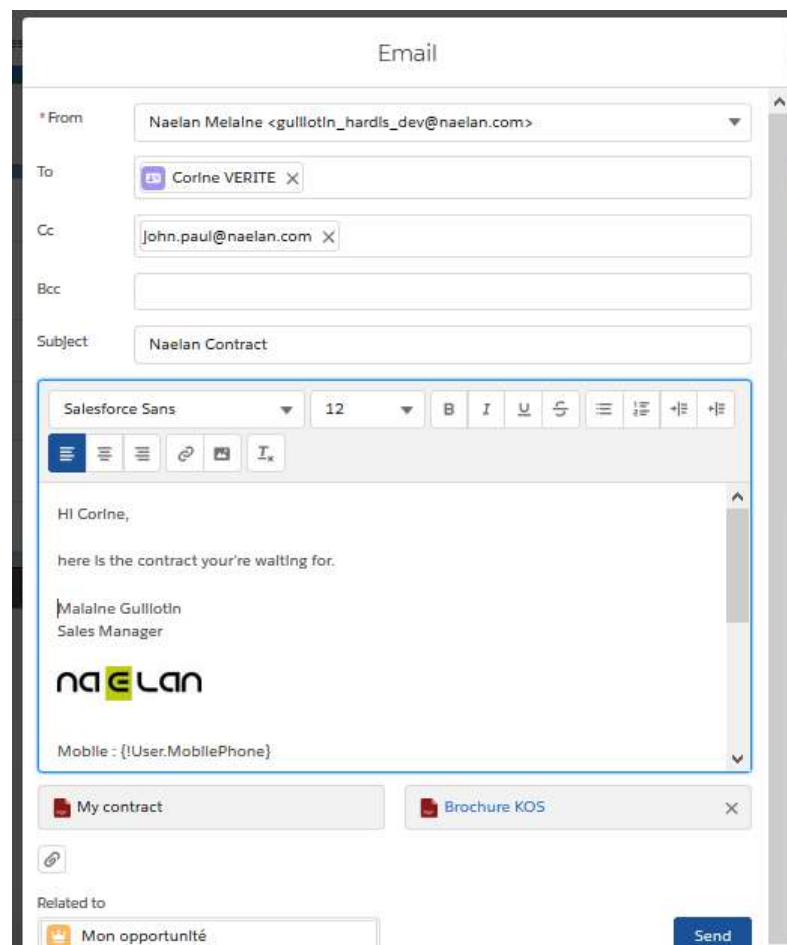
### 7.1. Action available on a PDF version of the document

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

- View : to view the document in a new tab if it's a PDF format, or download it if it is another format (docx for example)
- Send by e-mail: to send the document as an attachment of a new e-mail
- Delete: to delete the KSL document and its Salesforce® record.

### 7.2. Actions specific for sending the document by e-mail

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



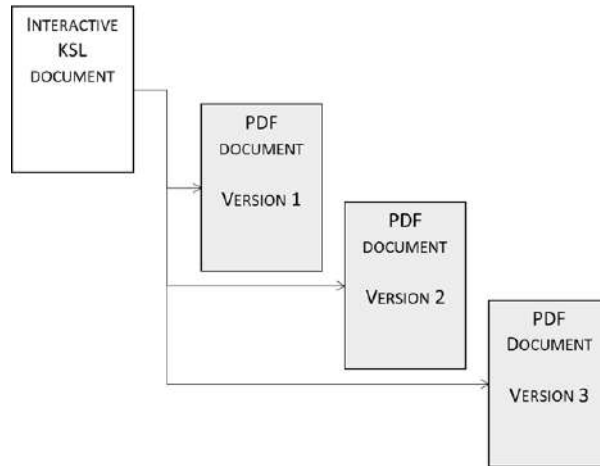
The e-mail is displayed in a KSL window which allows to finish and send the e-mail. This window has the same characteristics of a standard Salesforce email:

- 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 e-mail signature is automatically inserted (if the signature was set in the user's profile)
- Additional attachments stored from Salesforce®
- Additional downloaded attachments coming from the local workstation
- Email delivery by Salesforce
- Delivery log by creating a Salesforce activity associated with the object from which the the document has been created
- Possibility to transfer the e-mail later to other recipients

**i** *The fields of the delivery window can be pre-filled (KSL configuration of an e-mail delivery). This prefill can be defined for each Salesforce object. As such, some fields are editable and others are not.*

### 7.3. Action available on an interactive document

A KSL interactive document can 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 sent to 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 the latest PDF version.

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

- Edit: open the document in a modification mode in the interactive KSL editor
- View : to view the PDF document in a new tab
- Send by e-mail: to send the PDF document as an attachment of a new e-mail
- Send Word by e-mail: to send the .docx document for Word as an attachment of a new e-mail ; it is the current interactive document which will be re-composed in Word format. Note that it may be different from the last PDF version. This action is available via the ▼
- 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. This action is available via the ▼ icon

## 8. Trigger the sending of a KSL document on an automated KSL process

The change of a Salesforce field value or an object status, can trigger the creation of a KSL document and its e-mailing to one or more recipients. These automations are triggered by Salesforce flows (Process Builder or Flows).

In this context, a KSL process is launched in background and no interaction with it, is possible.

However following the trace of its activities is possible: in particular e-mail delivery events, in the object on which the actions are triggered.

## 9. Create response by e-mail with KSL

### 9.1. Use case of the creation of responses by e-mail

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

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 to have an e-mail including data field of the customer coming from Salesforce®
- Interactive personalization for a user to adapt his 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

### 9.2. Create a response by e-mail

From a case, a contact, an account, an opportunity, a request or any other Salesforce® object, a user accesses to e-mail templates from the Document templates view.

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

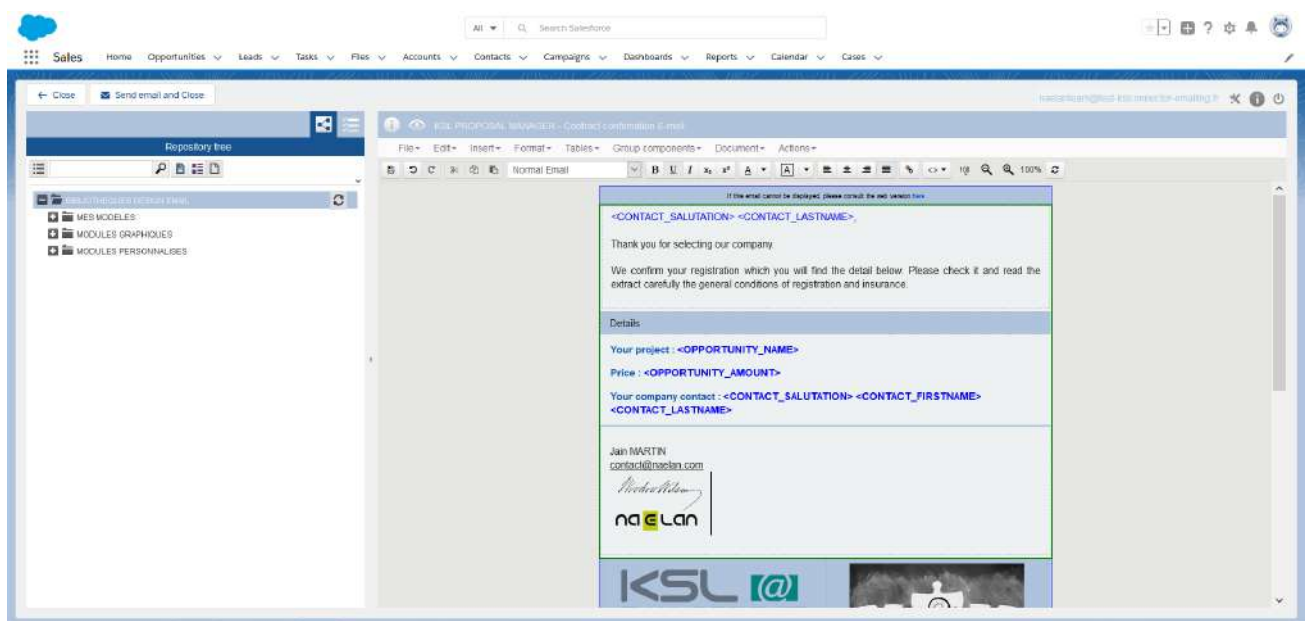
Let's take the example of an opportunity; the KSL Document templates view shows the e-mail templates on the right side of the opportunity:

**i** Note:

- If the number of e-mail templates is important, a tree view can be displayed in which the templates are classify. An input box above the templates allows to search for the templates that fit the 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.



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

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

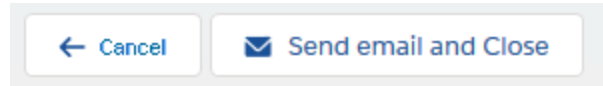
Response blocks can also be dragged & dropped from the centralized content repository into the body of the e-mail. With a few clicks complex and accurate answers can be created without the need for a large number of e-mail templates.



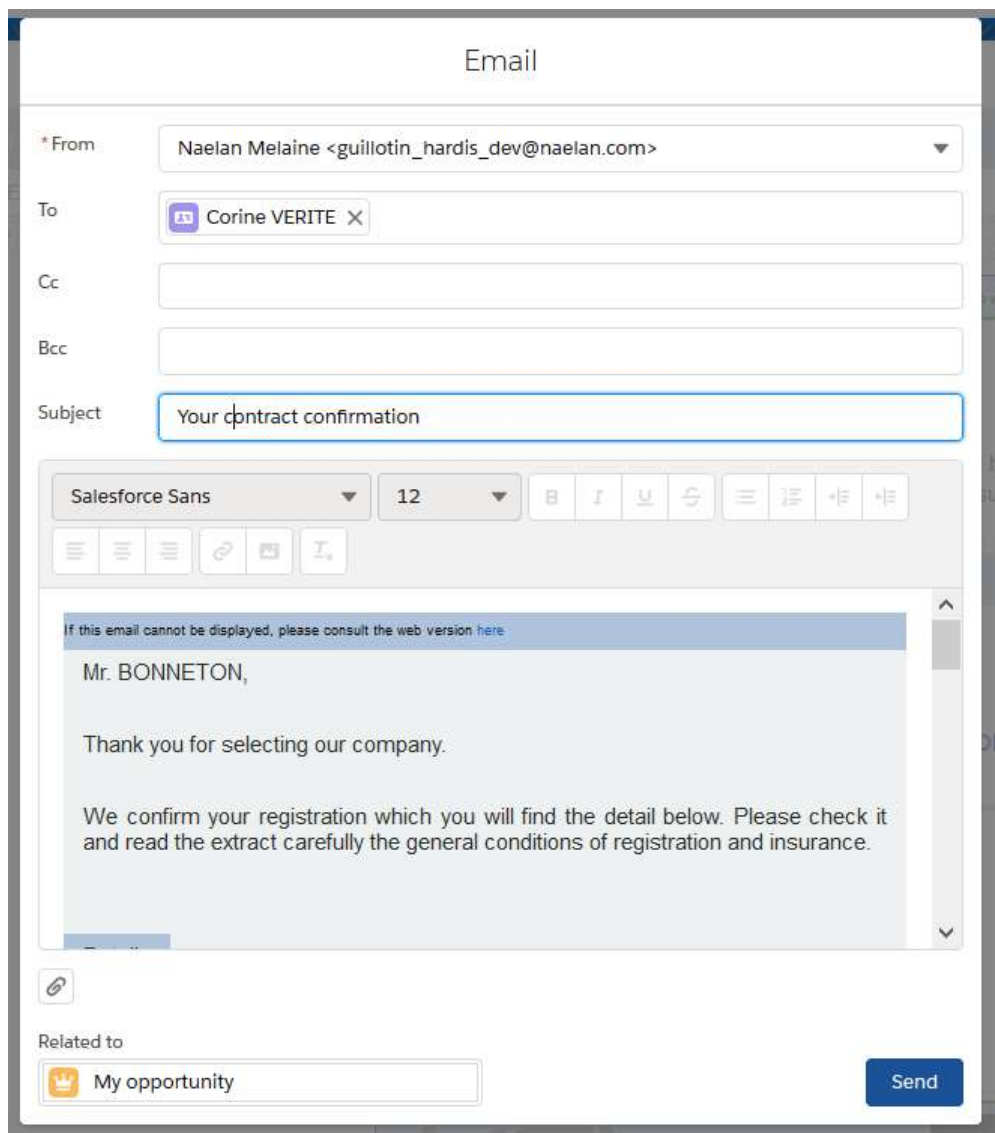
See also the KSL Email Designer user guide for more information.

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

- Cancel, to stop the creation of the e-mail, or
- Send e-mail and Close



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



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 a 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. The e-mail can also be forwarded later to other recipients

E-mail fields (envelope fields) can be personalized automatically with a KSL e-mail configuration, to facilitate the user's action and bring consistency to the e-mail communication. This outbox KSL configuration is created per Salesforce object; possible pre-filling for opportunities, possible pre-filling for accounts, for example..

*Example: with this KSL e-mail configuration, a family of e-mail response templates can be sent by a generic sales department e-mail address, with a same response e-mail address, and with a generic subject containing the request number and the name of the customer.*



This configuration is detailed in the KSL for Salesforce installation and setup guide. Thanks to this KSL e-mail configuration, the fields From, To, Cc and Cci, the response address, as well as the subject, can be personalized.

**Note:**

- *Once the interactive personalization one in the KSL editor, the body of the e-mail can not be modified in the e-mail*
- *After being sent and archived, the e-mail can still be transfered to another recipients.*

## 10. Create e-mailings with KSL

### 10.1. 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 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 to get an e-mailing including customer data fields coming from Salesforce®
- Interactive personalization to personalize e-mailing body and subject

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

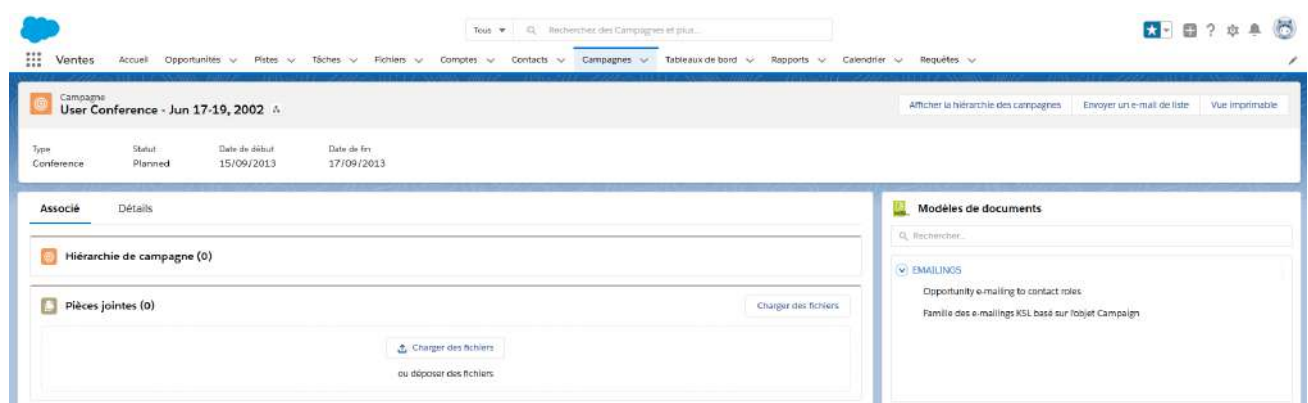
- Create e-mailings
- Create and share e-mailing templates with colleagues
- Automatically generate quality, personalized emails from Salesforce® data
- Send the e-mail or send it to an external service provider chosen by the company
- Trace as a task each e-mailing in Salesforce

## 10.2. Create e-mailing

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

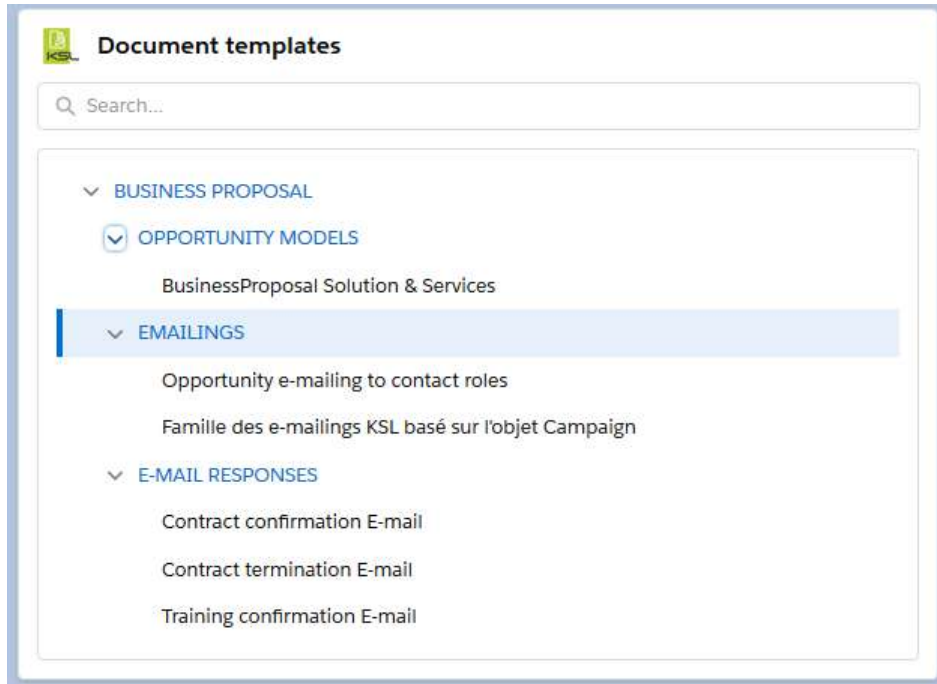
This view allows to access templates of e-mailings that the marketing or the customer communication team has made available to users, and which correspond to the context. The user will be able to create an e-mailing (mass sending) from these templates of e-mailing.

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

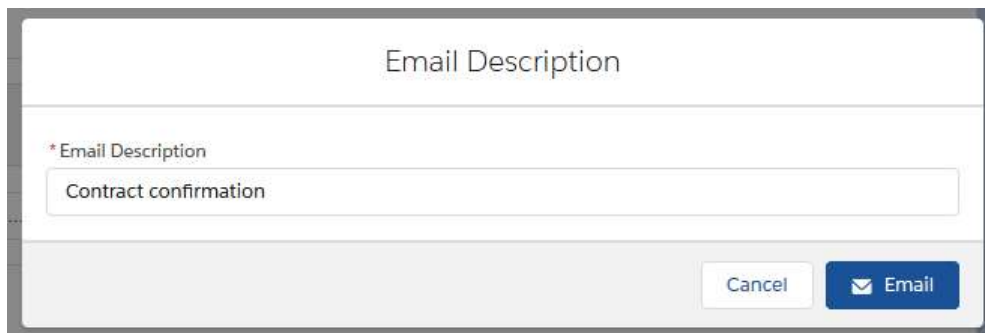


**Note:**

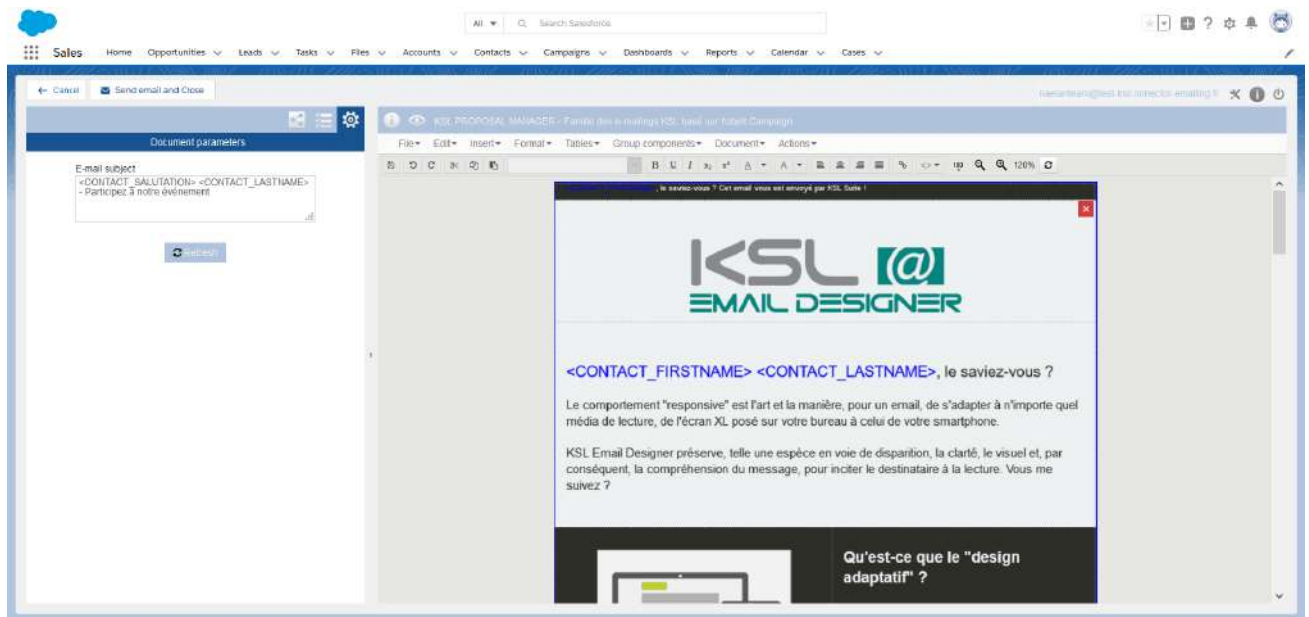
- If the number of e-mail templates is important, a tree view can be displayed in which the templates are sorted. An input box above the templates allows to search for the templates that fit to the needs.
- This view can also include document and e-mail templates as below.



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.




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


It allows to


- Create and personalize an e-mailing
- Customize the subject of the e-mailing (if necessary by inserting Salesforce data)
- Test and send an e-mailing


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 , it is possible to drag and drop additional marketing banners, images and blocks from the centralized content repository into the body of the e-mailing. With a few clicks a nice and efficient e-mailing can be created without the need of marketing experts.

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

From the tab accessible with the icon , access the different parameters of the e-mailing. Depending the template, it is possible 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 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:

*Design your e-mailing*



*Get responsive e-mail readable on any device*



## 11. 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 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.

*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 the 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

## 12. Design and administration tools provided by KSL

KSL provides a set of powerful tools to design templates and content and administrate the KSL Solution:

- The Salesforce KSL Administration application allowing to configure and administrate the KSL for Salesforce and the content repository
- A Content repository allowing to design and manager resources shared by document and e-mail templates, and to design e-mail templates
- KSL Studio, a Windows design tool for creating document templates
- KSL Admin, a web application to configure and administrate the KSL Server software used by the KSL for Salesforce connector

### 12.1. KSL Administration, configuration / administration of the KSL for Salesforce connector

KSL Administration is a Salesforce application provided by Naelan. It provides administrators with a tool for

setting up and managing the KSL for Salesforce application:

- Setup: parameters for authentication, for defining KSL Server endpoint, but also parameters for KSL processes that allow document and e-mail generation and sending
- XSD Generator: this tool allows to define what data is used in document and email templates
- XSD Validator: this tool allows to check schemas listed by the administrator; it checks that the data defined in the schemas exists in the Salesforce organization. This validation proactively detects mismatches between Salesforce data and data used in templates
- Automatic Process configurations: this wizard allows the step-by-step construction of a process for generating a personalized document, attaching it to a Salesforce object and, if necessary, sending it by e-mail ; the e-mail is in the latter case defined by a Salesforce e-mail template or a KSL e-mail template.
- E-mail configurations: this tool allows the construction of email configurations; an email configuration specifies the default fields of an e-mail envelope (fields From, To, Cc, Cci, subject...).
- Execution histories: this view is the event log of the KSL for Salesforce connector.
- Content repository: this view allows the design of content (text zones, groups of text zones, images, annexes, style sheets...) and the design of e-mail templates ; it allows to delegate their management to functional administrators.



For more information, please consult the KSL for Salesforce development guide, and the KSL for Salesforce installation and setup guide.

## 12.2. Content repository for shared resources creation

### a. Design of content resources

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

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

- 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

The screenshot shows a Salesforce form titled "Mandat" with a sub-header "FORMULAIRE MANDAT". The form is designed for a client to fill out. It includes a header "A remplir par le client". The main content area contains several sections:

- A text area for a declaration: "J'autorise l'établissement teneur de mon compte à débiter celui-ci conformément aux instructions de ASSUR ALL. Montant du prélèvement souhaité : ... Mois d'affat du prélèvement : ...".
- A section titled "Titulaire du compte à débiter" with fields for "Nom :", "Prénom :", "Adresse :", "Code postal :", and "Ville :".
- A section titled "Compte à débiter" with fields for "ASSUR ALL", "4 Rue Claude Choppet", "69370 Saint-Dier au Mont d'Or", "BIC", and "Polament :".

Example: translation of text content (variant content use)

The screenshot displays a Salesforce interface for managing content. The left sidebar shows a navigation menu with categories like "Racine", "PARAGRAPHE RÉPONSE À APPEL D'OFFRES", and "Notre Filiale". The main content area shows two variants of a page titled "1.1. NOTRE FILIALE DE PARIS" and "1.1. NOTRE FILIALE DE LYON".

**1.1. NOTRE FILIALE DE PARIS**

1.1.1. Notre spécificité  
Notre société à PARIS est leader sur le métier de la construction traditionnelle. Elle réalise plus d'une centaine de projets par an dans toute l'île de France. Nos bureaux sont implantés dans le quartier de la Defense à Courbevoie.

1.1.2. Nos chiffres clés

850 COLLABORATEURS	1,2 Milliard d'euros DE CHIFFRE D'AFFAIRES
-----------------------	---

1.1.3. Notre équipe de direction

	Mathieu Directeur Commercial 39 ans 12 ans d'expérience
	Sarah Directrice financière 40 ans 25 ans d'expérience
	Nathan Directeur technique

**1.1. NOTRE FILIALE DE LYON**

1.1.1. Notre spécificité  
Notre société à LYON est leader sur le métier de la construction métallique. Elle réalise plus d'une vingtaine de projets par an dans tout le département du Rhône.  
Nos bureaux sont implantés à LYON dans le quartier de Vaise.

1.1.2. Nos chiffres clés

200 COLLABORATEURS	120 millions d'euros DE CHIFFRE D'AFFAIRES
-----------------------	---

1.1.3. Notre équipe de direction

	Nathalie Directrice de la Filiale de Lyon 36 ans 11 ans d'expérience
	Jeanne Directrice logistique et finance

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

## b. 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, the administrator is able to give users an access to this view from his standard Salesforce® application.

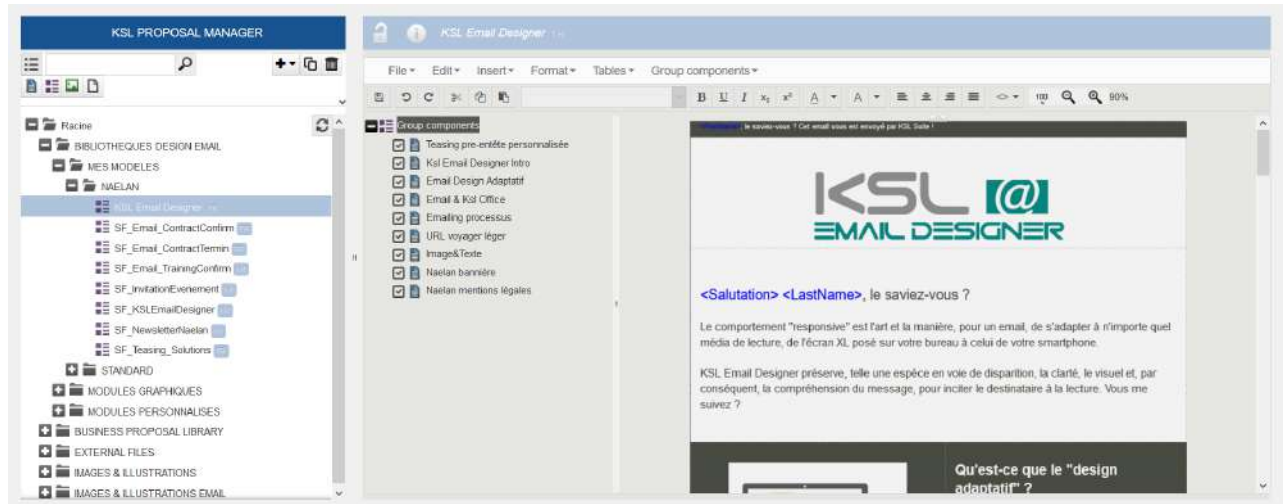
This application allows to create e-mail templates but also the shared components used by different templates:


- 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 different e-mail templates.



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

### 12.3. KSL Studio, design document templates

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,

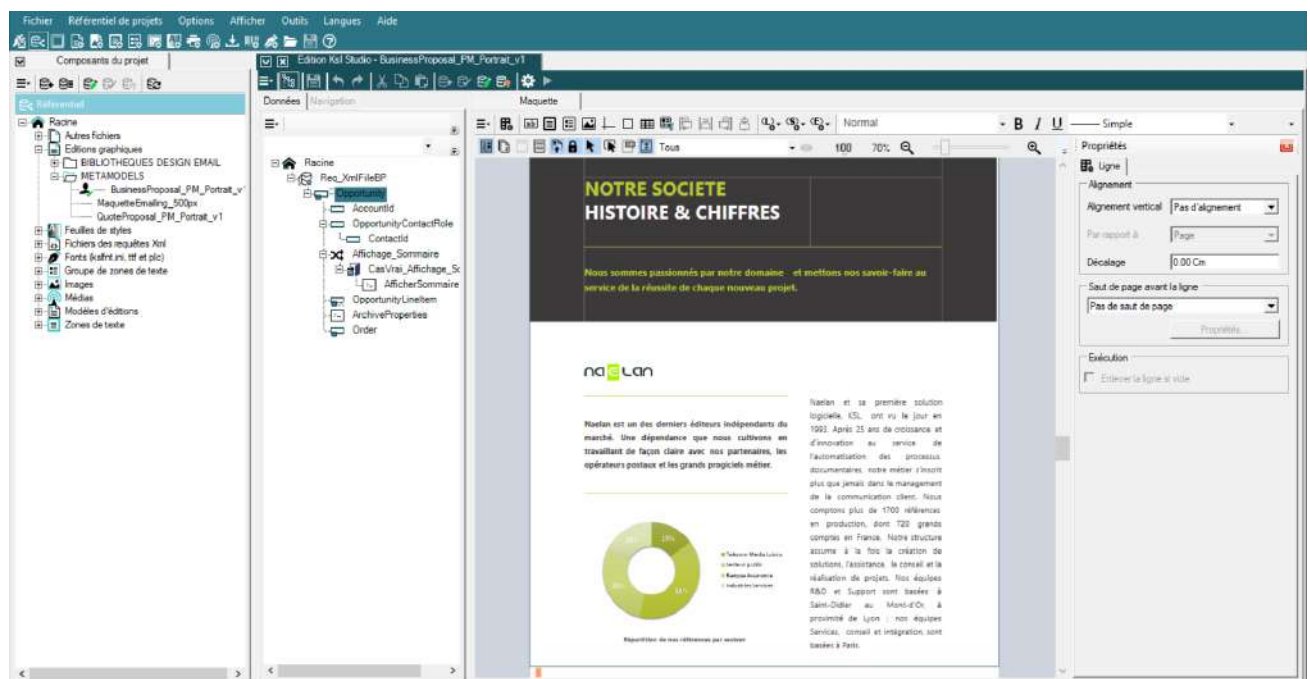
making it possible to limit the number of templates and to factorize the best use of the resources:

- 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



For more information, please consult the KSL Studio Guide.

## 12.4. KSL Admin, configuration et administration d'un serveur KSL Server

The KSL solution relies on two main softwares: the KSL for Salesforce connector installed in a Salesforce organization and KSL Server installed in the Naelan's data centers.

KSL Admin is a web application that allows to configure and administrate KSL Server:

- Permissions management including group associated with KSL for Salesforce roles
- KSL projects management
- Creation of document services from document templates
- KSL archive management
- Export/import to move KSL projects and components between two KSL environments
- KSL server supervision



For more information, please consult the KSL Server administration guide.



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