Using Your Salesforce Data in Microsoft Word

Access your salesforce.com data in Word so that you can produce any correspondence, from simple letters to complex quotes and contracts—in seconds!
Configuring salesforce.com as a Data Source

XpressDox can retrieve data from just about any database, but in particular data from a salesforce.com database can be made available to your users in Word for use in their correspondence tasks.

Before salesforce.com data becomes available in templates a Data Source must be configured. Although the salesforce.com (or force.com) database is a proprietary format, XpressDox is able to work with it natively.

This is a step-by-step tutorial on configuring a data source to make contacts and their accounts (the organizations they are associated with) available to XpressDox.

This is just the beginning of this partnership, because all salesforce.com data can be used in Word via XpressDox, not only Contacts and Accounts.
Select Settings>Configure from the XpressDox ribbon.
Select the New data source icon from the Data Sources tab.
Select the Force.com option
Enter your Salesforce.com user name (email address format)

User ID = name@address.com; Password = passwordToken

Check ‘Use Sandbox’ if you want to connect to your Salesforce.com test environment

XpressDox will construct the connection string automatically
Select the table you wish to access from the list of salesforce.com tables.
If you wish you may change the Data Element Name that XpressDox has suggested.
Choose a column, or group of columns, that uniquely identifies a row in the table.

The Id is a value which uniquely identifies a row in a table. It is derived from one or more columns called the "Id Columns".

The Id will usually be the Primary Key of the table, but can be any other combination of columns whose values will uniquely identify a row.

Double-Click the column name on the right to include it as an Id Column.
Choose the columns to be shown in the Search dialog when the template is run.

The filter enables a user to narrow the search and therefore the amount of data displayed.

Select this option only if you want XpressDox to automatically construct a Search dialog from which the user can choose a row.
Change the suggested Data Source to something more meaningful to the purpose you created it.

You can test the configuration by clicking the Test Data Source button. (If prompted, don’t save the schema as we still need to do a little more to the Data Source before it is ready.)

Once you have changed the Data Source name don’t forget to save the configuration.
Linking Supplementary Tables to the Main Table

Now we will link the Account each Contact belongs to so that when a user chooses a Contact the Account details for that Contact become available to the template.

This is where the really powerful database features of XpressDox come in to play.
Access the Edit Definition String options via the icon or button.
Right click on the Collection Contact node to add the Collection Account child node.

Because a Contact is associated with a single Account choose the option to retrieve only one row from the Account table. To avoid naming conflicts set a prefix for Account data elements.
Click IdColumn to define the column on which to base the link.

Every Data Object in a Collection (a Data Object is essentially a database row) must be uniquely identifiable by some combination of one or more columns. This unique identifier is called an "Id" in the context of this data source. It may be the database primary key, but does not have to be. Where the Id consists of more than one column, then as many "IdColumn" items can be added to the Collection as necessary (i.e. added in the tree view on the left).
Click Range to link the Account to the Contact
Repeat the process to add Collection Account so that account information is made available to templates.
Produce your correspondence in the Cloud

If the possibility of using salesforce.com data in your correspondence has sparked your curiosity (and excitement), click this link to learn how to make your template available to users in the Cloud.

Cloud integration and URL structure
About XpressDox

XpressDox takes document assembly to a new level. Not only is it one of the most powerful document assembly systems on the market, it is also one of the most versatile.

With XpressDox, users author templates in Microsoft Word for use in a wide variety of deployments, from stand-alone documents to multi-template systems, which run on the desktop, over a network, or securely via a browser from anywhere in the world.

Launching templates from the cloud means that organizations don’t need to deploy any software to users, which makes installation and administration simpler and less costly.

XpressDox even allows templates to be launched from a hyperlink on an organization’s web site, allowing customers or prospects to fill in their own forms. Learn More »