THE S GROUP   Installation Guide and Manual

PandaDoc Integration

Installation via Composer (Recommended)

After the purchase, open Your Account -> Composer Packages.

STEP 1

Create composer credentials:

Credentials

You need to create username/password or reset it.

Username   **Password**

CREATE/RESET CREDENTIALS

STEP 2

We recommend you switch the store into maintenance mode during the installation.

php bin/magento maintenance:enable

Then add the repository to your composer.json file by the command:

composer config www.sashas.org composer https://www.sashas.org

STEP 4

Install the module by the command:

composer require thesgroup/module-pandadoc-integration

After installation complete re-compile Magento and disable maintenance mode:

php bin/magento setup:upgrade

```
php bin/magento setup:di:compile
php bin/magento indexer:reindex
php bin/magento cache:flush
php bin/magento setup:static-content:deploy
php bin/magento maintenance:disable
```

Installation via zip archive

STEP 1

Files are packaged in a zip archive, to extract files from the archive. Extract files in any folder.

STEP 2

Copy module files to the Magento root app/code/TheSGroup/PandaDoc folder.

STEP 3

Login to your website ssh console and switch to the site owner user (In case your Magento file owner is not the same as the current user)

STEP 4

Execute the following commands:

```
php bin/magento maintenance:enable
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento indexer:reindex
php bin/magento cache:flush
php bin/magento setup:static-content:deploy
php bin/magento maintenance:disable
```

UNINSTALL The Module

Execute the following commands:
```
php bin/magento maintenance:enable
composer remove thesgroup/module-pandadoc-integration
php bin/magento setup:upgrade
php bin/magento cache:flush
php bin/magento maintenance:disable
```

Configuration

Before starting with PandaDoc API, ensure you're on the right plan.

You can test it with the Sandbox key on the Business, Enterprise, and API plans. The Production API key is only available on the Enterprise, and API plans.

To access the API, go to the Developer Dashboard page and generate either a Sandbox or a Production key.

In the Magento admin panel open Sales -> PandaDoc -> Configuration. Then Change "Enable Integration" to Yes, select the environment type, and copy the API key.

Create a Template

The signature document is generated based on pre-existing PandaDoc template. There is a guide on how to create a template in the PandaDoc dashboard: https://support.pandadoc.com/hc/en-us/articles/360051205934-Self-paced-Onboarding-Creating-a-Template

When you have a template created open Sales -> PandaDoc -> Template Management in the Magento admin panel and select the option "Add New Template"

Template Properties Section

PandaDoc Template *
Magento Test Template with Tokens ▾ ?

Select a template that will be used for a new document.

Name *
Subtotal more than 30 with tokens

The name of document will be shown on the storefront.

Role *
Client ▾ ?

Select role of a document viewer. The list updates based on template selection.

Active * 🟢 Yes

Websites *
Main Website ?
Second Website

Customer Groups *
NOT LOGGED IN ?
General
Wholesale
Retailer

Priority
0

List of documents to sign will be shown based on the highest priority.

In the template properties template, you will need to select the PandaDoc template from the dropdown field. The name field is a name of a document that will be shown to a customer at the checkout.

The role drop-down auto-populated based on the selected template. The selected role would be applied to a customer who will be required to sign the document. The template roles are created at the PandaDoc

dashboard. There is an article describing template roles:
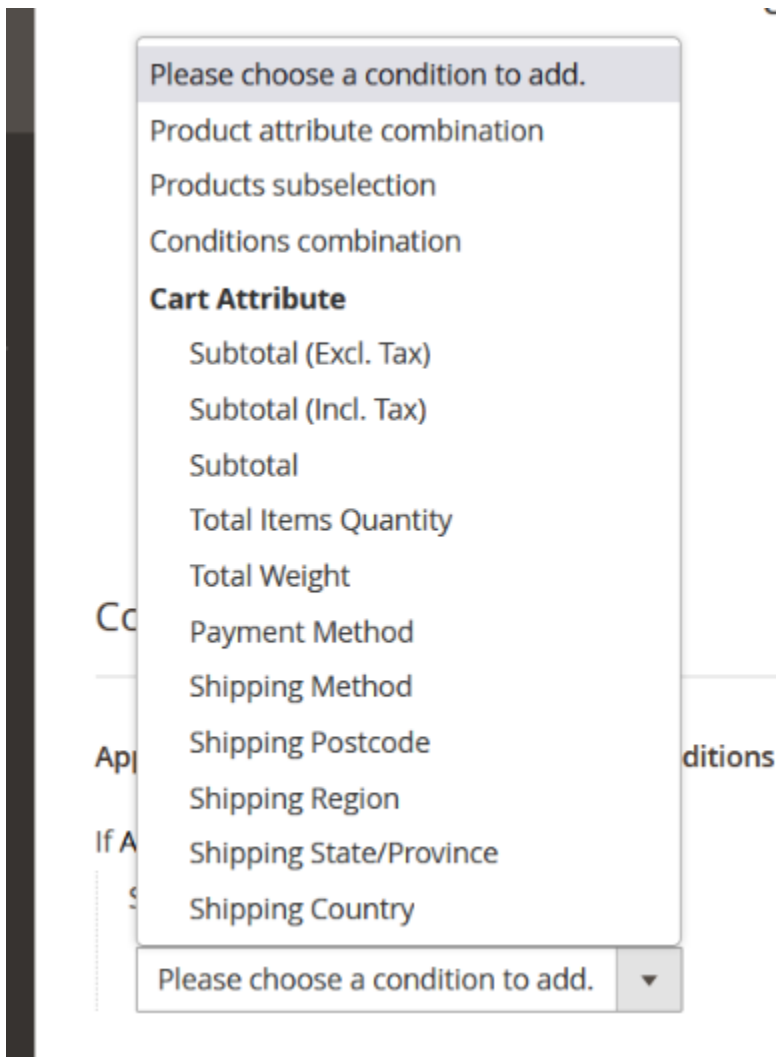https://support.pandadoc.com/hc/en-us/articles/360035231013-Template-Roles

The active field determined is the template enabled in Magento.
At the websites and customer groups fields you can select for which websites and customer groups this template will apply.
In the case where you have several templates that match the conditions set then they will be shown based on the priority field where a template with a smaller priority number will be shown first.

Conditions Section

In this section, you can select the condition of the cart or cart items that should be met in order for the template to apply. It can be one condition or a combination of several conditions.

The list of conditions works identically to the Magento cart price rules conditions. There is more information on how to use Magento rule conditions with an example of a cart price rule:
https://experienceleague.adobe.com/docs/commerce-admin/marketing/promotions/cart-rules/price-rules-cart-create.html?lang=en

Variables Section

The variables section provides the ability to automatically populate the PandaDoc document with customer information. When you will create a template at the PandaDoc dashboard you will need to specify variables and they will be automatically shown in the Magento template edit form. There is more information about variables in the PandaDoc templates: https://support.pandadoc.com/hc/en-us/articles/360020552894-Variables

The "Magento Field" is a list of available variables for a customer in Magento whereas the "PandaDoc Template Variable" will have a list of variables defined in the PandaDoc template.

FAQ

- **I don't see any fields in the PandaDoc template dropdown.**
  The template list is auto-populated from PandaDoc. In the case where there are no templates shown you need to verify that the API key is correct and you have at least one template created in the PandaDoc dashboard.

- **Where can I request installation support if I bought it without it?**
  You can buy the support package at https://www.sashas.org/extension-support.html and then contact us at https://www.sashas.org/contact with your order # and FTP, admin access for the website.

- **How can I extract files from the archive?**
  You may use WinRAR for this purpose: http://www.rarlab.com/download.htm