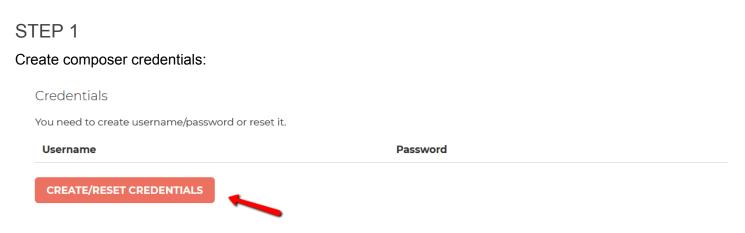


# PandaDoc Integration

# Installation via Composer (Recommended)

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



## 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 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 <u>Developer Dashboard</u> page and generate either a Sandbox or a Production key.

bg	Settings	Developer dashboar	d		? Need help 🕌	
	PROFILE	Monitoring Logs	Webhooks history Configuration			
D	Personal info	API keys				
	S Authorized applications	Sandbox key	Test PandaDoc API for free. All documents will include a developer prefix and you'll be able to use up to 10 requests per minute. Sandbox API setup		Generate	
	<ul> <li>Branding</li> <li>Integrations</li> </ul>	Production key	Go live with PandaDoc API: You'll have full control over document names, no watermarks on PDFs, and up to 100 requests per minute. Production API setup		Generate	
$\bigcirc$	S Developer dashboard					
L.	<b>L</b> Team	Applications	olication to send and receive document data from your			
$\bigcirc$	🔹 Settings	PandaDoc account v	PandaDoc account with increased security. Application setup			
	Saved messages	Name	Published by	Client ID		
	ORGANIZATION	test v2	test	6223e77c3b08ea7214c5		
	🖸 Billing 🚺	PostmanApp	Test	6b7715616b2686e621f1		
	Workspaces					

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

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### Integration Configuration

Enable Integration [store view]	Yes	•
Environment Type [store view]	Production	•
Production API Key [store view]		
	Production PandaDoc API Key. You can the API key at the Settings->Developer dashboard section of the PandaDoc Admin Panel	

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-Te mplate

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

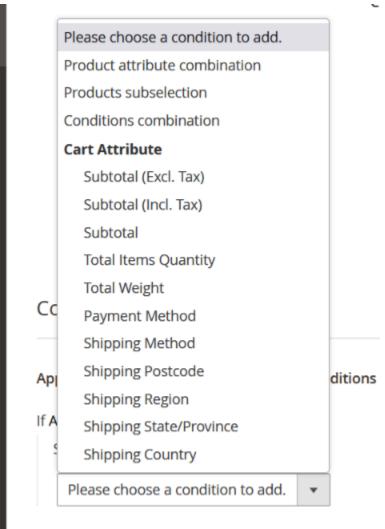
The active field determined is the template enabled in Magento.

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: <u>https://experienceleague.adobe.com/docs/commerce-admin/marketing/promotions/cart-rules/price-rules-cart-cr</u> <u>eate.html?lang=en</u>

### 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: <a href="https://support.pandadoc.com/hc/en-us/articles/360020552894-Variables">https://support.pandadoc.com/hc/en-us/articles/360020552894-Variables</a>

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.

Vari	ables					
	Magento Field *			PandaDoc Template Va	ariabl	e *
	BillingAddress.City	•	]	Client.City	•	0
	BillingAddress.Firstname BillingAddress.Lastname			Client.Company	•	0
	BillingAddress.City BillingAddress.Company			Client.Country	•	0
	BillingAddress.Countryld BillingAddress.Postcode			Client.FirstName	•	0
	BillingAddress.Region BillingAddress.RegionId BillingAddress.RegionCode			Client.LastName	•	0
	BillingAddress.Street BillingAddress.Telephone					
	Customer Email			Client.PostalCode	•	
	RillingAddress Region	*		Client State	*	2

### Variables

Magento Field *	PandaDoc Template Variable *
BillingAddress.City	Client.City 🔹 🕻
	Client.City
BillingAddress.Company	Client.Company
	Client.Country
BillingAddress.CountryId 🔻	Client.Email
II	Client.FirstName
II Dilling to delay a Cimbra and	Client.LastName
BillingAddress.Firstname	Client.Phone
	Client.PostalCode
BillingAddress.Lastname 🔻	Client.State
	Client.StateCode
BillingAddress.Postcode	Client.StreetAddress

#### - 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 <u>https://www.sashas.org/extension-support.html</u> and then contact us at <u>https://www.sashas.org/contact</u> 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