

Document Solutions for Salesforce

Trial Setup

Overview

Nutrient Document Solutions empowers Salesforce users to generate, view, edit, and sign documents — all within Salesforce, without switching tools or browser tabs. Whether managing proposals, contracts, or reports, this integration streamlines document workflows and accelerates approvals.

This guide walks you through the installation and setup process so you can be fully operational in just a few minutes.

How This Guide Is Organised

1. Installation — install the package into your Salesforce instance.
2. Basic Setup — add and configure the **nutrientLWC** component.
3. Viewing & Editing — open existing files to view, markup, or edit.
4. Sending for Signature — send PDFs for electronic signature in Salesforce.
5. Document Generation — create templates and generate docs with Salesforce data.

Who This Guide Is For

This guide is designed for Salesforce administrators, solution engineers, and developers implementing Nutrient Document Solutions for Salesforce for the first time. You will learn how to install the unmanaged package, configure its components, and start managing documents efficiently inside Salesforce.

Prerequisites

Before you begin, ensure you have:

- Permission to install unmanaged packages.
- Supported browsers: Chrome, Edge, or Safari (latest versions).
- Familiarity with basic Salesforce setup steps (e.g., editing Lightning pages).

1. Installation

Begin by installing the Nutrient package sent to you via email. Click on the link sent to you via email to install the unmanaged package into your Salesforce org. Once completed, the package will appear in your org's Installed Packages list.

After logging into your org, you should see this screen before installation.



Install Document Solutions for Salesforce

By Canada



What if existing component names conflict with ones in this package?

☒ Do not install.

☐ Rename conflicting components in package.



☒ Install for Admins Only



☐ Install for All Users



☐ Install for Specific Profiles...

App Name	Publisher	Version Name	Version Number
Document Solutions for Salesforce	Canada	Document Bundling	1.0

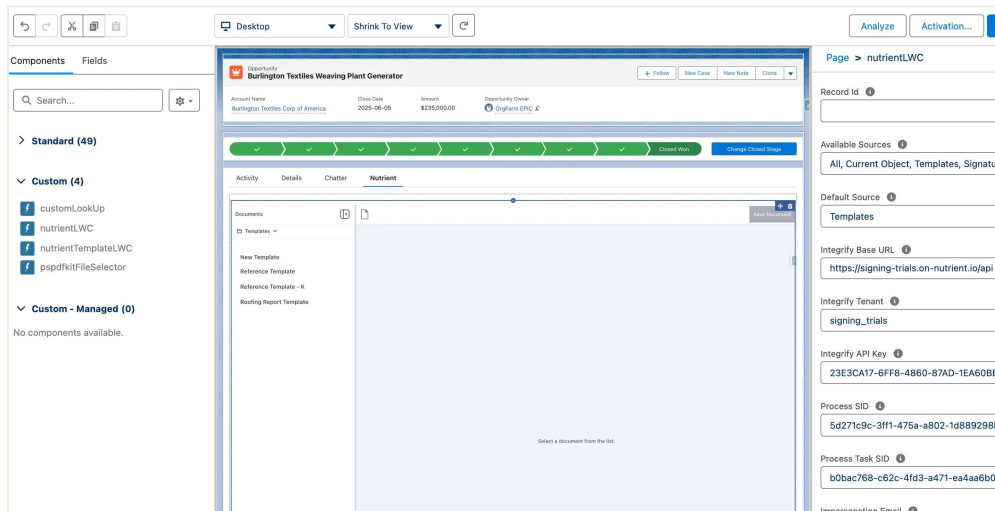
[Additional Details](#)
[View Components](#)

Next: Add the Lightning Web Component to a page layout and configure it.

2. Basic Setup (Adding the LWC Component)

Once the package is installed, add the Nutrient Lightning Web Component (*nutrientLWC*) to a Salesforce page.

Navigate to an object such as **Opportunity**, click **Edit Page**, and drag the *nutrientLWC* component from the **Custom** section onto your layout.



The *nutrientLWC* can be dragged onto any location on a page layout and then configured for specific use cases like Viewing, Editing, Signing etc.

The *nutrientLWC* component appears under **Custom Components** and can be placed anywhere on the layout.

On the right-hand side, configure the available fields described below.

Configuring Fields

- **Available Sources:** Choose where to pull files from. Options include:
 - *All* — all files available in your Salesforce org.
 - *Current Object* — files attached to the current record.
 - *Current Object and Related* — files from the current record and its related objects.
 - *Templates* — document templates available for generation.
 - *Signature Requests* — documents that have been sent for signing.

- **Signature Fields (signing only):**

If using signing features, provide the following fields. Otherwise, leave these fields blank.

You can use the values below for **testing purposes only** (at your own risk). Please **do not upload sensitive documents** when using these trial credentials.

Field	Value (for trial)
Base URL	https://signing-trials.on-nutrient.io
Tenant	signing_trials
User to Impersonate	50acdc319cef5986988d7cbd38c582b56bb3a0c7af8936e250
API Key	23E3CA17-6FF8-4860-87AD-1EA60BB0E910 (Backup: 1642E8B6-C121-4CA1-BE3C-9F2EAC3F0CF6)
Signing Process GUID	5d271c9c-3ff1-475a-a802-1d889298b218
Form Task GUID (Start)	b0bac768-c62c-4fd3-a471-ea4aa6b09f06
Signing Task GUID	19664a60-15a1-46aa-8b36-0fdad24852bb

Note:

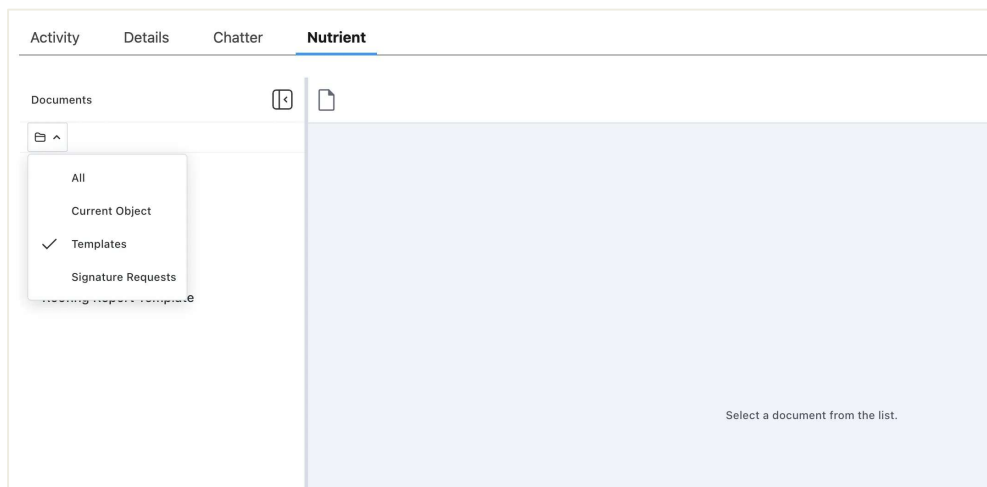
By default, the package operates in trial mode. Documents opened in trial mode will display a watermark. To remove watermarks, enter valid license keys in the Web SDK and Document Authoring fields. [Contact Nutrient](#) to request a time-limited demo key.

Next: Open a record and try viewing or editing a file.

3. Viewing and Editing Documents

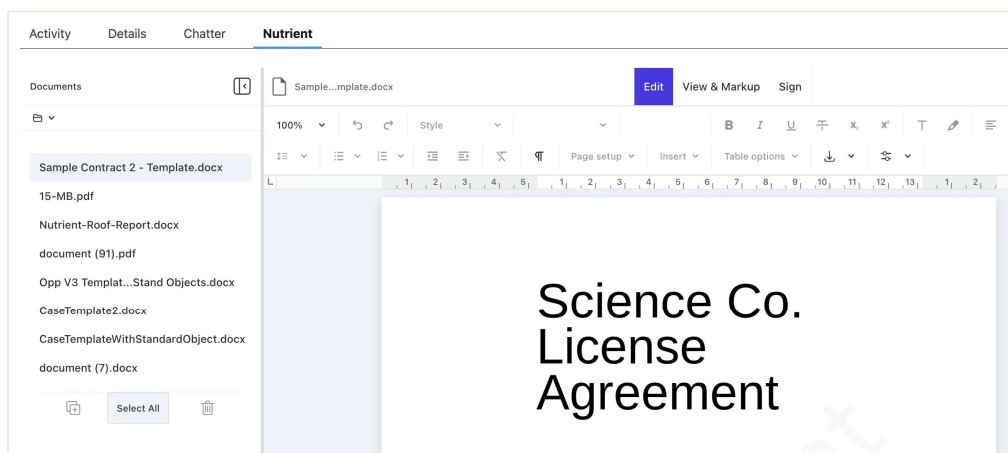
After setup, return to your chosen Salesforce object and select a file source from the dropdown in the sidebar (for example, **All** or **Current Object and Related**). A list of files appears.

- Click a **PDF** to open it in the **View & Markup** tab.
- Click a **Word (.DOCX)** file to open it in the **Edit** tab, where it can be edited in its native format.

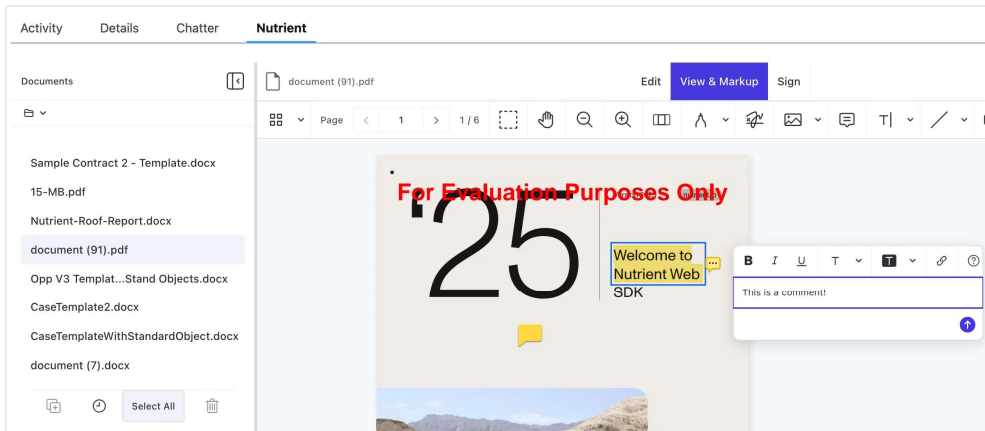


The dropdown in the sidebar lets the user pick between loading existing files or Generate a new document based on Templates or view files sent for signature.

To convert a Word document to PDF, switch from **Edit** to **View & Markup**. You can then annotate or prepare it for signature.



A .DOCX file will load in the Edit tab by default where it can be edited using Nutrient Document Authoring.

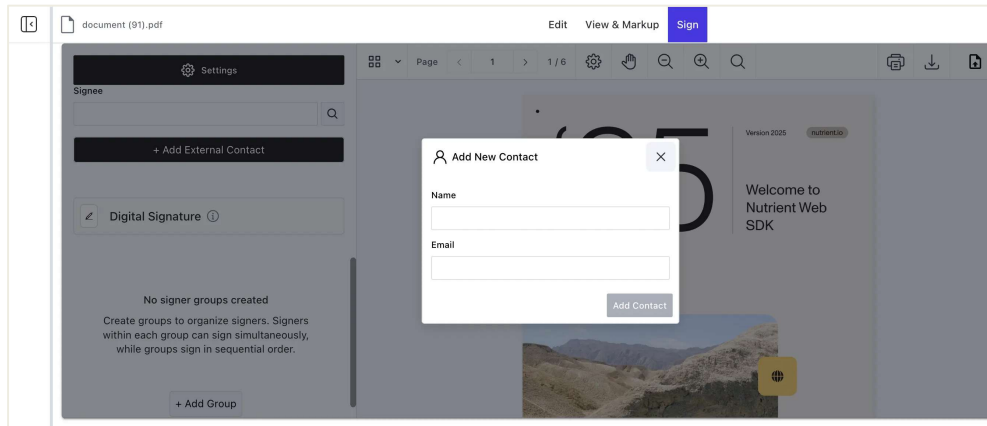


When clicking on the View & Markup tab files are converted to PDF and loaded in the Nutrient Web SDK.

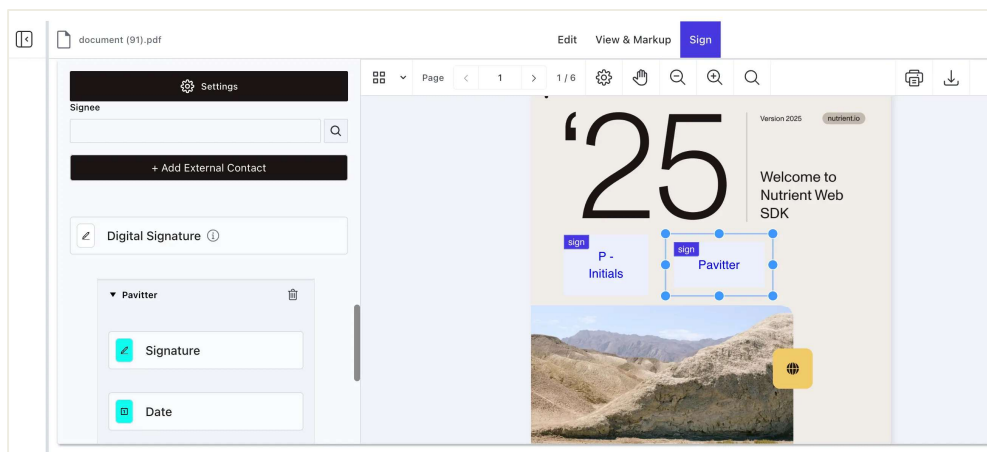
Next: Send a document for signature.

4. Sending for Signature

Open any document and click **Sign**.



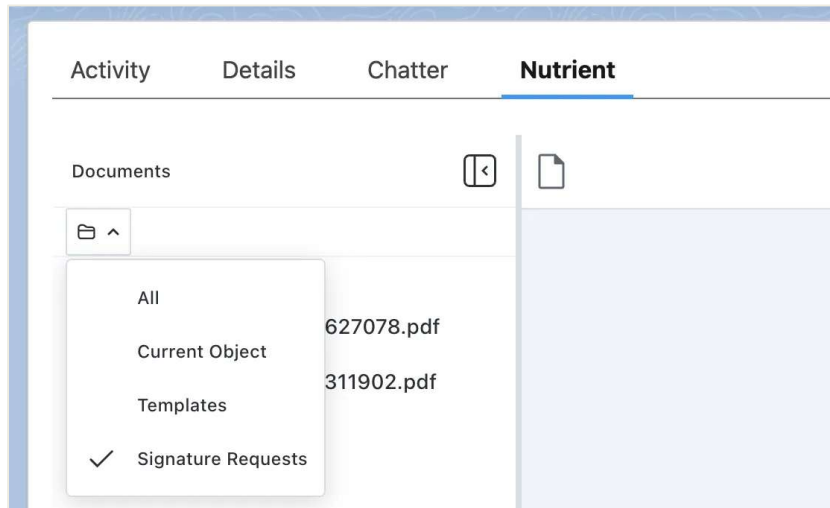
External Contacts can be added when sending documents for signature.



Placeholders for Signatures, Initials, Date fields and more can be placed on the document.

1. If the document is an Office file, it is automatically converted to PDF.
2. In the sidebar, add signers by entering their names and email addresses.
3. Drag fields such as **Signature**, **Initials**, or **Date** onto the document.
4. Click **Submit** to send the document for signing.

Track the progress of each request under the **Signature Requests** tab.



All sent signature requests can be tracked in the Signature Requests tab.

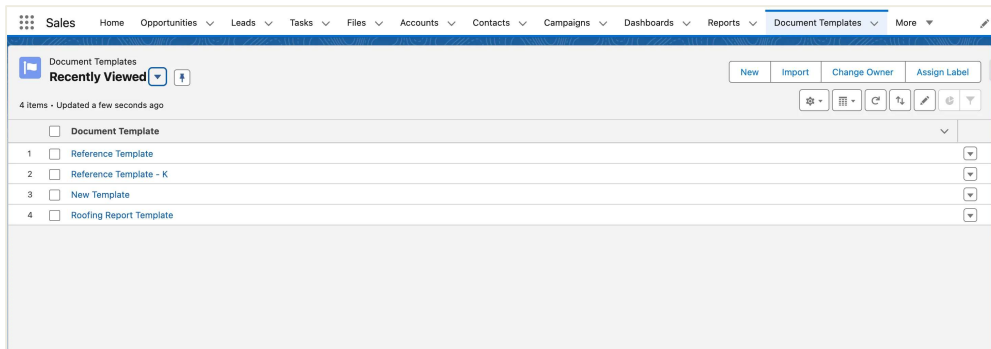
Next: Generate a document from a template.

5. Document Generation

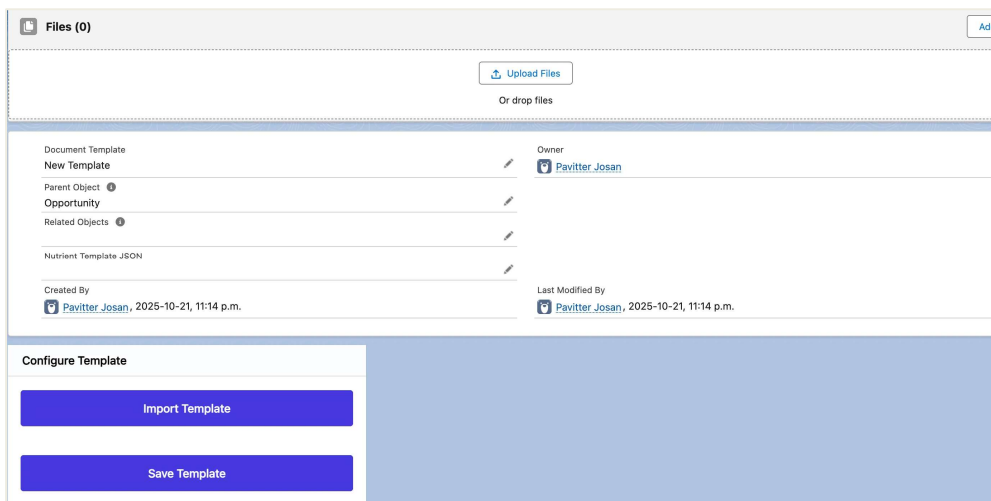
Open the **Document Templates** tab to create a new template record.

Each record represents a reusable Word template for document generation.

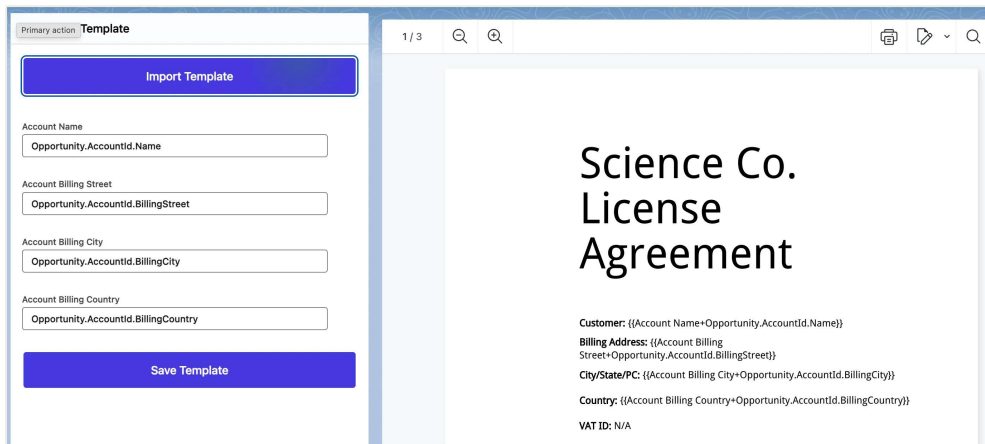
- Click **New** and fill in:
 - Template Name** — the name displayed in the UI.
 - Parent Object** — the main Salesforce object (for example, Opportunity).
 - Related Objects** — additional related objects (for example, Account).
- Upload a Word file containing placeholders in the upload section at the top of the page.
 - You can use [this](#) template to get started.
 - A detailed guide on how to build your own templates can be found [here](#).
- Click **Import Template** to analyze and validate the file. The import process checks syntax and lists all recognized fields.
- Click **Save Template** to store the configuration.



The Document Templates is installed with the package, each record represents a template.



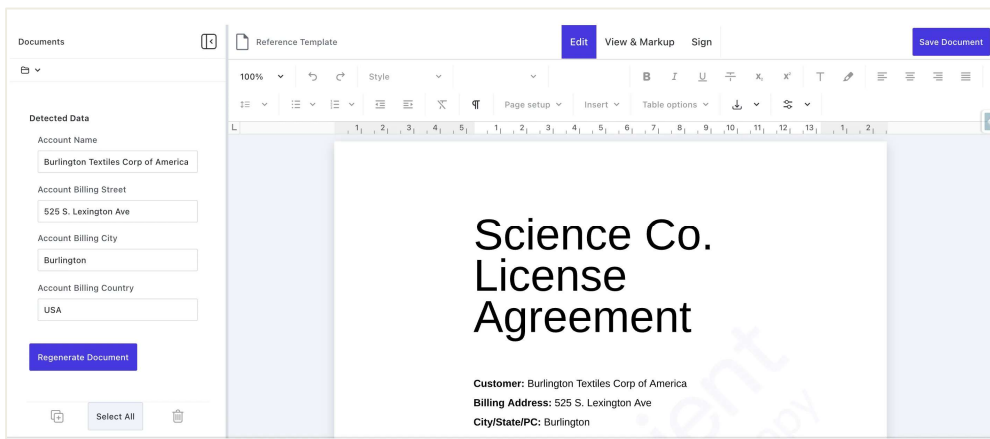
A word template with placeholders (merge fields) needs to be uploaded, you can use our sample template referenced above.



Importing and saving the template shows a preview of the document, lists all recognised fields on the template and saves their mapping to the template record.

After saving, select **Templates** in the nutrientLWC sidebar and click a template to generate a new document populated with live Salesforce data.

The system automatically replaces placeholders such as `{{Opportunity Name+Opportunity.Name}}` with corresponding field values.



When a document is generated from a template, the data that went into the document is shown in the left sidebar.

Generated documents open as **.DOCX** files in the **Edit** tab.

You can convert them to PDF under **View & Markup** or send them for signatures under **Sign**.

Conclusion

You have successfully set up Nutrient Document Solutions for Salesforce. You can now view, edit, generate, and sign documents — all within Salesforce — without switching tools.

For advanced configuration topics, including automation, custom placeholders, and integrations with external systems please contact Nutrient.

