

salesforce

Quip

Salesforce, Summer '25

Summer '25



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CONTENTS

- Quip 1
 - Get Started with Quip 1
 - Use Quip 3
 - Administer Quip 73
- Quip in Salesforce 77
 - Get Started with Quip (formerly Salesforce Anywhere) in Salesforce 77
 - Use Quip Features in Salesforce 140

Quip helps you collaborate and create, all in one place. With Quip, your users can project manage with living documents and spreadsheets that centralize teamwork. It doesn't matter if people are in the same room or on the other side of the globe. They can work in tandem and focus on what matters.

[Get Started with Quip](#)

Review some important information about products, features, and accessibility to get the most out of Quip.

[Use Quip](#)

Learn how to get the most out of Quip features.

[Administer Quip](#)

Get your users up and running with Quip.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Get Started with Quip

Review some important information about products, features, and accessibility to get the most out of Quip.

[Supported Browsers and Devices for Quip](#)

You can use Quip in a web browser, in the desktop app, or on a mobile device. See the compatible browsers, operating systems, and mobile devices.

[Supported Languages for Quip](#)

See the languages that Quip supports, and learn how to update your language settings.

[Quip Accessibility Considerations](#)

Quip is working to make every part of it fully accessible to the WCAG 2.1 AA standard.

[Open Documents in the Quip Desktop App](#)

Set up Quip so that all document links to your Quip site open in the Quip desktop app instead of your web browser.

Supported Browsers and Devices for Quip

You can use Quip in a web browser, in the desktop app, or on a mobile device. See the compatible browsers, operating systems, and mobile devices.

Web Browsers

You can use Quip in the latest version of these web browsers.

- Google Chrome
- Microsoft Edge
- Mozilla Firefox

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

- Safari

Desktop App

To use the Quip desktop app, your operating system must be MacOS High Sierra (10.13) or later.

Mobile App

To use the Quip mobile app, your mobile device must be iOS 12 or later.

Supported Languages for Quip

See the languages that Quip supports, and learn how to update your language settings.

Quip is available in 12 languages.

- English
- Spanish
- Italian
- Chinese (Traditional)
- Chinese (Simplified)
- French
- German
- Dutch
- Portuguese (Brazil)
- Russian
- Turkish
- Korean

[Change Language Settings in Quip](#)

Change your language settings in Quip. All Quip features and UI text appear in the chosen language.

Change Language Settings in Quip

Change your language settings in Quip. All Quip features and UI text appear in the chosen language.

1. From your Quip account settings, select **Profile**.
2. Select a language.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Quip Accessibility Considerations

Quip is working to make every part of it fully accessible to the WCAG 2.1 AA standard.

SEE ALSO:

[External Link: Accessibility for Quip](#)

EDITIONS

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited Editions**

Open Documents in the Quip Desktop App

Set up Quip so that all document links to your Quip site open in the Quip desktop app instead of your web browser.

1. Open Quip in your web browser.
2. From your profile in Quip, click **Appearance**.
3. Select **Open Links in App**.
4. Save your settings.

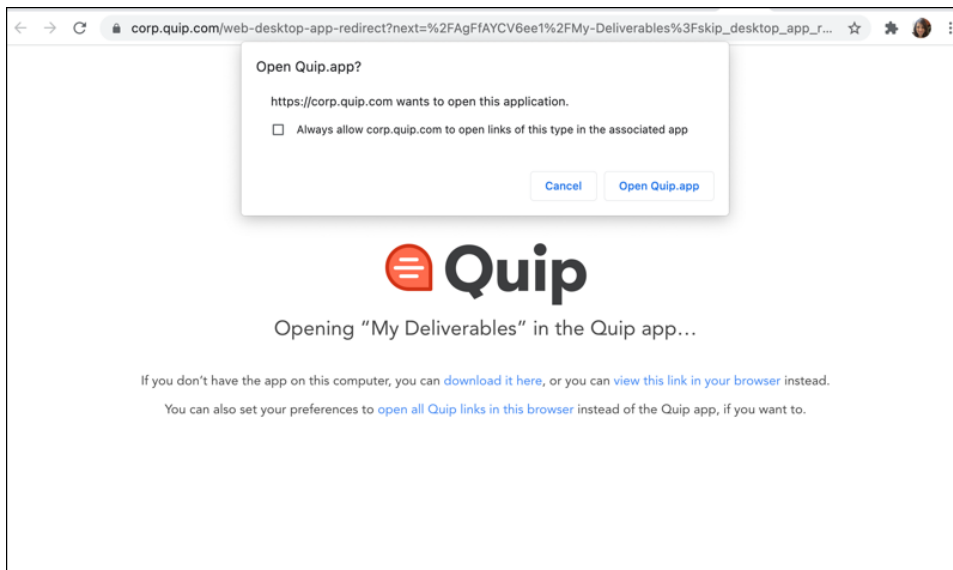


Note: This setting applies only to the current web browser. Repeat these steps for each browser and device that you use.

The next time that you open a Quip link from your email, Slack, or somewhere else, confirm that you want to open the document in the desktop app. If you don't have the Quip app, download it from the confirmation page.

EDITIONS

Available in: **Quip on Web**



Use Quip

Learn how to get the most out of Quip features.

Documents

Bring your documents to life with real-time collaboration in Quip documents.

Spreadsheets

Organize your data in spreadsheets, and view it in context in Quip documents.

Comments

Keep collaboration in context with embedded comments in Quip. Comments change color after you read them so you can focus on the content that still needs your attention.

Emojis and GIFs

Add some fun to your comment, conversation message, document, or spreadsheet with emojis and GIFs.

Navigation and Folders

Learn how to use the Quip sidebar, search, and keep your files organized with folders.

Sharing and Access

Learn how to share your documents and control who has access to your documents, spreadsheets, and folders in Quip. Only members of your organization's Quip site can see the Share settings.

Live Apps and Live Data

Create alignment, prioritize backlogs, and track progress with live data in Quip. Keep your team up to date with native Quip live apps, use third-party live apps, or create your own live apps to meet your business's custom needs.

Tasks

Manage your work across documents and teams with tasks.

Notifications

Get notified about the Quip changes and documents that you care about.

Documents

Bring your documents to life with real-time collaboration in Quip documents.

Update Content Across Documents Automatically with Live Paste

Reference content from a source document in other documents. When the source document is updated, the content in other documents automatically updates too.

Lock Edits in Documents

Prevent other users from making accidental changes or deleting document content. Keep entire documents secure, or only lock specific sections.

Insert Elements into Documents

Use the @ symbol to mention people, documents, and more. Or, insert a range of elements such as spreadsheets, media, and data.

Link to Specific Document Sections

Direct teammates to a specific document sections with anchor links.

Collapse and Expand Document Sections

See only the content you need by showing or hiding document sections.

Preview Documents in Quip

Quickly preview and navigate between cross-referenced documents with Quick Peek. Without opening new tabs, view document content and respond to activity in linked documents.

Add a Document to a Folder

Relocate documents and spreadsheets to make them easier to find or to change who they're shared with quickly. When you move or add a document to another folder, the document members change to reflect the folder members.

Document Tools

Count how many words are in a document, check spelling, see an outline, and more.

Markdown in Quip

Quip supports many markdown shortcuts.

Update Content Across Documents Automatically with Live Paste

Reference content from a source document in other documents. When the source document is updated, the content in other documents automatically updates too.

Use Live Paste in a Quip Document

Use Live Paste to duplicate information across documents, gather distributed content in a central document, or reference pertinent information across related documents.

Refresh Live Paste Content

Update Live Paste content on demand instead of automatically.

See Live Paste Source Content

Find out where source content is referenced by Live Paste content.

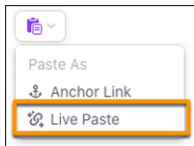
Stop Updates to Live Paste Content

Stop updates to Live Paste content permanently.

Use Live Paste in a Quip Document

Use Live Paste to duplicate information across documents, gather distributed content in a central document, or reference pertinent information across related documents.

1. In the source document, copy the content.
2. In another document, paste the content.
3. Open the Paste menu, and select **Live Paste**.



Note: The menu only appears when you copy a content type that works with Live Paste.

A purple line next to the content indicates that it's synced to a source document via Live Paste. The reference content retains the format of the source content.

Considerations for Live Paste

When using Live Paste, keep these considerations in mind.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Considerations for Live Paste

When using Live Paste, keep these considerations in mind.

- Live Paste doesn't support:
 - Live Apps
 - Content from within the same document
- When you Live Paste a multi-column layout from a source document, the content appears in a single column in the reference document.
- Live Paste content containing people @mentions only sends notifications related to the source document.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Refresh Live Paste Content

Update Live Paste content on demand instead of automatically.


1. In the reference document, select the Live Paste content.
2. From the Live Paste menu, select **Update Now**.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

See Live Paste Source Content

Find out where source content is referenced by Live Paste content.

1. In the source document, click anywhere in the content that's referenced elsewhere.
2. Click the Live Paste menu .
3. To see a list of where the content is referenced with Live Paste, select **References**.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Stop Updates to Live Paste Content

Stop updates to Live Paste content permanently.

1. In the reference document, select the Live Paste content.
2. From the Live Paste menu, select **Unlink**.

Live Paste content also stops updating if the person who inserts the Live Paste content leaves your organization or loses access to the source document. Anyone with access to the source document can relink the Live Paste content.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Lock Edits in Documents

Prevent other users from making accidental changes or deleting document content. Keep entire documents secure, or only lock specific sections.

[Lock a Quip Document](#)

Lock edits for an entire Quip document.

[Lock a Quip Document Section](#)

Lock edits for specific sections within a Quip document.

Lock a Quip Document

Lock edits for an entire Quip document.

- 1. From the Document menu, select **Advanced**, and then select **Lock Edits to Document**.
- 2. Confirm that you want to lock edits.

To unlock the document, next to the document title, select **Edits Disabled**. Then, confirm that you want to unlock the document.

 **Note:** Unlocking a document that you didn't lock sends a Quip notification to the person who locked the document.

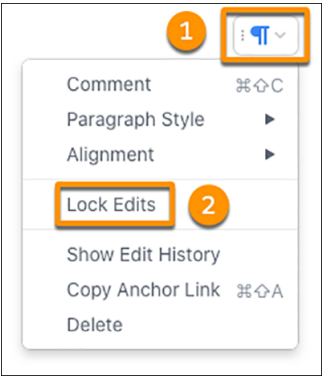
EDITIONS

Available in: **Quip desktop app** and **Quip on web**

Lock a Quip Document Section

Lock edits for specific sections within a Quip document.

- 1. Put your cursor in the section that you want to lock.
- 2. Select the section menu, and then select **Lock Edits**.



EDITIONS

Available in: **Quip desktop app** and **Quip on web**

To unlock the section, return to the section menu, select **Lock Edits** again, and then confirm that you want to unlock edits.

Insert Elements into Documents

Use the @ symbol to mention people, documents, and more. Or, insert a range of elements such as spreadsheets, media, and data.

Element	Description	Mention	Additional Instructions
Image	Show your teammates what you're talking about. Comment on images to spark discussion.	@image	Select Insert , and then choose the desired image.
Video	Show your teammates what you're talking about. Comment on videos to spark discussion.	@video	Select Insert , and then choose the desired video.

EDITIONS

Available in: **Quip desktop app**, **Quip iOS mobile app**, and **Quip on web**

Element	Description	Mention	Additional Instructions
File	Upload content and reference it in context.	@file	Select Insert , and then choose the desired file.
Date	Never lose track of deadlines by adding dates or reminders.	@date or @reminder	<p>Choose the desired date from the calendar.</p> <p>To remind a teammate, @ mention them on the same paragraph or row as the date.</p> <p>The date appears in your document highlighted in blue. As the date approaches, the date color changes to orange and you get a Quip notification. To change the date format, from the Document menu, select Advanced, and then select Change Date Formatting.</p>
Spreadsheets	Keep all your data in one place.	@spreadsheet	<p>To add a new table to your document, enter @spreadsheet.</p> <p>To embed an existing spreadsheet in a document, enter the @ symbol, and then type the spreadsheet title.</p> <p>To see the spreadsheet in full screen mode, from the Document menu, select Advanced, and then select Spreadsheet.</p>
Tables	Use a spreadsheet without row and column headers.	@table	NA
Checklists	Manage tasks in a sortable list.	@checklist	<p>Select Insert.</p> <p>To assign a task, @ mention a teammate, and select a date.</p>
Equations	Insert math equations and scientific formulas rendered using the KaTeX library, which supports many LaTeX functions.	@math	<p>Enter your equation. For complex expressions, use LaTeX syntax.</p> <p>Use the Expand/Collapse icon to choose how the math content is displayed.</p>
Formulas	Reference spreadsheet values inline in a document.	@formula	<p>Enter the cell name, like <code>A15</code>. If your document has multiple spreadsheets, use the sheet name and the cell. For example, <code>Sheet1!A15</code>.</p> <p>You can also add formulas that calculate outside of the spreadsheet, like <code>MAX(A1:A5)</code>.</p>

SEE ALSO:

[Salesforce Help: Comment in Quip](#)

[External Link: KaTeX Supported Functions](#)

Link to Specific Document Sections

Direct teammates to a specific document sections with anchor links.

1. Place your cursor in the document section that you want to link to.
2. From the section menu, select **Copy Anchor Link**. To use a keyboard shortcut to copy the anchor link, press Ctrl+Shift+a (Windows) or Cmd+Shift+a (macOS).

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Collapse and Expand Document Sections

See only the content you need by showing or hiding document sections.

To show or hide document sections, you have two options:

- Collapse or expand an individual document section. Hover to the left of a section heading, and click the arrow.
- Collapse or expand all document sections at once. From the View menu, select **Collapse / Expand**, and then choose to collapse or expand all sections.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

[Considerations for Collapsed Sections](#)

When collapsing sections in your Quip document, keep these considerations in mind.

Considerations for Collapsed Sections

When collapsing sections in your Quip document, keep these considerations in mind.

- You can't collapse the document title or any content in columns.
- Find and Replace works on collapsed sections.
- Any content that you collapse or expand applies only to your view. Your teammates don't see your selections.
- By default, collapsed content is included when you print a document. To avoid printing collapsed content, from the Document menu, select **Print Options**, and then deselect **Print collapsed sections**.

Preview Documents in Quip

Quickly preview and navigate between cross-referenced documents with Quick Peek. Without opening new tabs, view document content and respond to activity in linked documents.

EDITIONS

Available in: **Quip desktop app and Quip on web**

Small Preview

The small preview shows the document's first page. You see the small preview when you hover over a document that's @ mentioned and you have access to the document. Small previews aren't available in the conversation pane, comments, or folders.

Large Preview

The large preview shows the entire document. In the large preview, you can add comments without opening the document in a new tab. To open the large preview, hover over the linked document, then press Shift and click it. To edit the linked document, click **Open**. Large previews aren't available in folders.



Note: If Synced Sharing is enabled for your Salesforce org and you have View Only access, you don't see the conversation pane in the large preview.

Add a Document to a Folder

Relocate documents and spreadsheets to make them easier to find or to change who they're shared with quickly. When you move or add a document to another folder, the document members change to reflect the folder members.

1. Open the document or spreadsheet.
2. In the Document or Spreadsheet menu, select **Move To Folder**.
3. Choose whether you want to move the document from its current folder or add it to another folder.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Document Tools

Count how many words are in a document, check spelling, see an outline, and more.

Tool	Description	Instructions
Line Numbers	See the line numbers in your document.	From the View menu, select Show Line Numbers .
Outline	See your document's outlines. Quip creates the outline automatically when you add headings.	To see the outline temporarily, on the right side of the document, hover over the blue dot. To see the outline permanently, from the View menu, select Keep Outline Expanded .
Spell Check	Quip checks for spelling errors in different ways depending on your device or operating system.	In the Quip desktop app, Quip uses the operating system tool to check for mistakes. In a web browser, Quip uses the browser spell check tool. On mobile, Quip uses the operating system tool to check for mistakes.
Word Count	See the word count of the entire document or just a section.	To see a word count, highlight the whole document or a section of the document. The word count appears in the bottom-left corner.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Markdown in Quip

Quip supports many markdown shortcuts.

Keystroke	Shortcut
1 + space	Start a numbered list

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Keystroke	Shortcut
* + space	Start a bulleted list
--- + space	Insert a line break
[At the end of a line or paragraph] // + space	Add a comment
# + space	Heading 1
## + space	Heading 2
### + space	Heading 3
Space four times	Start a new code block
[] + space	Start a new checklist
{{ any text }}	Text inside brackets becomes inline code
type any text *type any text*	Italic text
__type any text__ **type_any_text**	Bold text
~~type any text~~	Strikethrough text

Spreadsheets

Organize your data in spreadsheets, and view it in context in Quip documents.

[Edit and Format Cell Values](#)

Change the look of spreadsheet cells, and update cell content.

[Use Data Validation in Spreadsheets](#)

Apply data validation to a cell or series of cells to keep data in your spreadsheets consistent.

[Apply Conditional Formatting in Spreadsheets](#)

Automatically highlight cells that meet certain conditions or match specific values.

[Reference Data in Spreadsheets](#)

Show the values in a cell, range of cells, or sheet from one spreadsheet in another spreadsheet. Referenced data retains the source formatting, and it refreshes automatically when you load the spreadsheet or when the source data is updated.

[Lock Data in Quip Spreadsheets](#)

Lock individual cells, a spreadsheet tab, or an entire spreadsheet to prevent accidental edits to spreadsheet data. Locking spreadsheet data prevents you and other users from making edits.

Sort and Filter Spreadsheet Data

See only the data that you want to see with filters and filter views. Sort to see your data how you want to see it.

Add Lists in Spreadsheet Cells

Format a Quip spreadsheet cell as a bulleted list, a numbered list, or a checklist. You can include one list type per cell.

Add Formulas and Functions to a Spreadsheet

Use functions to create formulas and perform calculations on your data.

Create Charts with Spreadsheet Data

Turn any range of your spreadsheet data into a chart. Charts dynamically update to reflect changes to your spreadsheet data.

Edit and Format Cell Values

Change the look of spreadsheet cells, and update cell content.

Action	Instructions
Edit a cell.	Start typing in the cell.
Add another line of text to the same cell.	Use a keyboard shortcut: <ul style="list-style-type: none">• Option+Return (macOS)• Alt+Enter (Windows)
Change the format of cells or cell text.	Use the Format menu or the formatting ribbon at the top of the spreadsheet to change cell formatting such as: <ul style="list-style-type: none">• Text color• Cell color• Font• Number format

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Use Data Validation in Spreadsheets

Apply data validation to a cell or series of cells to keep data in your spreadsheets consistent.

- From the Data menu, select **Data Validation**. Or, right-click to open the cell menu, and select **Data Validation**.

Select From List	Users select a cell value from a dropdown list. Enter and sort the values for the dropdown list, and choose a color to apply to the cell for each value.
Select From Range	Users select a cell value from a dropdown list that references a range of data in the spreadsheet. Select the data range that you want to reference from the spreadsheet.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Number	Users can enter only numbers in this cell. To specify a range, choose an operation and enter an argument.
Email	Users can enter only email addresses in this cell.
Text	Users can only enter text that matches, contains, or doesn't contain a specified text string. To define the text string, choose an operation and enter an argument.
Date	Users can enter only dates. To specify a date range, choose an operation and enter an argument.
Attachment	Users can add only attachments to the cell.
URL	Users can enter only URLs in the cell.
Checkbox	Format the cell as a checkbox.
Person	Users can only @ mention people in the cell.

[Use Dropdown Lists in Spreadsheet Cells](#)

Create a dropdown list for a cell or series of cells to let users choose from a group of defined values when entering data.

Use Dropdown Lists in Spreadsheet Cells

Create a dropdown list for a cell or series of cells to let users choose from a group of defined values when entering data.

1. Select the cell or cells where you want to add a dropdown list.
2. From the Data menu, select **Data Validation**. Or, right-click to open the cell menu, and select **Data Validation**.
3. From the Type dropdown, choose **Select from List**.
4. Define the criteria for the dropdown.
5. Click **Apply**.

A dropdown arrow appears in each cell. If users enter a value in the cell that doesn't match a value in the dropdown list, an error appears. To remove a dropdown list from a cell, from the Data menu, select **Data Validation**, and then click **Remove Validation**.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Apply Conditional Formatting in Spreadsheets

Automatically highlight cells that meet certain conditions or match specific values.

1. Select the cell or cells where you want to use conditional formatting.
2. From the Format menu, select **Conditional Formatting**. Or, right-click to open the cell menu, and select **Conditional Formatting**.
3. Add formatting rules.
4. Save your work.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**


To remove conditional formatting from a cell, from the Format menu, select **Conditional Formatting**. Delete the formatting rules that you want to remove, and then save your work.

Reference Data in Spreadsheets

Show the values in a cell, range of cells, or sheet from one spreadsheet in another spreadsheet. Referenced data retains the source formatting, and it refreshes automatically when you load the spreadsheet or when the source data is updated.


To create or edit a data reference, you must have access to the source spreadsheet. Other people can see the referenced data even if they don't have access to the source spreadsheet.

1. Click a cell in the spreadsheet.
2. From the Insert menu, select **Data Reference**.
3. Search for the spreadsheet that you want to reference.
4. From the correct spreadsheet, select the cell or range of cells that you want to reference, and then select **Reference**.

 **Tip:** To compile data from several spreadsheets in a single spreadsheet, repeat steps 1 through 4 for each data set.

After you create a data reference, you can work with it in two ways:

- You can filter but not sort referenced data.
- To update referenced data, open the source spreadsheet, and edit the data.

 **Tip:** When you update source data, check your data reference structure to make sure that all data remains referenced. For example, if you reference a fixed range and then add a column or row in that range, the data originally referenced in that range is cut off.

- To delete referenced data, clear the cell. Deleting a data reference doesn't affect the source data.
- To see the source of referenced data, in the spreadsheet formula bar, select **Data Reference**.

Lock Data in Quip Spreadsheets

Lock individual cells, a spreadsheet tab, or an entire spreadsheet to prevent accidental edits to spreadsheet data. Locking spreadsheet data prevents you and other users from making edits.

Locked Cells

When an individual cell is locked, no one can:

- Apply formatting.
- Delete the cell.
- Hide or reveal the row or column containing the cell.
- Freeze or unfreeze the row or column containing the cell.
- Move a row or column containing the cell.
- Use filters with a range containing the cell.
- Sort a range containing the cell.

Locked Tabs

When a tab is locked, no one can:

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

- Make edits of any kind.
- Add or remove columns or rows.
- Delete the tab.

Locked Embedded Spreadsheets

When an embedded spreadsheet in a Quip document is lost, no one can:

- Make edits of any kind.
- Add or remove columns or rows.
- Delete the embedded spreadsheet.

Locked Spreadsheets

When an entire spreadsheet is locked, no one can:

- Make edits of any kind.
- Add or remove columns or rows.
- Delete any tabs.

[Lock a Spreadsheet Cell](#)

Lock an individual cell or range of cells to prevent edits to only specific spreadsheet data.

[Lock a Spreadsheet Tab](#)

Lock one tab in a Quip spreadsheet.

[Lock an Embedded Spreadsheet](#)

Lock one spreadsheet embedded in a Quip document.

[Lock a Spreadsheet](#)

Lock an entire Quip spreadsheet.

Lock a Spreadsheet Cell

Lock an individual cell or range of cells to prevent edits to only specific spreadsheet data.

1. Highlight the cell or cells that you want to lock.
2. From the Data menu, select **Lock/Unlock Cells**.
3. Select **Lock Selection**.

To unlock the cell or cell range, highlight it. From the Data menu, select **Lock/Unlock Cells**, and then select **Unlock Selection**.

Lock a Spreadsheet Tab

Lock one tab in a Quip spreadsheet.

1. Open the spreadsheet, and identify the sheet that you want to lock.
2. To open the tab menu, click the down arrow next to the tab name at the bottom of the window.
3. Select **Lock**.

To unlock the sheet, open the tab menu, and select **Unlock**.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Lock an Embedded Spreadsheet

Lock one spreadsheet embedded in a Quip document.

1. Within the Quip document, identify the embedded spreadsheet that you want to lock.
2. From the Spreadsheet menu, select **Lock Sheet**.

Unlock the embedded spreadsheet, return to the Spreadsheet menu, and then deselect **Lock Sheet**.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Lock a Spreadsheet

Lock an entire Quip spreadsheet.

1. From the Spreadsheet menu, select **Advanced**, and then select **Lock Edits to Document**.
2. Confirm that you want to lock edits.

To unlock the spreadsheet, next to the spreadsheet title, select **Edits Disabled**, and then confirm that you want to unlock the document.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Sort and Filter Spreadsheet Data

See only the data that you want to see with filters and filter views. Sort to see your data how you want to see it.

[Create a Spreadsheet Filter](#)

Filter data in your spreadsheet. When you turn on filtering, you filter the view for everyone who's a member of the spreadsheet.

[Create a Spreadsheet Filter View](#)

Create a filter view to filter spreadsheet data without affecting your teammates' views. Any member of the spreadsheet can use or edit your filter views.

[Sort Data in a Spreadsheet](#)

Sort your spreadsheet to view your data exactly how you want.

Create a Spreadsheet Filter

Filter data in your spreadsheet. When you turn on filtering, you filter the view for everyone who's a member of the spreadsheet.

1. From the Data menu, select **Turn on Filter**.
2. Select a single column, multiple columns, or a custom range within or across columns.
3. Define filter criteria.
 - **Equals** shows only exact matches for the letters or word that you put in the value field.
 - **Greater Than** and **Less Than** show rows that are alphabetically before or after the letters or word that you put in the value field.
4. Click **Apply**.

To remove individual filters, select the filter menu for the column that you want to stop filtering, and then select **Remove Filter**. To remove all filters, from the Data menu, select **Turn off Filter**.


EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Create a Spreadsheet Filter View

Create a filter view to filter spreadsheet data without affecting your teammates' views. Any member of the spreadsheet can use or edit your filter views.

If your Salesforce org uses Synced Sharing and you only have Comment Access to a spreadsheet, you can create a temporary filter view. Only you can use the temporary filter view, and it isn't saved.

1. From the Data menu, select **Filter Views**, and then select **Create New Filter View**. Or, if filters are already turned on in your spreadsheet, select the **Filter View** dropdown in the Filter banner, and then select **Save as Filter View**.
2. Enter your filter criteria.
3. If you want to rename the filter view, click the Settings icon  next to the Filter View menu at the top of the spreadsheet.

After you create a filter view, you can work with it in several ways:

- To close a filter view, click **X** in the Filter banner.
- To open a different filter view, select the **Filter View** dropdown in the Filter banner, and then select the view that you want to open.
- To create a copy of a filter view that you can customize, select the **Filter View** dropdown in the Filter banner, and then select **Duplicate Filter View**.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Sort Data in a Spreadsheet

Sort your spreadsheet to view your data exactly how you want.

To sort spreadsheet data, you can either:

- Right-click the column header, and select **Sort**. Then select how you want to sort the spreadsheet or data range.
- From the Data menu, select how you want to sort the spreadsheet or data range. If you can't sort a range from the menu, select a range first.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Sort Multiple Columns Together

Sort your spreadsheet data by multiple columns at the same time.

Sort Multiple Columns Together

Sort your spreadsheet data by multiple columns at the same time.

1. Select the cells that you want to sort. Or, select the entire spreadsheet.
2. From the Data menu, select **Custom Sort**.
3. Select the first column that you want to sort and how you want to sort it.
If you want to see the column names, select **Use the first row as headers**.
4. To sort by another column, click **Add Sort Column**, choose the column, and select the sort conditions.
5. Click **Apply**.



Example: You use a spreadsheet to manage your sales, with columns for Region, Sales Rep, and Revenue. You want to group records for each region together, with regions sorted alphabetically. Within each region, you also want to sort Revenue from highest to lowest.

In your spreadsheet, set up a custom sort to sort by Region and then by Revenue. Use the first row for headers to make it easier to select the columns that you want to sort by.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Custom Sort

Apply Sort to

☒ Selected Range

☐ Entire Sheet

Sort by

Region

☒ A → Z

☐ Z → A

then by

Revenue

☐ A → Z

☒ Z → A

X

+ Add Sort Column

☒ Use the first row as headers

Cancel

Apply

Add Lists in Spreadsheet Cells

Format a Quip spreadsheet cell as a bulleted list, a numbered list, or a checklist. You can include one list type per cell.

Action	Instructions
Add a bulleted list.	<ul style="list-style-type: none">Spreadsheet Toolbar: From the spreadsheet toolbar, select the format menu, and then choose Bulleted List.@Mention: @Bulleted ListKeyboard Shortcut: Command+Shift+8 (Mac), Ctrl+Shift+8 (Windows)
Add a numbered list.	<ul style="list-style-type: none">Spreadsheet Toolbar: From the spreadsheet toolbar, select the format menu, and then choose Numbered List.@Mention: @Numbered ListKeyboard Shortcut: Command+Shift+7 (Mac), Ctrl+Shift+7 (Windows)
Add a checklist.	<ul style="list-style-type: none">Spreadsheet Toolbar: From the spreadsheet toolbar, select the format menu, and then choose Checklist@Mention: @ChecklistKeyboard Shortcut: Command+Shift+9 (Mac), Ctrl+Shift+9 (Windows)
Add a new item in a list.	<p>While editing list contents in a cell, use a keyboard shortcut.</p> <ul style="list-style-type: none">Option+Return

EDITIONS

Available in: **Quip desktop app** and **Quip on web**

Action	Instructions
	<ul style="list-style-type: none"> Alt+Enter (Windows)
Check or uncheck a checklist item.	While editing a checklist in a cell, use a keyboard shortcut. <ul style="list-style-type: none"> Command+Return (Mac) Ctrl+Enter (Windows)
Change a list type in a cell.	Use your cursor to select a cell, and then choose a new list type from the format menu in the toolbar. To change the list type while editing cell contents, use the list type's keyboard shortcut.
Paste a list from a Quip document into a spreadsheet cell.	Copy the list from the Quip document, double-click a cell in the spreadsheet to edit its contents, and then use a keyboard shortcut to paste. Lists with more than one hierarchy level convert to a single level in the cell. If you don't double-click to edit a cell's contents, the list pastes into separate cells.
Paste a list from a spreadsheet cell into a Quip document.	Copy a single cell that contains a list, and then paste it into the Quip document. If you copy more than one cell, the cells paste into a Quip document as an embedded spreadsheet.

Limitations for Lists in Cells

These actions aren't supported for lists in spreadsheet cells.

- Changing horizontal text alignment in cells with lists.
- Dragging to reorder list items in a cell.
- Customizing numbering in numbered lists.
- Indenting lists in cells.

Add Formulas and Functions to a Spreadsheet

Use functions to create formulas and perform calculations on your data.

- From a spreadsheet, select a cell.
- Type an equal sign, and then enter the name of the function. The function auto-completes as you type.

[Supported Formulas and Functions in Quip](#)

Quip supports formulas and over 400 common functions.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Supported Formulas and Functions in Quip

Quip supports formulas and over 400 common functions.

Formula	Description
ABS	Returns the absolute value of a number.
ACCRINT	Calculates the accrued interest of a security if there are periodic payments.
ACCRINTM	Calculates the accrued interest of a security if there's a one-off payment at the settlement date.
ACOS	Returns the inverse trigonometric cosine of a number.
ACOSH	Returns the inverse hyperbolic cosine of a number.
ACOT	Returns the inverse cotangent (the arccotangent) of the given number.
ACOTH	Returns the inverse hyperbolic cotangent of the given number.
ADD	Returns the sum of two numbers.
AND	Returns TRUE if all arguments are TRUE.
ARABIC	Calculates the value of a Roman number. The value range must be from 0 and 3999.
ASIN	Returns the inverse trigonometric sine of a number.
ASINH	Returns the inverse hyperbolic sine of a number.
ATAN	Returns the inverse trigonometric tangent of a number.
ATAN2	Returns the inverse trigonometric tangent of the specified x and y coordinates.
ATANH	Returns the inverse hyperbolic tangent of a number.
AVEDEV	Returns the average of the absolute deviations of data points from their mean.
AVERAGE	Returns the average of the arguments.
AVERAGEA	Returns the average of the arguments. The value of text is 0.
AVERAGEIF	Averages the arguments that meet the conditions.
AVERAGEIFS	Averages the value of the cells that meet multiple criteria in multiple ranges.
BASE	Converts a positive integer to a specified base into a text from the numbering system.
BESSELI	Returns the modified Bessel function $I_n(x)$.
BESSELJ	Returns the Bessel function $J_n(x)$.
BESSELK	Returns the Bessel function $K_n(x)$.
BESSELY	Returns the Bessel function $Y_n(x)$.
BETA.DIST	Values of the beta distribution.
BETA.INV	Values of the inverse beta distribution.
BETADIST	Returns the beta function.
BETAINV	Returns the inverse of the cumulative beta probability density function.
BIN2DEC	The result is the decimal number for the binary number entered.

Formula	Description
BIN2HEX	The result is the hexadecimal number for the binary number entered.
BIN2OCT	The result is the octal number for the binary number entered.
BINOM.DIST	Values of the binomial distribution.
BINOM.DIST.RANGE	Returns the probability of a trial result using binomial distribution.
BINOM.INV	Returns the smallest value for which the cumulative binomial distribution is greater than or equal to a criterion value.
BINOMDIST	Returns the individual term binomial distribution probability.
BITAND	Returns a bitwise logical “and” of the parameters.
BITLSHIFT	Shifts a number left by n bits.
BITOR	Returns a bitwise logical “or” of the parameters.
BITRSHIFT	Shifts a number right by n bits.
BITXOR	Returns a bitwise logical “exclusive or” of the parameters.
CEILING	Rounds a number up to the nearest multiple of significance.
CEILING.MATH	Rounds a number up to the nearest multiple of significance.
CEILING.PRECISE	Rounds a number up to the nearest multiple of significance, regardless of sign of significance.
CHAR	Converts a number into a character according to the current code table.
CHIDIST	Returns the probability value from the indicated chi-squared that a hypothesis is confirmed.
CHIINV	Returns the inverse of the one-tailed probability of the chi-squared distribution.
CHISQ.DIST	Returns left-tail probability of the cumulative distribution function or values of the probability density function of the chi-squared distribution.
CHISQ.DIST.RT	Returns the right-tail probability of the chi-squared distribution.
CHISQ.INV	Values of the inverse of CHISQ.DIST(x;DegreesOfFreedom;TRUE()).
CHISQ.INV.RT	Values of the inverse of CHIDIST(x; DegreesOfFreedom).
CHISQ.TEST	Returns the chi-squared independence test.
CHITEST	Returns the probability of a deviance from a random distribution of two test series based on the chi-squared test for independence.
CHOOSE	Uses an index to return a value from a list of up to 30 values.
CLEAN	All non-printing characters are removed from the string.
CODE	Returns a numeric code for the first character in a text string.
COL	Returns the column number of a specified cell.
COLUMNS	Returns the number of columns in the given reference.

Formula	Description
COMBIN	Returns the number of combinations for elements without repetition.
COMBINA	Returns the number of combinations of a subset of items including repetitions.
COMPLEX	The result is a complex number that is returned from a real coefficient and an imaginary coefficient.
CONCAT	Combines two strings into one string.
CONCATENATE	Combines several text strings into one string.
CONFIDENCE	Returns the (1-alpha) confidence interval for a normal distribution.
CONFIDENCE.NORM	Returns a (1 alpha) confidence interval for a normal distribution.
CONFIDENCE.T	Returns a (1 alpha) confidence interval for a Student's t-distribution.
CONVERT	Converts a numeric value to a different unit of measure.
CORREL	Returns the correlation coefficient between two data sets.
COS	Returns the cosine of the given angle (in radians).
COSH	Returns the hyperbolic cosine of a number.
COT	Returns the cotangent of the given angle (in radians).
COTH	Returns the hyperbolic cotangent of a given number (angle).
COUNT	Counts how many numbers are in the list of arguments.
COUNTA	Counts how many values are in the list of arguments.
COUNTBLANK	Returns the number of empty cells.
COUNTIF	Returns the number of cells that meet with certain criteria within a cell range.
COUNTIFS	Counts the cells that meet multiple criteria in multiple ranges.
COUNTUNIQUE	Counts the unique values in a list of specified values and ranges.
COUPDAYBS	Returns the number of days from the first day of interest payment on a security until the settlement date.
COUPDAYS	Returns the number of days in the current interest period in which the settlement date falls.
COUPDAYSNC	Returns the number of days from the settlement date until the next interest date.
COUPNCD	Returns the date of the first interest date after the settlement date. Formats the result as a date.
COUPNUM	Returns the number of coupons (interest payments) between the settlement date and the maturity date.
COUPPCD	Returns the date of the interest date before the settlement date. Formats the result as a date.
COVAR	Returns the covariance of the product of paired deviations.
COVARIANCE.P	Calculates the population covariance.
COVARIANCE.S	Calculates the sample covariance.

Formula	Description
CRITBINOM	Returns the smallest value for which the cumulative binomial distribution is greater than or equal to a criterion value.
CSC	Returns the cosecant of the given angle (in radians). The cosecant of an angle is equivalent to 1 divided by the sine of that angle.
CSCH	Returns the hyperbolic cosecant of a number.
CUMIPMT	Calculates the cumulative interest payments, that is, the total interest, for an investment based on a constant interest rate.
CUMPRINC	Returns the cumulative interest paid for an investment period with a constant interest rate.
DATE	Provides an internal number for the date given.
DATEDIF	Calculates the number of days, months, or years between two dates.
DATEVALUE	Returns an internal number for a text having a possible date format.
DAY	Returns the sequential date of the month as an integer (from 1 through 31) in relation to the date value.
DAYS	Calculates the number of days between two dates.
DAYS360	Calculates the number of days between two dates based on a 360-day year.
DB	Returns the depreciation of an asset for a specified period using the fixed-declining balance method.
DDB	Returns the depreciation of an asset for a specified period using the arithmetic-declining method.
DEC2BIN	The result is the binary number for the decimal number entered from -512 through 511.
DEC2HEX	The result is the hexadecimal number for the decimal number entered.
DEC2OCT	The result is the octal number for the decimal number entered.
DECIMAL	Converts text with characters from a number system to a positive integer in the base radix given.
DEGREES	Converts radians into degrees.
DELTA	The result is TRUE (1) if both numbers, which are delivered as an argument, are equal, otherwise it's FALSE (0).
DEVSQ	Returns the sum of squares of deviations based on a sample mean.
DISC	Calculates the allowance (discount) of a security as a percentage.
DIVIDE	Returns the division of two numbers.
DOLLAR	Converts a number to an amount in the currency format, rounded to a specified decimal place.
DOLLARDE	Converts a quotation that has been given as a decimal fraction into a decimal number.
DOLLARFR	Converts a quotation that has been given as a decimal number into a mixed decimal fraction.
DURATION	Calculates the number of periods required by an investment to attain the desired value.

Formula	Description
EDATE	Returns the serial number of the date that is a specified number of months before or after the start date.
EFFECT	Returns the effective annual interest rate.
EOMONTH	Returns the serial number of the last day of the month that comes a certain number of months before or after the start date.
EQ	Returns TRUE if two values are equal and FALSE otherwise.
ERF	Returns values of the Gaussian error integral.
ERF.PRECISE	Returns the error function.
ERFC	Returns complementary values of the Gaussian error integral between x and infinity.
ERFC.PRECISE	Returns the complementary error function.
ERROR.TYPE	Returns a number corresponding to an error type.
EVEN	Rounds a positive number up to the next even integer and a negative number down to the next even integer.
EXACT	Compares two text strings and returns TRUE if they're identical.
EXP	Returns e raised to the power of a number.
EXPON.DIST	Values of the exponential distribution.
EXPONDIST	Returns the exponential distribution.
F.DIST	Values of the left tail F probability distribution.
F.DIST.RT	Values of the right tail F probability distribution.
F.INV	Values of the inverse left tail F distribution.
F.INV.RT	Values of the inverse right tail F distribution.
F.TEST	Calculates the F test.
FACT	Returns the factorial of a number.
FACTDOUBLE	Returns the double factorial of a number.
FALSE	Returns the logical value FALSE.
FDIST	Calculates the values of an F distribution.
FILTER	Filters a range of data based on specified criteria.
FIND	Looks for a string of text within another string.
FINV	Returns the inverse of the F probability distribution.
FISHER	Returns the Fisher transformation for x and creates a function close to a normal distribution.
FISHERINV	Returns the inverse of the Fisher transformation for x and creates a function close to a normal distribution.

Formula	Description
FIXED	Returns a number as text with a specified number of decimal places and optional thousands separators.
FLOOR	Rounds a number down to the nearest multiple of significance.
FLOOR.MATH	Rounds number down to the nearest multiple of significance.
FLOOR.PRECISE	Rounds number down to the nearest multiple of significance, regardless of sign of significance.
FORECAST	Extrapolates future values based on existing x and y values.
FORMULATEXT	Returns the formula as a string.
FTEST	Returns the result of an F test.
FV	Returns the future value of an investment based on periodic constant payments and a constant interest rate.
FVSCHEDULE	Calculates the accumulated value of the starting capital for a series of periodically varying interest rates.
GAMMA	Returns the Gamma function value.
GAMMA.DIST	Returns the value of the probability density function or the cumulative distribution function for the Gamma distribution.
GAMMA.INV	Values of the inverse gamma distribution.
GAMMADIST	Returns the values of a Gamma distribution.
GAMMAINV	Returns the inverse of the Gamma cumulative distribution GAMMADIST.
GAMMALN	Returns the natural logarithm of the Gamma function: $\Gamma(x)$.
GAMMALN.PRECISE	Returns the natural logarithm of the gamma function.
GAUSS	Returns the standard normal cumulative distribution.
GCD	Returns the greatest common divisor of two or more integers.
GEOMEAN	Returns the geometric mean of a sample.
GESTEP	The result is 1 if Number is greater than or equal to Step.
GT	Returns TRUE if the first value is strictly greater than the second value, and FALSE otherwise.
GTE	Returns TRUE if the first value is greater than or equal to the second value, and FALSE otherwise.
HARMEAN	Returns the harmonic mean of a data set.
HEX2BIN	The result is the binary number for the hexadecimal number entered.
HEX2DEC	The result is the decimal number for the hexadecimal number entered.
HEX2OCT	The result is the octal number for the hexadecimal number entered.
HLOOKUP	Searches for a value and reference to the cells below the selected area.
HOUR	Determines the sequential number of the hour of the day (from 0 through 23) for the time value.

Formula	Description
HYPGEOM.DIST	Values of the hypergeometric distribution.
HYPGEOMDIST	Returns the hypergeometric distribution.
IF	Specifies a logical test to be performed.
IFERROR	Returns value if not an error value, else alternative.
IFNA	Returns value if not a #N/A error, else alternative.
IMABS	The result is the absolute value of a complex number.
IMAGINARY	The result is the imaginary coefficient of a complex number.
IMARGUMENT	The result is the argument (the phi angle) of a complex number.
IMCONJUGATE	The result is the conjugated complex complement to a complex number.
IMCOS	The result is the cosine of a complex number.
IMCOSH	Returns the hyperbolic cosine of a complex number.
IMCOT	Returns the cotangent of a complex number.
IMCSC	Returns the cosecant of a complex number.
IMCSCH	Returns the hyperbolic cosecant of a complex number.
IMDIV	The result is the division of two complex numbers.
IMEXP	The result is the power of e and the complex number.
IMLN	The result is the natural logarithm (to the base e) of a complex number.
IMLOG10	The result is the common logarithm (to the base 10) of a complex number.
IMLOG2	The result is the binary logarithm of a complex number.
IMPOWER	The result is the complex number raised to the power of number.
IMPRODUCT	The result is the product of up to 29 complex numbers.
IMREAL	The result is the real coefficient of a complex number.
IMSEC	Returns the secant of a complex number.
IMSECH	Returns the hyperbolic secant of a complex number.
IMSIN	The result is the sine of a complex number.
IMSINH	Returns the hyperbolic sine of a complex number.
IMSQRT	The result is the square root of a complex number.
IMSUB	The result is the subtraction of two complex numbers.
IMSUM	The result is the sum of up to 29 complex numbers.
IMTAN	Returns the tangent of a complex number.

Formula	Description
INDEX	INDEX returns a sub range, specified by row and column number, or an optional range index. Depending on context, INDEX returns a reference or content.
INT	Rounds a number down to the nearest integer.
INTERCEPT	Calculates the point at which a line intersects the y-values by using known x-values and y-values.
IPMT	Calculates the periodic amortization for an investment with regular payments and a constant interest rate.
IRR	Calculates the internal rate of return for an investment.
ISBLANK	Returns TRUE if the reference to a cell is blank.
ISERROR	Tests for error conditions, including the #N/A error value, and returns TRUE or FALSE.
ISEVEN	Returns TRUE if the value is an even integer, or FALSE if the value is odd.
ISNA	Returns TRUE if a cell contains the #N/A (value not available) error value.
ISNONTEXT	Tests if the cell contents are text or numbers, and returns FALSE if the contents are text.
ISNUMBER	Returns TRUE if the value refers to a number.
ISTEXT	Returns TRUE if the cell contents refer to text.
ISO.CEILING	Rounds a number up to the nearest multiple of significance, regardless of sign of significance.
ISODD	Returns TRUE if the value is odd, or FALSE if the number is even.
ISOWEekNUM	Returns the ISO week number of the year for the date specified.
ISPMT	Calculates the level of interest for unchanged amortization installments.
JOIN	Combines values from one or more one-dimensional arrays using a specified separator.
KURT	Returns the kurtosis of a data set (at least 4 values required).
LARGE	Returns the Rank C, the largest value in a data set.
LCM	Returns the least common multiple of one or more integers.
LEFT	Returns the first character or characters of a text.
LEN	Returns the length of a string including spaces.
LN	Returns the natural logarithm based on the constant e of a number.
LOG	Returns the logarithm of a number to the specified base.
LOG10	Returns the base-10 logarithm of a number.
LOGINV	Returns the inverse of the log-normal distribution.
LOGNORM.DIST	Values of the log normal distribution.
LOGNORM.INV	Values of the inverse of the log-normal distribution.
LOGNORMDIST	Returns the values of a log-normal distribution.

Formula	Description
LOOKUP	Returns the contents of a cell either from a one-row or one-column range.
LOWER	Converts all uppercase letters in a text string to lowercase.
LT	Returns TRUE if the first value is strictly less than the second value, and FALSE otherwise.
LTE	Returns TRUE if the first value is less than or equal to the second value, and FALSE otherwise.
MATCH	Returns the relative position of an item in an array that matches a specified value.
MAX	Returns the maximum value in a list of arguments.
MAXA	Returns the maximum value in a list of arguments. Unlike the MAX function, you can enter text. The value of the text is 0.
MAXIFS	Returns the maximum value from a range of cells specified by a set of criteria.
MDETERM	Returns the array determinant of an array.
MEDIAN	Returns the median of a set of numbers. In a set containing an uneven number of values, the median is the number in the middle of the set. In a set containing an even number of values, it's the mean of the two values in the middle of the set.
MID	Returns a text string of a text. The parameters specify the starting position and the number of characters.
MIN	Returns the minimum value in a list of arguments.
MINA	Returns the minimum value in a list of arguments. Unlike the MIN function, you can enter text. The value of the text is 0.
MINIFS	Returns the minimum value from a range of cells specified by a set of criteria.
MINUS	Returns the difference of two numbers.
MINUTE	Determines the sequential number for the minute of the hour (from 0 through 59) for the time value.
MIRR	Calculates the modified internal rate of return of a series of investments.
MOD	Returns the remainder when one integer is divided by another.
MODE	Returns the most common value in a data set.
MODE.SNGL	Returns the most common value in a sample.
MONTH	Determines the sequential number of a month of the year (from 1 through 12) for the date value.
MROUND	Returns a number rounded to the nearest multiple of another number.
MULTINOMIAL	Returns the factorial of the sum of the arguments divided by the product of the factorials of the arguments.
MULTIPLY	Returns the product of two numbers.
N	Returns the numeric value of the given parameter. Returns 0 if parameter is text or FALSE.
NA	Returns the error value #N/A.
NE	Returns TRUE if two values aren't equal. Otherwise, returns FALSE.

Formula	Description
NEGBINOM.DIST	Values of the negative binomial distribution.
NEGBINOMDIST	Returns the negative binomial distribution.
NETWORKDAYS	Returns the number of workdays between two dates.
NETWORKDAYS.INTL	Returns the number of workdays between two dates using arguments to indicate weekend days and holidays.
NOMINAL	Calculates the yearly nominal interest rate given the effective rate and the number of compounding periods per year.
NORM.DIST	Values of the normal distribution.
NORM.INV	Values of the inverse normal distribution.
NORM.S.DIST	The values of the standard normal distribution.
NORM.S.INV	Values of the inverse standard normal distribution.
NORMDIST	Returns the density function or the normal cumulative distribution.
NORMINV	Returns the inverse of the normal cumulative distribution.
NORMSDIST	Returns the standard normal cumulative distribution function. The distribution has a mean of zero and a standard deviation of one.
NORMSINV	Returns the inverse of the standard normal cumulative distribution.
NOT	Complements (inverts) a logical value.
NOW	Determines the current time of the computer.
NPER	Returns the number of periods for an investment based on periodic constant payments and a constant interest rate.
NPV	Returns the present value of an investment based on a series of periodic cash flows and a discount rate. To get the net present value, subtract the cost of initial cash flow at time zero from the returned value.
NUMBERVALUE	Converts text to a number, in a locale-independent way.
OCT2BIN	The result is the binary number for the octal number entered.
OCT2DEC	The result is the decimal number for the octal number entered.
OCT2HEX	The result is the hexadecimal number for the octal number entered.
ODD	Rounds a positive number up to the nearest odd integer and a negative number down to the nearest odd integer.
OR	Returns TRUE if at least one argument is TRUE.
PDURATION	Duration. Calculates the number of periods required by an investment to attain the desired value.
PEARSON	Returns the Pearson product moment correlation coefficient r.
PERCENTILE	Returns the alpha-percentile of data values in an array.

Formula	Description
PERCENTILE.EXC	Returns the alpha percentile of a sample.
PERCENTILE.INC	Returns the alpha percentile of a sample.
PERCENTRANK	Returns the percentage rank of a value in a sample.
PERCENTRANK.EXC	Returns the percentage rank (0..1, exclusive) of a value in a sample.
PERCENTRANK.INC	Returns the percentage rank (0..1, inclusive) of a value in a sample.
PERMUT	Returns the number of permutations for a given number of objects.
PERMUTATIONA	Returns the number of permutations for a given number of objects (repetition allowed).
PHI	Returns the values of the distribution function for a standard normal distribution.
PI	Returns 3.14159265358979, the value of the mathematical constant PI to 14 decimal places.
PMT	Returns the periodic payment for an annuity with constant interest rates.
POISSON	Returns the Poisson distribution.
POISSON.DIST	Returns the Poisson distribution.
POW	Returns a number raised to another number.
POWER	Returns a number raised to another number.
PPMT	Returns for a given period the payment on the principal for an investment that is based on periodic and constant payments and a constant interest rate.
PRICE	Calculates the market value of a fixed interest security with a par value of 100 currency units as a function of the forecast yield.
PRICEDISC	Calculates the price per 100 currency units of par value of a non-interest bearing security.
PRICEMAT	Calculates the price per 100 currency units of par value of a security, that pays interest on the maturity date.
PROB	Returns the probability that values in a range are between two limits.
PRODUCT	Multiplies all the numbers given as arguments and returns the product.
PROPER	Capitalizes the first letter in all words of a text string.
PV	Returns the present value of an investment resulting from a series of regular payments.
QUARTILE	Returns the quartile of a data set.
QUARTILE.EXC	Returns the quartile of a sample.
QUARTILE.INC	Returns the quartile of a sample.
QUOTIENT	Returns the integer part of a division operation.
RADIANS	Converts degrees to radians.
RAND	Returns a random number from 0 through 1.

Formula	Description
RANDBETWEEN	Returns an integer random number in a specified range.
RANK	Returns the rank of a number in a sample.
RANK.AVG	Returns the ranking of a value in a sample; if more than one value has the same rank, the average rank is returned.
RANK.EQ	Returns the ranking of a value in a sample; if more than one value has the same rank, the top rank of that set of values is returned.
RATE	Returns the constant interest rate per period of an annuity.
RECEIVED	Calculates the amount received that is paid for a fixed-interest security at a given point in time.
REFERENCERANGE	Uses data referencing to reference or insert a specific cell or range of cells from a different spreadsheet.
REFERENCESHEET	Uses data referencing to reference or insert an entire spreadsheet.
REGEXEXTRACT	Extracts matching substrings according to a regular expression.
REGEXMATCH	Returns TRUE if specified text matches the regular expression and FALSE otherwise.
REGEXREPLACE	Replaces part of a text string with a different text string specified using a regular expression.
REPLACE	Replaces part of a text string with a different text string.
REPT	Repeats a character string by the given number of copies.
RIGHT	Returns the last character or characters of a text.
ROMAN	Converts a number into a Roman numeral. The value range must be from 0 through 3999, the modes can be integers from 0 to 4.
ROUND	Rounds a number to a certain number of decimal places.
ROUNDDOWN	Rounds a number down, toward zero, to a certain precision.
ROUNDUP	Rounds a number up, away from zero, to a certain precision.
ROW	Returns the row number of a specified cell.
ROWS	Returns the number of rows in a reference or array.
RRI	Calculates the interest rate resulting from the profit (return) of an investment.
RSQ	Returns the square of the Pearson correlation coefficient based on the given values.
SEARCH	Returns the position of a text segment within a character string.
SEC	Returns the secant of the given angle (in radians). The secant of an angle is equivalent to 1 divided by the cosine of that angle
SECH	Returns the hyperbolic secant of a number.
SECOND	Determines the sequential number of the second of a minute (from 0 through 59) for the time value.
SERIESSUM	Sums the first terms of a power series.
SIGN	Returns the sign of a number. Returns 1 if the number is positive, -1 if negative and 0 if zero.

Formula	Description
SIN	Returns the sine of the given angle (in radians).
SINH	Returns the hyperbolic sine of a number.
SKEW	Returns the skewness of a distribution.
SKEW.P	Returns the skewness of a distribution using the population of a random variable.
SLN	Returns the straight-line depreciation of an asset for one period.
SLOPE	Returns the slope of the linear regression line.
SMALL	Returns the Rank_c-th smallest value in a data set.
SORT	Sorts data from a range or array.
SQRT	Returns the positive square root of a number.
SQRTPI	Returns the square root of (PI times a number).
STANDARDIZE	Converts a random variable to a normalized value.
STDEV	Estimates the standard deviation based on a sample.
STDEV.P	Calculates the standard deviation based on the entire population.
STDEV.S	Calculates the standard deviation based on a sample.
STDEVA	Calculates the standard deviation of an estimation based on a sample.
STDEVP	Calculates the standard deviation based on the entire population.
STDEVPA	Calculates the standard deviation based on the entire population.
STEYX	Returns the standard error of the predicted y value for each x in the regression.
SUBSTITUTE	Substitutes new text for old text in a string.
SUM	Adds all the numbers in a range of cells.
SUMIF	Adds the cells specified by a given criteria.
SUMIFS	Totals the values of cells in a range that meet multiple criteria in multiple ranges.
SUMPRODUCT	Multiplies corresponding elements in the given arrays, and returns the sum of those products.
SUMSQ	To calculate the sum of the squares of numbers, totaling up of the squares of the arguments, enter SUMSQ into the text fields.
SUMX2MY2	Returns the sum of the difference of squares of corresponding values in two arrays.
SUMX2PY2	Returns the sum of the squares of corresponding values in two arrays.
SUMXMY2	Adds the squares of the variance between corresponding values in two arrays.
SYD	Returns the arithmetic-declining depreciation rate.
T	This function returns the target text, or a blank text string if the target isn't text.
T.DIST	Returns the t-distribution.

Formula	Description
T.DIST.2T	Returns the two-tailed t-distribution.
T.DIST.RT	Returns the right-tailed t-distribution.
T.INV	Values of the left-tailed inverse t-distribution.
T.INV.2T	Values of the two-tailed inverse t-distribution.
T.TEST	Calculates the t-test.
TAN	Returns the tangent of the given angle (in radians).
TANH	Returns the hyperbolic tangent of a number.
TBILLEQ	Calculates the annual return on a treasury bill.
TBILLPRICE	Calculates the price of a treasury bill per 100 currency units.
TBILLYIELD	Calculates the yield of a treasury bill.
TDIST	Returns the t-distribution.
TEXT	Converts a number into text according to a specified format.
TIME	Determines a time value from the details for hour, minute and second.
TIMEVALUE	Returns a sequential number for a text shown in a possible time entry format.
TINV	Returns the inverse of the t-distribution.
TODAY	Determines the current date of the computer.
TRANSPOSE	Returns a horizontal range of cells as a vertical range, or vice versa.
TRIM	Removes spaces from a string, leaving only a single space character between words.
TRIMMEAN	Returns the mean of a data set without the Alpha percent of data at the margins.
TRUE	The logical value is set to TRUE.
TRUNC	Truncates a number by removing decimal places.
TTEST	Returns the probability associated with a Student's t-Test.
TYPE	Returns the type of value.
UMINUS	Returns the specified number with its sign reversed.
UNARY_PERCENT	Returns a number as a percentage.
UNICHAR	Converts a code number into a Unicode character or letter.
UNICODE	Returns the numeric code for the first Unicode character in a text string.
UNIQUE	Returns unique values from a range of data.
UPLUS	Returns the specified number, unchanged.
UPPER	Converts the string specified in the text field to uppercase.

Formula	Description
VALUE	Converts a text string into a number.
VAR	Estimates the variance based on a sample.
VAR.P	Calculates variance based on the entire population.
VAR.S	Calculates the variance based on a sample.
VARA	Estimates a variance based on a sample. The value of text is 0.
VARP	Calculates a variance based on the entire population.
VARPA	Calculates the variance based on the entire population. The value of text is 0.
VLOOKUP	Vertical search with reference to adjacent cells to the right.
WEEKDAY	Returns the day of the week for the date value as an integer (from 1 through 7).
WEEKNUM	Returns the number of the calendar week in which the specified date occurs.
WEIBULL	Returns the values of the Weibull distribution.
WEIBULL.DIST	Returns the values of the Weibull distribution.
WORKDAY	Returns the serial number of the date before or after a specified number of workdays.
WORKDAY.INTL	Returns the serial number of the date before or after a number of workdays using arguments to indicate weekend days and holidays.
XIRR	Calculates the internal rate of return for a list of payments that take place on different dates.
XNPV	Calculates the capital value (net present value) for a list of payments that take place on different dates.
XOR	Returns TRUE if an odd number of arguments evaluates to TRUE.
YEAR	Returns the year of a date value as an integer.
YEARFRAC	Returns the number of years (including fractional part) between two dates.
YIELD	Calculates the yield of a security.
ZOIDBERG	Why not Zoidberg?
Z.TEST	Calculates the probability of observing a z-statistic greater than the one computed based on a sample.
ZTEST	Calculates the probability of observing a z-statistic greater than the one computed based on a sample.



Note: The TEXT() formula only supports leading zeroes, comma separators, numbers, currency, dates, times, and percentages. The TEXT() formula doesn't support fractions, custom formats, question marks (?), phone numbers, latitude, longitude, or accounting patterns.

Create Charts with Spreadsheet Data

Turn any range of your spreadsheet data into a chart. Charts dynamically update to reflect changes to your spreadsheet data.

1. Highlight the spreadsheet data that you want to visualize.
2. From the Insert menu, select **Chart**.
3. Select the type of chart that you want to make. Quip creates the chart from your data.
4. To change how the chart looks, double-click the chart, or from the chart menu, select **Edit Chart**.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Customization Options for Charts

After you create a chart, use the Chart Editor to customize the data the chart uses, select a new chart type, update the chart labels, and more.

Area Charts

Use an area chart to spot trends in data over time. Use a stacked area chart to visualize parts of a whole in datasets over time.

Bar Charts

Quip provides these types of bar charts: bar, stacked bar, and bar stacked to 100 percent. Use a bar chart to compare related values. Use a stacked bar chart to compare parts of a whole and show values across one or more categories. Use a bar chart stacked to 100 percent to compare the proportions between values in one or more categories.

Bubble Charts

Bubble charts use the size and coloring of bubbles to show multiple dimensions and measures. Use a bubble chart to illustrate the relationship between two columns of numerical data in your spreadsheet. A third numerical column represents the size of each bubble in the chart.

Column Charts

Quip provides these types of column charts: column, stacked column, and column stacked to 100 percent. Use a column chart to compare related values. Use a stacked column chart to compare parts of a whole and show values across one or more categories. Use a column chart stacked to 100 percent to compare the proportions between values in one or more categories.

Combo Charts

Combine a bar chart and a line chart to show more than one data series.

Donut Charts

Use a donut chart when you have a grouping and want to show not only the proportion of a single value for each group member against the total, but also the total amount itself.

Line Charts

Use a line chart when you have one important grouping representing an ordered set of data and one or more values to show.

Pie Charts

Use a pie chart when you have multiple groupings and want to show the proportion of a single value for each grouping against the total.

Scatter Charts

Use a scatter chart to show correlation between two groups of data.

Customization Options for Charts

After you create a chart, use the Chart Editor to customize the data the chart uses, select a new chart type, update the chart labels, and more.

There are two ways to open the Chart Editor.

- Double-click a chart.
- From the chart menu, select **Edit Chart**.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Data Tab

Under the Data tab, you can see and adjust how the data is treated.

- Range: Specify which cells you want to include in the chart.
- X-Axis: Specify the cell range for the chart's X-axis.
- Y-Axis (Bubble charts only): Specify the cell range for the chart's Y-axis.
- Series: Add additional cell ranges to the chart as data series.
- Sizes (Bubble charts only): Specify the cell range for the bubble sizes.
- Switch rows and columns: Change the axis on which rows and columns are plotted.
- Use first row as headers: Use column titles as chart labels, and leave them out of the data range.
- Use first column as labels: Use row titles as chart labels, and leave them out of the data range.

Customize Tab

Under the Customize tab, you can see or change the chart type, and change the chart's appearance. The customization options that are available depend on the chart type.

- Chart Type: Select a new chart type, add a title to the chart, and choose stacking options for column, bar, and area charts.
- Style: Choose where to show the chart legend. Change the chart's background color or border color.
- Series: Apply data labels to one or more data series in the chart, and choose the labels' position and text color.
- Horizontal Axis: Add an axis label. Set the minimum and maximum data range, and change the intervals between the tick marks. Update the number format for the data range. Reverse the axis order.
- Vertical Axis: Add an axis label. Set the minimum and maximum data range, and change the intervals between the tick marks. Update the number format for the data range. Show grid lines in the chart.

Area Charts

Use an area chart to spot trends in data over time. Use a stacked area chart to visualize parts of a whole in datasets over time.

Data Options for Area Charts

To customize data in area charts, open the Chart Editor, and click the **Customize** tab.

- Stacking: Choose whether to stack data series in the area chart.
- Style: Change the position of the chart legend, or hide it entirely. Select the colors for the chart's background and border.
- Series: Apply data labels to show values directly in the chart, and set the labels' position and color.
- Horizontal Axis: Give the axis a title, change the number formatting, display grid lines, reverse the axis order, and treat data labels as text.

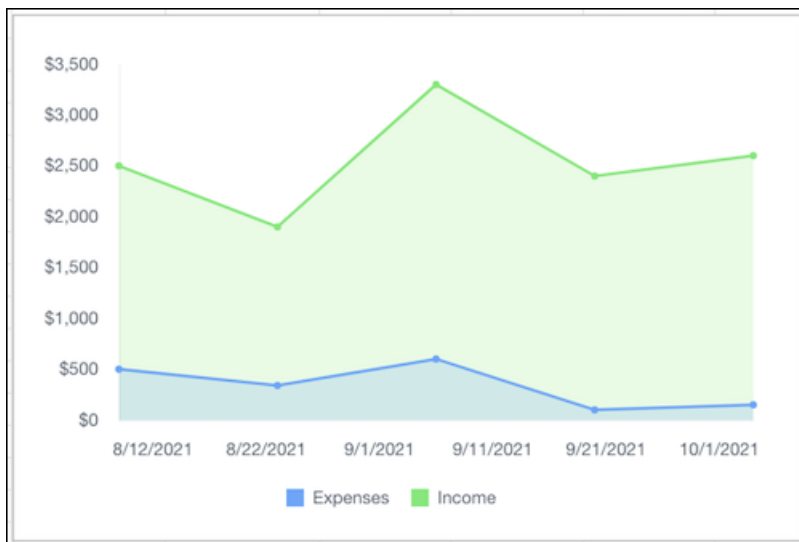
EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

- Vertical Axis: Give the axis a title, adjust its scale, set the number of tick marks shown, change the number formatting, and display grid lines.

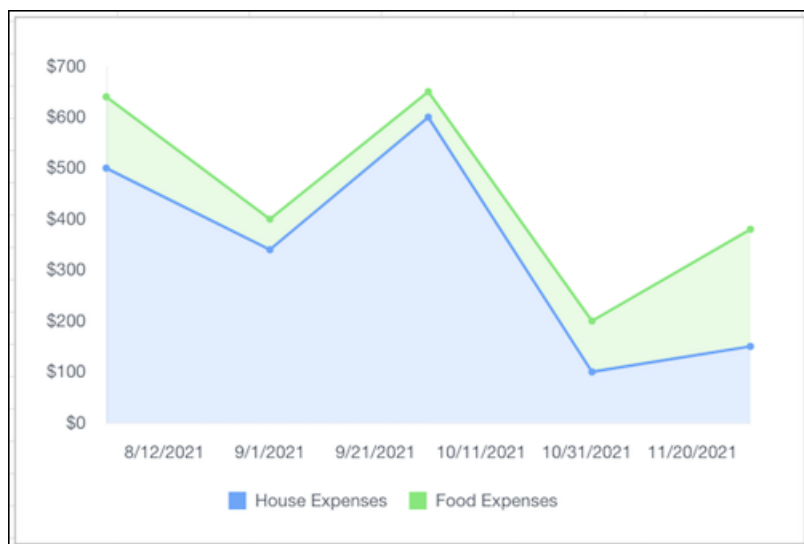
Sample Data for Area Charts

Date	Expenses	Income
8/9/2021	\$500	\$2,500
8/23/2021	\$340	\$1,900
9/6/2021	\$600	\$3,300
9/20/2021	\$100	\$2,400
10/4/2021	\$150	\$2,600



Sample Data for Stacked Area Charts

Date	House Expenses	Food Expenses
8/1/2021	\$500	\$140
9/1/2021	\$340	\$60
10/1/2021	\$600	\$50
11/1/2021	\$100	\$100
12/1/2021	\$150	\$230



Bar Charts

Quip provides these types of bar charts: bar, stacked bar, and bar stacked to 100 percent. Use a bar chart to compare related values. Use a stacked bar chart to compare parts of a whole and show values across one or more categories. Use a bar chart stacked to 100 percent to compare the proportions between values in one or more categories.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Data Options for Bar Charts

To customize data in bar charts, open the Chart Editor, and click the **Customize** tab.

- **Stacking:** Choose whether to stack data series in the bar chart.
- **Style:** Change the position of the chart legend, or hide it entirely. Select the colors for the chart's background and border.
- **Series:** Apply data labels to show values directly in the chart, and set the labels' position and color.
- **Horizontal Axis:** Give the axis a title, adjust its scale, set the number of tick marks shown, and change the number formatting.
- **Vertical Axis:** Give the axis a title, change the number formatting, and reverse the axis order.

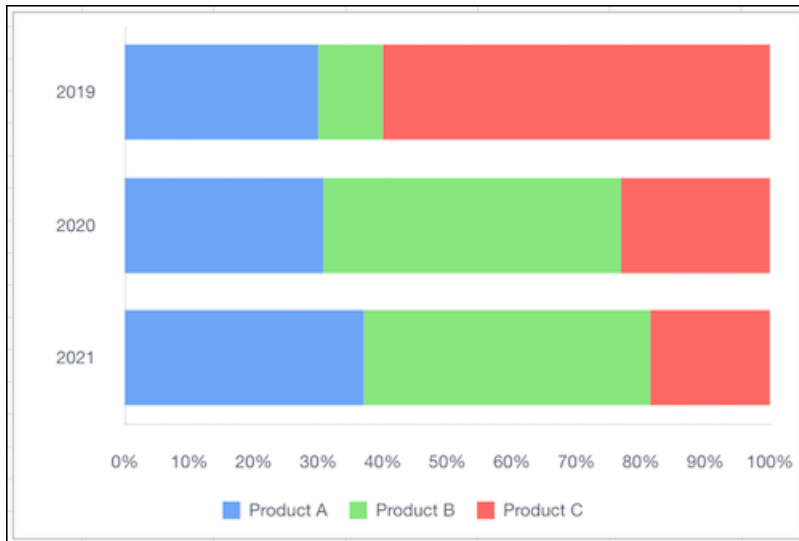
Sample Data for Bar Charts and Stacked Bar Charts

Rep	Q1 Sales	Q2 Sales	Q3 Sales
Brian	\$10,000	\$25,000	\$53,000
Cameron	\$45,000	\$60,000	\$36,000
Sally	\$37,000	\$50,000	\$78,000



Sample Data for Bar Charts Stacked to 100 Percent

Product Market Share	Product A	Product B	Product C
2019	30%	10%	60%
2020	20%	30%	15%
2021	50%	60%	25%



Bubble Charts

Bubble charts use the size and coloring of bubbles to show multiple dimensions and measures. Use a bubble chart to illustrate the relationship between two columns of numerical data in your spreadsheet. A third numerical column represents the size of each bubble in the chart.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Data Options for Bubble Charts

To adjust the data in bubble charts, open the Chart Editor.

To see and adjust how the data is treated, use the Data tab. In addition to the standard options, there are several more settings for bubble charts.

- **Y-Axis:** Specify the cell range for the chart's Y-axis.
- **Sizes:** Specify the cell range for the sizes of the bubbles in the chart.

To adjust the appearance of bubble charts, use the Customize tab.

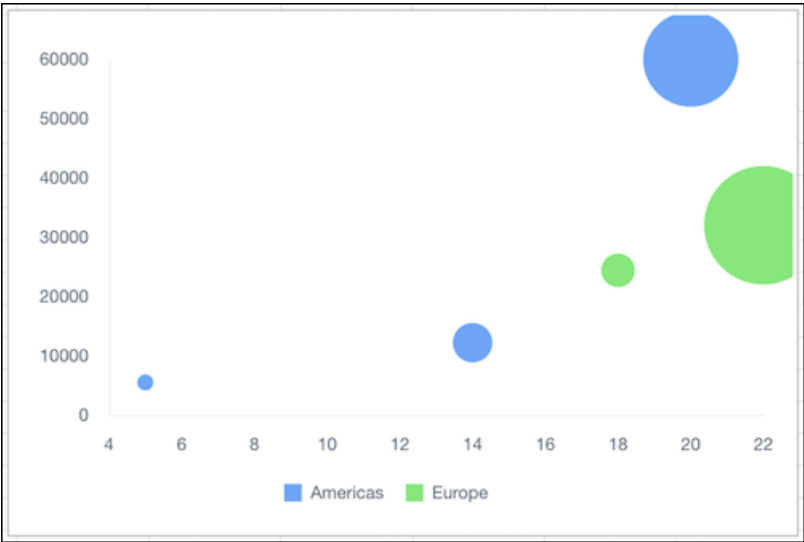
- **Style:** Change the position of the chart legend, or hide it entirely. Select the colors for the chart's background and border.
- **Horizontal Axis:** Give the axis a title, adjust its scale, set the number of tick marks shown, change the number formatting, and reverse the axis order.
- **Vertical Axis:** Give the axis a title, adjust its scale, set the number of tick marks shown, and change the number formatting

Sample Data for Bubble Charts

To create a sample bubble chart, copy the sample data, and paste it into a Quip spreadsheet. Select the data range, and then from the Insert menu, select **Chart > Bubble**. To adjust how the data appears, double-click the chart to open the Chart Editor, and then deselect **Switch rows and columns**.

Country	Sales Reps	Sales	Region	Market Size
USA	5	\$5,500	Americas	3%
Brazil	14	\$12,200	Americas	12%
Mexico	20	\$60,000	Americas	33%

Country	Sales Reps	Sales	Region	Market Size
Italy	18	\$24,400	Europe	10%
France	22	\$32,000	Europe	42%



Column Charts

Quip provides these types of column charts: column, stacked column, and column stacked to 100 percent. Use a column chart to compare related values. Use a stacked column chart to compare parts of a whole and show values across one or more categories. Use a column chart stacked to 100 percent to compare the proportions between values in one or more categories.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Data Options for Column Charts

To customize data in column charts, open the Chart Editor, and click the **Customize** tab.

- Stacking: Choose whether to stack data series in the column chart.
- Style: Change the position of the chart legend, or hide it entirely. Select the colors for the chart’s background and border.
- Series: Apply data labels to show values directly in the chart, and set the labels’ position and color.
- Horizontal Axis: Give the axis a title, adjust its scale, set the number of tick marks shown, and change the number formatting.
- Vertical Axis: Give the axis a title, adjust its scale, change the number formatting, and reverse the axis order.

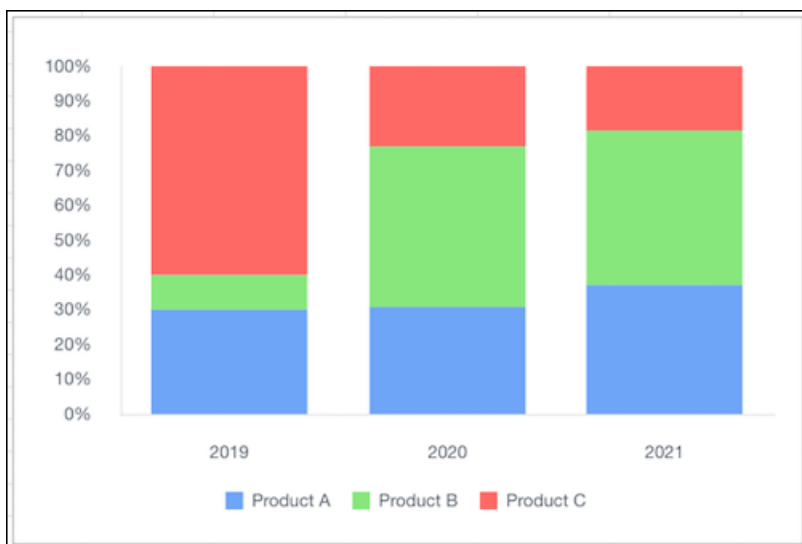
Sample Data for Column Charts and Stacked Column Charts

Rep	Q1 Sales	Q2 Sales	Q3 Sales
Brian	\$10,000	\$25,000	\$53,000
Cameron	\$45,000	\$60,000	\$36,000
Sally	\$37,000	\$50,000	\$78,000



Sample Data for Column Charts Stacked to 100 Percent

Product Market Share	Product A	Product B	Product C
2019	30%	10%	60%
2020	20%	30%	15%
2021	50%	60%	25%



Combo Charts

Combine a bar chart and a line chart to show more than one data series.

Data Options for Combo Charts

To customize data in combo charts, open the Chart Editor, and click the **Customize** tab.

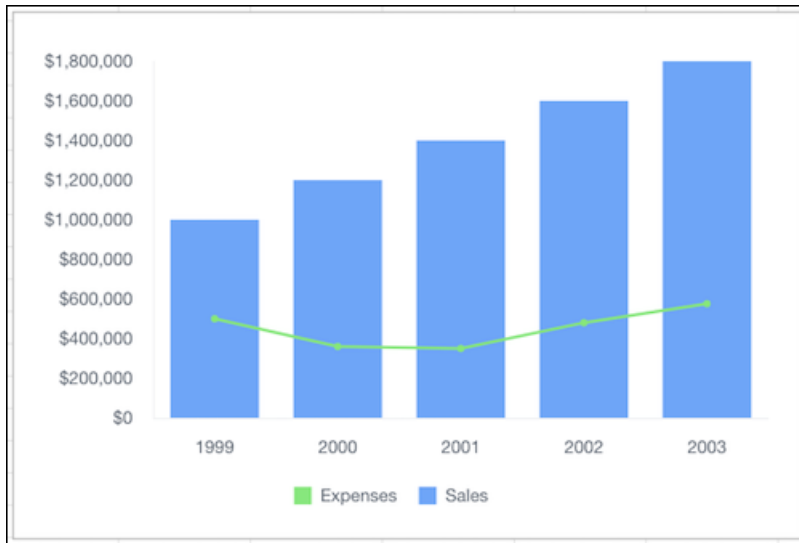
- **Style:** Change the position of the chart legend, or hide it entirely. Select the colors for the chart's background and border.
- **Series:** Apply data labels to show values directly in the chart, and set the labels' position and color.
- **Horizontal Axis:** Give the axis a title, change the number formatting, display grid lines, and reverse the axis order.
- **Vertical Axis:** Give the axis a title, adjust its scale, set the number of tick marks shown, change the number formatting, and display grid lines.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Sample Data for Combo Charts

Year	Sales	Expenses
1999	\$1,000,000	\$500,000
2000	\$1,200,000	\$360,000
2001	\$1,400,000	\$350,000
2002	\$1,600,000	\$480,000
2003	\$1,800,000	\$576,000



Donut Charts

Use a donut chart when you have a grouping and want to show not only the proportion of a single value for each group member against the total, but also the total amount itself.

Data Options for Donut Charts

To customize data in donut charts, open the Chart Editor, and click the **Customize** tab.

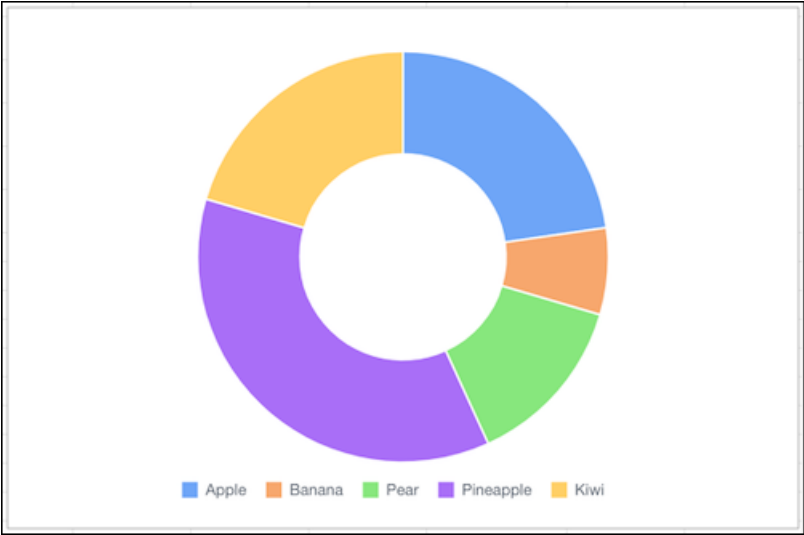
- **Style:** Change the position of the chart legend, or hide it entirely. Select the colors for the chart's background and border.
- **Series:** Apply data labels to show values directly in the chart, and set the labels' position and color.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Sample Data for Donut Charts

Fruits	Quantity
Apple	10
Banana	3
Pear	6
Pineapple	16
Kiwi	9



Line Charts

Use a line chart when you have one important grouping representing an ordered set of data and one or more values to show.

Data Options for Line Charts

To customize data in line charts, open the Chart Editor, and click the **Customize** tab.

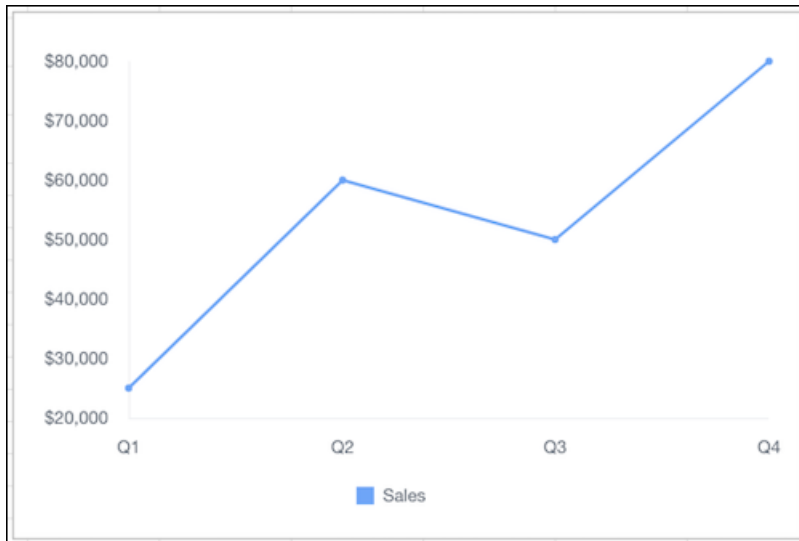
- **Style:** Change the position of the chart legend, or hide it entirely. Select the colors for the chart’s background and border.
- **Series:** Apply data labels to show values directly in the chart, and set the labels’ position and color.
- **Horizontal Axis:** Give the axis a title, change the number formatting, display grid lines, reverse the axis order, and treat data labels as text.
- **Vertical Axis:** Give the axis a title, adjust its scale, set the number of tick marks shown, change the number formatting, and display grid lines.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Sample Data for Line Charts

Quarter	Sales
Q1	\$25,000
Q2	\$60,000
Q3	\$50,000
Q4	\$80,000



Pie Charts

Use a pie chart when you have multiple groupings and want to show the proportion of a single value for each grouping against the total.

Data Options for Pie Charts

To customize data in pie charts, open the Chart Editor, and click the **Customize** tab.

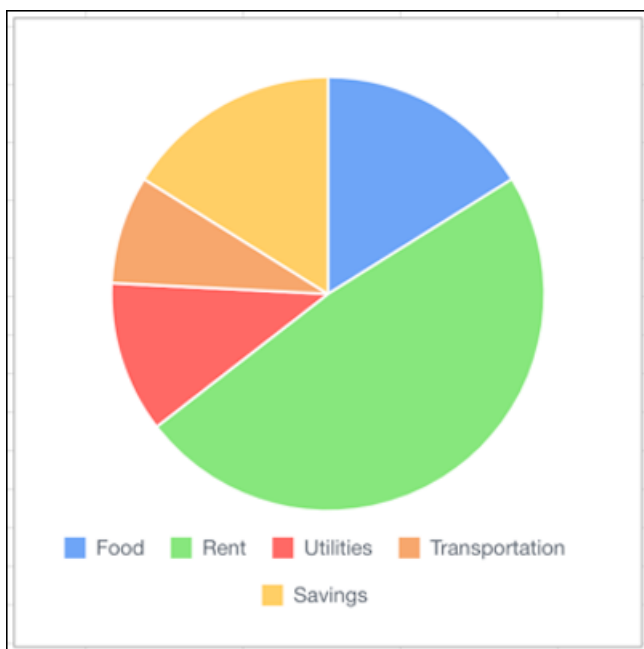
- **Style:** Change the position of the chart legend, or hide it entirely. Select the colors for the chart's background and border.
- **Series:** Apply data labels to show values directly in the chart, and set the labels' position and color.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Sample Data for Pie Charts

Expense	Amount
Food	\$500
Rent	\$1,500
Utilities	\$350
Transportation	\$250
Savings	\$500



Scatter Charts

Use a scatter chart to show correlation between two groups of data.

Data Options for Scatter Charts

To customize data in scatter charts, open the Chart Editor, and click the **Customize** tab.

- **Style:** Change the position of the chart legend, or hide it entirely. Select the colors for the chart's background and border.
- **Series:** Apply data labels to show values directly in the chart, and set the labels' position and color.
- **Horizontal Axis:** Give the axis a title, change the number formatting, display grid lines, reverse the axis order, and treat data labels as text.
- **Vertical Axis:** Give the axis a title, adjust its scale, set the number of tick marks shown, change the number formatting, and display grid lines.

EDITIONS

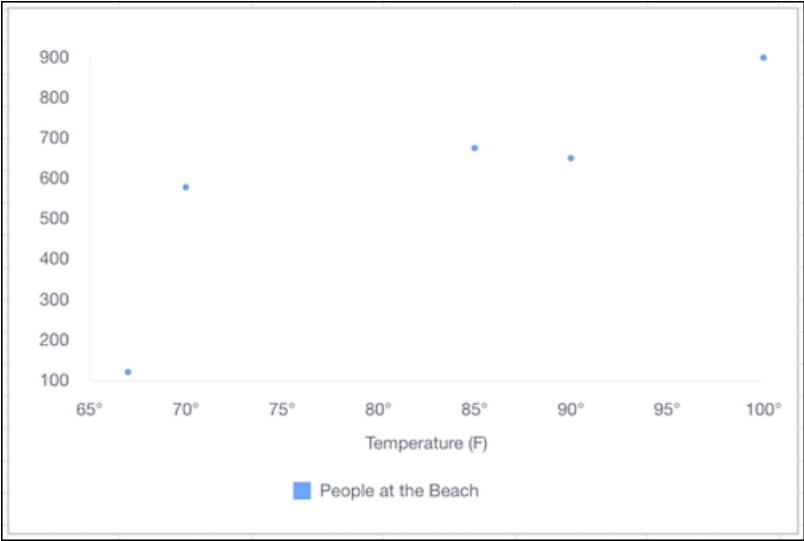
Available in: **Quip desktop app**, **Quip iOS mobile app**, and **Quip on web**

Sample Data for Scatter Charts

To create a sample scatter chart, copy the sample data, and paste it into a Quip spreadsheet. Select the data range, and then from the Insert menu, select **Chart > Scatter**. To adjust how the data appears, double-click the chart to open the Chart Editor, and then select **Use first column as labels**.

Temperature (F)	People at the Beach
70	578
85	675
90	650
67	120

Temperature (F)	People at the Beach
100	899




Comments

Keep collaboration in context with embedded comments in Quip. Comments change color after you read them so you can focus on the content that still needs your attention.

You can comment on specific parts of a document or participate in the document conversation.

Comments


You can comment on text, images, and cells in Quip by clicking the Comment icon  .

When you leave a comment, the person who authored the content and anyone you @mention gets a notification.

Conversation

Every document and spreadsheet has a conversation where you and your teammates can send messages about document-level issues. By default, the conversation is displayed on the right side of the document. Only users with comments access and above can see the conversation pane.

The conversation contains:

- Any messages people post to the conversation.
- A history of every edit made to the document.
-  **Note:** Deleted sections still appear in the conversation.
- A history of every comment made on the document.
- A record of when people become a member of the document.

Broadcasting Comments and Messages

To send a notification to every member of a document, you can include @everyone in a comment or message. If you @mention everyone when you edit a comment or message, Quip doesn't send a notification.

[Add a Comment](#)

Solicit or provide feedback, ask questions, or get answers about a specific part of a document.

[Edit a Comment or Message](#)

Did you mix up your emojis, @mention the wrong teammate, or change your mind about what you wrote? No worries. Edit comments and messages from the conversation pane. You can also edit comments inline.

[Share a Comment or Message](#)


Let your teammates know about an important part of the document conversation by broadcasting, forwarding, or linking to it.

Add a Comment

Solicit or provide feedback, ask questions, or get answers about a specific part of a document.

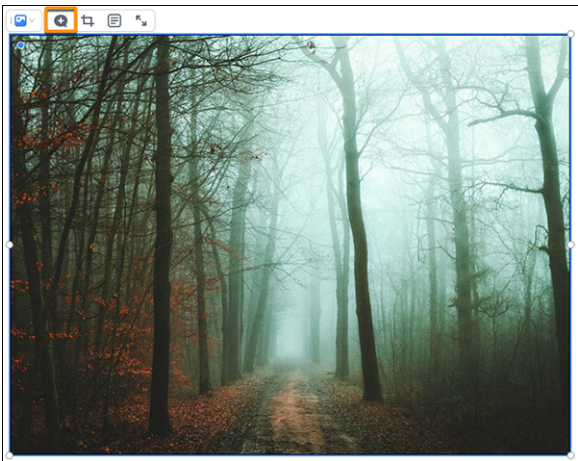
- 1. Specify the content to comment on.

Content	Action
Text	Highlight the text.
Header, paragraph, or list item	Place your cursor next to the content.
Whole image	Click the image.
Part of an image	From the Image menu, select the Comment icon, and drag the orange circle to the part of the image that you want to comment on.
Cell in spreadsheet	Select the cell, then in the formatting ribbon, select the Comment icon.

 **Note:** You can't comment on spreadsheet rows, columns, or cell ranges.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

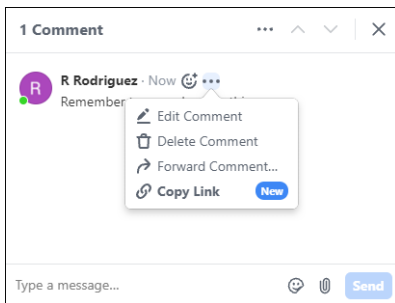


2. Write your comment.
You can include emojis and attachments and @mention your teammates.
3. Click **Send**.
Quip notifies the document creator and anyone you @mentioned in your comment.

Edit a Comment or Message

Did you mix up your emojis, @mention the wrong teammate, or change your mind about what you wrote? No worries. Edit comments and messages from the conversation pane. You can also edit comments inline.

1. Hover over the comment or message.
2. Click the ellipsis or **Message Options** menu.

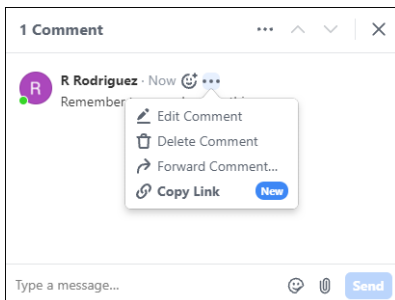


3. Click **Edit Comment** or **Edit Message**.
4. Modify the text as needed, and then click the check mark to save your changes.
If you @mention everyone when you edit a comment or message, Quip doesn't send a notification.

Share a Comment or Message

Let your teammates know about an important part of the document conversation by broadcasting, forwarding, or linking to it.

1. Hover over the comment or message.
2. Click the ellipsis or **Message Options** menu.



3. Select one of these two options.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Option	Description
Forward Comment	Send the comment or message to one or more people. You can search for recipients by name and include additional text, emojis, and attachments with your forwarded comment or message. Recipients are notified by a Quip alert.
Copy Link	Copy a direct link to the comment or message that you can then paste wherever you need it. The link goes directly to the comment or message so that recipients don't have to sift through the whole document conversation.

Emojis and GIFs

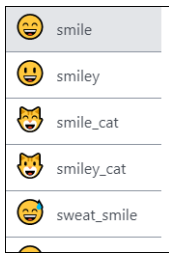
Add some fun to your comment, conversation message, document, or spreadsheet with emojis and GIFs.

You can insert emojis and GIFs in two ways:

- In a comment or conversation message, use the emoji icon.



- In a document or spreadsheet, type a colon followed by the name of the emoji.



EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Navigation and Folders

Learn how to use the Quip sidebar, search, and keep your files organized with folders.

[Navigate Quip Using the Sidebar](#)

Use the Quip sidebar to quickly find your documents, browse folders, see notifications, and more.

[Use Search in Quip](#)

Find specific documents, spreadsheets, chats, or folders.

[Use Folders in Quip](#)

Use folders to organize, share, and navigate content.

[Use Favorites and Collections](#)

Keep important documents accessible with Favorites. Group Favorites by topic with Collections. All your Favorites appear in the Home tab of the sidebar.

[See Referenced Documents in Quip](#)

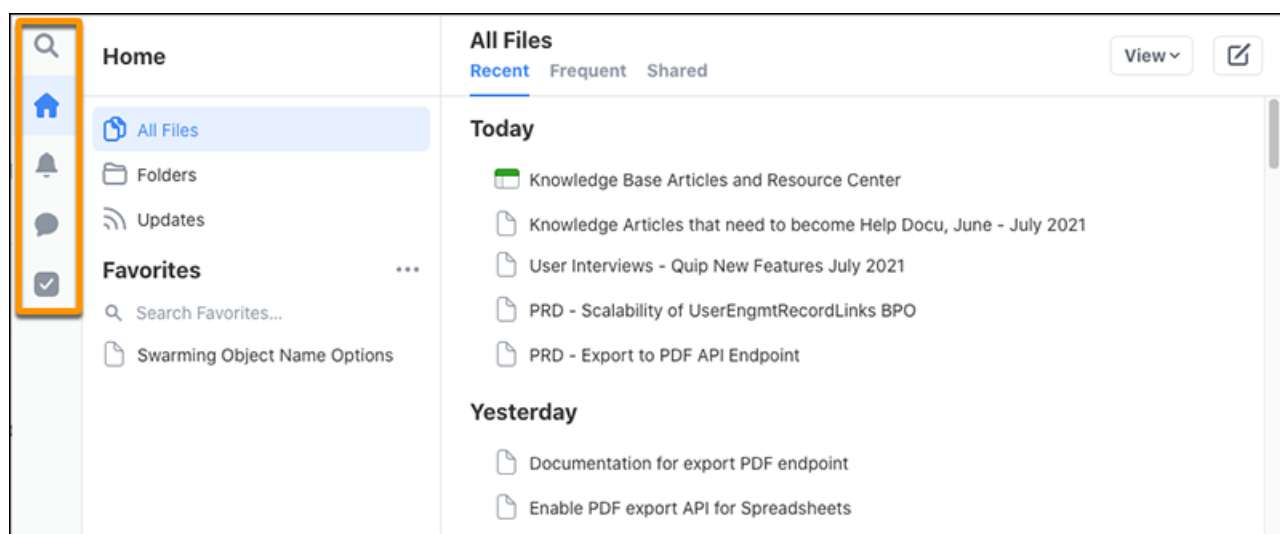
See the links to and from a given document in one place. View all the documents that reference the document that you're working in, or see all the documents that are mentioned within the current document. Don't worry about document security: You see only the documents that you have access to.

Navigate Quip Using the Sidebar

Use the Quip sidebar to quickly find your documents, browse folders, see notifications, and more.

EDITIONS

Available in: **Quip desktop app**, **Quip iOS mobile app**, and **Quip on web**



- Select Search to find your content.
- Select Home to see your recently and frequently used documents, folders, favorites, and updates.
- Select Notifications to stay up to date on conversations and requests. To mark all new notifications as read, at the top of the sidebar, click the check mark.
- Select Tasks to ensure that nothing important slips through the cracks. See the tasks from all your documents in one place, in the order that they're due.

SEE ALSO:

[Salesforce Help: Use Search in Quip](#)

[Salesforce Help: Manage Notifications](#)

[Salesforce Help: Manage Work with Tasks](#)

Use Search in Quip

Find specific documents, spreadsheets, chats, or folders.

To search, use the Search tab in the sidebar. Quip returns results as you type.

- You can search by the item’s title or content.
- Search results include all files, folders, and chats that you have access to.

To find files more easily, narrow your search results with filters.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Modified by	Has content that was edited or commented on by the person you specify.
Has Salesforce data from	References the type of Salesforce data you specify. <ul style="list-style-type: none">• Object Type: Includes documents that are linked to the object and documents that reference data from the object.• Record Name: Includes documents that are linked to the record and documents that reference data from the record.
Created by	Was created by the person you specify.
Recently opened	Was opened by you in the timeframe you specify.
Date created	Was created within the date range you specify.
In folder	Is part of the folder you specify.
Include	Shows only the types of content you specify. <ul style="list-style-type: none">• Older versions: Includes content that was deleted from documents.• Comments: Includes content in a document’s comments.

Use Folders in Quip

Use folders to organize, share, and navigate content.

You can view all the folders that you have access to in the Folders tab of the Home pane.

Create a Folder

Organize your documents into groupings that make sense to you.

Move a Folder

Reorganize your folders by dragging and dropping them in the Folders tab or by using a Folder menu option.

Private Folder

By default, each Quip site member has a Private folder. When you create a document, it appears in your Private folder.

Trash Folder

Do away with content that you no longer need.

Shared Folders

Shared folders are folders that you can add members to. Quip includes three types of shared folders—standard, group, and workspace.

Folder Limits

To keep your Quip folders reliable and consistent, there are limits on the number of items and members that you can add, depending on the folder type.

Monitor Folders for Limits

You can monitor folders that approach or reach their item and member limits.

Create a Folder

Organize your documents into groupings that make sense to you.

1. From the **Compose** menu, select **New Folder**.
2. Name the folder, and then choose a target folder and color.
3. Click **Create**.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Move a Folder

Reorganize your folders by dragging and dropping them in the Folders tab or by using a Folder menu option.

1. Open the folder.
2. From the Folder menu, select **Move Folder**.
3. Choose the destination folder, and then select **Move**.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Private Folder

By default, each Quip site member has a Private folder. When you create a document, it appears in your Private folder.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Private Folder Access

You can't share your Private folder, but you can share documents within your Private folder.



Important: Sharing a document in your Private folder doesn't move the content out of your Private folder.

Trash Folder

Do away with content that you no longer need.

When you delete a document or folder, it's moved to the Trash folder. Content in the trash folder is permanently deleted after 30 days.

Shared Folders

Shared folders are folders that you can add members to. Quip includes three types of shared folders—standard, group, and workspace.

All three folder types can contain documents and be shared with other users. However, there are restrictions on who can create each type and what activities folder members are notified about.

- **Standard:** A standard shared folder is a folder that any user can create and share.

EDITIONS


Available in:

- **Group:** A group shared folder is a folder that an admin can create and share with a team or organization. You can enable users to add and remove documents and add members in group folders.

For group folders with fewer than eight members, folder members receive notifications about updates to documents in the folder. For group folders with more than eight members, folder members receive notifications only if they turn on notifications for the folder in their notification settings. You can manage group folders from the Admin Console.

- **Workspace:** A workspace folder is a folder that only Quip or Salesforce Customer Support can create.

You can manage membership in a workspace folder created by Quip using the Share button. You can manage membership in a workspace folders created by Salesforce Customer Support in the Admin Console.

 **Note:** If a standard or group folder exceeds the member limit, Quip automatically converts the folder to a workspace folder. If the converted folder is a standard folder, Quip also moves the folder to the top level of the folder hierarchy if the folder was nested.

Folder membership in a shared folder provides:

- Read and write access to the contents of the folder by default
- Access to the folder and its contents from the Folders pane and search
- Automatic updates about documents in the folder in the Updates pane. For workspace folders, members see updates about documents that they create, add a comment to, and add a message to in the document conversation. For standard and group folders, members also see updates about documents they edit.

SEE ALSO:
[Salesforce Help: Folder Limits](#)

Folder Limits

To keep your Quip folders reliable and consistent, there are limits on the number of items and members that you can add, depending on the folder type.


Item Limit

Quip folder item limit for documents, spreadsheets, and subfolders:

Recommended Item Limit	Enforced Item Limit
1,000	4,000

After you add an item from the user interface or API to a shared folder that exceeds the recommended item limit, Quip displays a warning. If you try to add an item to a folder that exceeds the enforced item limit, Quip displays an error and doesn't add the item. The error appears whether you try to add the item from the user interface, API, Flow Builder, or Salesforce Process Builder. For Flow Builder and Process Builder errors, you receive an email notification.

The content of any subfolders doesn't count toward the item limit of a parent folder. Private folders and folders in Trash folders aren't subject to the item limit.

 **Note:** For more information on Quip folders that reach item limits, see [Workarounds for the Quip Folder Item Limit](#).

Member Limit

Member limits for Quip standard, group, and workspace shared folders:

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Folder Type	Member Limit
Standard	500
Group	1000
Workspace	1000

Standard folders that exceed the member limit are automatically converted to workspace folders that can be managed from **Group Folders** in the **Quip Admin Console**.

SEE ALSO:

[Salesforce Help: Monitor Folders for Limits](#)

[Salesforce Help: Shared Folders](#)

Monitor Folders for Limits

You can monitor folders that approach or reach their item and member limits.

1. From the **Quip Admin Console**, click **Folders**.
2. To show a list of folders that are approaching or meet their limits, click **Folder Limit Details**.

SEE ALSO:

[Salesforce Help: Folder Limits](#)

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Use Favorites and Collections

Keep important documents accessible with Favorites. Group Favorites by topic with Collections. All your Favorites appear in the Home tab of the sidebar.

[Add a Document to Favorites](#)

Mark an important document as a Favorite so that you can find it easily later.

[Create a Collection](#)

If you have lots of Favorites, organize them into Collections to make them easier to find.

[Rename or Delete a Collection](#)

Remove collections that you don't need, or rename collections to better reflect the documents in them. When you delete a Collection, the documents in the Collection are no longer marked as Favorites.

Add a Document to Favorites

Mark an important document as a Favorite so that you can find it easily later.

1. Open the document to add.
2. Click the star or **Add to Favorites** menu at the top of the document.
3. To add the document to a collection, select the collection.
4. Click out of the **Add to Favorites** menu.

The document appears in the Favorites list in the Home tab of the sidebar.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Create a Collection

If you have lots of Favorites, organize them into Collections to make them easier to find.

1. From the sidebar, select the **Home** tab.
2. Next to Favorites, click the three dots or the **Favorites Options** menu.
3. Select **New Collection**.
4. Name the collection.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Rename or Delete a Collection

Remove collections that you don't need, or rename collections to better reflect the documents in them. When you delete a Collection, the documents in the Collection are no longer marked as Favorites.

1. From the sidebar, click the **Home** tab.
2. Right-click the Collection, and then select **Rename Collection** or **Delete Collection**.
3. If you selected **Rename Collection**, type a new name, and then press *Enter*.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

See Referenced Documents in Quip

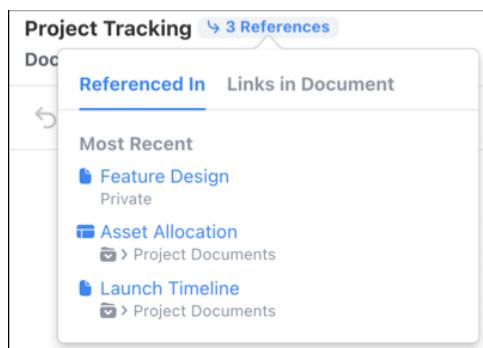
See the links to and from a given document in one place. View all the documents that reference the document that you're working in, or see all the documents that are mentioned within the current document. Don't worry about document security: You see only the documents that you have access to.

To see links to and from your current document, next to the document's title, click **References**.

- The Referenced In tab shows the documents that include a link to the current document.
- The Links in Document tab shows the links to other documents that appear in the current document.

EDITIONS

Available in: **Quip desktop app and Quip on web**



Click a document to open it, or hover over a document to preview it.

References to the Current Document

The Referenced In tab includes these documents.

- Documents and spreadsheets that @ mention the current document
- Documents with Live Pasted content that includes a link to the current document
- Documents that include Live Pasted content from the current document

- Documents and spreadsheets that include anchor links to the current document
- Documents that include a hyperlink to the current document
- Document links in Live Apps

Links in the Current Document

The Links in Document tab includes these documents.

- Documents that you @ mention in the current document
- Anchor links that you include in the current document
- Hyperlinks in the current document that have a Quip URL

[Considerations for Referenced Documents in Quip](#)

When viewing referenced documents in Quip, keep these considerations in mind.

Considerations for Referenced Documents in Quip

When viewing referenced documents in Quip, keep these considerations in mind.

- Only the documents that you have access to appear in the References window. The list also includes the documents that are shared with you via link sharing. Documents that are shared with you via link sharing but that you haven't opened yet don't appear in the list.
- The References button appears even if there are no links to or from the document.
- The number on the References button represents only the documents that link to the current document, not the number of links within the current document. If the References button doesn't show a number, no documents reference the current document. Or, you don't have access to the related documents.
- You can see up to 99 documents that reference the current document. The documents that were referenced most recently appear at the top of the list.
- If a document includes more than one reference to the current document, it's included in the References window only one time.

Sharing and Access

Learn how to share your documents and control who has access to your documents, spreadsheets, and folders in Quip. Only members of your organization's Quip site can see the Share settings.

[Share a Document or Folder by Notification](#)

Provide one or more users with access to a document or folder, and then let them know with a Quip notification.

[Share a Document or Folder with a Link](#)

Link sharing allows you to share a document or folder with a wide audience quickly. Instead of sharing a document or folder with individuals, you broadcast a link to it. Anyone with access to the link has view and edit access to the document or folder.

[Share a Document with People Outside Your Organization](#)

Use a link to share documents with someone who doesn't have a Quip account.

[Change a User's Access to a Document](#)

As your teammates move on and off projects, you can provide and revoke access to documents.

[Restrict Access to a Folder](#)

Keep the content in a folder private, or share it only with certain people.

[Access Level Overview](#)

Review the access level that's required to perform various tasks in Quip.

[Considerations for Granting Access](#)

Here's some important information about sharing documents and folders with other users.

Share a Document or Folder by Notification

Provide one or more users with access to a document or folder, and then let them know with a Quip notification.

1. Open the document or folder, and then click **Share**.
2. In the text field, search for users by name or email address.
3. Select the level of access to provide to the users.
4. Click **Done**.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Share a Document or Folder with a Link

Link sharing allows you to share a document or folder with a wide audience quickly. Instead of sharing a document or folder with individuals, you broadcast a link to it. Anyone with access to the link has view and edit access to the document or folder.

1. Open the document or folder.
2. Click **Share**.
3. Turn on **Sharable Link**.
4. Click **Copy Link**, and then share the link over email, chat, or whatever method you choose.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

[Considerations for Link Sharing](#)

When you turn on link sharing for a document or folder, keep these points in mind.

Considerations for Link Sharing

When you turn on link sharing for a document or folder, keep these points in mind.

- The link is enabled for all users in your organization.
- When a user opens the folder from the link, they become a member of the folder and have view, edit, and share access.
- When a user becomes a member of the folder, they become members of the documents in the folder.
- When you turn on link sharing for a folder, it doesn't turn on link sharing for the documents in the folder.
- If link sharing is turned off, new members can't be added to the folder using the link. Existing members remain members and retain their access.

EDITIONS


Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Share a Document with People Outside Your Organization

Use a link to share documents with someone who doesn't have a Quip account.

What an external user sees when they open the document depends on the level of access for link sharing.

- If the access level is view, edit, and comment: External users see the document and the conversation. If an external user tries to edit or add a message to the document, they're prompted to sign in.
- If the access level is view only: External users only see the document, not the conversation.

 **Important:** If your company uses Quip Enterprise Tier, your Quip admin has the option to disable external sharing, or to restrict external sharing to an allowlist of permitted collaborators. If your Quip admin turns on this setting, you can't share documents with anyone not on the allowlist. You also can't add any documents to a folder created by someone at another company.

1. Open the document.
2. Click **Share**.
3. Turn on **Shareable Link**.
4. Click **Link Settings**.
5. Select an access level.
6. Select **Allow access outside of [organization name]**.
7. Select **Done**.

A banner indicating that the document is available to external users appears next to the document title.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Change a User's Access to a Document

As your teammates move on and off projects, you can provide and revoke access to documents.

1. Open the document or spreadsheet, and then click **Share**.
2. Click **Manage**.
3. Locate the user, and select a new level of access in the dropdown.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Restrict Access to a Folder

Keep the content in a folder private, or share it only with certain people.

When you create a folder, the documents in the folder are shared with all the members of the parent folder by default.

1. Open the folder.
2. Click **Share**, and then click **Manage**.
3. Turn on **Restrict Folder**.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Access Level Overview

Review the access level that's required to perform various tasks in Quip.

	Full Access	Editor	Commenter	View Only
Share Document	✓	✓	✗	✗
Change Link Settings	✓	✗	✗	✗
Move to Folder	✓	✗	✗	✗
Delete Document	✓	✗	✗	✗
Lock Edits	✓	✗	✗	✗
Mark as Template	✓	✗	✗	✗
Connect to Slack	✓	✗	✗	✗
Add/Edit/Remove Sections	✓	✓	✗	✗
Change Data Formatting	✓	✓	✗	✗
Add Integration	✓	✓	✗	✗
Undo/Redo Edits	✓	✓	✗	✗
Cut/Copy/Paste	✓	✓	✗	✗
Show Outline	✓	✓	✗	✗
Show Page Breaks	✓	✓	✗	✗
Change Font	✓	✓	✗	✗
Change Title	✓	✓	✗	✗
View Share Dialog	✓	✓	✗	✗
Save Print Options	✓	✓	✗	✗
View People in Document	✓	✓	✗	✗
View Document History	✓	✓	✗	✗
Restore to Previous Version	✓	✓	✗	✗
Copy Anchor Link	✓	✓	✓	✗
See Conversation Pane	✓	✓	✓	✗
Add Comments	✓	✓	✓	✗

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

	Full Access	Editor	Commenter	View Only
Add Messages	✓	✓	✓	✗
Copy Document	✓	✓	✓	✓
Export Document	✓	✓	✓	✓
Print Document	✓	✓	✓	✓
Change Notification Settings	✓	✓	✓	✓
Find	✓	✓	✓	✓
Favorite	✓	✓	✓	✓

Considerations for Granting Access

Here's some important information about sharing documents and folders with other users.

- If a user already has access to a document or spreadsheet through a shared folder, you can increase their access at the document level.
- If a user has access to a document or spreadsheet through multiple sources, the access level granted at the document level takes precedence. For example, if a user has Comment access at the document level, but Edit access from link sharing, the user has Comment access.
- A user with Full Access to a document can revoke another user's access to the document at the document level. However, users can have access to a document through multiple mechanisms, like document level access and access through a shared link. Revoking access at the document level doesn't revoke access obtained by other means.
- A user can only decrease their own access level, and they can't increase it again for themselves.
- If the only user with Full Access permissions on a document leaves your organization, contact Salesforce support for help.
- You can restrict access to a subset of documents in a folder by putting them in a subfolder with different sharing settings than the parent folder.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Live Apps and Live Data

Create alignment, prioritize backlogs, and track progress with live data in Quip. Keep your team up to date with native Quip live apps, use third-party live apps, or create your own live apps to meet your business's custom needs.

[Live Data in Quip](#)

Learn about the different live data integrations you can add to your documents, spreadsheets, and templates.

[Live Data on the Quip Mobile App](#)

Learn about which live data integrations work on the Quip mobile app.

Live Data in Quip

Learn about the different live data integrations you can add to your documents, spreadsheets, and templates.



Note: Salesforce live apps and data integrations are included only for Quip Advanced users. Third-party live apps are available via the App Exchange.

Live Data	What It Does	How It Works	Refresh Behavior	Export to PDF	Considerations
Calendar Live App	Add a calendar to your documents to coordinate projects and work.	@Mention <i>Calendar</i> in a document. You can @mention people, dates, and documents in a calendar event. Drag and drop events to rearrange them.	NA	<ul style="list-style-type: none"> • @Mentions are clickable and open in Quip. • You can't open comments. 	<ul style="list-style-type: none"> • Supported only in documents and templates. • Users aren't notified of @mentions in live apps, only attached comments. • Doesn't sync with third-party calendars like Google or iCal. You can build these integrations with the Quip API.
Countdown Live App	Add a countdown clock to your documents to highlight important deadlines.	@Mention <i>Countdown</i> in a document. You can set the end date and see it count down in real time.	NA	<ul style="list-style-type: none"> • @Mentions are clickable and open in Quip. • You can't open comments. 	<ul style="list-style-type: none"> • Supported only in documents and templates. • Doesn't sync with third-party applications. • Comments aren't sticky to the individual time elements but to the countdown live app as a whole.
Kanban Board Live App	Add a kanban board to your documents to easily track tasks.	@Mention <i>Kanban Board</i> in a document. You can create columns, create cards, and set card colors. To move cards to another column, simply drag.	NA	<ul style="list-style-type: none"> • @Mentions are clickable and open in Quip. • You can't open comments. 	<ul style="list-style-type: none"> • Supported only in documents and templates. • Doesn't sync with third-party applications. • Doesn't support upvoting. • Users are notified of @mentions in the kanban card and comments.

Live Data	What It Does	How It Works	Refresh Behavior	Export to PDF	Considerations
					<ul style="list-style-type: none"> Salesforce recommends a maximum of 50 cards in a Kanban board.
Poll Live App	Add a voting poll to your documents to get quick and lightweight feedback.	@Mention <i>Poll</i> in a document. You can set voting to single or multiple votes, add comments to poll options, and set poll option colors.	NA	<ul style="list-style-type: none"> @Mentions are clickable and open in Quip. You can't open comments. 	<ul style="list-style-type: none"> Supported only in documents and templates. Doesn't sync with third-party applications. Poll votes are shown in the Conversation pane. Users aren't notified of @mentions in the poll option, only attached comments.
Process Bar Live App	Add a process bar to your documents to track a step-by-step or phased process.	@Mention <i>Process Bar</i> in a document. You can add steps, set a process bar color, and add comments to steps. To mark a step as the current step, click the dropdown.	NA	<ul style="list-style-type: none"> @Mentions are clickable and open in Quip. You can't open comments. 	<ul style="list-style-type: none"> Supported only in documents and templates. Doesn't sync with third-party applications. Users are notified of @mentions in the step and comments. You can set different steps to different colors.
Project Tracker Live App	Add a project tracker spreadsheet to your documents to track projects, set project owners, set deadlines, and link to relevant files.	@Mention <i>Project Tracker</i> in a document. You can add projects, edit or add new columns, and customize the	NA	<ul style="list-style-type: none"> @Mentions are clickable and open in Quip. You can't open comments. 	<ul style="list-style-type: none"> Supported only in documents and templates. Doesn't sync with third-party applications.

Live Data	What It Does	How It Works	Refresh Behavior	Export to PDF	Considerations
		different project statuses. Columns can be set to people, dates, status, files, or plain text. To @mention a document in Quip, use a text column.			<ul style="list-style-type: none"> Users are notified of @mentions in the text columns and people columns. Setting deadlines doesn't create a task for the project owner. Salesforce recommends a maximum of 50 cards in a project tracker.
Relationship Map Live App on page 269	Add a lightweight relationship map to your documents to map out key stakeholders, easily identify deal detractors and influencers, and more.	@Mention <i>Relationship Map</i> in a document. You can create custom and Salesforce cards to manage customer relationships, key stakeholders, and relationship health from a document. Add fields, rearrange cards, and add color indicators to your custom and Salesforce cards.	<ul style="list-style-type: none"> If Mirrored Salesforce Permissions are off, the Relationship Map live app doesn't automatically refresh on page load. The live app must be manually refreshed. If Mirrored Salesforce Permissions are on, the Relationship Map live app automatically refreshes on page load based on the viewing user's level of access. The live app can also be manually refreshed. 	<ul style="list-style-type: none"> Salesforce record fields and records aren't clickable. Some formatting doesn't align. You can't open comments. 	<ul style="list-style-type: none"> Considerations for the Relationship Map Live App on page 275 Supported only in documents and templates. Supports only integrations with Salesforce and not third-party applications. You can't @mention users or documents in the Relationship Map live app. To use @mentions, add comments.

Live Data	What It Does	How It Works	Refresh Behavior	Export to PDF	Considerations
Salesforce Record Live App on page 261	Add an embedded Salesforce record to your documents to get the latest record information, collaborate on Salesforce data in context, and save edits to Salesforce from Quip.	@Mention <i>Salesforce Record</i> in a document or template.	<ul style="list-style-type: none"> If Mirrored Salesforce Permissions are off, the Salesforce Record live app automatically refreshes on page load based on the permissions of the user who inserted it. The live app can also be manually refreshed by users with full or partial access to the record's fields. If Mirrored Salesforce Permissions are on, the Salesforce Record live app automatically refreshes on page load based on the viewing user's level of access. The live app can also be manually refreshed. 	<ul style="list-style-type: none"> The Salesforce record name is clickable and opens the record in Salesforce. Salesforce record fields aren't clickable. Some formatting doesn't align. You can't open comments. 	<ul style="list-style-type: none"> Supported only in documents and templates. Supported Fields in Salesforce Live Apps on page 249 You can't @mention people or documents in the Salesforce Record live app. To use @mentions, add comments. Supports only integrations with Salesforce and not third-party applications. Updates to the Salesforce Record live app don't appear in the document's conversation pane. You can change Salesforce Data Permissions from the Quip Admin Console.
Salesforce List Live App on page 251	Add an embedded Salesforce list view or related list view to your documents to do bulk updates, sync your changes to Salesforce, and add list view filters. You	@Mention <i>Salesforce List</i> in a document or template.	<ul style="list-style-type: none"> If Mirrored Salesforce Permissions are off, the Salesforce List live app automatically refreshes on page load based on the 	<ul style="list-style-type: none"> The Salesforce list view name is clickable and opens the list view in Salesforce. Salesforce records aren't clickable. 	<ul style="list-style-type: none"> Supported only in documents and templates. Considerations for List Views in Quip on page 252 Supported Fields in Salesforce Live

Live Data	What It Does	How It Works	Refresh Behavior	Export to PDF	Considerations
	can even add notes and next steps that you can share with your team.		<p>permissions of the user who inserted it. The live app can also be manually refreshed by any user with access to the document.</p> <ul style="list-style-type: none"> If Mirrored Salesforce Permissions are on, the Salesforce List live app automatically refreshes on page load based on the viewing user's level of access. The live app can also be manually refreshed. 	<ul style="list-style-type: none"> Some formatting doesn't align. You can't open comments. 	<p>Apps on page 249</p> <ul style="list-style-type: none"> You can't @mention people or documents in the Salesforce List live app. To use @mentions, add comments. Supports only integrations with Salesforce and not third-party applications. You can change Salesforce Data Permissions from the Quip Admin Console.
CRM Analytics Live App on page 264	Add an embedded CRM Analytics dashboard to your documents to update dashboard filters, interact with components, and collaborate on Salesforce data.	@Mention <i>CRM Analytics</i> in a document or template.	NA	NA	<ul style="list-style-type: none"> Supported only in documents and templates. Supported Fields in Salesforce Live Apps on page 249 CRM Analytics Live App Considerations on page 267 You can't @mention people or documents in the CRM Analytics live app. To use @mentions, add comments.

Live Data	What It Does	How It Works	Refresh Behavior	Export to PDF	Considerations
					<ul style="list-style-type: none"> Supports only integrations with Salesforce and not third-party applications.
Live Salesforce Reports on page 286	Add an embedded Salesforce report to your documents to get the latest report information, collaborate on Salesforce data in context, and add custom Quip filters to your reports.	@Mention <i>Salesforce Report</i> in a document or template.	<ul style="list-style-type: none"> If Mirrored Salesforce Permissions are off, Salesforce reports automatically refresh on page load based on the permissions of the user who inserted it. Reports can also be manually refreshed by any user with access to the document. If Mirrored Salesforce Permissions are on, Salesforce reports don't automatically refresh on page load. Salesforce reports can also be manually refreshed based on the viewing user's level of access. 	<ul style="list-style-type: none"> Salesforce records in the report are clickable and open in Salesforce. You can't open comments. 	<ul style="list-style-type: none"> Supported only in documents and templates. Considerations for Salesforce Reports in Quip on page 287 You can't save changes to filters made in Quip to Salesforce. You can't @mention people or documents in reports. To use @mentions, add comments. Supports only integrations with Salesforce and not third-party applications. You can change Salesforce Data Permissions from the Quip Admin Console.
Salesforce Data Mentions on page 277	Add live Salesforce data to your documents, spreadsheets, and templates. With in-line data mentions, data reads like normal text but stays up to date and	@Mention <i>Salesforce Data Mention</i> in a document, spreadsheet, or template.	<ul style="list-style-type: none"> If Mirrored Salesforce Permissions are off, Salesforce data mentions refresh on a page load or through a 	<ul style="list-style-type: none"> Data mentions don't expand and aren't clickable. You can't open comments. 	<ul style="list-style-type: none"> Considerations for Salesforce Data Mentions on page 284 You can't @mention people or documents in

Live Data	What It Does	How It Works	Refresh Behavior	Export to PDF	Considerations
	syncs with Salesforce. Edit the record fields from the data mentions, making it easier to keep your Salesforce work in Quip.		<p>manual data mention reload based on the permissions of the user who inserted it. Data mentions can also be manually refreshed by any user with access to the document.</p> <ul style="list-style-type: none"> • If Mirrored Salesforce Permissions are on, live data mentions (LDM) are refreshed only during two scenarios. Either the user loads a document with a given LDM based on the viewing user's level of access, and the record hasn't been refreshed in the last 10 minutes, or, the user manually refreshes a data mention. 		<p>Salesforce data mentions. To use @mentions, add comments.</p> <ul style="list-style-type: none"> • Supports only integrations with Salesforce and not third-party applications. • You can change Salesforce Data Permissions from the Quip Admin Console.

Live Data on the Quip Mobile App

Learn about which live data integrations work on the Quip mobile app.



Note: Salesforce live apps and data integrations are included only for Quip Advanced users. Third-party live apps are available via the App Exchange.

Live Data	iOS	View	Insert	Edit	Stage Edits	Save to Salesforce	Considerations
Calendar Live App	✓	✓	✓	✓	NA	NA	Use the Calendar Actions section to cut, copy, or delete the live app. You can also set the default month.
Countdown Live App	✓	✓	✗	✗	NA	NA	Use the Countdown Actions section to cut, copy, or delete the live app. Not all actions are supported on mobile, like changing the colors or dates.
Kanban Board Live App	✓	✓	✓	✓	NA	NA	Use the Kanban Actions section to cut, copy, or delete the live app. You can also add columns.
Poll Live App	✓	✓	✓	✓	NA	NA	Use the Poll Actions section to cut, copy, or delete the live app. You can also add poll options and set voting to single or multiple. Not all actions are supported on mobile, like setting the poll option colors.
Process Bar Live App	✓	✓	✓	✓	NA	NA	Use the Process Bar Actions section to cut, copy, or delete the live app. You can also add steps.
Project Tracker Live App	✓	✓	✓	✓	NA	NA	Use the Project Tracker Actions section to cut, copy, or delete the live app. You can also add rows. Column dropdowns aren't supported.
Relationship Map Live App on page 269	✓	✓	✗	✗	✗	✗	The Relationship Map live app is view-only on mobile.
Salesforce Record Live App on page 261	✓	✓	✗	✓	✓	✓	Use the Salesforce Record Actions section to save your changes to Salesforce, refresh the data, open the record in Salesforce, or discard your changes. Not all actions are supported on mobile, like configuring fields after you add a record to a document.
Salesforce List Live App on page 251	✓	✓	✗	✓	✓	✓	Use the Salesforce List Actions section to save your changes to Salesforce, refresh the data, open the list view in Salesforce, or discard your changes. You can also select a different list view and select the visible fields. Not all actions are supported on mobile, like configuring fields after you add a record to a document.

Live Data	iOS	View	Insert	Edit	Stage Edits	Save to Salesforce	Considerations
CRM Analytics Live App on page 264	✓	✓	✗	✗	✗	✓	On mobile devices, the CRM Analytics live app redirects to the CRM Analytics mobile app. Tap any dashboard embedded in a document to launch CRM Analytics for mobile. You must be signed in to the Quip and CRM Analytics mobile apps with the same username and org.
Live Salesforce Reports on page 286	✓	✓	✗	✗	✗	✓	Salesforce reports are view-only on mobile.
Salesforce Data Mentions on page 277	✓	✓	✓	✓	✗	✓	Click the data mention to see all record fields and make edits. Edited fields are saved to Salesforce and can't be staged.

Tasks

Manage your work across documents and teams with tasks.

Create a Task

Track action items for yourself and others.

Manage Tasks

Mark tasks as done, and decide which tasks to display in the Tasks tab.

Create a Task

Track action items for yourself and others.

1. In a document, add a checklist.
2. @mention someone in a checklist item.
3. To add a deadline, @mention a date.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Manage Tasks

Mark tasks as done, and decide which tasks to display in the Tasks tab.

You can manage your tasks in the Tasks tab of the sidebar:

- To mark a task as done, select the checkbox in the source document or in the Tasks tab.
- To keep a task at the top of your task list, hover over it, and then select **Pin**.
- To stop seeing a task, hover over it, and then select **Hide**.
A task stays hidden unless someone updates the checklist item in the source document.
- To see your hidden tasks, select the arrow at the top of the tab, and then select **Show Hidden**.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

- To reveal a previously hidden task, hover over it, and then select **Show**.

SEE ALSO:

[Salesforce Help: Navigate Quip Using the Sidebar](#)

Notifications

Get notified about the Quip changes and documents that you care about.

[Manage Notifications](#)

Determine the kinds of notifications that you receive and when you get them.

[Change Your Default Notification Settings](#)

Change how often Quip notifies you of activities on your desktop, mobile phone, email, and Slack.

[Change Your Notification Settings for a Document](#)

You can override your default notification settings for a document.

Manage Notifications

Determine the kinds of notifications that you receive and when you get them.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Notifications in Quip

By default, you get a notification in the Notifications tab when:

- Someone @ mentions your name in a document or chat.
- Someone @ mentions @everyone in a document or a chat that you're a part of.
- Someone adds you to a document, folder, or chat.
- Someone adds a document to a shared folder that you're a part of.
- Someone responds to your comments in a document.
- Someone comments on an edit that you made.
- Someone likes one of your comments or chats.
- Someone likes a comment or chat that you're mentioned in.
- Someone opens a document that you shared with them.
- Someone requests access to a document that you're a part of.
- A date that you @ mentioned is approaching.

When you take any of these actions, your teammates get notifications.

You can see all your notifications in the Notifications tab of the sidebar. From there, you can click the blue dot next to a notification to indicate that you read it. You can also mark all notifications as read by clicking the checkbox at the top of the tab. If you click the filter icon, you see only your unread notifications.



Note: Quip doesn't notify you if someone opens a document that you created with more than seven members. It also doesn't notify you if someone adds a document to a shared folder that you're a member of if the folder has more than seven members.

Email Notifications

By default, you get an email notification when:

- Someone @ mentions your name in a document or chat.
- Someone @ mentions @everyone in a document or chat that you're a part of.
- Someone responds to your comments in a document.
- Someone comments on an edit that you made.

SEE ALSO:

[Salesforce Help: Navigate Quip Using the Sidebar](#)

Change Your Default Notification Settings

Change how often Quip notifies you of activities on your desktop, mobile phone, email, and Slack.

1. From Account Settings, click **Notifications**.
2. In each tab, set the level of notification.
3. Click **Done**.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Change Your Notification Settings for a Document

You can override your default notification settings for a document.

1. Open the document or folder.
2. From the Document or Folder menu, select **Advanced > Notification Setting**.
The setting that you select remains in effect if you change your account-level default notification settings later.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

You can apply custom notification settings to every item in a folder by changing the notification settings for the folder.

Administer Quip

Get your users up and running with Quip.

[Change Your Company Information in Quip](#)

Update your company's Quip site information, such as the company name, quip.com subdomain, and company logo.

[Turn Off Live Paste Automatic Updates](#)

You can turn off automatic updates for content that users paste with Live Paste. When automatic updates are off, only members of the source document can update Live Pasted content.

[Create and Manage Group Folders](#)

Help your site members manage documentation across the organization.

Restricted Sharing in Quip

Quip makes it easy to balance security with collaboration. To keep your content secure, you can prevent users from sharing content with external organizations. You can also limit sharing to a trusted allowlist. Restricting sharing doesn't change users' access to documents or folders that are already shared.

Quip Templates and Automation Limits

These limits govern the use of Quip templates and automation. Make sure to stay within them for best performance.

Change Your Company Information in Quip

Update your company's Quip site information, such as the company name, quip.com subdomain, and company logo.

1. Go to `https://admin.quip.com`.
2. Log in using your Quip admin email and password.
3. From Settings, select **Site Settings**.
4. To update your company information, click **Edit Profile**.

Considerations for Updating Company Information in Quip

As you update your company's Quip site information, keep these considerations in mind.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Considerations for Updating Company Information in Quip

As you update your company's Quip site information, keep these considerations in mind.

- Changing your company's quip.com subdomain doesn't break old URLs. Anyone trying to visit a URL with the old domain is sent to the URL at its new domain.
- Changing your company name doesn't automatically rename your Quip site's default group folder. To update the group folder name, rename the folder.

Turn Off Live Paste Automatic Updates

You can turn off automatic updates for content that users paste with Live Paste. When automatic updates are off, only members of the source document can update Live Pasted content.

1. Go to `https://admin.quip.com`.
2. Log in using your Quip admin email and password.
3. From Settings, select **Site Settings**.
4. Turn off **Allow Automatic Updates for Live Pasted Content**.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

Create and Manage Group Folders

Help your site members manage documentation across the organization.

Only Quip admins can create group folders. Many organizations create group folders for each team or organization. If you're an enterprise organization with 500+ people, talk to your Account Executive or Success Manager about specific folder recommendations for large companies. Depending on your access level, you can add or remove documents, add members, and more.

EDITIONS

Available in: **Quip desktop app, Quip iOS mobile app, and Quip on web**

- Fewer than 8 members: Each folder member receives notifications about updates to documents in the folder.
- More than 8 members: A folder member receives notifications only if they turn on notifications for the folder in their notification settings.

Restricted Sharing in Quip

Quip makes it easy to balance security with collaboration. To keep your content secure, you can prevent users from sharing content with external organizations. You can also limit sharing to a trusted allowlist. Restricting sharing doesn't change users' access to documents or folders that are already shared.

[Restrict External Sharing from Your Quip Site](#)

When you restrict external sharing, your users can't share documents or folders with people outside your site. Restricting external sharing also prevents your users from creating publicly shared links and adding documents or folders to shared folders that are owned by other companies.

Restrict External Sharing from Your Quip Site

When you restrict external sharing, your users can't share documents or folders with people outside your site. Restricting external sharing also prevents your users from creating publicly shared links and adding documents or folders to shared folders that are owned by other companies.

EDITIONS

Available in: **Quip on web**

1. Go to `https://admin.quip.com`.
2. Log in using your Quip admin email and password.
3. From Settings, select **Sharing**.
4. Turn on **Restricted External Sharing**.
5. When external sharing is restricted, your users see an error message when they try to share a document or folder with users outside of your organization. To add a custom help link to the error message, next to Learn More Link, click **Edit**.
6. You can let your users share content with specific external users or organizations. Next to External User and Domain Allowlist, click **Add**.
 - To add an entire organization to the allowlist, enter the company's email domain.
 - To add an individual user, enter their email address.

Organizations and users on the allowlist can't share your content with anyone else.

7. If you have other Quip managed sites, you can choose whether your site's users can share content with these sites. Under Managed Sites Sharing, click **Edit**, and select a sharing setting.

Quip Templates and Automation Limits

These limits govern the use of Quip templates and automation. Make sure to stay within them for best performance.


Limits

Item	Recommended Limit
Spreadsheets	10,000 cells

Item	Recommended Limit
Live apps	
Media	

QUIP IN SALESFORCE

Quip helps your users collaborate to make smarter, faster decisions—all within the context of your Salesforce data. With Quip Advanced (previously Salesforce Anywhere Advanced), your users can project manage with living documents and spreadsheets that centralize teamwork. It doesn't matter if people are in the same room or on the other side of the globe. They can work in tandem and focus on what matters. Embed customizable business process templates in Salesforce records to create a single source of truth about your customers.

 **Important:** Salesforce Anywhere is now called Quip. Quip helps your team make faster, smarter decisions in the context of your Salesforce data. We're excited to announce this name change, although you still see the Salesforce Anywhere name in the product for a short time.

[Get Started with Quip \(formerly Salesforce Anywhere\) in Salesforce](#)

Familiarize yourself with features and their availability, and learn how to set up and manage Quip in Salesforce.

[Use Quip Features in Salesforce](#)

Learn how to get the most out of Quip features in Salesforce.

EDITIONS

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited Editions**

Get Started with Quip (formerly Salesforce Anywhere) in Salesforce

Familiarize yourself with features and their availability, and learn how to set up and manage Quip in Salesforce.

[Quip Glossary for Salesforce](#)

Search for terms and brush up on your Quip knowledge.

[Considerations for Quip in Salesforce](#)

Review some important information about products, features, and availability to get the most out of Quip in Salesforce.

[Set Up Quip in Salesforce](#)

Learn about technology requirements, setup, and permissions to get your users up and running with Quip in Salesforce.

[Manage Quip Permissions](#)

Give your team access to Quip with permission sets in Salesforce. Add your users to your Quip site, manage your users' access to Salesforce data in Quip, and more.

[Report on Quip Engagement](#)

Run reports in Lightning Experience that show how and which users engage with documents and templates associated with Salesforce records. Go further with templates and see what's working for your team, and what needs your attention.

[Test Your Quip and Salesforce Configuration with Health Check](#)

Use the Quip Health Check to run automated tests on your Quip site and Salesforce org connection. When Health Check identifies a problem, get on-the-spot results and solution recommendations.

EDITIONS

Available in: **Lightning Experience**

EDITIONS

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited Editions**

[Solution Kits for Quip](#)

Get the most out of Salesforce with your Quip integrations by implementing one or more solution kits. Get feature recommendations, workflow details, and instructions to help you implement the solution from start to finish.

Quip Glossary for Salesforce

Search for terms and brush up on your Quip knowledge.

Quip Advanced (previously Salesforce Anywhere Advanced)

Collaboration Document Metrics

Represents metrics for a document. Includes Quip site ID, document URL, document title, source template, last updated date, update count, and viewer, editor, and commenter counts. Available in API version 50.0 and later.

Collaboration Document Metric Records

Represents an association between a Collaboration Document Metric and a Salesforce record. It tracks which Salesforce record, such as an Account or Contact, is associated with the document engagement metric. Available in API version 50.0 and later.

Collaboration Template Metrics

Represents metrics for a template. Includes Quip site ID, template ID, template URL, template title, number of documents created from a template, and last updated date. Available in API version 50.0 and later.

Collaboration Template Metric Records

Represents an association between a Collaboration Template Metric and a Salesforce record. It tracks which Salesforce record, such as an Account or Contact, is associated with the template engagement metric. Available in API version 50.0 and later.

Collaboration User Engagement Metrics

Represents the user engagement metrics for a Quip thread in a template or document. Includes Salesforce user ID, Quip user ID, Quip thread ID, title, and type, Quip site ID, source template ID, metric date, and viewer, editor, and commenter counts. Available in API version 50.0 and later.

Collaboration User Engagement Records

Represents an association between a Collaboration User Engagement Metric and a Salesforce record. It tracks which Salesforce record, such as an Account or Contact, is associated with the user engagement metric. Available in API version 50.0 and later.

Comment Access

- Level of access to a document or spreadsheet. Users with this level of access can view and comment.
- Synced Sharing setting for documents linked to a record. Users who can view a Salesforce record can view and comment on documents linked to it.

Comment Count

Quip per-user engagement metric that records the number of comments by the user for the specified Metric Date.

Commenter Count

Quip engagement metric that records the daily number of unique document comments.

Company Gallery

Template gallery in Quip that contains custom galleries that are shared across your company. Admins can publish company-wide templates to the Template Library's company galleries from the Quip Admin Console. Company galleries make it easier to streamline and share your processes across your business.

Default Salesforce Org

Quip site setting that redirects users to a specific Salesforce login page when they log in to their Quip site. Salesforce Single Sign-On (SSO) users can automatically connect the default Salesforce org to Quip. Choosing a default org also recommends that org to users when they connect an org to use Salesforce integrations in Quip. Available in the Quip Admin Console.

Directly Linked

Documents that are manually linked to a Salesforce record through the Quip Associated Documents component or that are created from an embedded template.

Document ID

Quip engagement metric that records the ID of the document.

Document Range

Headings in a template that define the template's structure. Use document ranges to automate your template flows based on a template section.

Document Title

Quip engagement metric that records the title of the document.

Document URL

Quip engagement metric that records the URL of the document.

Edit Access

- Level of access to a document or spreadsheet. Users with this level of access can view, comment, and edit.
- Synced Sharing setting for documents linked to a record. Users who can view a Salesforce record can view, comment on, and edit documents linked to it.

Edit Count

Quip per-user engagement metric that records the number of edits by the user for the specified Metric Date.

Editor Count

Quip engagement metric that records the number of unique document edits.

Einstein Analytics Live App

Salesforce live app that lets users add Einstein Analytics dashboards to their documents.

Example Gallery

Template gallery in Quip that contains sample templates from quip.com/templates. Sample templates aren't customizable by admins. Documents, spreadsheets, and slides added to your site by Quip Support are also shown in the Example Templates gallery.

Full Access

- Level of access to a document or spreadsheet. Users with this level of access can view, comment, edit, and share.
- Synced Sharing setting for documents linked to a record. Users who can view a Salesforce record can view, comment on, edit, and share documents linked to it.

Gallery

Grouping of templates in the Template Library similar to a folder. Template Library galleries include private galleries, the Example Templates gallery, and company galleries.

Health Check

Automated tests that check the connection between your Quip Advanced site and Salesforce org. When Health Check identifies a problem, get on-the-spot results and solution recommendations.

Last Updated Date

Quip engagement metric that records the date that the document was last updated.

Linked Document

An association between a document and a Salesforce record. Link a document to a record to easily find documents, like an Account Plan, that are related to Salesforce. You can link a document to a record from the document, or from the Quip Associated Documents component on the record.

Linked from Related Records

Documents that are linked to a related record and are shown in the Quip Associated Documents component. For example, see documents linked to an opportunity from the Account record.

Live App

Interactive first-party or third-party application that continuously updates with the latest data and is embedded in a document. The Salesforce Record and Salesforce List live apps pull live data from Salesforce and support saving local changes to Salesforce. Other live apps include Einstein Analytics, Relationship Map, Kanban boards, polls, process bars, and more.

Lock Document Edits

Marks a document as complete and stops users from making edits. You can lock edits to a document in Process Builder and Flow Builder, and from a document. Only users with full access to a document can lock or unlock edits.

Lock Section Edits

Locks edits to a template section to prevent accidental edits. You can lock edits to a section in Process Builder and Flow Builder, and from a template. Only users with full access to a template can lock or unlock edits.

Mail Merge Syntax

Merge fields in a template that dynamically populate with Salesforce data. Templates embedded in a Salesforce record using the Quip Document component use mail merge syntax to auto-populate text and live apps based on the record. A Salesforce object's merge fields are shown in the Object Manager.

Mirrored Salesforce Permissions

Access management setting that gives users access to only the Salesforce data in Quip that they can access in Salesforce.

Metric Date

Quip engagement metric that records the date of the gathered metric.

Multi-Org Allowlist

Allowlist that determines which Salesforce orgs users can pull data from in Quip. Add preapproved orgs to your allowlist or disallow orgs that you don't want your users to pull data from. Allowlists ensure that company-critical data stays secure and users access only the Salesforce data in Quip that you approve. Available in the Quip Admin Console.

No Access

Synced Sharing setting for documents linked to a record. Users who can view a Salesforce record can't view documents linked to it.

None

Level of access to a document or spreadsheet that removes a user's access to it. Users who previously had access to a document can no longer view, comment on, edit, or share it.

Object Type

Quip engagement metric that records the object type of the Salesforce record, such as Account or Contact.

Owner

The user a Salesforce app's data is based on. The owner depends on how the Salesforce app was added to the document:

- The owner of a list view added manually to a document is the user who added it.
- The owner of a list view added by copying a template is the user who copied it.
- The owner of a list view added using Process or Flow Builder is the first user to open the document.
- The owner of a record is the user who added it, the last user to refresh it, or the last user to add or remove a field.
- The owner of a report added manually to a document is the user who added it, or the last user to edit it.
- The owner of a report added by copying a template is the user who copied it.

Parent Record ID

Quip engagement metric that records the ID of the Salesforce record.

Preferred Org

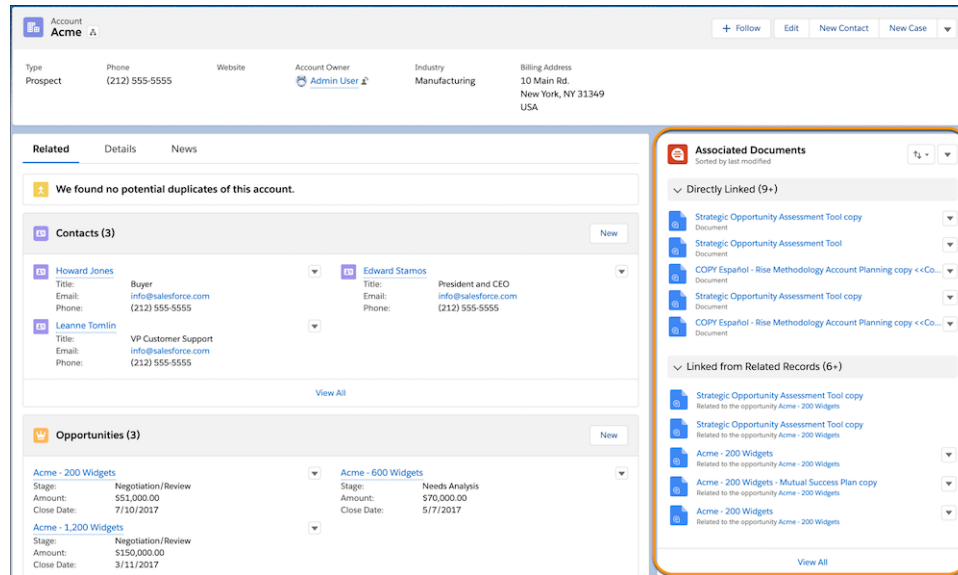
Integration setting available to all users that lets you mark your go-to Salesforce org as preferred. Salesforce live apps and integrations automatically pull data from your preferred org.

Private Gallery

Template gallery in Quip that contains the Created by Me and Shared with Me galleries. Available via the Template Library.

Quip Associated Documents Component

Lightning component that lets you link documents to a Salesforce record. The component also surfaces documents linked to related records.



Quip Document Component

Lightning component that lets you embed a template in a Salesforce record. Users can also create documents or link existing ones from the component.

QuipDocumentURL

Custom field on page 200 on a Salesforce object that the Quip Document component uses to store the URL of the embedded document. Only required if you want to use different documents for your Salesforce records.

Quip Document Metric

Quip engagement metric that records the ID of the Collaboration Document Metric.

Quip Engagement Metrics

Measures which users are interacting with documents associated with Salesforce records. Available in Lightning.

Quip Notifications Component

Lightning component that lets you see your Quip notifications in Salesforce.

Quip Setup Starter

A managed package that sets up your Salesforce org with popular Quip Advanced features like embedded templates, Flow Builderactions, and more.

Quip Template Metric

Quip engagement metric that records the ID of the Collaboration Template Metric.

QuipTemplateURL

[Custom field](#) on page 200 on a Salesforce object that the Quip Document component uses to store a template URL. Only required if you want to use different templates for different Salesforce records.

Quip Thread

Quip per-user engagement metric that records the Quip thread ID.

Quip Thread Title

Quip per-user engagement metric that records the title of the document or sheet.

Quip Thread Type

Quip per-user engagement metric that records the type of Quip thread. The possible values are chat, document, sheet, or template.

Quip User

Quip per-user engagement metric that records the ID of the Quip user.

Read Only

Level of access to a document or spreadsheet. Users with this level of access can view.

Refresh

Button that pulls the latest Salesforce data for your Salesforce live apps, data mentions, and reports. When the Salesforce live apps and data mentions refresh, they use the data that the app owner has access to.

Relationship Map Live App

Lightweight org charts and relationship maps in Quip. Create custom maps or create maps based on Salesforce data. [See Relationship Map Glossary](#) on page 276

Restrict Synced Sharing Access

Access management setting that stops users that are granted access to a document via Synced Sharing from becoming permanent document members. When a user's Synced Sharing access level changes, so does their document access.

Salesforce Actions Cloud

Button that lets you take Salesforce actions from a document. You can link a document to a Salesforce record, add a Salesforce data, or log activity back to Salesforce.

Salesforce Activities

Options available via the Salesforce Actions cloud. Activities include Log a Call, New Task, and New Event.

Salesforce Data Mention

Inline Salesforce fields and records. Supports saving local changes to Salesforce for easy updates to your records and record fields.

Salesforce List Live App

Live Salesforce list views in Quip. The Salesforce List live app supports bidirectional syncing with Salesforce for easy updates to your list views and related lists. You can add the Salesforce List live app to a document with the @key or by adding it to a template with Process or Flow Builder.

Salesforce Record Live App

Live Salesforce records in Quip. The Salesforce Record live app updates with the latest Salesforce data and supports bidirectional syncing with Salesforce. For example, add the Salesforce Record live app to a Case Swarm document. Service reps can collaborate in-context, update the case status, and even add fields directly in Quip.

Salesforce Record Access

Synced Sharing setting for documents linked to a record. Users who can access a Salesforce record have the same level of access to documents linked to it.

Salesforce Related List

Live Salesforce related list views in Quip. Use the Salesforce List live app to add record-specific related lists to a document. Stay on top of deals and cases with in-line editing, comments, and bi-directional syncing to Salesforce.

Salesforce Report

Live Salesforce reports in Quip. Salesforce reports update automatically with the latest Salesforce data. You can apply your report's custom filters to tailor your report view in Quip.

Salesforce User ID

Quip engagement metric that records the ID of a Salesforce user.

Site

Quip engagement metric that records the ID of the Quip site.

Source Template

Quip engagement metric that records the ID of the source template.

Source Template URL

Quip engagement metric that records the URL of the source template.

Staged Edits

Edits to Salesforce live apps that are saved locally. Don't save changes made in Quip to Salesforce. Staged edits are supported in the Salesforce List and Salesforce Record live apps.

Synced Sharing on page 110

Org-level document sharing setting that uses a user's access to a Salesforce record to grant access to documents linked to a record. After Synced Sharing is enabled, only users with access to a Salesforce record are able to view, comment on, edit, or share its embedded documents. Available in the Quip Admin Console.

Edit Salesforce Organization Access Level

☐ No Access
Users who can view a record can't view Quip documents linked to it.

☐ View Access
Users who can view a record can view Quip documents linked to it.

☒ Comment Access
Users who can view a record can view and comment on Quip documents linked to it.

☐ Edit Access
Users who can view a record can view, comment on, and edit Quip documents linked to it.

☐ Full Access
Users who can view a record can view, comment on, edit, and share Quip documents linked to it.

☐ Salesforce Record Access
Users who have access to a Salesforce record have the same level of access to Quip documents linked to it. To grant additional access to users, share in Quip.

CancelSave

Syncing

Lets you save changes made to the Salesforce List live app, Salesforce Record live app, Relationship Map live app, and Salesforce Data Mentions in Salesforce.

- Any user can edit and comment on records and fields in Quip. Only users with edit access to the fields in Salesforce can sync edits to Salesforce.
- List view and record owners can choose to discard or save changes made in Quip by non-owners.

Template

Document configured to scale and streamline business processes like Account Plans. Include mail merge syntax to create dynamic fields that autofill based on a Salesforce record and add it to the Quip Document component. Documents can be marked as templates or created from scratch using the template format.

Now

[[Account.Name]] Account Plan

Purpose:

Give your account teams a holistic view of your key customers in one living document where anyone on the team can take action. Embed your account plan in the Account record in Salesforce and maximize cross-functional collaboration without siloed communication. Combine checklists, live Salesforce data, and real-time discussions to drive revenue as a team. Whether you're contributing to the doc, reviewing contextual conversations, or Salesforce data, everything is live, even if you're on your phone or offline.

This use case is available with Quip for Salesforce.

Executive Summary

Please give the executive summary of the account here.

Hover over the blue dot to the right to quickly access the contents of this document.

Use the @Salesforce Record Live App to showcase important data from your Account record in Salesforce. The data is live and if you have permission in Salesforce, you can even update it from here.

Acme Corp Inc

Account

Type	Mid-Market
Industry	Technology
Employees	450
Total Sales	\$80,000.00

Open Opportunities

Use the @Salesforce Record Live App to showcase open Opportunities for this account to help direct everyone's attention to new business.

Acme Corp Inc

Account

Last updated just now

Template ID

Quip engagement metric that records the ID of the template.

Template Library

Lets you easily find and create templates in Quip. With the Template Library, users can create and share templates in private galleries, like the Created by Me and Shared with Me galleries, access company templates, or get started with example templates.

Template URL

Quip engagement metric that records the URL of the template.

Templated Live Apps and Data Mentions

Salesforce live apps and Salesforce Data Mentions added to an embedded template that dynamically populate based on the record's data.

Total Document Count

Quip engagement metric that records the number of documents created from a template.

Update Count

Quip engagement metric that records the daily number of document edits.

User Engagement Metric ID

Quip per-user engagement metric that records the ID of the Collaboration User Engagement Metric record.

View Access

Synced Sharing setting for documents linked to a record. Users who can view a Salesforce record can view documents linked to it.

View Count

Quip per-user engagement metric that records the number of views by the user for the specified Metric Date.

Viewer Count

Quip engagement metric that records the daily number of unique document views.

@Mention

Use the @ key to add people, documents, Salesforce live apps, images, Kanban boards, and more to your documents.

Considerations for Quip in Salesforce

Review some important information about products, features, and availability to get the most out of Quip in Salesforce.

[What Is Quip in Salesforce?](#)

There are two Quip feature sets in Salesforce: Quip Advanced (previously Salesforce Anywhere Advanced) and Quip for Customer 360.

[When Do Quip Features Become Available?](#)

Quip features become available at different times, depending on the platform.

[Which Quip Features Work in VPC and Salesforce Sandbox?](#)

See what Quip Advanced features are supported in VPC or Salesforce sandbox. Enable Synced Sharing, live Salesforce data in documents, SSO, and more.

EDITIONS

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited Editions**

What Is Quip in Salesforce?

There are two Quip feature sets in Salesforce: Quip Advanced (previously Salesforce Anywhere Advanced) and Quip for Customer 360.

Quip Advanced and Quip for Customer 360 give all users access to:

- Freeform collaboration tools with Salesforce integrations, including Quip documents, spreadsheets, live apps, and data mentions
- Quip Lightning components
- Quip actions in Flow Builder
- The Quip Template Library
- Synced Sharing
- Log activity

Quip Advanced is available for purchase to:

- Customers who have Sales Cloud, Service Cloud, or Salesforce Platform
- Users with Salesforce User, Salesforce Platform, and Lightning Platform licenses

Quip (previously Quip for Customer 360) is available to existing customers only. To get Quip for Customer 360 features and more, purchase Quip Advanced.

When Do Quip Features Become Available?

Quip features become available at different times, depending on the platform.

Most Quip features in Lightning Experience become available when the newest release becomes available for your org.

Salesforce in Quip features become available on a rolling basis throughout each release.

Which Quip Features Work in VPC and Salesforce Sandbox?

See what Quip Advanced features are supported in VPC or Salesforce sandbox. Enable Synced Sharing, live Salesforce data in documents, SSO, and more.

Quip Advanced Feature	VPC Support	Sandbox Support	More Info
Salesforce connection	Yes	Yes	To connect your Quip site to a sandbox, log in to your Salesforce sandbox. In Setup, enter <i>Quip</i>

EDITIONS

Available in: **Lightning Experience**

EDITIONS

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited Editions**

EDITIONS

Available in: **Lightning Experience**

EDITIONS

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited Editions**

EDITIONS

Available in: **Lightning Experience**

Quip Advanced Feature	VPC Support	Sandbox Support	More Info
			<p>(<i>Salesforce Anywhere</i>) in the Quick Find box and follow the guided setup on page 96.</p> <p>Connect Quip VPC to Salesforce</p>
Salesforce SSO	Yes	Yes	<p>Set Up Salesforce Single Sign-On for a Quip VPC</p> <p>On the Quip login page, use the Sign in with Salesforce Sandbox option. To let specific sandbox orgs use SSO by default, grant access in the Quip Admin Console on page 108.</p>
Native Quip	Yes	Yes	All Quip features, including interactive documents, spreadsheets, and real-time chat work in a VPC and in a sandbox.
Synced Sharing on page 110	Yes	Yes	<p>Manage user access at the org level for your documents linked to a Salesforce record. Synced sharing applies to users with access to the record.</p> <p>To enable synced sharing in a sandbox, go to the Quip Admin Console. Under Settings, select Salesforce, and go to the Connected Salesforce Orgs section. Click Add Salesforce Sandbox Org. After you add your sandbox org, you can set your Synced Sharing preference.</p>
Document linking	Yes	Yes	Link a document to a record from Quip or add the document to the Quip Associated Documents Lightning component.
Log a call in Quip	Yes	Yes	Log a call from a document that syncs to Salesforce.
Create a task in Quip	Yes	Yes	Create a task from a document that syncs to Salesforce.
Salesforce Record live app	Yes	Yes	Enable Live Apps in a Quip VPC

Quip Advanced Feature	VPC Support	Sandbox Support	More Info
Salesforce List live app	Yes	Yes	Enable Live Apps in a Quip VPC
CRM Analytics live app on page 264	Yes	Yes	Set Up the CRM Analytics Live App in a VPC on page 98 Enable Live Apps in a Quip VPC
Third-party live apps	Yes	Yes	Contact Quip Support to enable third-party live apps in a VPC.
Live Salesforce reports on page 285	Yes	Yes	After you connect Quip to Salesforce, you can pull Salesforce data into a document. To add a live Salesforce report, enter <i>@Salesforce Report</i> in Quip, enter the =IMPORT formula in a Quip spreadsheet, or click Open in Quip from a report in Salesforce.
Quip Document component on page 198	Yes	Yes	After you connect Quip to Salesforce on page 90, you can add the Quip Document component to your record layouts in Salesforce.
Quip Associated Documents component on page 193	Yes	Yes	After you connect Quip to Salesforce on page 90, you can add the Quip Associated Documents component to your record layouts in Salesforce.
Quip Notifications component	Yes	Yes	After you connect Quip to Salesforce on page 90, you can add the Quip Notifications component to your record layouts in Salesforce.
Salesforce Data Mentions	Yes	Yes	VPC and Sandbox support applies to both Salesforce Data Mentions and Salesforce Template Data Mentions. Data mentions work in VPCs if the admin allows users to connect to Salesforce orgs.

Set Up Quip in Salesforce

Learn about technology requirements, setup, and permissions to get your users up and running with Quip in Salesforce.

1. [Create a Salesforce API Key](#)

To connect your Quip site to Salesforce, you need an API key.

2. [Connect Quip and Salesforce](#)

Connect your Quip site to Salesforce. When you set up your site, we create permission sets, an Auth. provider, and external data source for you.

3. [Complete the Quip Connection](#)

To use Quip features in Salesforce, users must complete the Salesforce and Quip connection.

4. [Remind Quip Users to Connect to Salesforce](#)

Identify the users who haven't connected Salesforce and Quip, and then send them an email reminder to complete the connection. After they complete the connection, your users can access all Quip features in Salesforce, and your Quip engagement metrics become more accurate.

5. [Keep Users Working in Lightning Experience](#)

Remove the Open in Quip button from Lightning Experience so that your users always collaborate within the context of your Salesforce records.

6. [Quip in a Sandbox](#)

Set up and test your Quip features with a sandbox Salesforce org.

7. [Quip in a VPC](#)

Let your users collaborate and stay productive while keeping your Salesforce data secure. Control what Salesforce data your users can access and where.

EDITIONS

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited Editions**

EDITIONS

Available in: **Lightning Experience**

Create a Salesforce API Key

To connect your Quip site to Salesforce, you need an API key.

Only a Quip admin can create an API key.

1. Log in to the Quip Admin Console.

2. Click **Settings**, then **Integrations**.

3. Click **New API Key**.

4. Name your API key and enable the User Read, User Manage, User Write, Admin Read, Admin Write, and Admin Manage scopes.

When you get started with Quip in Salesforce Setup, use your new API key's Client ID and Client Secret. To find the Client ID and Client Secret, go to the Quip Admin Console's Integrations page, view your API key, and click **Copy**.

EDITIONS

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited Editions**

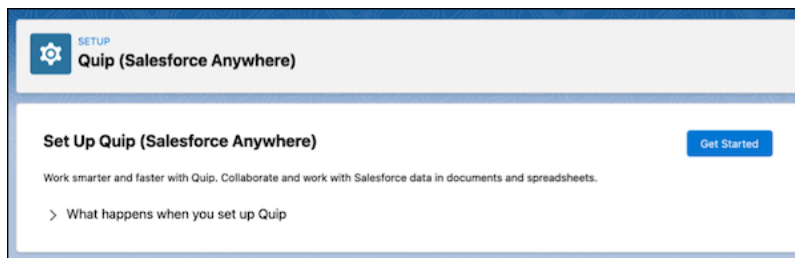
Connect Quip and Salesforce

Connect your Quip site to Salesforce. When you set up your site, we create permission sets, an Auth. provider, and external data source for you.

- Only a Quip admin and Salesforce admin can connect an existing Quip site to Salesforce.
 - To complete the setup, first create a [Client ID and Client Secret](#) on page 89 in the Quip Admin Console.
1. In Salesforce Setup, from the Quick Find box, enter *Quip*, then select **Quip (Salesforce Anywhere)**.
 2. Click **Get Started**.

EDITIONS

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited** Editions



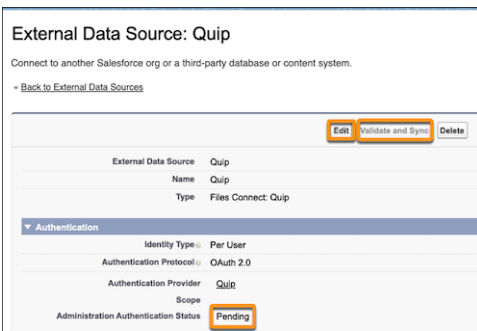
3. To connect your site, enter your Quip site subdomain and click **Use your Quip Client ID and Client Secret**. [Tell Me How](#) on page 89

 **Note:** If you're not a Quip site admin, ask the site's admin for the [Client ID and Client Secret](#) on page 89.

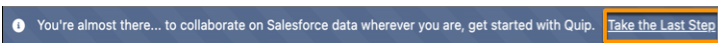
4. Assign the Quip permission set to give your team access to Quip features in Salesforce. You can manually assign the permission set or assign it to everyone. [Learn About Quip Permissions](#) on page 101



- Optional: To see documents and spreadsheets in Global Search, validate and sync the external data source. Click **Go To External Data Source** and click **Validate and Sync** on the External Data Source page. If the Quip external data source is pending, click **Edit**, then **Validate and Sync**.



- To complete the setup, tell your users to click **Take the Last Step**.



SEE ALSO:

- [Create a Salesforce API Key](#)
- [Learn About Quip Permissions](#)
- [Complete the Quip Connection](#)
- [Add Users to Your Quip Site](#)

Complete the Quip Connection

To use Quip features in Salesforce, users must complete the Salesforce and Quip connection.

There are three ways users can complete the connection:

- The Quip banner in Lightning Experience (Recommended for all)
 - For Quip Advanced and Quip for Customer 360 users.
 - Tell your users to click **Take the Last Step**.



- The Connected Salesforce Orgs settings page in Quip (Quip users)
 - For Quip Advanced and Quip for Customer 360 users.
 - For users that work primarily in Quip, connecting this way lets them pull Salesforce data into Quip, without giving access to Lightning components in Salesforce.

EDITIONS

Available in: **Lightning Experience**

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited Editions**

- From your profile, click **Salesforce**, then click **Connect** and log in to Salesforce.
- Quip Lightning components
 - For Quip Advanced and Quip for Customer 360 users.
 - From a Quip Lightning component, click **Get Started**.

After your users complete the connection, they can use Quip Lightning components, Salesforce live apps in Quip, and more.

Remind Quip Users to Connect to Salesforce

Identify the users who haven't connected Salesforce and Quip, and then send them an email reminder to complete the connection. After they complete the connection, your users can access all Quip features in Salesforce, and your Quip engagement metrics become more accurate.

1. From Setup, in the Quick Find box, enter *Quip*, and then select **Quip (Salesforce Anywhere)**.
2. Under Remind Quip Users to Connect to Salesforce, click **Get Users and Template**.
3. In the Users and Email Template window, the Users to Remind tab shows the Quip users who haven't connected to Salesforce. Select the users who you want to remind, and then click **Copy Emails**.

EDITIONS

Available in: **Lightning Experience**

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited Editions**

Users and Email Template

Send Quip users a connection reminder

The following users haven't completed the Salesforce and Quip connection. Until they do, they can't take advantage of Salesforce integration features. Select users and copy a list of their email addresses. Then, use the email template to remind users to complete the connection.

Users to Remind (5) Email Template

Users

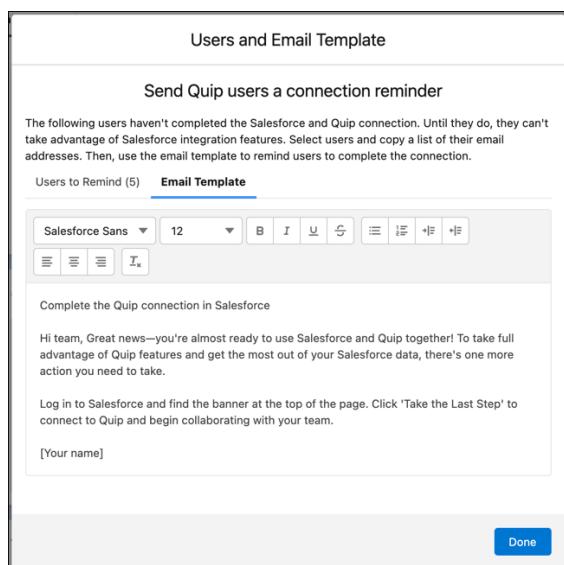
Search users...

<input type="checkbox"/>	Name	Email	Access Granted Date
<input type="checkbox"/>	Claudia Wilson	m2zhang@quip.com	Oct 27, 2021
<input type="checkbox"/>	Jack Smith	m1zhang@quip.com	Oct 27, 2021
<input type="checkbox"/>	Dwayne Dalton	m4zhang@quip.com	Oct 27, 2021
<input type="checkbox"/>	James Melton	m3zhang@quip.com	Oct 27, 2021
<input type="checkbox"/>	Admin User	tanay.ponkshe@salesfo...	Oct 27, 2021

Copy Emails

Done

4. Open your preferred email client and paste the copied email addresses in the To: field.
5. Return to the Users and Email Template window in Salesforce Setup, and then click the **Email Template** tab.



6. To copy the email template, place your cursor in the text box and double-click. Then, right-click or use a keyboard shortcut to copy.
7. Click **Done**.
8. In your email client, paste the copied text into the email body.
9. Select *Complete the Quip connection in Salesforce* and right-click or use a keyboard shortcut to cut. Then, paste the text in the subject line.
10. Send the email.

Keep Users Working in Lightning Experience

Remove the Open in Quip button from Lightning Experience so that your users always collaborate within the context of your Salesforce records.

1. From Setup, in the Quick Find box, enter *Quip*, and then select **Quip (Salesforce Anywhere)**.
2. To ensure that your users work on embedded Quip documents and spreadsheets in Lightning Experience, toggle Open Documents in Quip.com to **Inactive**.

To display the Open in Quip button again and allow your users to work in Quip with documents that auto-fill with Salesforce data, toggle Open Documents in Quip.com back to **Active**.

EDITIONS

Available in: **Lightning Experience**

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited Editions**

Quip in a Sandbox

Set up and test your Quip features with a sandbox Salesforce org.

[Decide Between a Quip Managed Site and Your Main Quip Site](#)

To test out your new Quip features with a sandbox org before you roll them out to your users, you have two options: use the same main Quip site with your sandbox and production Salesforce orgs or use a Quip managed site.

[Use Quip in a Salesforce Sandbox](#)

Use Quip Advanced and Quip (previously Quip for Customer 360) features in a Salesforce sandbox.

EDITIONS

Available in: **Lightning Experience**

[Connect Your Salesforce Sandbox Org to Quip](#)

To pull in live Salesforce data from your Sandbox org into Quip, connect your Sandbox org to Quip.

[Migrate Your Sandbox Templates to Production](#)

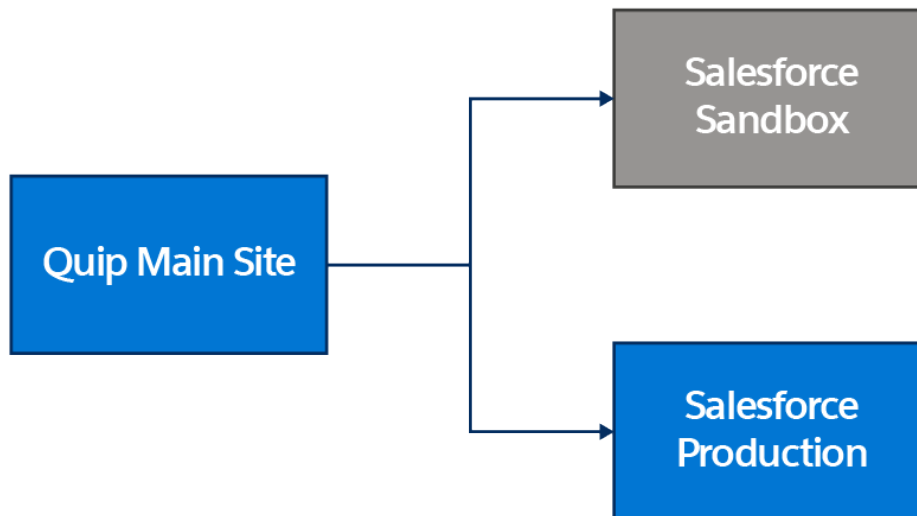
After you finish testing your templates in sandbox and get feedback from your pilot users, update your templates to work in your Salesforce production org.

Decide Between a Quip Managed Site and Your Main Quip Site

To test out your new Quip features with a sandbox org before you roll them out to your users, you have two options: use the same main Quip site with your sandbox and production Salesforce orgs or use a Quip managed site.

To reduce the number of steps and repetitive tasks, we recommend using the same main Quip site for your Sandbox and Production orgs. Using your main Quip site also doesn't use extra licenses and doesn't count against your license subscription.

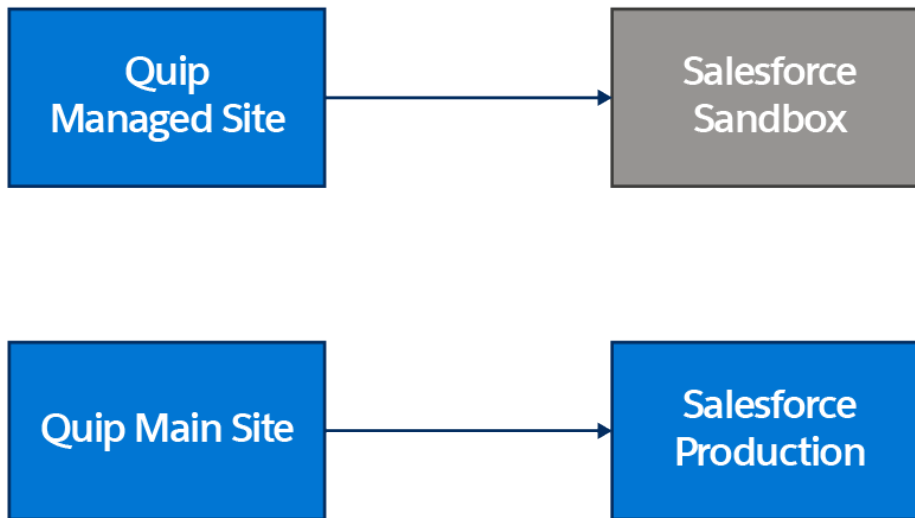
- Use the same main Quip site your Sandbox and Production Salesforce orgs.



- Use a separate Quip managed site for Sandbox testing.

EDITIONS

Available in: **Lightning Experience**



Requirements for a Quip Managed Site	Requirements for a Shared Quip Main Site
Create a separate test site	✗
Provision members to a separate site	✗
Set up authentication	✗
In Salesforce sandbox, connect to Quip test site	In Salesforce sandbox, connect to main Quip site
Create templates in Quip test site	Create templates in main Quip site
Point live apps to Salesforce sandbox	Point live apps to Salesforce Sandbox
Embed templates in Salesforce sandbox	Embed templates in Salesforce sandbox
Set up automations in Salesforce sandbox	Set up automations in Salesforce sandbox
When ready to roll out: <ul style="list-style-type: none"> • Connect to main Quip site to Salesforce production org • Migrate templates from test to main site • Point live apps to Salesforce production • Embed templates in Salesforce production • Set up automations in Salesforce production 	When ready to roll out: <ul style="list-style-type: none"> • Connect to main Quip site to Salesforce production org • Copy templates into a new folder • Point live apps to Salesforce production • Embed templates in Salesforce production • Set up automations in Salesforce production

Use Quip in a Salesforce Sandbox

Use Quip Advanced and Quip (previously Quip for Customer 360) features in a Salesforce sandbox. Connect an existing Quip production site to a Salesforce sandbox.

1. Go to the Quip Admin Console and log in with your Quip admin credentials.
2. Under Settings, click **Integrations**.
3. Create an API key and enable the User Read, User Manage, User Write, Admin Read, Admin Write, and Admin Manage scopes.
4. View your new API key and copy the Client ID and Client Secret.
5. In Salesforce, log in to your Salesforce sandbox.
6. In Setup, from the Quick Find box, enter *Quip*, then select **Quip (Salesforce Anywhere)**.
7. Click **Get Started**, and set up Quip with an existing site. Use your copied Quip Client ID and Client Secret.

EDITIONS

Available in: **Lightning Experience**

USER PERMISSIONS

To connect a Salesforce sandbox:

- Manage Dev Sandboxes (Developer or Developer Pro only) or Manage Sandboxes (all sandbox types)

Connect Your Salesforce Sandbox Org to Quip

To pull in live Salesforce data from your Sandbox org into Quip, connect your Sandbox org to Quip.


1. From your profile in Quip, click **Salesforce**.
2. Under Advanced Connection Options, find Connect to a Salesforce Sandbox, and click **Connect**.
3. Enter your Sandbox username and password and click **Log In to Sandbox**.
4. Select **Allow** and then **Done**.

EDITIONS

Available in: **Lightning Experience**

Migrate Your Sandbox Templates to Production

After you finish testing your templates in sandbox and get feedback from your pilot users, update your templates to work in your Salesforce production org.

 **Important:** Mail merge syntax can be different in your sandbox and production orgs. Check your available fields in both to make sure that they line up and change as necessary.

1. To move your sandbox templates to a new Production Templates folder in Quip, navigate to your sandbox templates folder, click **Folder**, then **Copy Folder**.
2. Create a folder called Production Templates. By default, the folder is added to your Private folder.
3. Redirect your Salesforce data from your Salesforce sandbox org to your production org.
4. Open the template.
5. To update the template for the Salesforce Record live app:
 - a. Click **Salesforce Record**, and then **Configure Template Record**.
 - b. Click the **Salesforce Org** dropdown.
 - c. Change it from your sandbox org to a production Salesforce org.
6. To update the template for the Salesforce List live app:
 - a. Click **Salesforce List**, and then **Configure Template Related List**.
 - b. Click the **Salesforce Org** dropdown.

EDITIONS

Available in: **Lightning Experience**

- c. Change it from your sandbox org to a production Salesforce org.
- 7. To update the template for a non-templated list view:
 - a. You must reselect a list view from your production Salesforce org, because the live app is pointing to a specific list view in your sandbox org.
 - b. Under Salesforce List, click Select **Different List View**.
 - c. Select a list view.
 - d. Click the **Salesforce Org dropdown**.
 - e. Change it from your sandbox org to a production Salesforce org.
- 8. To update the template for a Salesforce report or Salesforce Template Data Mention, you must delete the Salesforce report or the Salesforce Template Data Mention, and reselect them from your Salesforce production org. You can't update them directly, because reports and Salesforce Template Data Mention point directly to your sandbox,

Quip in a VPC

Let your users collaborate and stay productive while keeping your Salesforce data secure. Control what Salesforce data your users can access and where.

Grants users on your VPC allowlist access to Salesforce integration features like live Salesforce lists that sync back to Salesforce and live reports. Your data stays secure without hindering collaboration.

EDITIONS

Available in: Lightning Experience

[Connect Quip VPC to Salesforce](#)

Connect your Quip VPC site to Salesforce to get your users in sync, use Quip Lightning components, and more, all while keeping your data secure.

[Set Up Salesforce Single Sign-On for a Quip VPC](#)

Set up single sign-on (SSO) access for Salesforce users on your Quip VPC allowlist.

[Set Up the CRM Analytics Live App in a VPC](#)

Set up your organization to use CRM Analytics dashboards in Quip VPC. After you set it up, users can see and update filters directly in their documents.

[Enable Live Apps in a Quip VPC](#)

Give your new VPC users access to first-party live apps in a document, like the Salesforce List, Salesforce Record, or CRM Analytics live app.

Connect Quip VPC to Salesforce

Connect your Quip VPC site to Salesforce to get your users in sync, use Quip Lightning components, and more, all while keeping your data secure.

Only a Quip admin and a Salesforce admin can complete the Quip integration setup.

1. From Setup, in the Quick Find box, enter *Quip*, and then select **Quip (Salesforce Anywhere)**.
2. Click **Get Started**.
3. To connect your Quip VPC site, choose to connect an existing site.
4. Use your Quip site's Client ID and Client Secret. To find your Quip Client ID and Client Secret, log in to the Quip Admin Console. Under Settings, select **Integrations**, and view your Salesforce API Key.
5. In Salesforce, enter your Client ID and Client Secret.

USER PERMISSIONS

To set up Quip in VPC:

- Customize Application

- Under Authorize Endpoint URL, enter `https://platform.<customervpcname>.onquip.com/1/oauth/login`.



Note: Not all VPCs use the same Authorize Endpoint and Token Endpoint URL structures. To get your VPC's specific URLs, contact Quip Support.

- Under Token Endpoint URL, enter `https://platform.<customervpcname>.onquip.com/1/oauth/access_token`.
- Assign permissions to give your team access to Quip.
- Optional: To see documents and spreadsheets in Global Search, validate and sync the external data source. Click **Go To External Data Source** and click **Validate and Sync** on the External Data Source page. If the Quip external data source is pending, click **Edit**, then **Validate and Sync**.

To check that your Quip VPC site is successfully connected to Salesforce, contact Quip Support. After the setup is complete, get the most out of your Quip integration with Quip Lightning components, live Salesforce data in Quip, and more.

Set Up Salesforce Single Sign-On for a Quip VPC

Set up single sign-on (SSO) access for Salesforce users on your Quip VPC allowlist.

Only admins with access to `<customervpcname>.tools` can enable SSO in a VPC. To enable SSO, make sure that your Salesforce orgs are added to the VPC allowlist and that they are connected to your Quip site. To see what orgs are connected to Quip, log in to the Quip Admin Console. Under Settings, select **Integrations** and check the list of connected Salesforce orgs.

- Go to `<customervpcname>.tools/dynamic-settings` and log in using your admin credentials.



Note: To get the name of your VPC, contact Quip Support.

- Search for **show_sso_buttons_on_vpc** and click the **edit icon** to change the Effective Value to True.
- Select your cluster and click **Submit Change (PROD)**.

Your Salesforce users can now use Salesforce SSO option on the VPC login page to access documents and Salesforce integrations.

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To enable Salesforce SSO

- Customize Application

AND

Modify All Data

Set Up the CRM Analytics Live App in a VPC

Set up your organization to use CRM Analytics dashboards in Quip VPC. After you set it up, users can see and update filters directly in their documents.

To access the CRM Analytics live app in Quip, users need a CRM Analytics Growth or CRM Analytics Plus license.

- In Salesforce, go to the Setup page.
- In the Quick Find box, enter `CORS` and click **New**.
- For the Origin URL Pattern, enter `https://*YOURCOMPANY.qvpc-apps.com`.

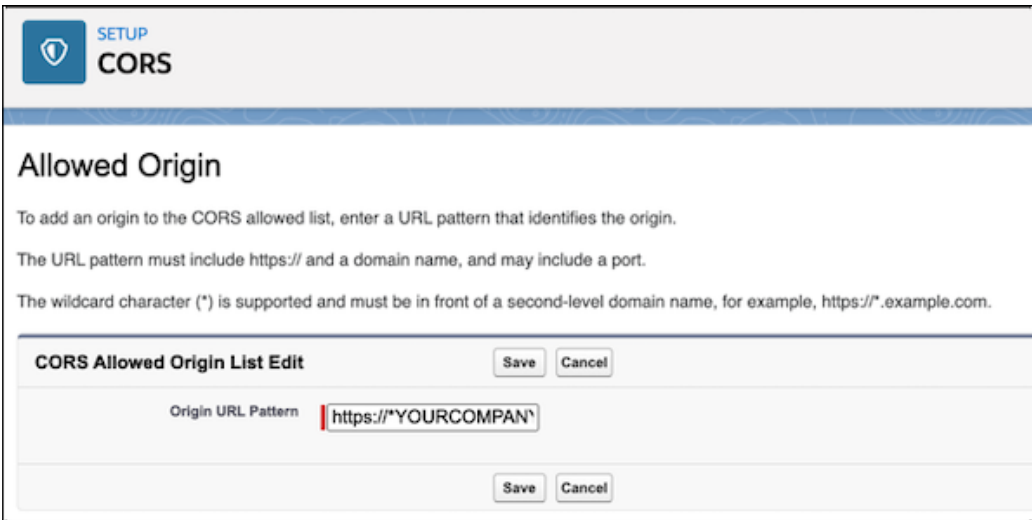
EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To configure the CRM Analytics live app:

- Customize Application



SETUP
CORS

Allowed Origin

To add an origin to the CORS allowed list, enter a URL pattern that identifies the origin.

The URL pattern must include https:// and a domain name, and may include a port.

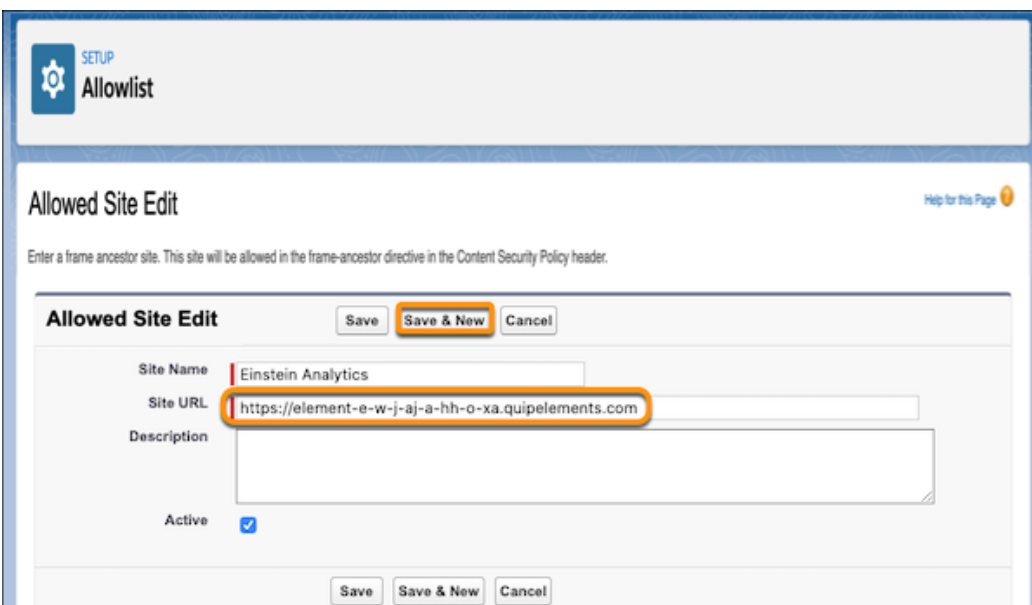
The wildcard character (*) is supported and must be in front of a second-level domain name, for example, https://*.example.com.

CORS Allowed Origin List Edit Save Cancel

Origin URL Pattern

Save Cancel

4. In the Quick Find box, enter *Analytics*.
5. Under Analytics, click **Allowlist**, and then **New**.



SETUP
Allowlist

Allowed Site Edit

Enter a frame ancestor site. This site will be allowed in the frame-ancestor directive in the Content Security Policy header.

Allowed Site Edit Save Save & New Cancel

Site Name

Site URL

Description

Active ☒

Save Save & New Cancel

6. Enter a site name. To make it easier to identify later, we recommend naming it *TableauCRMQuip*.
7. For the site URL, enter *https://element-e-w-j-aj-a-hh-o-xa.YOURCOMPANY.qvpc-apps.com*.
8. Click **Save and New**.
9. Use the CRM Analytics live app in a sandbox org.
 - a. Enter a site name.
 - b. Enter your Quip site URL using the format *https://YOURCOMPANY-sbx.YOURCOMPANY.onquip.com*. Save the action.
10. Use the Einstein Analytics live app in production.

- a. Enter a site name.
- b. Enter your Quip site URL using the format `https://YOURCOMPANY.onquip.com`. Save the action.

11. In Setup, add these URLs as Trusted URLs with all Content Security Policy (CSP) directives selected.

- `https://*.salesforce-experience.com`
- Sandbox: `https://YOURCOMPANY-sbx.YOURCOMPANY.onquip.com`
- Production: `https://YOURCOMPANY.onquip.com`
- `https://*.salesforce.com`
- `https://*.force.com`

If `https://*.force.com` is already a CSP trusted site, don't readd it.

- `https://*.site.com`
- `https://*.salesforce-sites.com`

To let your VPC users add CRM Analytics dashboards in Quip, [enable the CRM Analytics live app](#) on page 100

Enable Live Apps in a Quip VPC

Give your new VPC users access to first-party live apps in a document, like the Salesforce List, Salesforce Record, or CRM Analytics live app.

Only new VPC admins with access to `<customervpcname>.tools` can enable live apps in a VPC. To set up live apps as an existing VPC customer, contact Quip Support.

1. Go to `<customervpcname>.tools/element-configs-vpc` and log in using your admin credentials.



Note: To get the name of your VPC, contact Quip Support.

2. Under Elements to push, choose the first-party live apps you want to enable for your VPC allowlist.
3. Under Clusters to push to, select the VPC allowlist you want to have live app access.
4. Click **Push to Cluster(s)**.

Users on your VPC allowlist can now add live Salesforce records, list views, and CRM Analytics dashboards to their documents with a simple @mention.

EDITIONS

Available in: Lightning Experience

Manage Quip Permissions

Give your team access to Quip with permission sets in Salesforce. Add your users to your Quip site, manage your users' access to Salesforce data in Quip, and more.

To let your users access Quip and search for documents in Salesforce, assign the Quip permission set to your users.

Use the Salesforce org allowlist to control which Salesforce orgs can connect to a Quip site and which are disallowed. After an org is disallowed, users can't access Salesforce data from that org in Quip.

To let users see only the Salesforce data in Quip that they have access to in Salesforce, enable Mirrored Salesforce Permissions. You can also disable live reports in Quip to stop users from adding Salesforce reports in Quip.

To streamline document access, set an org-wide level of access to documents linked to Salesforce records with Synced Sharing.

EDITIONS

Available in: Lightning Experience

[Learn About Quip Permissions](#)

Quip Advanced and Quip for Customer 360 enable permissions from two different permission sets.

[Assign the Quip Permission Set](#)

To give your users access to Quip features in Lightning Experience, assign them the Quip permission set.

[Add Users to Your Quip Site](#)

To give your users access to your Quip site, add them manually, upload a CSV, or automatically grant access to all users from a Salesforce org.

[Deactivate Quip Users](#)

Ensure that your Salesforce users are configured to get the most out of Quip.

[Manage Quip Permissions in Salesforce](#)

Manage access to Salesforce data in Quip with Mirrored Salesforce Permissions, set org access to documents shared in Salesforce with Synced Sharing, and more.

Learn About Quip Permissions

Quip Advanced and Quip for Customer 360 enable permissions from two different permission sets.

EDITIONS

Available in: **Lightning Experience**

Quip Permission Set

The Quip permission set enables the following permissions by default. Salesforce live apps still work in Quip even if these permissions are disabled.

User Permission	What It Enables
Files Connect Cloud	Access to cloud-based external content sources and search and share files from Quip. Users can work with connected Salesforce report data in spreadsheets, collaborate with discussion threads, and seamlessly share documents and folders within Salesforce records.
Run Reports	Optional. Lets users see reports in Lightning Experience. Users can still add Salesforce reports to documents from Quip even if this permission is disabled.
Export Reports	Optional. Lets users see and export reports to a document from Lightning Experience. Users can still add Salesforce reports to documents from Quip even if this permission is disabled.
Quip Metrics	Access to metrics on engagement with embedded and linked documents. Users assigned the Quip Metrics user permission can see all linked document titles, regardless of their individual access to them. After you turn on Quip engagement metrics, you can't manually turn them off. This user permission isn't enabled by default in the Quip permission set. You must manually enable it. To add this user permission to a permission set, go to System Permissions, and click Enable .
Quip User Engagement Metrics	Access to metrics on user engagement with embedded and linked documents. Users assigned the Quip User Engagement Metrics user permission can see all linked document titles, regardless of their individual access to them. They can also see which users are interacting with documents associated with Salesforce records. After you turn on Quip engagement metrics, you can't manually turn them off. This user permission isn't enabled by default. To add this user permission to a permission set, go to System Permissions. Enable the Quip Metrics user permission, and then enable Quip User Engagement Metrics.

Allow Quip Integration Object Access Permission Set

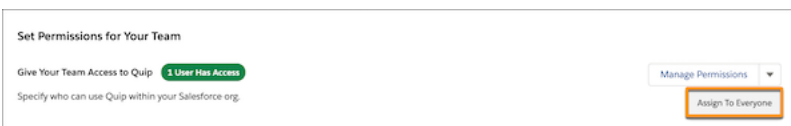
Automatically update Salesforce data in Quip. Don't assign to users.

User Permission	What It Enables
Quip Integration Access	Gives the Quip Integration Access user Read and View All Records permissions on Salesforce objects. Allows for admin control over access to objects. Don't assign to users.

Assign the Quip Permission Set

To give your users access to Quip features in Lightning Experience, assign them the Quip permission set.

1. From Setup, enter *Quip*, and select **Quip (Salesforce Anywhere)**
2. Under Give Your Team Access to Quip, select **Manage Assignments** to give certain users access to Quip, or select **Assign to Everyone** to give all users access.



EDITIONS

Available in: **Lightning Experience**

After your users are assigned the Quip permission set, they must click **Take the Last Step** from the Quip banner in Lightning Experience.



Add Users to Your Quip Site

To give your users access to your Quip site, add them manually, upload a CSV, or automatically grant access to all users from a Salesforce org.

Salesforce permissions don't affect which users can access your Quip site, only which users can use Quip Advanced features in Lightning Experience.

1. Go to <https://admin.quip.com>.
2. Log in using your Quip admin email and password.
3. Click **Site Members**, and then **Provision Members**.

EDITIONS

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited Editions**

4. To add a small number of users to your site, enter the users' names and emails in the text box.
5. To add a large number of users to your site, upload a CSV with name and email pairs.
6. To let anyone from a Salesforce org automatically connect to your site, select **Provision everyone from a Salesforce org**, and log in to the Salesforce org.
7. Click **Continue**.
8. Choose whether you want to send your users a welcome email, onboarding emails, and email digests. You can customize the welcome email to help your users get up and running.

After you add users to your Quip site, they can be @mentioned in documents and messages before they even log in for the first time.

Deactivate Quip Users

Ensure that your Salesforce users are configured to get the most out of Quip.

Users are automatically set up and configured when Quip is enabled for your Salesforce org. When you add users and grant them access to use Quip features, they can connect and their account gets configured automatically. But when a user is deactivated or frozen in your Salesforce org, we suggest disabling the user account via the Quip Admin Console.

1. Go to <https://admin.quip.com>.
2. Log in using Salesforce.
3. Go to the Site Members console tab.
4. Find the user and from the dropdown, select **Deactivate**.

Manage Quip Permissions in Salesforce

Manage access to Salesforce data in Quip with Mirrored Salesforce Permissions, set org access to documents shared in Salesforce with Synced Sharing, and more.

Available to customers with Quip Advanced and Quip (previously Quip for Customer 360).

EDITIONS

Available in: **Enterprise**, **Performance**, **Professional**, **Developer**, and **Unlimited** Editions

EDITIONS

Available in: **Lightning Experience**

Multi-Org Allowlisting in Quip

Use allowlists to manage what Salesforce data your users can access from Quip. Add preapproved orgs to your allowlist or disallow orgs that you don't want your users to pull data from. Allowlists ensure that company-critical data stays secure and users access only the Salesforce data in Quip that you approve.

Let Sandbox Users Log In to Quip with SSO

Add your sandbox orgs to the Quip Admin Console so that your sandbox users can automatically use Salesforce Single Sign-On to log in to Quip.

Mirrored Salesforce Permissions

Manage access to Salesforce data in Quip with Mirrored Salesforce Permissions. After it's enabled, users can access only the same Salesforce data in Quip as in Salesforce.

Synced Sharing

Streamline user access to embedded documents with synced Salesforce record sharing permissions. Set access at the org level for all documents linked to a Salesforce record rather than manually granting access to individual documents.

Enable Live Salesforce Reports in Quip

To add live Salesforce reports in a document, enable Salesforce reports. Reports are enabled by default.

Multi-Org Allowlisting in Quip

Use allowlists to manage what Salesforce data your users can access from Quip. Add preapproved orgs to your allowlist or disallow orgs that you don't want your users to pull data from. Allowlists ensure that company-critical data stays secure and users access only the Salesforce data in Quip that you approve.

See which Salesforce orgs your users connected to Quip and which are admin-connected. To prevent users from embedding sensitive Salesforce data in Quip documents using live apps and Salesforce integrations, disallow the org from the Quip Admin Console. After you turn on allowlisting, users can connect to and pull data only from the orgs on that allowlist.

To redirect users to a specific Salesforce login page when they log in to their Quip site, mark the Salesforce org as the default.

EDITIONS

Available in: Lightning Experience

Create a Salesforce Org Allowlist for Your Quip Site

To manage access to Salesforce data in Quip, add Salesforce orgs to an allowlist or disallow orgs that you don't want your users to access.

Mark a Salesforce Org as the Default

To redirect users to a specific Salesforce login page when they log in to their Quip site, mark the Salesforce org as the default. Then the Salesforce Single Sign On (SSO) users can automatically connect the default Salesforce org to Quip.

Multi-Org Allowlist Considerations

When setting up your Salesforce org allowlist in the Quip Admin Console, keep these allowlist action considerations in mind. Also, some actions have more considerations that are described in their reference topics.

Create a Salesforce Org Allowlist for Your Quip Site

To manage access to Salesforce data in Quip, add Salesforce orgs to an allowlist or disallow orgs that you don't want your users to access.

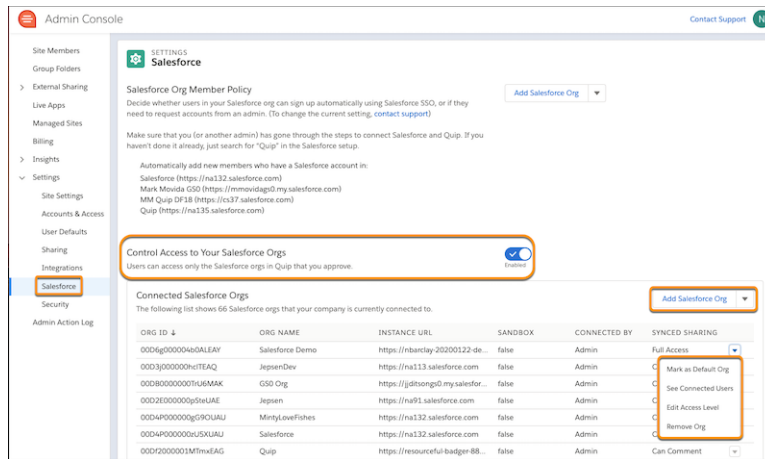
Only a Quip site and Salesforce admin can access the Quip Admin Console and add new Salesforce orgs to the allowlist. After you turn on the allowlist, users can connect only to orgs on that list.

1. Go to <https://admin.quip.com>.

EDITIONS

Available in: Lightning Experience

- Log in using your Quip admin email and password.
- From Settings, select **Salesforce**.
- To use allowlists to control which Salesforce orgs can connect to your Quip site, select **Control Access to Your Salesforce Orgs**.



- To add a Salesforce org to the allowlist, click **Add Salesforce Org**. To add a Salesforce sandbox, click the **Add Salesforce Org** dropdown and select **Add Salesforce Sandbox**.
- Log in using your Salesforce credentials and click **Add Salesforce Org**.
- To disallow a connected org, click ☐ next to the org that you want to manage access to. You can readd a disallowed org to your allowlist later.
 - To see which users are connected to an org in a CSV before disallowing it, select **See Connected Users**. For orgs with more than 3,000 users, check the email associated with your account to see the user CSV.
 - Select **Remove Org**. After you remove an org from the allowlist, users can no longer access or see that Salesforce data in Quip. [Tell Me More](#) on page 107
- To make an org the default when a user connects a Salesforce org to Quip, select **Mark as Default Org** from the org's dropdown. After the allowlist is turned on, only a Quip site and Salesforce admin can connect new orgs. Salesforce data embedded in live apps and live reports, and Salesforce integrations like Log a Call and recording linking, aren't available for disallowed orgs.

Mark a Salesforce Org as the Default

To redirect users to a specific Salesforce login page when they log in to their Quip site, mark the Salesforce org as the default. Then the Salesforce Single Sign On (SSO) users can automatically connect the default Salesforce org to Quip.

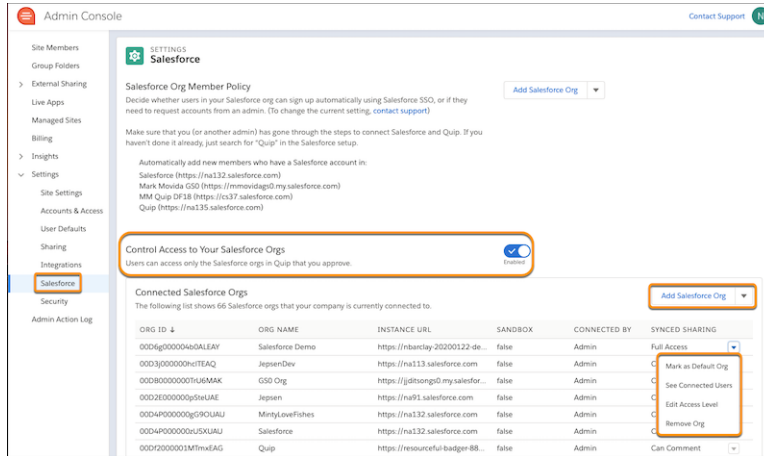
Available in: Lightning Experience

Save your users clicks and streamline adding Salesforce data to Quip by marking a Salesforce org as the default in the Quip Admin Console. SSO users from the default org can automatically connect to their org when they insert a Salesforce live app in a Quip document without more logins.

Choosing a default org also recommends that org to users when they connect an org to use Salesforce integrations in Quip. For example, Acme marks acme.salesforce.com as their default Salesforce org and Acme's Quip site is acme.quip.com. So when a user logs in to acme.quip.com, they automatically get routed to log in to their acme.salesforce.com login.

Only a Quip and Salesforce admin can mark a Salesforce org as a default.

1. Go to <https://admin.quip.com>.
2. Log in using your Quip admin email and password.
3. From Settings, select **Salesforce**.
4. To mark the first Salesforce org that you add to your allowlist as the default, click **Add Salesforce Org**, and select **Mark as the default Salesforce org**.
5. To mark an existing allowlist org as the default, select **Mark as Default Org** from the org's dropdown.



Multi-Org Allowlist Considerations

When setting up your Salesforce org allowlist in the Quip Admin Console, keep these allowlist action considerations in mind. Also, some actions have more considerations that are described in their reference topics.

[Org Removal Considerations](#) on page 107

EDITIONS

Available in: Lightning Experience

Live Apps

Allowlists in Quip manage access only to first-party Salesforce live apps like the Salesforce List, Salesforce Record, and Einstein Analytics live apps. Allowlists don't manage access to third-party live apps that integrate with Salesforce.

Salesforce Data in Quip

Salesforce data downloaded from Quip isn't deleted after the org is removed from the allowlist.

User-Connected Orgs

Salesforce orgs connected by users appear in the Salesforce org allowlist and remain even if the users are no longer connected.

[Org Removal Considerations](#)

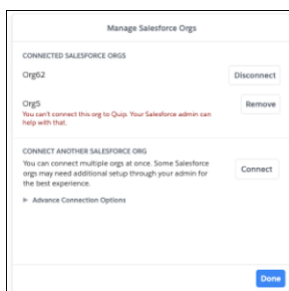
Before you remove Salesforce orgs from your Quip allowlist, keep in mind these considerations. You can add a removed org to your allowlist again later.

Org Removal Considerations

Before you remove Salesforce orgs from your Quip allowlist, keep in mind these considerations. You can add a removed org to your allowlist again later.

Connection to Existing Salesforce Orgs

After a Salesforce org is removed from the allowlist, connected users see an error message telling them that the org is no longer allowed.



EDITIONS

Available in: Lightning Experience

Salesforce SSO

After an org is removed from the allowlist, users can only use the Salesforce SSO associated with that org when they first join the Quip site. After that, users can create a Quip password or use another Salesforce SSO to log in to Quip.

Auto-Add Salesforce Orgs

If a Salesforce domain that was set to auto-add is removed from the allowlist, users from that Salesforce org are no longer auto-added to your Quip site.

New Salesforce Integrations

After a Salesforce org is removed from the allowlist, users can't use Quip for Customer 360 features for that org. Features include logging a call, linking a document to a record from that org, or adding Salesforce reports and live apps connected to the removed org.

Existing Quip for Customer 360 Features

After a Salesforce org is removed from the allowlist, existing Salesforce integrations from that org behave in the following way:

- Salesforce Report: When the report refreshes, Salesforce data is removed.
- Salesforce Record live app: The data from before the org was removed stays visible. Users can't refresh the live app for updated data or sync edits to Salesforce.
- Salesforce List live app: The data from before the org was removed stays visible. Users can't refresh the live app for updated data or sync edits to Salesforce.
- Document-Record linking: Users can't see which disconnected records the document is linked to.

Quip Lightning Components

After a Salesforce org is removed from the allowlist, Quip documents previously linked to a record remain accessible in Salesforce from the Quip Associated Documents component. Disallowing a Salesforce org doesn't delete the Quip site's linked documents in Salesforce.

External Sharing

If an org is disallowed in one Quip site but not another, a user from the site with the allowed org can share a document with Salesforce data with a user from the other Quip site.



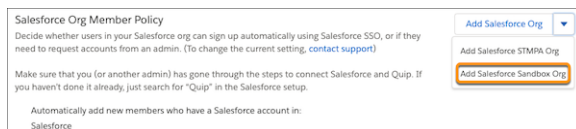
Example: User A from Quip site A can't access Salesforce org A. Quip site B has access to Salesforce org A. User B from Quip site B creates a document with data from Salesforce org A and shares it with User A. User A can see the Salesforce data even if the org is not on the allowlist because it was shared externally.

Let Sandbox Users Log In to Quip with SSO

Add your sandbox orgs to the Quip Admin Console so that your sandbox users can automatically use Salesforce Single Sign-On to log in to Quip.

To let your Salesforce sandbox users log in to Quip with SSO, [connect your sandbox to Salesforce](#) on page 96.

1. Go the Quip Admin Console and log in with your Quip admin credentials.
2. Under Settings, click **Accounts & Access**.
3. Under the Salesforce Org Member Policy section, click the dropdown next to **Add Salesforce Org**. Select **Add Salesforce Sandbox Org**.



4. Log in to your Salesforce sandbox and click **Add Salesforce Org**.

Users from your Salesforce sandbox org can now automatically log in to Quip using SSO without requesting access.

Mirrored Salesforce Permissions

Manage access to Salesforce data in Quip with Mirrored Salesforce Permissions. After it's enabled, users can access only the same Salesforce data in Quip as in Salesforce.

Add Salesforce live apps, such as the Salesforce List or Salesforce Record live app, to documents without worrying about data security. After you enable Mirrored Salesforce Permissions, users can see only the Salesforce data that they have access to, down to the field level. Your data stays secure without hindering collaboration.

Considerations Before You Enable Mirrored Salesforce Permissions

When enabling Mirrored Salesforce Permissions in Quip, keep these considerations in mind.

Enable Mirrored Salesforce Permissions

To let users access only the same Salesforce data in Quip as in Salesforce, enable Mirrored Salesforce Permissions.

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To add a Salesforce sandbox in Quip:

- Manage Dev Sandboxes (Developer or Developer Pro only) or Manage Sandboxes (all sandbox types)

EDITIONS

Available in: Lightning Experience

Considerations Before You Enable Mirrored Salesforce Permissions

When enabling Mirrored Salesforce Permissions in Quip, keep these considerations in mind.

EDITIONS

Available in: Lightning Experience

Live Apps

After you enable Mirrored Salesforce Permissions, Salesforce live apps that are added to documents behave in the following way.

Salesforce Record live app:

- Users who are logged in to Salesforce but don't have Salesforce access to the record can't see any of its data.
- Users who are logged in to Salesforce and have access to the record but not certain fields can see only the fields that they have access to in Salesforce.
- All users with access to the document can see comments attached to fields, regardless of their level of access to the record.
- Users who aren't logged in to Salesforce can't see any record data.
- The Salesforce Record live app refreshes automatically when the page loads or refreshes. Every time the live app refreshes, it checks the viewing user's access to the live app data.
- Only users with edit permissions in Salesforce can sync changes made in Quip to Salesforce.

Salesforce List live app:

- Users that are logged in to Salesforce but don't have Salesforce access to the list view can't see any of its data.
- Users that are logged in to Salesforce but don't have access to certain records in the list can't see those records.
- Users that are logged in to Salesforce but don't have access to certain fields in the list can't see those fields.
- All users with access to the document can see comments attached to fields, regardless of their level of access to the field or list.
- Users that aren't logged in to Salesforce can't see any list view records or data.
- The Salesforce List live app refreshes automatically on page load or refresh. Every time that the live app refreshes, it checks the viewing user's access to the live app data.
- Only users with edit permissions in Salesforce can sync changes made in Quip to Salesforce.

Relationship Map live app:

- Users who are logged in to Salesforce but don't have Salesforce access to any cards can't see any of its data.
- Users who are logged in to Salesforce but don't have access to certain cards in the relationship map can't see those cards.
- Users who are logged in to Salesforce but don't have access to certain fields in the card can't see those fields.
- All users with access to the document can see comments attached to fields, regardless of their level of access to the field or record.
- Users who aren't logged in to Salesforce can't see any Salesforce cards or data.
- The Relationship Map live app refreshes automatically when the page loads or refreshes. Every time that the live app refreshes, it checks the viewing user's access to the live app data.
- Only users with edit permissions in Salesforce can sync changes made in Quip to Salesforce.

Salesforce Reports

After you enable Mirrored Salesforce Permissions, Salesforce reports added to documents behave in the following way.

- To see the latest data, reports must be manually refreshed. The report data shown upon refresh is based on the refreshing user's access. Users with access to the document see the report data from the last refresh.
- If a user refreshes the report but doesn't have access in Salesforce, they can't see any of its data. The report data is removed until the report is refreshed by a user with access.

- If a user refreshes the report but doesn't have access to certain report cells, they can't see those cells. The cell data is removed until the report is refreshed by a user with access.
- If a user refreshes the report but isn't logged in to Salesforce, they can't see any report data. The report data is removed until the report is refreshed by a user with access.

Salesforce Data Mentions

After you enable Mirrored Salesforce Permissions, Salesforce data mentions behave in the following way.

- Users who are logged in to Salesforce but don't have Salesforce access to the record can't see any of its data.
- Users who are logged in to Salesforce but don't have access to certain fields of a record can't see those fields.
- Users who aren't logged in to Salesforce can't see any data mentions or data.
- Salesforce data mentions refresh automatically when the page loads or refreshes. Every time that the data mention refreshes, it checks the viewing user's access to the record and data.
- Only users with edit permissions in Salesforce can sync changes to Salesforce.

Document-Record Linking

After you enable Mirrored Salesforce Permissions, users can see only the document's linked Salesforce records that they have access to.

Enable Mirrored Salesforce Permissions

To let users access only the same Salesforce data in Quip as in Salesforce, enable Mirrored Salesforce Permissions.

Only a Quip admin can set up Mirrored Salesforce Permissions. Before you enable Mirrored Salesforce Permissions in Quip, keep [these considerations](#) on page 109 in mind.

1. Go to <https://admin.quip.com>.
2. Log in using your Quip admin email and password.
3. From Settings, select **Salesforce**.
4. Enable **Mirror Salesforce Permissions**.

Mirror Salesforce Permissions
Users can access only the same Salesforce data in Quip as in Salesforce.



5. Click **Turn On**.

After Mirrored Salesforce Permissions are on, live apps filter automatically based on the user's Salesforce permissions. Live Salesforce reports in Quip must be manually refreshed to get the latest data and verify access. [Tell Me More](#) on page 109

Synced Sharing

Streamline user access to embedded documents with synced Salesforce record sharing permissions. Set access at the org level for all documents linked to a Salesforce record rather than manually granting access to individual documents.

Make sure that the right users are accessing the right documents at scale. With Synced Sharing, you can use Salesforce record access to determine who can work with embedded documents. It keeps your documents secure and reduces friction for user access to key documents.

EDITIONS

Available in: Lightning Experience

EDITIONS

Available in: Lightning Experience

Give your users View, Comment, Edit, Full, or Salesforce Record access to documents linked to a record. You can also block user access. After Synced Sharing is enabled, only users with access to a Salesforce record are able to view, comment on, edit, or share its embedded documents.

Table 1: Synced Sharing Access Levels

Access Level	Description
View Access	Users who can view a Salesforce record can view documents linked to it.
Comment Access	Users who can view a Salesforce record can view and comment on documents linked to it.
Edit Access	Users who can view a Salesforce record can view, comment on, and edit documents linked to it.
Full Access	Users who can view a Salesforce record can view, comment on, edit, and share documents linked to it.
No Access	Users who can view a Salesforce record can't view documents linked to it.
Salesforce Record Access	Users who have access to a Salesforce record have the same level of access to documents linked to it.

[Considerations for Synced Sharing](#)

When setting up Synced Sharing for your Salesforce org, keep in mind these considerations.

[Set Up Synced Sharing](#)

Manage user access at the org level via Synced Sharing for your documents associated with Salesforce records. Grant users with access to a record view, comment, or edit access to its linked documents, or align document access with Salesforce record permissions.

[Restrict Synced Sharing Document Membership](#)

Make document access granted through Synced Sharing dynamic by preventing users from joining documents as members when they edit or comment on a document. Enable Restrict Synced Sharing Access to block users from becoming permanent document members regardless of their document activity. Ensure that when a user's Synced Sharing access level changes, so does their document access.

[Standardize Team Collaboration with Synced Sharing](#)

Use Synced Sharing to set access to documents linked to Salesforce records at the org level. Set Synced Sharing to Comment Access so that your users can comment on a Mutual Close Plan linked to an Opportunity and close deals as a team.

[Troubleshoot Synced Sharing](#)

Synced Sharing can be complex, which means it's sometimes difficult to know where document access went wrong when you or your users encounter unexpected results.

Considerations for Synced Sharing

When setting up Synced Sharing for your Salesforce org, keep in mind these considerations.

Org-Wide Setting

Synced Sharing is an org-wide setting that assigns users with access to a Salesforce record a level of access to documents linked to that record.

Admin Access

The Quip site admin that enables Synced Sharing for a Salesforce org must also be the Salesforce admin for that particular Salesforce org.

Document Membership

Users that access a document via Synced Sharing become permanent document members when they edit or comment on the document. If their Synced Sharing access changes, they keep their member level of access. To make Synced Sharing document access dynamic, [restrict Synced Sharing access](#) on page 117.

A user has access to a document via Synced Sharing and *edits* the document. Then, that user loses access to the record that the document is associated with.

Synced Sharing Access	Restrict Synced Sharing Access is Enabled	Restrict Synced Sharing Access is Disabled
View Access	N/A	N/A
Comment, Edit, and Full Access	Loses document access N/A for Comment Access	Full Access users can edit and share the document Edit Access users can edit the document N/A for Comment Access
Salesforce Record Access	Loses document access	Can access and edit the document

A user has access to a document via Synced Sharing and *comments on* the document. Then, that user loses access to the record that the document is associated with.

Synced Sharing Access	Restrict Synced Sharing Access is Enabled	Restrict Synced Sharing Access is Disabled
View Access	N/A	N/A
Comment, Edit, and Full Access	Loses document access	Full Access users can edit and share the document Edit Access users can edit the document Comment Access users can comment on the document
Salesforce Record Access	Loses document access	Can access and edit the document

A user has access to a document via Synced Sharing and *views* the document. Then, that user loses access to the record that the document is associated with.

Synced Sharing Access	Restrict Synced Sharing Access is Enabled	Restrict Synced Sharing Access is Disabled
View Access	Loses document access	Loses document access
Comment, Edit, and Full Access	Loses document access	Loses document access
Salesforce Record Access	Loses document access	Loses document access

Notifications

Users who can access a document via Synced Sharing get notified of @mentions only after they open the document for the first time.

Retroactive Access

Synced Sharing is retroactive and applies to both new and existing documents linked to a Salesforce record. After you turn on Synced Sharing, all previously linked documents are shared with record members at the access level chosen.

Quip Associated Documents Component

Synced Sharing is based on documents linked to the Quip Associated Documents component. Only documents linked to the component have Synced Sharing enabled.

Linked Document Access

Synced Sharing is enabled for a document if the user who links the document to a record has Full Access to it. If a user with Can Edit, Can Comment, or Can View access to a document links it to a Salesforce record, Synced Sharing isn't enabled. Users with access to a record can't access documents linked by users with less than Full Access to the document.

Link Sharing Settings

If a document has link sharing set to `view, comment, and edit` and a user edits the document, they're now a Full Access user. Even if Synced Sharing is set to less than Full Access, the user keeps the directly shared Full Access level.

Automation

Documents created via the Copy Document action in Flow Builder don't have Synced Sharing enabled by default. For Synced Sharing to take effect, the copied documents must either be manually linked to the record, or linked via the Attach Document to Record action in Flow Builder.

User Records

Synced Sharing isn't enabled for documents linked to user records, like Contacts. If a user links a document to a user record, users with access to the record can't access the document via Synced Sharing.

Connected Salesforce Orgs

A user can access a linked document via Synced Sharing only if they connected their Salesforce org to Quip.

- From the user profile in Quip, click **Salesforce**.
- Click **Connect** and log in to Salesforce.

Documents Shared in Quip

If a linked document is shared with a user in Quip, the access granted in Quip overrides the access granted via Synced Sharing. If the user has Can Comment access in Quip but Synced Sharing is set to Edit Access, then the user has comment access to the document.

Access Removal

If a user is removed from a Salesforce record that has Synced Sharing enabled, the user's access to linked documents isn't revoked. You can manage user access in Quip.

Salesforce Reports

To see the latest data, you must manually refresh Salesforce reports in Quip documents that are linked to Salesforce records.

SEE ALSO:

[Knowledge Article: Synced Sharing Scenarios, Salesforce Anywhere Advanced \(Quip\)](#)

Set Up Synced Sharing


Manage user access at the org level via Synced Sharing for your documents associated with Salesforce records. Grant users with access to a record view, comment, or edit access to its linked documents, or align document access with Salesforce record permissions.

To get started, make sure that your Quip site is connected to Salesforce. In Setup, enter *Quip (Salesforce Anywhere)* in the Quick Find box and follow the steps. Only a Salesforce and Quip admin can manage Synced Sharing.



Note: The Quip site admin that enables Synced Sharing for a Salesforce org must also be the Salesforce admin for that particular Salesforce org.

The Quip Associated Documents component must be added to your layouts and documents added to it for Synced Sharing to take effect.

1. Go to <https://admin.quip.com>.
2. Log in using your Quip admin email and password.
3. From Settings, select **Salesforce**.
4. In the Connected Salesforce Organizations section, click  next to the org that you want to manage access to.



Note: You can test Synced Sharing in a sandbox environment first. From the Add Salesforce Org dropdown, select **Add Salesforce Sandbox Org**.

5. Next to Synced Sharing, click **Edit Access Level** from the dropdown and choose the access level for documents linked to Salesforce records. Synced Sharing is set to Comment Access by default.

EDITIONS

Available in: **Lightning Experience**

USER PERMISSIONS

To manage document access:

- Customize Application

Edit Salesforce Organization Access Level

☐ **No Access**
Users who can view a record can't view Quip documents linked to it.

☐ **View Access**
Users who can view a record can view Quip documents linked to it.

☒ **Comment Access**
Users who can view a record can view and comment on Quip documents linked to it.

☐ **Edit Access**
Users who can view a record can view, comment on, and edit Quip documents linked to it.

☐ **Full Access**
Users who can view a record can view, comment on, edit, and share Quip documents linked to it.

☐ **Salesforce Record Access**
Users who have access to a Salesforce record have the same level of access to Quip documents linked to it. To grant additional access to users, share in Quip.

[Cancel](#) [Save](#)

Important: Synced Sharing is set at the org level and not at the user level. If you choose **Comment Access**, all users from your org with access to a record can comment on its linked documents. To grant users with access to a Salesforce record the same access to its linked documents, select **Salesforce Record Access**.

6. Click **Save**.

After Synced Sharing is enabled, users are notified when they link a document to a record that their document is shared with record members. Users can also see what Synced Sharing level of access record members have to their linked documents from the Share window in Quip.

Share

ADD PEOPLE

[Full Access](#)

SHAREABLE LINK

Link sharing is off, so only current members can access this document through its URL. [Copy link](#)

LINKED SALESFORCE RECORDS @

Some users in Salesforce have access to this document. [Link Record](#)

1 Linked Record in Isotope

Users with access to the record may be able to comment on this document. [Manage](#)

[Done](#)

SEE ALSO:

[Knowledge Article: Synced Sharing Scenarios, Salesforce Anywhere Advanced \(Quip\)](#)

Restrict Synced Sharing Document Membership

Make document access granted through Synced Sharing dynamic by preventing users from joining documents as members when they edit or comment on a document. Enable Restrict Synced Sharing Access to block users from becoming permanent document members regardless of their document activity. Ensure that when a user's Synced Sharing access level changes, so does their document access.

EDITIONS

Available in: **Lightning Experience**

Table 2: User has access to document via Synced Sharing and edits the document. Then, that user loses access to the record that the document is associated with.

Synced Sharing Access	Restrict Synced Sharing Access is Enabled	Restrict Synced Sharing Access is Disabled
View Access	N/A	N/A
Comment, Edit, and Full Access	Loses document access N/A for Comment Access	Can edit and share the document N/A for Comment Access
Salesforce Record Access	Loses document access	Can access and edit the document

Table 3: User has access to document via Synced Sharing and comments on the document. Then, that user loses access to the record that the document is associated with.

Synced Sharing Access	Restrict Synced Sharing Access is Enabled	Restrict Synced Sharing Access is Disabled
View Access	N/A	N/A
Comment, Edit, and Full Access	Loses document access	Can comment on, edit, and share the document
Salesforce Record Access	Loses document access	Can access and edit the document

Table 4: User has access to document via Synced Sharing and views the document. Then, that user loses access to the record that the document is associated with.

Synced Sharing Access	Restrict Synced Sharing Access is Enabled	Restrict Synced Sharing Access is Disabled
View Access	Loses document access	Loses document access
Comment, Edit, and Full Access	Loses document access	Loses document access
Salesforce Record Access	Loses document access	Loses document access

Enable Restrict Synced Sharing Document Access

Make document access granted through Synced Sharing dynamic. Users who can access a document with Synced Sharing aren't permanent document members. When their Synced Sharing access level changes, so does their document access.

Enable Restrict Synced Sharing Document Access

Make document access granted through Synced Sharing dynamic. Users who can access a document with Synced Sharing aren't permanent document members. When their Synced Sharing access level changes, so does their document access.

Only a Salesforce and Quip admin can manage Synced Sharing.

After you set the Synced Sharing access level for your Salesforce org, set Synced Sharing limits.

1. Go to <https://admin.quip.com>.
2. Log in using your Quip admin email and password.
3. From Settings, select **Salesforce**.
4. Enable **Restrict Synced Sharing Access**.




Example: An admin sets Synced Sharing to Comment Access for their Salesforce org. Users in that org can now comment on all documents linked to Salesforce records they can access. A user with view-only record permissions opens up an Account Plan associated with an account and adds a comment. The Salesforce admin wants to keep the org's linked documents more secure and decides to change Synced Sharing access to Salesforce Record Access. Restrict Synced Sharing Access is enabled. Users, regardless of whether they interacted with documents accessed via Synced Sharing, now have the same access to linked documents as to Salesforce records. The user with view-only record permissions can no longer comment on the linked document.

Standardize Team Collaboration with Synced Sharing

Use Synced Sharing to set access to documents linked to Salesforce records at the org level. Set Synced Sharing to Comment Access so that your users can comment on a Mutual Close Plan linked to an Opportunity and close deals as a team.

Grant users with access to a Salesforce record Comment Access to documents linked to it. Easily set access to documents at the org level to streamline team collaboration. After a user creates a Mutual Close Plan from a template, teammates with access to the Opportunity jump into the document to comment and help. In this workflow, it is assumed that:

- The [Quip Document component](#) on page 208 is set up on an Opportunity page.
- A [Mutual Close Plan](#) is added to the Quip Document component.
- The [Quip Associated Documents component](#) on page 194 is set up on the Opportunity page.
- The Quip site admin that enables Synced Sharing for a Salesforce org must also be the Salesforce admin for that particular Salesforce org.

1. Go to <https://admin.quip.com>.
2. Log in using your Quip admin email and password.
3. From Settings, select **Salesforce**.
4. In the Connected Salesforce Organizations section, click  next to the org that you want to manage access to.
5. Click **Edit Access Level** from the dropdown and select **Comment Access**.

EDITIONS

Available in: **Lightning Experience**

USER PERMISSIONS

To manage document access:

- [Customize Application](#)

EDITIONS

Available in: **Lightning Experience**

USER PERMISSIONS

To manage document access:

- [Customize Application](#)

Edit Salesforce Organization Access Level

☐ **No Access**
Users who can view a record can't view Quip documents linked to it.

☐ **View Access**
Users who can view a record can view Quip documents linked to it.

☒ **Comment Access**
Users who can view a record can view and comment on Quip documents linked to it.

☐ **Edit Access**
Users who can view a record can view, comment on, and edit Quip documents linked to it.

☐ **Full Access**
Users who can view a record can view, comment on, edit, and share Quip documents linked to it.

☐ **Salesforce Record Access**
Users who have access to a Salesforce record have the same level of access to Quip documents linked to it. To grant additional access to users, share in Quip.

[Cancel](#) [Save](#)

6. Click **Save**.

After a user creates a Mutual Close Plan from the template, the document is linked to the Opportunity from the Quip Associated Documents component. With Synced Sharing Comment Access enabled, other users with access to the Opportunity can easily find, open, and comment on the document. Data stays secure in Salesforce without hindering team collaboration.

Troubleshoot Synced Sharing

Synced Sharing can be complex, which means it's sometimes difficult to know where document access went wrong when you or your users encounter unexpected results.

If something goes wrong with Synced Sharing, try some of these troubleshooting options to address common issues:

If a linked document is in a shared folder and Synced Sharing is enabled, does @everyone notify all folder members?

Users who have viewed, commented on, or edited a document in a shared folder are notified when @mentions are used in that document.

Does Synced Sharing apply to Quip files in the Files component or Notes and Attachments component?

Synced Sharing is enabled only for files attached to the Quip Associated Documents component.

If Restrict Synced Sharing Access is enabled, can users still become permanent document members?

The Restrict Synced Sharing Access setting stops users from becoming permanent document members through Synced Sharing. However, if user A with Full Access to the document directly shares the document with user B, then user B becomes a permanent document member.

If a user accesses a document via Synced Sharing and Restrict Synced Sharing Access is enabled, can that user be @mentioned in the document?

Users who are permanent document members or who can access a document via Synced Sharing and have viewed the document can be @mentioned.

If Synced Sharing is enabled, but a user with access to the record can't open a linked document, how can I troubleshoot?

- To access documents linked to a Salesforce record, the user must complete the Quip and Salesforce connection.
- Make sure that the user has connected a Salesforce org to their Quip site.

If Synced Sharing is enabled and the Copy Document action is used in Flow Builder to create a document from a template, do users with access to the record have access to the newly created document?

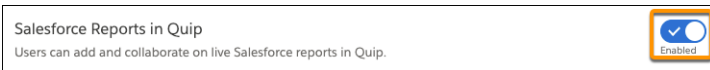
For Synced Sharing to come into effect on the new document, you must link that document to the Quip Associated Documents component. You can do this via automation by adding the Attach Document to Record action to your flows or processes.

Enable Live Salesforce Reports in Quip

To add live Salesforce reports in a document, enable Salesforce reports. Reports are enabled by default.

Only a Quip admin can enable Salesforce reports in Quip.

1. Go to <https://admin.quip.com>.
2. Log in using your Quip admin email and password.
3. From Settings, select **Salesforce**.
4. Enable **Salesforce Reports in Quip**.



5. Click **Turn On**.

After you turn on reports in Quip, users can enter *@Salesforce Report* to add live Salesforce reports to their documents. If you disable Salesforce reports in Quip, existing reports become spreadsheets and don't sync with the latest Salesforce data, and users can't add new Salesforce reports.

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To enable reports in Quip:

- Run Reports

Report on Quip Engagement

Run reports in Lightning Experience that show how and which users engage with documents and templates associated with Salesforce records. Go further with templates and see what's working for your team, and what needs your attention.

[Quip Engagement Metric Objects and Fields](#)

Use Quip engagement metrics in Lightning reports to measure which users are interacting with documents associated with Salesforce records, and how those users are interacting with them.

[Best Practices and Considerations for Quip Engagement Metrics](#)

Looking for best practices and considerations to help you get the most out of Quip engagement metrics? You've come to the right place.

[Request Historical Engagement Metrics](#)

Quip captures 30 days of historical engagement metrics automatically. If you want a more comprehensive view of your user engagement, you can request additional historical metrics from the Quip Admin Console.

EDITIONS

Available in: Lightning Experience

[Report on Quip Usage with Salesforce Reports](#)

Get metrics on how your users engage with templates and documents embedded in Salesforce. Create custom Quip reports and add them to your Lightning dashboards.

[Report on Quip User Engagement with Salesforce Reports](#)

Use reports and dashboards to understand trends in user engagement on embedded documents and templates.

[Report on Quip Engagement with CRM Analytics](#)

Get metrics on how your users engage with templates and documents embedded in Salesforce and connect them to other data sources in CRM Analytics.

Quip Engagement Metric Objects and Fields

Use Quip engagement metrics in Lightning reports to measure which users are interacting with documents associated with Salesforce records, and how those users are interacting with them.

Quip objects begin with Collaboration. Quip metric objects don't have secondary objects.

EDITIONS

Available in: Lightning Experience

Collaboration Document Metrics

The Collaboration Document Metrics object captures the metrics for a Quip document.

Field Name	Description
Commenter Count	The number of unique users who commented on the document on a given day
Document	The Quip document ID
Document Title	The Quip document title
Document URL	The Quip document URL
Editor Count	The number of unique users who edited the document on a given day
Last Updated Date	The date that the document was created, last edited, or last shared (shown in your local time zone in Salesforce reports)
Last Updated Date Only	The date that the document was created, last edited, or last shared in UTC
Metric Date	The date that the metric was gathered (shown in your local time zone in Salesforce reports)
Metric Date Only	The date that the metric was gathered in UTC
Site	The Quip site ID
Source Template	The source template ID
Source Template URL	The source template URL
Update Count	The number of edits made on the document on a given day
Viewer Count	The number of unique users who viewed the document on a given day

Collaboration Document Metric Records

The Collaboration Document Metric Records object represents the association between document metrics and a Salesforce record.

Field Name	Description
Entity Type	The Salesforce object type
Metric Date	The date that the metric was gathered (shown in your local time zone in Salesforce reports)
Metric Date Only	The date that the metric was gathered in UTC
Parent Record ID	The Salesforce parent record name. Admins who configure report types in CRM Analytics can use this field as a join to include additional data in the report.
Quip Document Metric	The Quip Document Metric record ID

Collaboration Template Metrics

The Collaboration Template Metrics object captures the metrics for a Quip template document.

Field Name	Description
Last Updated Date	The date that the template was created, last edited, or last shared (shown in your local time zone in Salesforce reports)
Last Updated Date Only	The date that the template was created, last edited, or last shared in UTC
Metric Date	The date that the metric was gathered (shown in your local time zone in Salesforce reports)
Metric Date Only	The date that the metric was gathered in UTC
Site	The Quip site ID
Template	The Quip template ID
Template Title	The Quip template title
Template URL	The Quip template URL
Total Document Count	The number of documents that were created from the template

Collaboration Template Metric Records

The Collaboration Template Metric Records object represents the association between template metrics and a Salesforce record.

Field Name	Description
Entity Type	The Salesforce object type
Metric Date	The date that the metric was gathered (shown in your local time zone in Salesforce reports)
Metric Date Only	The date that the metric was gathered in UTC
Parent Record ID	The Salesforce parent record name. Admins who configure report types in CRM Analytics can use this field as a join to include additional data in the report.
Quip Template Metric	The Quip Template Metric record ID

Collaboration User Engagement Metrics

The Collaboration User Engagement Metrics object captures per-user engagement metrics for a Quip document, spreadsheet, or template.

Field Name	Description
Comment Count	The number of comments that the user made on a given day
Edit Count	The number of edits that the user made on a given day. Any edits made over a 2-hour period are aggregated as one edit. A maximum of 12 edits per user per day are captured.
Metric Date	The date that the metric was gathered (shown in your local time zone in Salesforce reports)
Metric Date Only	The date that the metric was gathered in UTC
Quip User ID	The Quip user ID
SFDC User ID	The Salesforce user ID
Site ID	The Quip site ID
Source Template	The source template ID
Thread ID	The Quip document, spreadsheet, or template ID
Thread Title	The Quip document, spreadsheet, or template title
Thread Type	The type of Quip file: document, spreadsheet, or template
View Count	The number of documents that a user opens on a given day

Collaboration User Engagement Records (Retired)

The `CollabUserEngmntRecordLinks` object was retired for the Winter '22 release. You can collect the same data by using CRM Analytics to link the Collaboration User Engagement Metric to the Collaboration Document Metric Record.

[Connect Quip User Engagement Metrics to Salesforce Records](#)

To associate Quip user engagement metrics with a Salesforce record, link the Collaboration User Engagement Metric object to the Collaboration Document Metric Record object.

SEE ALSO:

[Report on Quip Engagement with CRM Analytics](#)

Connect Quip User Engagement Metrics to Salesforce Records

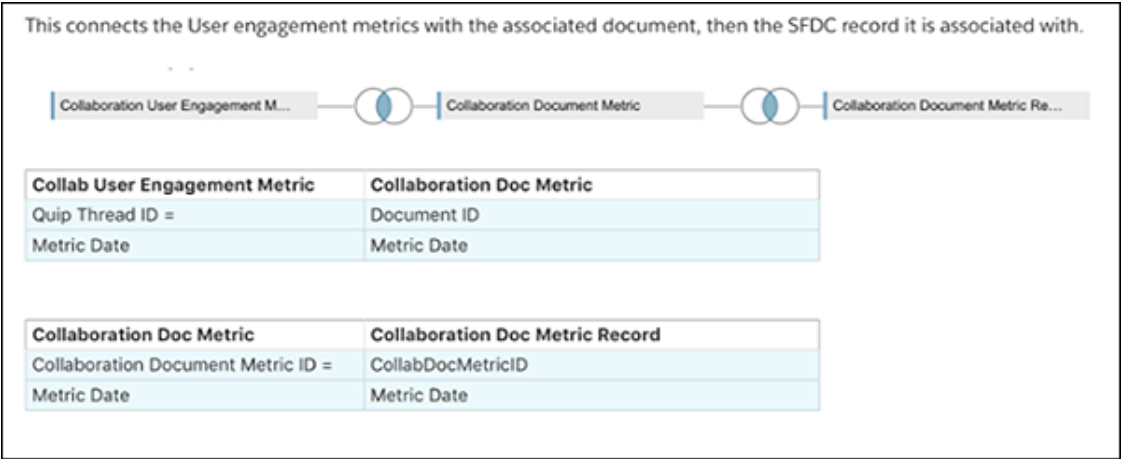
To associate Quip user engagement metrics with a Salesforce record, link the Collaboration User Engagement Metric object to the Collaboration Document Metric Record object.

1. To connect the Collaboration User Engagement Metric to the Collaboration Document Metric, use CRM Analytics.
 - Match the `Quip Thread ID` of the Collaboration User Engagement Metric to the `Document ID` of the Collaboration Document Metric.
 - Match the `Metric Date` fields on both objects.

EDITIONS

Available in: Lightning Experience

2. Also in CRM Analytics, connect the Collaboration Document Metric to the Collaboration Document Metric Record.
- Match the `Id` field from Collaboration Document Metric to the `CollabDocMetricId` field of the Collaboration Document Metric Record.
 - Match the `Metric Date` fields on both objects.



Now the Collaboration User Engagement Metric has a record ID in the same row, which came from the Collaboration Document Metric Record table. This configuration creates the same data that was previously tracked through the `CollabUserEngmntRecordLinks` object.

Best Practices and Considerations for Quip Engagement Metrics

Looking for best practices and considerations to help you get the most out of Quip engagement metrics? You’ve come to the right place.

[Quip Engagement Metrics Best Practices](#)

Keep these best practices in mind when setting up Lightning reports with Quip engagement metrics.

[Quip Engagement Metrics Considerations and Limits](#)

Keep these considerations and limitations in mind when setting up and using Lightning reports with Quip engagement metrics.

[What Time Zone Is Used for Quip Metric Reporting?](#)

Quip metrics are aggregated for a given day in Coordinated Universal Time (UTC), but Salesforce reports show metrics in your local time zone. At certain times of day, UTC differs by 1 day from your time zone. For this reason, Quip metrics from a single date sometimes appear incorrectly in your Salesforce reports. To see more accurate metric dates, report on the Metric Date Only and Last Updated Date Only fields.

Quip Engagement Metrics Best Practices

Keep these best practices in mind when setting up Lightning reports with Quip engagement metrics.

General Best Practices for Quip Engagement Metrics

- To get comprehensive insights into your Quip engagement metrics plans, report on Salesforce objects in addition to Quip collaboration metrics.
- Build reports that focus on trends and trajectories rather than daily metric counts.

EDITIONS

Available in: Lightning Experience

- Quip metrics are aggregated for a given day in Coordinated Universal Time (UTC), but Salesforce reports show metrics in your local time zone. To see more accurate metric dates, report on the Metric Date Only and Last Updated Date Only fields rather than Metric Date and Last Updated Date.

Report on Collaboration Document Metrics

When reporting on Quip document metrics, group the report by the Quip document ID to see a document's complete Commenter Count, Editor Count, and Viewer Count. To calculate the sum of all engagement counts for a document, add a summary formula to the report.

Report on Collaboration User Engagement

When reporting on Quip user engagement, use the User records in Salesforce to sort users by department, manager, or another field.

Report on Salesforce Data with Quip Engagement

To get insights about data such as opportunity close rates with or without Quip, use Tableau CRM reporting rather than Salesforce reporting.

Quip Engagement Metrics Considerations and Limits

Keep these considerations and limitations in mind when setting up and using Lightning reports with Quip engagement metrics.

EDITIONS

Available in: Lightning Experience

Metrics Availability

- Quip engagement metrics are turned on by default in all orgs with Quip enabled, except for Salesforce sandboxes.
- It takes 24 hours for metrics data to refresh.
- Quip captures 30 days of historical engagement data.
- If your org is down, your Quip site metrics are still captured so that you don't miss any insights.

Turn On Quip Metrics in a Sandbox

Quip metrics aren't enabled automatically in Salesforce sandboxes. It takes 24 hours for metrics data to refresh. To report on Quip engagement in a sandbox, turn on metrics at least 1 day before.

To turn on metrics in a Salesforce sandbox, from Setup, enter *Quip* in the Quick Find box. Under Gather Data on Quip Usage, click **Turn on Quip Metrics**.

Edit Count Metrics

Quip aggregates any edits that a user makes over a 2-hour period as one edit. Quip captures a maximum of 12 edits per user per day.

Report Limits

Metrics reports can include a maximum of 2,000 rows.

Quip Metrics Permissions

Users who are assigned the Quip User Engagement Metrics permission set can see all linked document titles, regardless of their individual access to them. They can also see which users are interacting with documents associated with Salesforce records.

Considerations for Salesforce Admins

- Metrics reports show the Parent Record Name field instead of the Parent Metric ID field. Admins can't update custom report types to show the Parent Metric ID instead of the Parent Record Name. In Tableau or CRM Analytics reports, admins can use the Parent Record Name field in joined reports to add additional information to the report.
- Quip metrics reports contain polymorphic fields—fields that relate to more than one object. For this reason, admins can't join Quip metrics reports with other reports in Salesforce.

What Time Zone Is Used for Quip Metric Reporting?

Quip metrics are aggregated for a given day in Coordinated Universal Time (UTC), but Salesforce reports show metrics in your local time zone. At certain times of day, UTC differs by 1 day from your time zone. For this reason, Quip metrics from a single date sometimes appear incorrectly in your Salesforce reports. To see more accurate metric dates, report on the Metric Date Only and Last Updated Date Only fields.



Example: Let's say that you have users in your org who work across different time zones, and a user in London edits a Quip document on November 15. Any edits made over a 2-hour period are aggregated as one edit. Quip aggregates the user's edits at 10:00 AM GMT and 6:00 PM GMT, for a total of two edits on November 15 in UTC.

If you report on the Metric Date and Last Update Date fields in Salesforce, users across the org see different results based on their local time zone.

- A user in London sees two edits on November 15 at 12:00 AM GMT.
- A user in California sees two edits on November 14 at 4:00 PM PST.
- A user in Singapore sees two edits on November 15 at 8:00 AM SST.

If you report on the Metric Date Only and Last Updated Date Only fields, all users across the org see two edits on November 15.

Request Historical Engagement Metrics

Quip captures 30 days of historical engagement metrics automatically. If you want a more comprehensive view of your user engagement, you can request additional historical metrics from the Quip Admin Console.

1. Go to <https://admin.quip.com>.
2. Log in using your Quip admin email and password.
3. From Settings, select **Salesforce**.
4. Under Historical Engagement Metrics, select the org that you want metrics for.
5. Enter up to five dates that you want metrics for.
 - Enter dates in YYYY-MM-DD format, separated by semicolons (;).
 - Metrics are aggregated for a given day in Coordinated Universal Time (UTC). If you're having trouble getting metrics for a date, try requesting metrics for one day before or one day after the original date that you entered.
 - You can request metrics only one time every 24 hours.
 - You can request metrics only for dates that are more than 30 days ago but less than one year ago.

EDITIONS

Available in: Lightning Experience

6. Click **Request Metrics**.

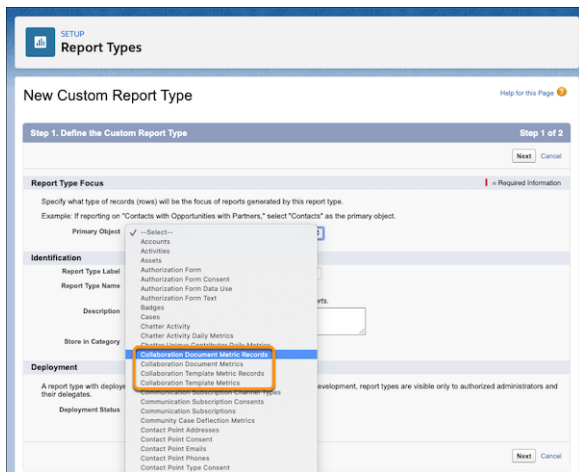
Metrics usually appear in your Salesforce org after 36 hours. To view your request history and each request's status, expand **Request History**.

Report on Quip Usage with Salesforce Reports

Get metrics on how your users engage with templates and documents embedded in Salesforce. Create custom Quip reports and add them to your Lightning dashboards.

Quip engagement metrics apply to templates and documents added to Quip Lightning components. Quip engagement metrics are turned on by default in all orgs with Quip enabled, except for Salesforce sandboxes. It takes 24 hours for metrics data to refresh.

1. Enable the Quip Metrics permission set.
 - a. In Setup, enter *Permission Sets* in the Quick Find box.
 - b. Select the permission set you want to assign Quip engagement metrics to, or assign it to a new one. Users assigned the Quip Metrics permission set can see all linked document titles, regardless of their individual access to them.
 - c. Under System, click **System Permissions** and then **Edit**.
 - d. Enable Quip Metrics.
 - e. Save the action.
2. To add metrics for templates and documents to a Lightning report, create a custom report type.
 - a. In Setup, enter *Report Types* in the Quick Find box.
 - b. Click **New Custom Report Type**.
 - c. Select a Quip *Primary Object* for your custom report type.



 **Tip:** Quip objects begin with *Collaboration*. See [Quip Engagement Objects](#) on page 120

- d. Enter the *Report Type Label* and the *Report Type Name*.
The label can be up to 50 characters long. If you enter a name that is longer than 50 characters, the name gets truncated. SOAP API uses the name.

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To create and update custom report types:

- **Legacy Folder Sharing**
Create and Customize Reports
AND
Manage Custom Report Types

Enhanced Folder Sharing

Create and Customize Reports
AND
Manage Custom Report Types

To build a dashboard:

- **Legacy Folder Sharing**
Drag-and-Drop Dashboard Builder

Enhanced Folder Sharing

Drag-and-Drop Dashboard Builder

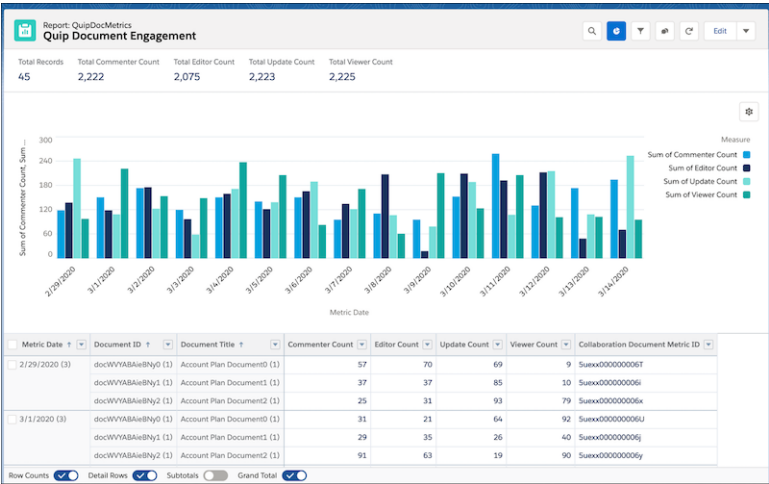
- e. Enter a description for your custom report type of up to 255 characters. If you enter a name that is longer than 255 characters, the name gets truncated.
- f. Select the category where you want to store the custom report type.
- g. Select a **Deployment Status**. Click **Next** and then save your changes. Quip metric objects don't have any child objects.
- h. To use Collaboration Document Metrics Records or Collaboration Template Metrics Records to get metrics on specific document fields like document titles, add fields via lookup.
- i. Click **Edit Layout**.

The screenshot shows the 'Report Types' setup page in Salesforce. The left sidebar contains navigation links: 'Feature Settings', 'Analytics', 'Reports & Dashboards', 'Access Policies', 'Historical Trending', 'Report Types' (selected), 'Reporting Snapshots', and 'Reports and Dashboards Settings'. The main content area is titled 'Edit Custom Report Type: QuipDocMetrics'. It includes instructions on how to select fields and sections. Below this is the 'Field Layout Properties' section, which shows a table of fields for 'Collaboration Document Metrics'. The table has columns for 'Field Name', 'Field Type', and 'Field Label'. The fields listed are: Collaboration..., Commenter Count, Document ID, Document Title, Document URL, Editor Count, Last Updated..., Metric Date, Site ID, Source Template..., Source Template..., Update Count, and Viewer Count. To the right of the table is a 'Legend' section with options: 'Not in Page Layout', 'Used in Page Layout', 'Selected', 'Checked by Default', and 'Added via Lookup'. Below the legend is a 'View' section showing a preview of the report type layout.

- j. Under View: Collaboration Document Metric Record Fields, click **Add fields related via lookup**.
 - k. Select **Collaboration Document Metric**, and choose the fields you want to add. Click **OK**.
 - l. Save the action.
3. Create a report using your new custom report type.
 - a. In Salesforce, go the Reports tab and click **New Report**.
 - b. Select your new custom report type and click **Continue**.

The screenshot shows the 'Choose Report Type' dialog box in Salesforce. It has a search bar at the top with the text 'Search Report Types...'. Below the search bar is a list of report types. The first item is 'Quip Doc Metrics', which is highlighted. At the bottom of the dialog are two buttons: 'Cancel' and 'Continue'.

- c. Set the Last Updated Date to **All Time** and click **Run**.



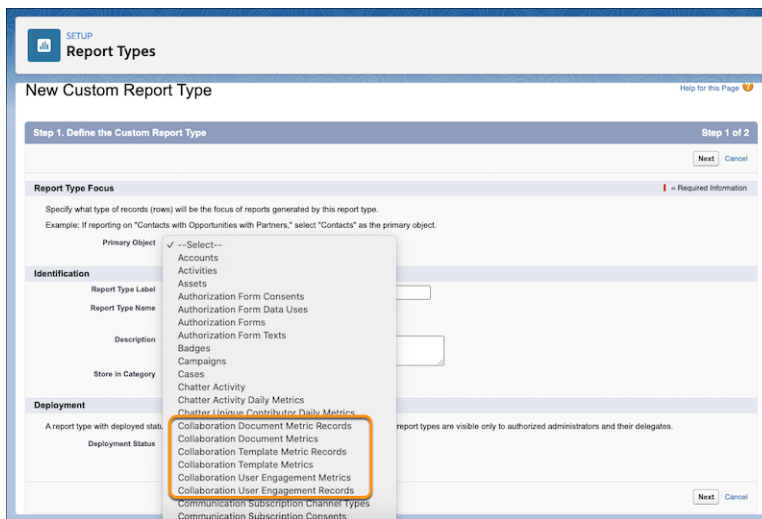
- 4. Add your report to an existing or new Lightning dashboard.

Report on Quip User Engagement with Salesforce Reports

Use reports and dashboards to understand trends in user engagement on embedded documents and templates.

Quip engagement metrics apply to templates and documents added to Quip Lightning components. Quip engagement metrics are turned on by default in all orgs with Quip enabled, except for Salesforce sandboxes. It takes 24 hours for metrics data to refresh.

1. Enable the Quip Metrics and Quip User Engagement Metrics permission sets.
 - a. In Setup, enter *Permission Sets* in the Quick Find box.
 - b. Select the permission set you want to assign Quip user engagement metrics to, or assign it to a new one. Users assigned the Quip User Engagement Metrics permission set can see all linked document titles, regardless of their individual access to them. They can also see which users are interacting with documents associated with Salesforce records.
 - c. Under System, click **System Permissions** and then **Edit**.
 - d. Enable Quip User Engagement Metrics and Quip Metrics.
 - e. Save the action.
2. To add metrics for templates and document user engagement to a Lightning report, create a custom report type.
 - a. In Setup, enter *Report Types* in the Quick Find box.
 - b. Click **New Custom Report Type**.
 - c. Select a Quip *Primary Object* for your custom report type.



 **Tip:** Quip objects begin with *Collaboration*. See [Quip Engagement Objects](#) on page 120

- d. Enter the *Report Type Label* and the *Report Type Name*.

The label can be up to 50 characters long. If you enter a name that is longer than 50 characters, the name gets truncated. SOAP API uses the name.

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To create and update custom report types:

- **Legacy Folder Sharing**
Create and Customize Reports
AND
Manage Custom Report Types
- **Enhanced Folder Sharing**
Create and Customize Reports
AND
Manage Custom Report Types

To build a dashboard:

- **Legacy Folder Sharing**
Drag-and-Drop Dashboard Builder
- **Enhanced Folder Sharing**
Drag-and-Drop Dashboard Builder

- e. Enter a description for your custom report type of up to 255 characters. If you enter a name that is longer than 255 characters, the name gets truncated.
- f. Select the category where you want to store the custom report type.
- g. Select a **Deployment Status**. Click **Next** and then save your changes. Quip metric objects don't have any child objects.
- h. To use Collaboration User Engagement Metrics and get metrics on specific user fields like Salesforce user IDs, add fields via lookup.
- i. Click **Edit Layout**.

- j. Under View: Collaboration User Engagement Metrics Fields, click **Add fields related via lookup**.
 - k. Select **Salesforce User**, and choose the fields you want to add. Click **OK**.
 - l. Save the action.
3. Create a report using your new custom report type.
 - a. In Salesforce, go to the Reports tab and click **New Report**.
 - b. Select your new custom report type and click **Continue**.
 - c. Set the Last Updated Date to **All Time** and click **Run**.

REPORT ▾

Quip Templates User Engagement Report ▾ / Quip User Metric ▾

Previewing a limited number of records. Run the report to see everything.

Get Feedback ▾

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📄 Save & Run

📄 Save ▾

🔍 Close

Run

Update Preview Automatically

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4. Add your report to an existing or new Lightning dashboard.

SEE ALSO:

[Salesforce Developer Portal: CollabUserEngagementMetric](#)

[Salesforce Developer Portal: CollabUserEngmtRecordLink](#)

Report on Quip Engagement with CRM Analytics

Get metrics on how your users engage with templates and documents embedded in Salesforce and connect them to other data sources in CRM Analytics.

Quip engagement metrics apply to templates and documents added to Quip Lightning components. Quip engagement metrics are turned on by default in all orgs with Quip enabled, except for Salesforce sandboxes. It takes 24 hours for metrics data to refresh.

1. Create the Quip Metrics permission set.
 - a. In Setup, from the Quick Find box, enter *Permission Sets*.
 - b. Click **New**. Enter a permission set name and set the license to **Analytics Cloud Integration User**.
 - c. Save the action.
 - d. Under System, click **System Permissions** and then **Edit**.
 - e. Enable Quip Metrics and Quip User Engagement Metrics.

Users assigned the Quip Metrics permission set can see all linked document titles, regardless of their individual access to them. Users assigned the Quip User Engagement Metrics permission set can see all linked document titles, regardless of their individual access to them. They can also see which users are interacting with documents associated with Salesforce records.
 - f. Save the action.
2. Assign the Quip metrics permission set to the Analytics Integration User.
 - a. From your new permission set, click **Manage Assignments**, then **Add Assignments**.
 - b. Select **Integration User** and click **Assign**.
3. Create a dataflow in CRM Analytics and add Quip metrics.
 - a. From the App Launcher, find and select **Analytics Studio**
 - b. Click **Create**, and then **Dataset**.
 - c. Select **Salesforce Data**.

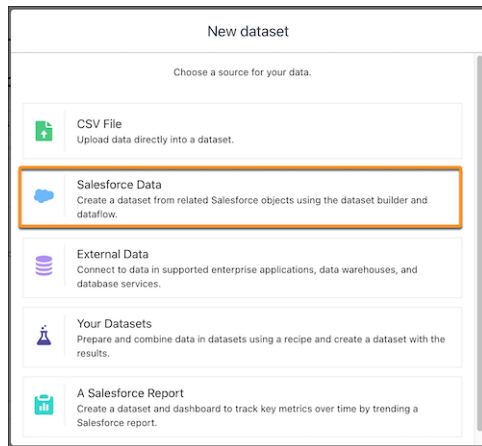
EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To use Quip Metrics in CRM Analytics:

- CRM Analytics Growth or CRM Analytics Plus license



d. Enter a dataset name.

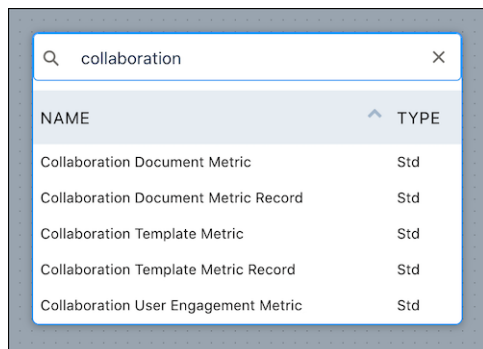
The screenshot shows the 'New Dataset' configuration screen. It prompts the user to 'Name the dataset and select a dataflow to add it to.' The 'Dataset Name' field is filled with 'Quip Metrics'. Under the 'Add to new dataflow' section (which is selected with a radio button), the 'Dataflow Name' field is filled with 'Doc Engagement Metrics'. A blue 'Next' button is located at the bottom right of the form.

e. Click **Add to new dataflow** and enter a dataflow name. Click **Next**.

f. To add Quip usage and user engagement metrics to your dataset, enter *Collaboration*.

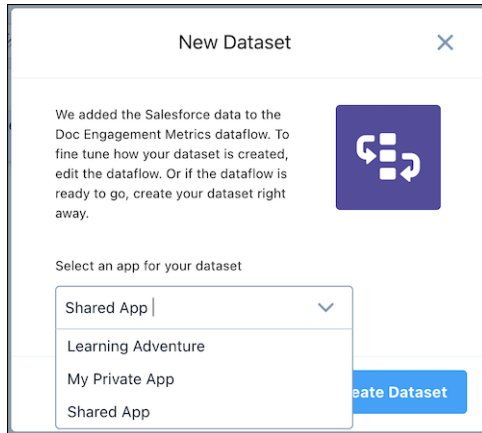
4. Select the Quip engagement object you want to report on.

 **Tip:** Quip objects begin with *Collaboration*. See [Quip Engagement Objects](#). on page 120

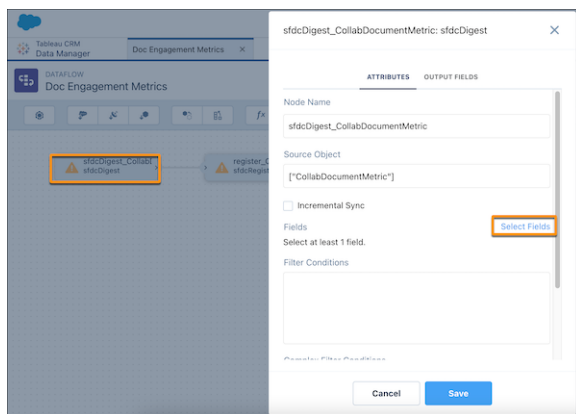


a. Enter or select a Collaboration object and click **Next**.

5. Select the app you want to store your dataflow in and click **Create Dataset**.



6. Select **sfdcDigest_<collab metrics>**. To report on the Collaboration object's fields, like Document Title or Last Modified by ID, click **Select Fields**.



Important: Do not select the MayEdit field when reporting on Collaboration objects. Extracting data from this field can cause the dataflow to fail.

7. Save and propagate your field changes.
8. Run the dataflow. You can see when the dataflow has run from the Monitor section of the Data Manager. To get more information about your Quip metrics dataset, go to the Data section of the Data Manager.

Test Your Quip and Salesforce Configuration with Health Check

Use the Quip Health Check to run automated tests on your Quip site and Salesforce org connection. When Health Check identifies a problem, get on-the-spot results and solution recommendations.

Only a Quip and Salesforce admin can run Health Check.

You can run two types of validations with the Quip Health Check: site level and user level.

- A site-level validation checks your Quip site and Salesforce org connection, and it checks for incorrect configurations, such as incomplete setup in Salesforce or expired access tokens.

EDITIONS

Available in: Lightning Experience

- A user-level validation checks the health of a Quip user's connection to Salesforce and whether the org is on the Salesforce org allowlist.

For both types of validations, results are sorted into two categories: those that can be resolved in Salesforce Setup and those that can be resolved in the Quip Admin Console.

1. Go to <https://admin.quip.com>.
2. Log in using your Quip admin email and password.
3. Run a site-level Health Check to test your Quip site connection to Salesforce.
 - a. From Settings, select **Salesforce**.
 - b. Under Connected Salesforce Orgs, click **Test Connection Health**.
 - c. Select a Salesforce org to check on the health of its connection to Quip. Click **Run Health Check**.


Connection Health Check					
Select a Salesforce org to check on the health of its connection to Quip.					
Organization ID	Organization Name	Instance Url	Is Sandbox	Login Status	
<input checked="" type="radio"/> 00d6000000004bALEAY	Salesforce Demo	https://nbarclay-20200122-122... false	false	Logged In	
<input type="radio"/> 00D2i0000000MfwEAE	MM Quip DF18	https://cx37.salesforce.com	true	Logged In	
<input type="radio"/> 00IDR00000009IKIMAY	Test Company	https://kiam.my.stmpa.stm.sales... false	false	Logged In	
<input type="radio"/> 00IDB0000000TrU6MAK	GSO Org	https://jlditong0.mysalesforce... false	false	Log In	
<input type="radio"/> 00D2E000000mdfQUAQ		https://na91.salesforce.com	false	Log In	
<input type="radio"/> 00D2E000000pSteUAE	Jepsen	https://na91.salesforce.com	false	Log In	
<input type="radio"/> 00D4P000000gG9OIAUJ	MintyLoveFishes	https://na132.salesforce.com	false	Log In	
<input type="radio"/> 00D4P000000xUXJUAI	Salesforce	https://na132.salesforce.com	false	Log In	
<input type="radio"/> 00D4P000000MtwUEAG	Quip	https://na132.salesforce.com	false	Log In	

You can select only the Salesforce orgs that you have access to. Select orgs marked as Logged In, or click **Log In**.


- d. View your results. Address errors in the Quip Admin Console or Salesforce Setup depending on the label. To save your results, click **Export Results**.

Connection Health Check

Test Company Result


[Export Results](#)

Organization ID	Instance URL	Sandbox
00DR00000009IKIMAY	https://kiam.my.stmpa.st...	false




Multiple Quip External Data Sources

Looks like this org has more than one Quip external data source. Ask your Salesforce admin to remove the additional ones.




Salesforce Access Token

Salesforce access token is valid.




Quip Permission Set

Permission set exists and is assigned to users.



External Data Source Linked


Quip external data source is linked to the Quip permission set.

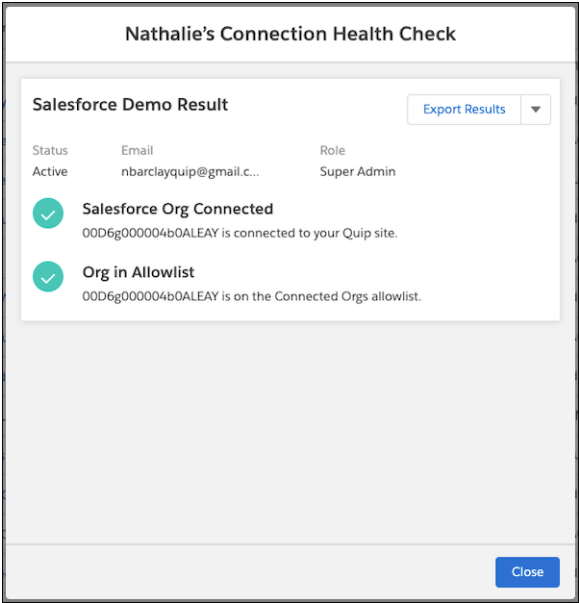


Salesforce API Key

Your org's API key is valid.

[Close](#)

- 4. Run a user-level Health Check to test a Quip user’s connection to Salesforce.
 - a. From Settings, select **Site Members**.
 - b. Find the user you want to check the connection health of. Click  by their name, and select **Test Connection Health**.
 - c. View your results and address any errors. [Troubleshoot Results](#) on page 135



- 5. To save the results, click **Export Results**.

[Quip Health Check Tests and Fixes](#)

See what tests the Quip Health Check runs and the recommended fixes.

Quip Health Check Tests and Fixes

See what tests the Quip Health Check runs and the recommended fixes.

Test Category	Error Message	Recommended Fix
Permission Set	Looks like this org doesn't have a Quip permission set. Ask your Salesforce admin to create one and assign it to users.	Option 1: In Salesforce, from Setup, in the Quick Find box, enter <i>Quip</i> . Click Fix Setup . Quip automatically creates a Quip permission set for you. Option 2: In Salesforce, manually create a Quip permission set and assign the Export Reports, Files Connect Cloud, and Run Report system permissions.

EDITIONS

Available in: Lightning Experience

Test Category	Error Message	Recommended Fix
External Data Source	Looks like this org doesn't have a Quip external data source. Ask your Salesforce admin to create one and validate and sync it.	<p>Option 1: In Salesforce, from Setup, in the Quick Find box, enter <i>Quip</i>. Click Fix Setup. Quip automatically creates a Quip external data source for you.</p> <p>Option 2: In Salesforce, manually create a Quip external data source, and add it to a permission set.</p>
Multiple External Data Sources	Looks like this org has more than one Quip external data source. Ask your Salesforce admin to remove the additional ones.	In Salesforce, from Setup, in the Quick Find Box, enter <i>External Data Sources</i> . Make sure that the other Quip external data sources aren't used by another team, and then delete them.
External Data Source Assigned to Permission Set	Looks like the Quip external data source isn't linked to the Quip permission set. Ask your Salesforce admin to link it, or reconnect Quip and Salesforce.	In Salesforce, from Setup, in the Quick Find Box, enter <i>Permission Sets</i> . Select the Quip permission set, click External Data Source Access , and then Edit . Assign the Quip external data source to the permission set and save the action.
Auth. Provider	Looks like this org doesn't have a Quip auth. provider. Ask your Salesforce admin to create one.	<p>Option 1: In Salesforce, from Setup, in the Quick Find box, enter <i>Quip</i>. Click Fix Setup. Quip automatically creates a Quip auth. provider for you.</p> <p>Option 2: In Salesforce, manually create a Quip auth. provider.</p>
Salesforce Access Token	Looks like the access token for this org is expired. Reconnect the org to Quip to refresh it.	From your user profile in Quip, click Salesforce . To refresh the org's access token, click Reconnect .
Salesforce Access Token	Looks like you haven't connected the org to Quip. Try connecting it or add the org to your Connected Salesforce Orgs.	<p>Option 1: From your user profile in Quip, click Salesforce. Click Connect and log in to your Salesforce org.</p> <p>Option 2: From the Quip Admin Console, add a Salesforce Org to your Connected Salesforce Orgs.</p>
Salesforce API Key	Looks like there was a problem with your org's Integration API key. Go to the Quip Admin Console and check the field.	From the Quip Admin Console, click Settings , and then Integrations . View your Salesforce API key and check the API key name, Client ID, and Client Secret.
Live Apps in VPC	Looks like one or more live apps aren't set up for this Quip VPC. Ask the VPC admin to enable them.	Enable live apps in your Quip VPC. on page 100

Test Category	Error Message	Recommended Fix
Quip Edition	Looks like you have the [Quip Edition Name] Quip edition. To use Salesforce integrations, upgrade to Quip for Customer 360.	Get Quip for Customer 360 or Quip Advanced.
OAuth	Looks like there was a problem with your Quip OAuth.	OAuth 2.0 Authorization Errors
Salesforce Org Allowlist	Looks like this org isn't on the Salesforce allowlist. Ask the org admin to add it.	From the Quip Admin Console, click Settings , and then Salesforce . Under Connected Salesforce Orgs, click Add Salesforce Org , and log in to Salesforce.

Solution Kits for Quip

Get the most out of Salesforce with your Quip integrations by implementing one or more solution kits. Get feature recommendations, workflow details, and instructions to help you implement the solution from start to finish.

[Test and Roll Out Your Quip Site](#)

Use these tips to plan your Quip rollout from start to finish. Build templates, test Salesforce and Quip permissions, and get feedback from your pilot users, all from the safety of your sandbox org. Then, when you're ready to share with your users, migrate your changes to production.

Test and Roll Out Your Quip Site

Use these tips to plan your Quip rollout from start to finish. Build templates, test Salesforce and Quip permissions, and get feedback from your pilot users, all from the safety of your sandbox org. Then, when you're ready to share with your users, migrate your changes to production.



Set Up Your Test Site





Prepare your Quip site.

- [Decide Between a Quip Managed Site and Your Main Quip Site](#) on page 94

To reduce the number of steps and repetitive tasks, we recommend using the same Quip site for your sandbox and production orgs.

- [Create a Quip Managed Site](#)



Set up your Quip site in a sandbox.

- [Use Quip in a Salesforce Sandbox](#) on page 96

The steps are the same for both your main Quip site and a Quip managed site.

- [Assign the Quip Permission Set](#) on page 102
- [Connect Your Salesforce Sandbox Org to Quip](#) on page 96



Manage your Quip sharing settings.

- [Create a Salesforce Org Allowlist for Your Quip Site](#) on page 104
- [Set Up Synced Sharing](#) on page 114
- [Considerations Before You Enable Mirrored Salesforce Permissions](#) on page 109
- [Enable Mirrored Salesforce Permissions](#) on page 110
- [Add Users to Your Quip Site](#) on page 102



Test Your Templates in Sandbox



Build your template in Quip.

- [Template Requirements Gathering](#) on page 221
- [Configure Your Template](#) on page 230
- [Mark a Document as a Template](#) on page 226
- [Edit a Template](#) on page 234



Embed your templates in your sandbox record layouts.

- [Create Custom Fields for the Document and Template URL](#) on page 200
- [Add the Quip Document Component to a Lightning Page](#) on page 208

To embed the same template across one object, we recommend that you select **One template for each record**. Make sure that your document is marked as a template, link sharing is set to view only, and live Salesforce data is templated.

- Optional. [Automation with Quip in Salesforce](#) on page 151
- Optional. [Quip Automation Use Cases](#) on page 152

To get the most out of your templates, use actions in Process Builder and Flow Builder.



Get feedback and iterate.

- [Get Feedback and Iterate on Your Templates](#) on page 231



Roll Out Quip to Your Production Org



Set up your Quip site in a production Salesforce org.

- [Set Up Quip in Salesforce](#) on page 90
- [Assign the Quip Permission Set](#) on page 102
- [Complete the Quip Connection in Salesforce](#) on page 91



Manage your Quip sharing settings.

- [Create a Salesforce Org Allowlist for Your Quip Site](#) on page 104
- [Set Up Synced Sharing](#) on page 114
- [Considerations Before You Enable Mirrored Salesforce Permissions](#) on page 109
- [Enable Mirrored Salesforce Permissions](#) on page 110
- [Add Users to Your Quip Site](#) on page 102



Migrate your test content.

- [Migrate Your Sandbox Templates to Production](#) on page 96
- [Create Custom Fields for the Document and Template URL](#) on page 200
- [Add the Quip Document Component to a Lightning Page](#) on page 208

When you copied your templates to a Production Templates folder, the template URL changed. Make sure you embed the new template URL.

- Optional. [Automation with Quip in Salesforce](#) on page 151
Recreate your sandbox automation in your production org.



Test your template workflow from start to finish, and then roll it out to your users.

Create a document from your embedded template, either manually or through automation, and check that your Salesforce data autofilled correctly. If everything looks good, it's time to roll out Quip to your users.



Use Quip Features in Salesforce

Learn how to get the most out of Quip features in Salesforce.

Considerations for Salesforce Classic

As you use Quip features in Salesforce Classic, keep in mind these considerations.

Install the Quip Setup Starter Managed Package

Get a taste of Salesforce integration features with the Quip Setup Starter managed package. After you connect your Quip site to Salesforce, install the managed package to set up Quip Lightning components, add templates to Salesforce records, and set up automation.

Automation with Quip in Salesforce

Use Quip features in your automated Salesforce business processes.

Quip Lightning Components

Use Quip Lightning components, like the Quip Associated Documents component, to get the best out of Quip features in Lightning Experience.

Quip Global Quick Actions

Add Quip global quick actions to almost any page that supports actions. Use global actions to let your users create documents without leaving the page that they're on.

Templates

Use document templates to streamline your business practices within the context of your Salesforce data, without compromising on customization.

Live Data in Quip

See which live data applications work in Quip. Learn more about live apps, like the Salesforce Record live app or the Calendar live app, as well as other live data, like Salesforce reports or Salesforce data mentions.

Document Linking in Quip

Link important documents to your Salesforce records. Make it easier to find your documents in Salesforce by linking them to related Salesforce records.

Salesforce Activities in Quip

Log calls, set up tasks, and schedule events from a Quip document. Get credit for your activity in the same place that you take notes, track your progress, and collaborate on your Account Plans.

EDITIONS

Available in: **Enterprise**, **Performance**, **Professional**, **Developer**, and **Unlimited** Editions

EDITIONS

Available in: **Lightning Experience**

Considerations for Salesforce Classic

As you use Quip features in Salesforce Classic, keep in mind these considerations.

[Set Up the Quip Associated Documents Component for Salesforce Classic](#)

Let users add documents to accounts, opportunities, leads, and most other records based on standard and custom objects.

EDITIONS

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited** Editions

Set Up the Quip Associated Documents Component for Salesforce Classic

Let users add documents to accounts, opportunities, leads, and most other records based on standard and custom objects.

1. [Create a Lightning App for the Quip Associated Documents Component](#)

Get on the path to creating a Quip Associated Documents component that your users can access from records in Salesforce Classic.

2. [Create and Test a Visualforce Page for the Quip Associated Documents Component](#)

Create your Visualforce page and test it. Then your users can add documents to their records in Salesforce Classic.

3. [Create a Custom Controller for the Quip Associated Documents Component](#)

Add your Lightning component to more Salesforce records when you create a custom controller.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Create a Lightning App for the Quip Associated Documents Component

Get on the path to creating a Quip Associated Documents component that your users can access from records in Salesforce Classic.

1. Open your Developer Console.
2. Click **File > New > Lightning Application**.
3. Name your app *QuipCard*.



Note: *QuipCard* is the name of the Lightning component. To keep things simple, we recommend using the same name.

4. Copy and paste this code.

```
<aura:application extends="ltng:outApp"
    access="global"
    description="LightningOut app for the Quip Card in Classic" >
</aura:application>
```

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

USER PERMISSIONS

To create a Lightning app:

- Customize Application

Create and Test a Visualforce Page for the Quip Associated Documents Component

Create your Visualforce page and test it. Then your users can add documents to their records in Salesforce Classic.

1. Go to a Salesforce record and take note of its object type (*Example:* account, opportunity, or lead) and its recordId.
2. From your Developer Console, click **File > New > Visualforce Page**.
3. Name your page *QuipCard*.
4. Copy and paste the following code, replacing the `//commented out//` portions with the object type and recordId from step 1.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

USER PERMISSIONS

To create Visualforce pages:

- Customize Application

```
<apex:page sidebar="false" standardController="//insert object type here//" >

    <apex:includeLightning />
    <div id="quipCardContainer"/>

    <script>
        $Lightning.use("c:QuipCard", function() {

            $Lightning.createComponent("lightning:quipCard",
                { "parentRecordId":
                  "//insert recordId here//" },
                "quipCardContainer",
                function(cmp)
                {
                });
            });
        </script>
    </apex:page>
```

5. Go back to the record you noted from step 1, and then click **Edit Layout**.
6. Add a section, preferably one column, and then drag QuipCard.vfp into it.
7. Save your layout and verify that the component works.
8. [Give access to the Visualforce page](#) for the user profiles of your choice, so that your users can add documents to their records using the Quip Associated Documents component.



Note: Tell your users to sign in to Quip the first time they use the component. And then tell them to refresh their browser window after they connect.

Create a Custom Controller for the Quip Associated Documents Component

Add your Lightning component to more Salesforce records when you create a custom controller.

1. Create a new Apex class.
2. Name it *myCustomOppController*.
3. Name your page *QuipCard*.
4. Copy and paste the following code.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

USER PERMISSIONS

To customize a controller:

- Customize Application

```
public class myCustomOppController {
    public String recordId {get; set;}

    public myCustomOppController(ApexPages.StandardController stdController) {
        setRecordIdForQuip(stdController.getRecord().id);
    }

    private void setRecordIdForQuip(Id recordId) {
        this.recordId = recordId;
    }
}
```

5. Replace your QuipCard.vfp code with this code.

```
<apex:page sidebar="false" standardController="Opportunity"
extensions="myCustomOppController" >
    <apex:includeLightning />
    <div id="quipCardContainer"/>

    <script>
        $Lightning.use("c:QuipCard", function() {
            $Lightning.createComponent("lightning:quipCard",
            { "parentRecordId": "{!recordId}" },
            "quipCardContainer",
            function(cmp) {}
            );
        });
    </script>
</apex:page>
```

Install the Quip Setup Starter Managed Package

Get a taste of Salesforce integration features with the Quip Setup Starter managed package. After you connect your Quip site to Salesforce, install the managed package to set up Quip Lightning components, add templates to Salesforce records, and set up automation.

Only a Salesforce and Quip admin can connect Quip and Salesforce.

When you install the Quip Setup Starter managed package, you get the following features.

- Quip connection check: Before you can use Salesforce integration features, check to make that your Quip site and Salesforce org are connected and ready to go.
 - Embedded Quip documents: Create Quip Account Plan and Opportunity Notes templates and embed them in a Salesforce record. You can also create your own documents and embed them in a record layout of your choice.
 - Automate Quip processes: Manage embedded documents, send document notifications, and set up a live deal feed with Quip actions in Process Builder and Flow.
1. Click the installation link on the download page. You can install the managed package on a production or sandbox org.
 - Production org: <https://sfdc.co/quipsetupstarter>
 - Sandbox org: https://sfdc.co/quipsetupstarter_sandbox

2. Select **Install for Admins Only**.

If you receive a request to approve third-party access, click **Yes** and **Continue**. Approving this request allows the street-level routing and optimization services to function.

3. If a message indicates that the installation is taking longer than expected, click **Done**.

You receive an email notification when the installation is complete.

After the package is installed, the App Launcher includes the Quip Setup Starter app.

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To install the Quip Setup Starter managed package:

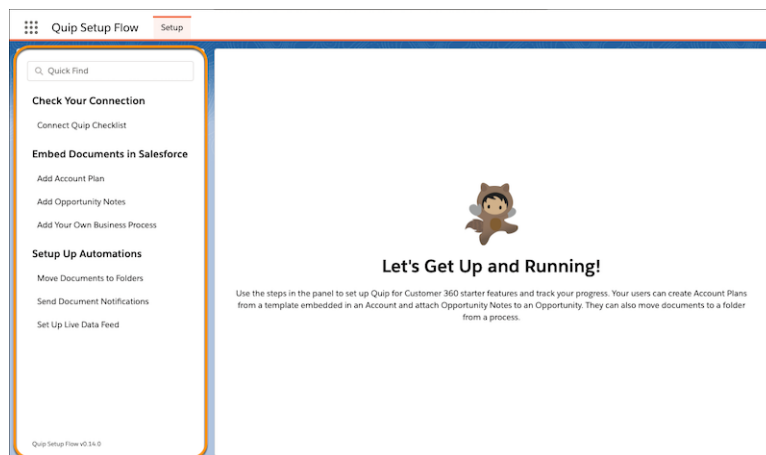
- Customize Application

To assign a permission set license:

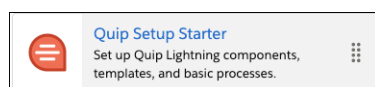
- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets



Launch the Quip Setup Starter from the App Launcher. Use the panel to check your Quip connection, embed documents, and set up Quip automation.



Quip Setup Starter Features

The Quip Setup Starter managed package sets up your Salesforce org with popular Salesforce Quip features. Here's what's happening in the background.

Reset Managed Package Features

Undo changes made to your Salesforce org by the Quip Setup Starter managed package.

Quip Setup Starter Features

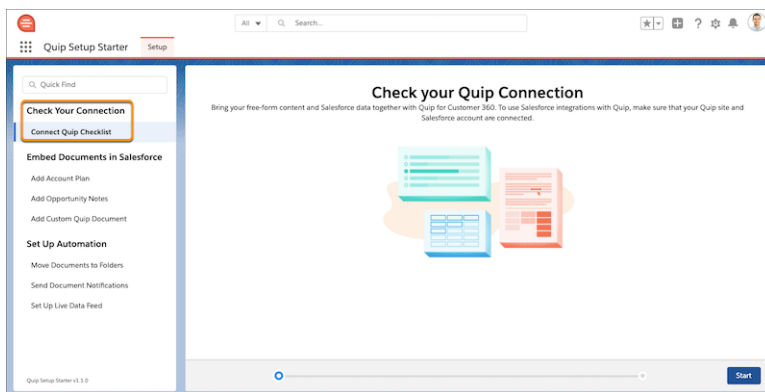
The Quip Setup Starter managed package sets up your Salesforce org with popular Salesforce Quip features. Here's what's happening in the background.

 [Watch a Demo](#) (7 minutes)

EDITIONS

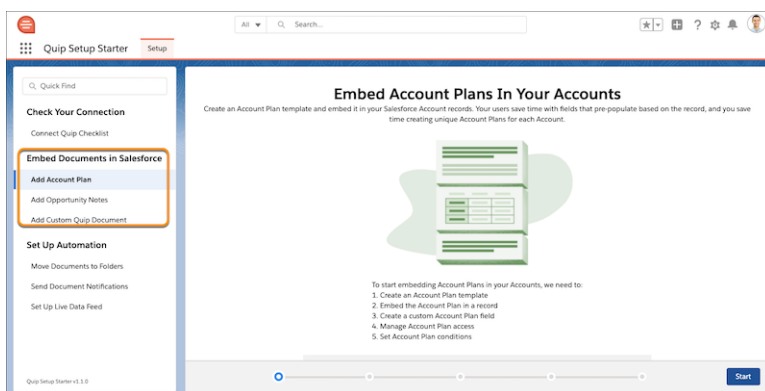
Available in: Lightning Experience

Check Your Connection



To use Salesforce integration features, verify that your Quip and Salesforce accounts are connected. [Tell Me More](#) on page 90

Embed Documents in Salesforce

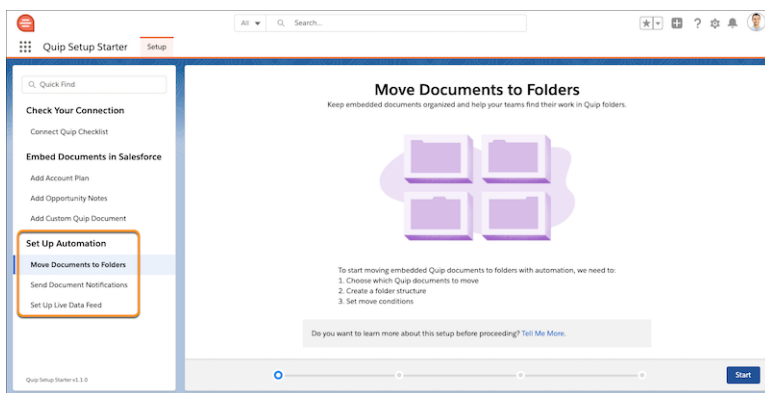


Embed Account Plans, Opportunity Notes, and custom templates in your Salesforce records. The Quip Setup Starter managed package uses the [Quip Document component](#) on page 198 to embed templates in Salesforce. When your users create a document from a template, the document is added to a custom tab. The Quip Setup Starter does the following in the background:

- Creates a template. You can select a template or create your own.

- Adds a custom field to an object. Quip uses this custom URL field to store your template URLs. By default, users have Read and Edit access to this field. You can change these permissions from the Object Manager.
- Adds a custom tab to your record layouts. To add a document to a record, Quip creates a custom tab. To change the tab layout, go to the object record and click **Setup**, then **Edit Page**.
- Manages document access. Set the access level for documents created from a template. By default, users have View and Edit access.
 - Users with View and Edit access can view and edit created documents in Salesforce and in Quip.
 - Users with View Only access can only view documents created from a template.
 - Users with Must Request Access can view and edit created documents after they request access.
- Sets up document automation. Create a document from a template when:
 - A user manually creates a document. After a user clicks **New Document from Template** on the Salesforce record, a new document is added to the custom tab. Only users with the Quip permission set can manually create a document from a template.
 - After a new record is created, Quip uses Process Builder to create a document from a template. To view or edit the Quip action, go to Process Builder. [Tell Me More](#) on page 191.
 - One or more conditions are met. To set custom conditions for your documents created from a template, create your own actions in Flow Builder. Your users can manually create documents from a template until the flow or process is activated.

Set Up Automation



The Quip Setup Starter uses Quip actions in Process Builder and Flow Builder to move new documents to a folder, send document notifications, and create a live data feed.

To automate Quip documents and folders, the Quip Setup Starter does the following in the background:

- Selects object-related documents. To move documents created from a template to a folder, select the object that they're linked to.
- Adds a custom field to the object. Quip uses a custom URL field to store your folders. To view or edit this field, go to the Object Manager and select the object's **Fields & Relationships**. The custom field is called Quip Folder URL.
- Creates a folder structure. Select how you want to organize documents created from a template.
 - To add all documents embedded in all objects to a single folder, select **One Folder**. The folder is added to your Private folder in Quip.
 - To create separate folders for each object type, select **One Folder Per Object Name**, and enter a parent folder name. The parent folder is added to your Private folder in Quip. Each object type gets its own subfolder within the parent folder.
 - To add documents to a related object's folder, select **One Folder Per Related Object**, enter a parent folder name, and select a related object. The parent folder is added to your Private folder in Quip. Each related object type gets its own subfolder within the parent folder.

- Sets up folder automation. To create a folder, Quip creates a process called Quip - [Object] - [Process] - Folder Organization. To move documents created from a template to a folder, Quip creates a flow action called [Object] - [Document URL] - Folder Organization. To view or edit the actions, go to Process Builder and Flow Builder.

To send notifications in a document when something changes in Salesforce, the Quip Setup Starter does the following in the background:

- Selects an object. To send notifications when an object record is created or edited, select an object.
- Creates a notification template. You can select a notification template or create your own.
- Creates a process. Quip creates a process called Quip - [Object] - [Condition] - Document Notifications. To view or edit the Quip action, go to Process Builder.

To set up a live data feed in a document and send alerts when something changes in Salesforce, the Quip Setup Starter does the following in the background:

- Selects an object. To send alerts in a document when something changes, select an object.
- Creates an alert template. You can select a live data alert template or create your own.
- Creates a process. Quip creates a process called Quip - [Object] - [Condition] - Live Data Feed. To view or edit the Quip action, go to Process Builder.

Reset Managed Package Features

Undo changes made to your Salesforce org by the Quip Setup Starter managed package.

Reset your Salesforce org and delete changes made by the Quip managed package.

EDITIONS

Available in: Lightning Experience

Add the Account Plan

To remove the Quip Account Plan from your accounts, then deactivate the process.

If you chose to create an Account Plan when a new record is created, do the following:

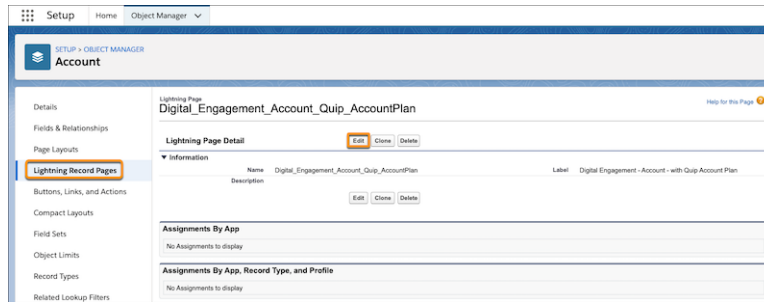
1. From the Quick Find box in Setup, enter *Process Builder*.
2. Select **Quip - Account - Create Account Plan**.

My Processes					
PROCESS	DESCRIPTION	OBJECT	PROCESS TYPE	LAST MODIFIED...	STATUS
> Quip - Account - Create Account Plan	Generated by Quip Setup Starter	Account	Record Change	7/24/2020	Active

3. Click **Deactivate**, then **Confirm**.
4. To delete the process, find the deactivated process and expand it, then click **Delete**.

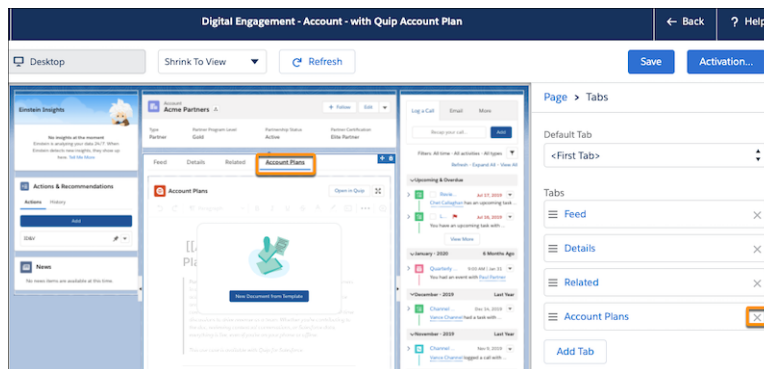
Quip - Account - Create Account Plan					
Version 1: Quip - Account - Create Account Plan	Generated by Quip Setup Starter	Account	Record Change	7/24/2020	Inactive Delete

5. If you chose not to activate the record page later, do the following:
 - a. From Setup, go to the Object Manager.
 - b. Select the object that you embedded your Account Plan template in.
 - c. Click **Lightning Record Pages**, then the record page you chose.

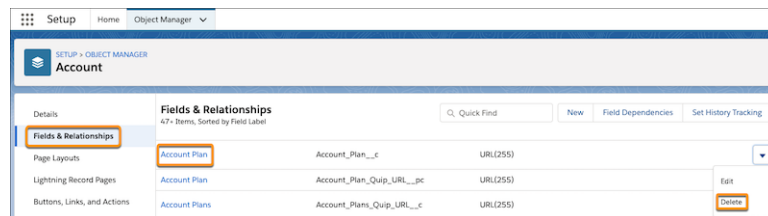


d. Click **Edit**.

e. From the Lightning App Builder, click the Account Plan tab, and delete it. Click **Save**.



6. To delete the custom field, from Setup, go to the Object Manager.
7. Select the object that you embedded your Account Plan template in.
8. Click **Fields & Relationships** and find the Account Plan field.



9. Click **Delete** from the dropdown.

Add Opportunity Notes

To remove Opportunity Notes from your opportunities, follow the same steps as with the Account Plan deletion process but for the Opportunity object.

- Deactivate and delete the Quip - Opportunity - Create Opportunity Notes process.
- If you chose to activate the record page later, delete the record page with “with Opportunity Notes” added to it.
- If chose not to activate the record page later, delete the Opportunity Notes tab.
- Delete the Opportunity Notes custom field.

Add Custom Quip Document

To remove your custom document from your selected object, follow the same steps as with the Account Plan and Opportunity Notes deletion process but for your object and document.

- Deactivate and delete the Quip - [Object Name] - [Process Name] process.
- If you chose to activate the record page later, delete the record page with “with [Process Name]” added to it.
- If you chose not to activate the record page later, delete the custom tab.
- Delete the [Process Name] custom field.

Move Documents to Folder

To reset your document management, complete the following steps:

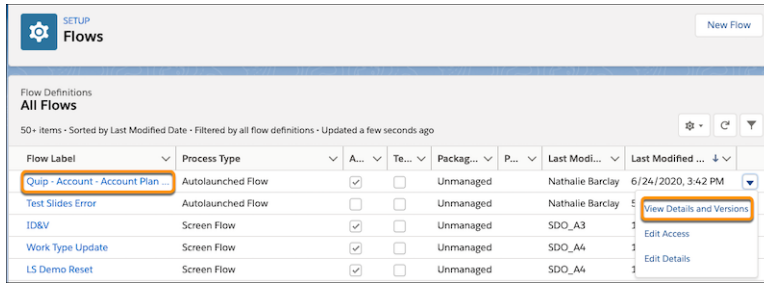
1. Deactivate the process.
 - a. From the Quick Find box in Setup, enter *Process Builder*.
 - b. Select **Quip - [Object] Folder Organization (Trigger)**.
 - c. Click **Deactivate**, then **Confirm**.
2. Delete the process. Find the deactivated process and expand it, then click **Delete**.

Version 1: Quip - Account - Account Plan - Folder Organization	Account	Record Change	7/24/2020	Inactive	Delete
--	---------	---------------	-----------	----------	--------

3. Delete the custom field.
 - a. From Setup, go to the Object Manager.
 - b. Select the object you chose during the document management setup.
 - c. Click **Fields & Relationships** and find the Quip Folder field.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Quip Folder	Quip_Folder__c	URL(255)		

- d. Click **Delete** from the dropdown.
4. Deactivate and delete the flow.
 - a. From the Quick Find box in Setup, enter *Flows*.
 - b. Find the flow that ends with “Folder Organization” and click **View Details and Versions** from the dropdown.



Flow Label	Process Type	A...	Te...	Packag...	P...	Last Modi...	Last Modified ...
Quip - Account - Account Plan	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Nathalie Barclay	6/24/2020, 3:42 PM
Test Slides Error	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Nathalie Barclay	
ID6V	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		SDO_A3	
Work Type Update	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		SDO_A4	
LS Demo Reset	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		SDO_A4	

c. Click **Deactivate**, then **Delete**.

5. Delete the folder.

a. In Quip, go to your Private folder.

b. Find the folder you specified during the setup and click **Delete Folder** from the dropdown.

Send Document Notifications

To stop automatic document notifications, complete the following steps:


1. Deactivate the process.

a. From the Quick Find box in Setup, enter *Process Builder*.

b. Select **Quip - [Object] - [Condition] - Document Notifications**.

c. Click **Deactivate**, then **Confirm**.

2. Delete the process. Find the deactivated process and expand it, then click **Delete**.



Version 1: Quip - Account - Account Plan - Folder Origin...	Account	Record Change	7/24/2020	Inactive	Delete
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Set Up Live Data Feed

To revert the live data feed, complete the following steps:

1. Deactivate the process.

a. From the Quick Find box in Setup, enter *Process Builder*.

b. Select **Quip - [Object] - [Condition] - Live Data Feed**.

c. Click **Deactivate**, then **Confirm**.

2. Delete the process. Find the deactivated process and expand it. Click **Delete**.



Version 1: Quip - Opportunity - New - Live Data Feed	Opportunity	Record Change	7/29/2020	Inactive	Delete
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Automation with Quip in Salesforce

Use Quip features in your automated Salesforce business processes.



Warning: Quip is retiring slides on January 31, 2021. After this date, the Copy Content action in Process Builder and Flow Builder no longer works, and Slides isn't a valid document type for the Edit Document and Create Document actions. [Tell Me More](#)

[Considerations for Using Quip in Flow Builder](#)

Review some important information about requirements and limitations to get the most out of Quip actions in Process Builder and Flow Builder.

[Quip Automation Use Cases](#)

Learn about ways to streamline and customize business processes with Quip actions in Flow Builder.

[Quip Actions in Process Builder](#)

Create documents, chat rooms, and folders when important events occur. Attach a document to a record so that your users have information in context. Update your spreadsheets with the latest Salesforce data. Send a message to a chat room or document. Add new slides to a deck, copy documents, add members to a document or chat, lock document edits, and more.

[Quip Actions in Flow Builder](#)

Quip provides several core actions for organizing, creating, and copying your Quip content in flows. To add one of these actions to your flow, drag an Action element onto the canvas. Then select the **Quip** category, and search for the appropriate action.

EDITIONS

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited Editions**

EDITIONS

Available in: **Lightning Experience**

Considerations for Using Quip in Flow Builder

Review some important information about requirements and limitations to get the most out of Quip actions in Process Builder and Flow Builder.

Availability

To use Quip actions, enable Quip for your Salesforce org.

Admins are the only users able to use Quip actions in Flow Builder and Process Builder.

EDITIONS

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited Editions**

End-User Limitations

If a flow or process is triggered by a user that hasn't connected to Quip, the flow or process doesn't run because the user doesn't have a valid access token.

Flow Type Limitations

For now, Quip actions don't work with scheduled flows.

Quip Automation Use Cases

Learn about ways to streamline and customize business processes with Quip actions in Flow Builder.

[Automate Close Plans with Flow Builder](#)

Save time manually creating and filling out Mutual Close Plans with templates in Flow Builder. Use Process Builder and Flow Builder to automatically add a Mutual Close Plan template to a record and generate an auto-populated Close Plan when the Opportunity stage changes. Add the copied document to a folder and send a message to @everyone to notify users that a document was created.

[Automate Close Plans and Account Folder Creation with Flow Builder](#)

Save time manually creating and filling out Close Plans with templates in Flow Builder. Use Flow Builder to automatically create Account folders in Quip and add your Close Plans to them.

[Add Opportunity Team Members to a Close Plan](#)

Automatically add an Opportunity's Team Members to a Close Plan when an Opportunity is created. Also add Opportunity Team Members to existing Close Plans already linked to an Opportunity so they always have a 360-degree view.

[Automate Pricing Proposals with Flow Builder](#)

Save time manually creating and filling out Pricing Proposals with templates in Flow Builder. Use Process Builder and Flow Builder to automatically add a Pricing Proposal template to an Opportunity and generate an auto-populated proposal when the Opportunity stage is set to Proposal/Quote. When the Opportunity is set to Closed/Won, export the proposal to a PDF and attach it to the Opportunity for record keeping.

[Add a Competitive Analysis Section to an Existing Account Plan](#)

Use Flow Builder to automatically add a section to the document associated a record each time the record is updated. For example, if you create an Account Plan template and associate it with the Account object, you can use the Edit Quip Document action to add a Competitive Analysis section.

[Automate Exporting a Quip Document to PDF](#)

Use Flow Builder to export a Quip document to PDF anytime the record associated with the document is updated.

EDITIONS

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited** Editions

Automate Close Plans with Flow Builder

Save time manually creating and filling out Mutual Close Plans with templates in Flow Builder. Use Process Builder and Flow Builder to automatically add a Mutual Close Plan template to a record and generate an auto-populated Close Plan when the Opportunity stage changes. Add the copied document to a folder and send a message to @everyone to notify users that a document was created.

Use a flow to automatically populate a Mutual Close Plan attached to an Opportunity. After you create a document from the template, the flow moves the document to a folder and sends a message in the conversation panel. Process Builder then autolaunches the flow when an Opportunity stage changes to Proposal/Quote.



Tip: This workflow works for other Salesforce objects. To add an Account Plan to an Account, set up the Quip Document component on an Account page, create an Account Plan URL field, and select Account as the object in Flow Builder.

EDITIONS

Available in: **Lightning Experience**

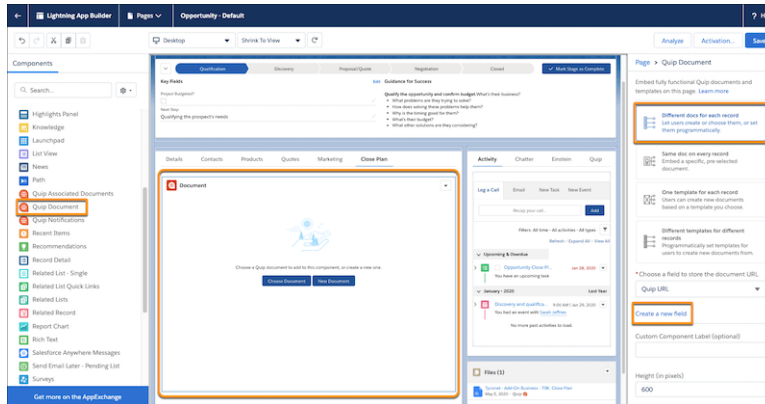
Set Up the Quip Document Component

Set up the Quip Document component on the Opportunity page layout. Create a Mutual Close Plan custom URL field to store Mutual Close Plans created from your template.

1. Navigate to an Opportunity record in Lightning Experience.
2. Click the gear icon, and select **Edit Page** to go to the Lightning App Builder.
3. Create a new tab called Close Plan.
4. In the left pane, select **Quip Document** and drag it to your new tab.

EDITIONS

Available in: **Lightning Experience**



5. Select **Different docs for each record**.



Note: *Different Docs for each record* uses Flow Builder to add a template to a record. To use Flow Builder or let users manually add templates, select **One template for each record**.

6. To create a custom URL field to store the new document URLs, select **Create a new field**.
7. Enter *Mutual Close Plan* as the field label and field name. You can make changes later from the Object Manager.

Create a Custom Field

Add a custom URL field to store the documents created from a template. By default, Standard profiles have edit access. The custom URL field isn't added to your page layout. You can make changes later from the [Object Manager](#)

* Field Label

* Field Name

Description

Cancel Save

8. Save the action.

To add your Mutual Close Plan template to the Quip Document component and to automate Mutual Close Plan creation, create actions in Flow Builder and Process Builder.

Create a Mutual Close Plan

Use Flow Builder to add your Mutual Close Plan template to the Opportunity and to automatically populate Mutual Close Plans created from it.

1. From the Quick Find box in Setup, enter *Flows*.
2. Click **New Flow**.
3. Select **Autolaunched Flow** and click **Next**.

Flow Builder displays the flow in the Auto-Layout flow layout. You can access Interactions, Logic, and Data via the plus icon.

Process Builder later launches the flow when an Opportunity stage is changed.

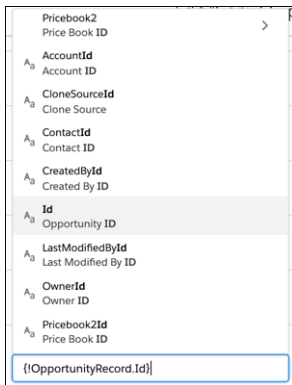
4. Drag the Action element onto the canvas.
5. Select **Quip**.
6. Enter *Copy Quip Document* as the Quip action.
7. Name the action *Create Mutual Close Plan from Template*. To auto-create the API name, press **Tab**.

The screenshot shows the 'New Action' configuration window in Salesforce Flow Builder. The 'Copy Quip Document' action is selected. The 'Set Input Values' section is visible, with the 'Document URL' field populated with the URL 'https://corp.quip.com/Rm1bAaCxx71a/OpportunityName-Close-Plan'. The 'Source Record ID' field is highlighted with an orange box, and the 'Include' toggle for 'Source Record ID' is also highlighted with an orange box.

8. Enter the Document URL for the Mutual Close Plan (<https://quip.com/Rm1bAaCxx71a/OpportunityName-Close-Plan>).
9. Include the Source Record ID. Under Source Record ID, click **+ New Resource**.
10. Select **Variable** as the Resource Type.
11. Enter the API name *OpportunityRecord*.
12. Select **Record** as the Data Type.
13. Select **Opportunity** as the Object.
14. Select **Available for input** and click **Done**.
15. When you get the "Data type of the resource you entered isn't compatible" error for the Source Record ID, enter *.id* after *OpportunityRecord*. Select **Opportunity ID**.

EDITIONS

Available in: **Lightning Experience**



16. Select **Manually assign variables**. Under Store Output Values, click **Document Link** and select **+ New Resource**.

17. Select **Variable** as the Resource Type.

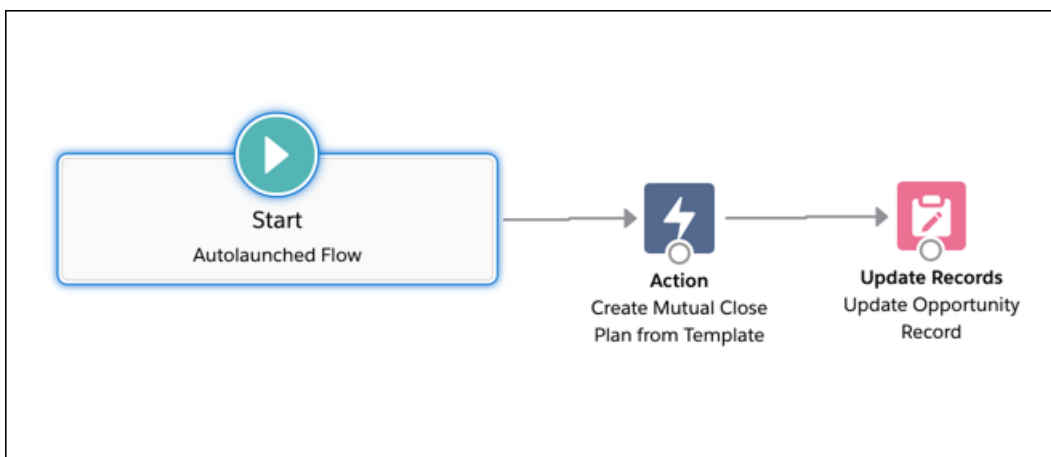
18. Enter `NewDocumentURL` as the API Name.

19. Select **Text** as the Data Type. Click **Done**, then **Done**.

20. Drag the Update Records onto the canvas.

21. Name the action `Update Opportunity Record`. To auto-create the API name, press **Tab**.

22. Select **Specify conditions to identify records, and set fields individually**.
23. Enter *Opportunity* as the Object.
24. Under Filter Opportunity Records, enter *Id* as the Field, select **Equals**, and enter `{!OpportunityRecord.Id}`.
25. Under Set Field Values for the Opportunity Records, enter *Mutual_Close_Plan__c* as the Field and `{!NewDocumentURL}` as the Value. Click **Done**.
26. Connect the elements and click **Save**.



27. Name the flow. For this example, we use the name Create Close Plan from Template. To auto-create the API name, press **Tab**. Click **Save**.
28. Click **Activate**.

Trigger the Process

Create a process that launches the Mutual Close Plan flow when an Opportunity stage is changed to Proposal/Quote. When a user updates the Opportunity stage to Proposal/Quote, a Mutual Close Plan is created from the attached template and autopopulated based on the Opportunity's data.

1. From the Quick Find box in Setup, enter *Process*. Select **Process Builder**.
2. Click **New**.

New Process

Process Name *

API Name *

Description

The process starts when *

3. Name the process *Create Close Plan*. To auto-create the API name, press **Tab**.
4. Select **A record changes** as the process trigger. Click **Save**.
5. Click **+ Add Object** and select **Opportunity** as the object type.

START

+ Add Object

+ Add Criteria TRUE

Choose Object and Specify When to Start the Process

Object *

Start the process *

☐ only when a record is created

☒ when a record is created or edited

> Advanced

6. Start the process **when a record is created or edited**. Click **Save**.
7. Click **+ Add Criteria**.

EDITIONS

Available in: **Lightning Experience**

Define Criteria for this Action Group

Criteria Name * ?
Opportunity Stage Change

Criteria for Executing Actions *

☒ Conditions are met

☐ Formula evaluates to true

☐ No criteria—just execute the actions!

Set Conditions

	Field *	Operator *	Type *	Value *
1	[Opportunity]... Q	Equals	Picklist	Proposal/Price Quo ×
2	[Opportunity]... Q	Is changed	Boolean	True ×

+ Add Row

Conditions *

☒ All of the conditions are met (AND)

☐ Any of the conditions are met (OR)

☐ Customize the logic

> Advanced

Save Cancel

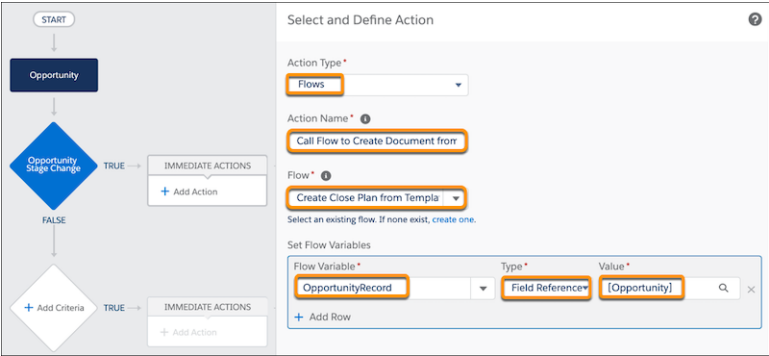
- 8. Name the criteria *Opportunity Stage Change*.
- 9. To determine when to trigger the process, select **Conditions are met**.
- 10. Set the conditions:

Field	Operator	Type	Value
[Opportunity]Stage	Equals	Picklist	Proposal/Quote

- 11. Click **+ Add Row** and set conditions:

Field	Operator	Type	Value
[Opportunity]Stage	Is changed	Boolean	True

- 12. Under Conditions, click **All of the conditions are met (AND)**.
- 13. Click **Save**.
- 14. Click **+ Add Action**.



15. Select **Flows** as the Action Type.
16. Name the action *Call Flow to Create Document from Template*.
17. Select the flow **Create_Close_Plan_from_Template**.
18. Set the flow variables:

Flow Variable	Type	Value
OpportunityRecord	Field Reference	[Opportunity]

19. Click **Save** and then **Activate**.

When your users update an Opportunity stage to Proposal/Quote, a Mutual Close Plan is automatically created and data from the Opportunity is autopopulated. The created document is then stored in the Mutual Close Plan field added to the Opportunity layout.

Move and Share a Mutual Close Plan

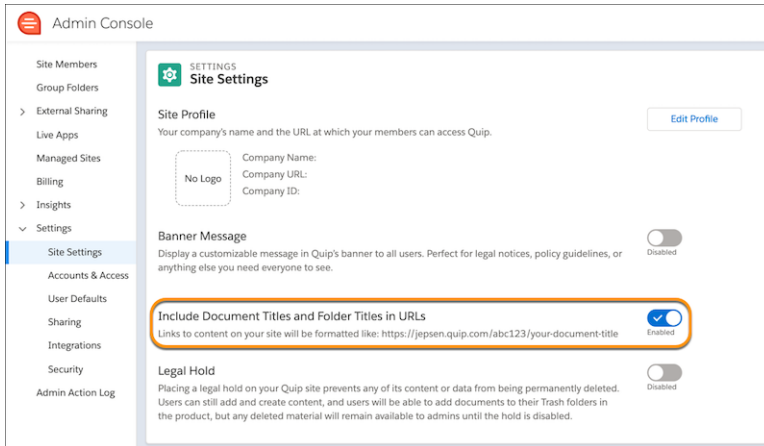
To make it easier to manage your Mutual Close Plans, use Flow Builder to move Mutual Close Plans created from a template to a specific folder. Automatically send a message in the conversation pane to let users know that a document was created.

EDITIONS

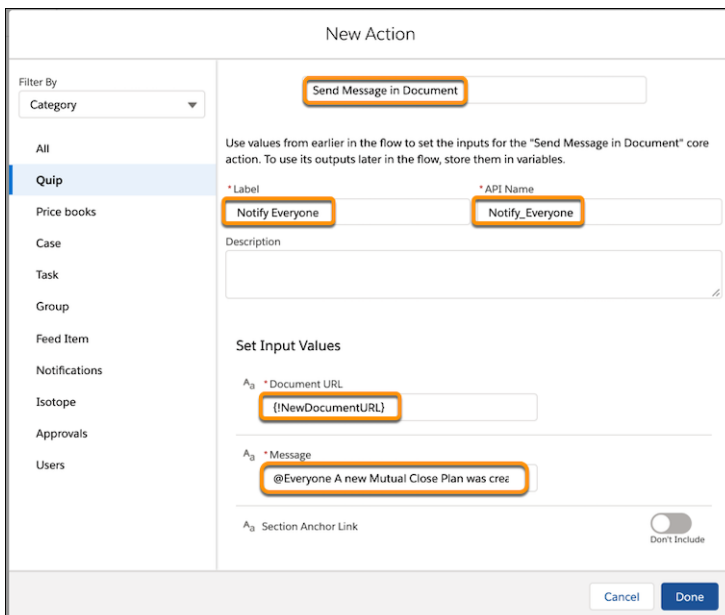
Available in: **Lightning Experience**

1. In Flow, open the Create Close Plan from Template flow.
2. Drag a new action onto the canvas after Update Records.
3. Select **Quip**.
4. Enter *Add Quip Document to Folder* as the Quip action.
5. Name the action *Add Quip Document to Folder*. To auto-create the API name, press **Tab**.

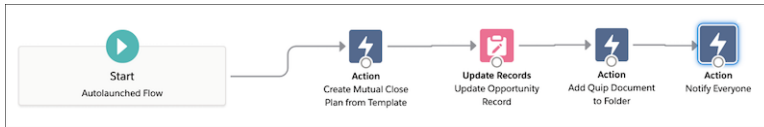
6. For the Document URL, enter `{!NewDocumentURL}`.
7. To get the folder URL, first go to the Quip Admin Console.



- a. Under Settings, click **Site Settings**.
 - b. Disable **Include Document Titles and Folder Titles in URLs**.
 - c. In Quip, go to the folder where you want to add Mutual Close Plans created from a template. Copy the folder URL.
 - d. Paste the folder URL in the Flow Builder action and click **Done**.
8. Connect the elements and click **Save**.
 9. To send a message alerting everyone that a document was created, drag a new action onto the canvas.
 10. Select **Quip**.
 11. Enter *Send Message in Document* as the Quip action.
 12. Name the action *Notify Everyone*. To auto-create the API name, press **Tab**.



13. For the Document URL, enter `{!NewDocumentURL}`.
14. Enter a custom message. To make sure that everyone gets notified, include `@everyone`.
15. Click **Done**.
16. Connect the last action. Click **Save As** and then **Activate**.



Example: [Watch an Account Plan Automation Demo \(English only\)](#)

Your flows and process are ready to go! To see them in action, go to an Opportunity page and change the stage to Proposal/Quote.

Automate Close Plans and Account Folder Creation with Flow Builder

Save time manually creating and filling out Close Plans with templates in Flow Builder. Use Flow Builder to automatically create Account folders in Quip and add your Close Plans to them.

Use a flow to automatically populate a Close Plan attached to an Opportunity when an Opportunity is created. After you create a document from the template, the flow moves the document to an existing folder named for the Opportunity's parent Account or creates a one.

EDITIONS

Available in: **Lightning Experience**

Create an All Accounts Folder in Quip

To keep all of your Account folders in one organized place, create an All Accounts parent folder in Quip. Flow later adds Account folders to this parent folder.

1. In Quip, click **Compose**, and then **New Folder**.
2. Name the folder *All Accounts* and click **Create**.
3. Click **Share** and turn on link sharing.

EDITIONS

Available in: **Lightning Experience**

Create a Custom Folder URL Field

To store the folder URL of documents created from a template, create a custom Folder URL field. Flow later uses this field to check whether a folder exists for an Account.

1. From Salesforce Setup, go to the Object Manager, and select **Account**.
2. Select **Fields & Relationships**, and then **New**.
3. Select **URL**, and then **Next**.
4. Enter *Quip Folder* as the field label and click **Next**.
5. Select the profiles that can edit the field, and click **Next**.
6. Save the action.

EDITIONS

Available in: **Lightning Experience**

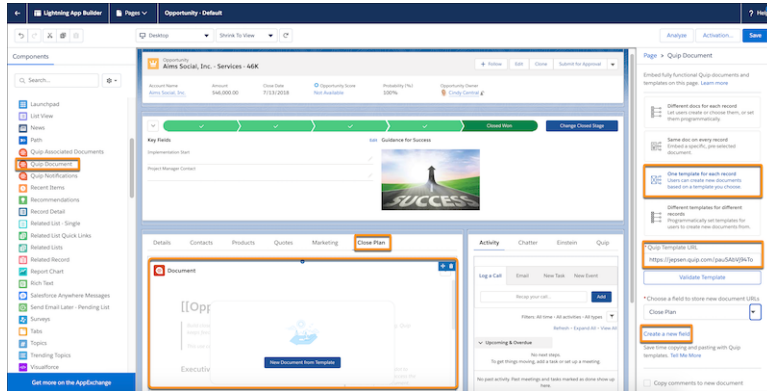
Set Up the Quip Document Component

Set up the Quip Document component on the Opportunity page layout. Create a Close Plan custom URL field to store Close Plans created from your template.


1. Navigate to an Opportunity record in Lightning Experience.
2. Click the gear icon, and select **Edit Page** to go to the Lightning App Builder.
3. Create a new tab called Close Plan.
4. In the left pane, select **Quip Document** and drag it to your new tab.

EDITIONS

Available in: **Lightning Experience**



5. Select **One template for each record**.

 **Note:** *One template for each record* lets you add a template via Flow Builder or lets your users manually add a template. To use Flow Builder only, select **Different Docs for each record**.

6.

Click . You can either paste your Close Plan template URL or select a template from the Template Library.

7. Click **Next** and validate the template. The validation checks that you have access to the document, that link sharing is turned on, that the document is marked as a template, and that it isn't a slide.

8. To create a custom URL field to store the new document URLs, select **Create a new field**.

9. Enter `Close Plan` as the field label and `Close_Plan` as the field name. You can make changes later from the Object Manager.

Create a Custom Field

Add a custom URL field to store the documents created from a template. By default, Standard profiles have edit access. The custom URL field isn't added to your page layout. You can make changes later from the [Object Manager](#).

* Field Label

* Field Name

Description

Cancel Save

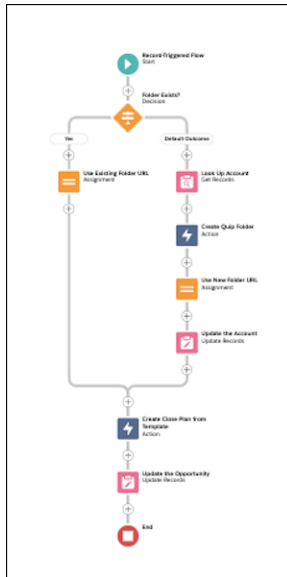
10. Save and activate the action.

Build a Flow to Add Opportunity Close Plans to New or Existing Account Folders

Use Flow Builder to create Close Plans from a template when an Opportunity is created and move them to the parent Account folder. If the folder doesn't exist, use Flow Builder to create one.

EDITIONS

Available in: **Lightning Experience**

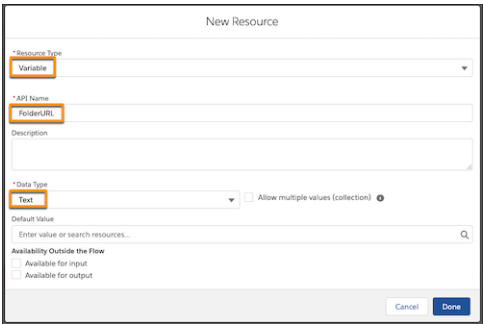


1. From the Quick Find box in Setup, enter *Flows*.
2. Click **New Flow**.
3. Select **Record-Triggered Flow** and click Next.
Flow Builder displays the flow in the Auto-Layout flow layout. You can access Interactions, Logic, and Data via the plus icon.
4. Under Trigger, click **Edit**. Set the flow to trigger when a **record is created**, and run the flow **after the record is saved**. Click **Done**.
5. Click **Choose Object**.
6. Select **Opportunity** as the object and set the conditions to **None**.
7. Check to see if a folder exists.
 - a. From the Elements tab, drag **Decision** onto your flow's canvas.

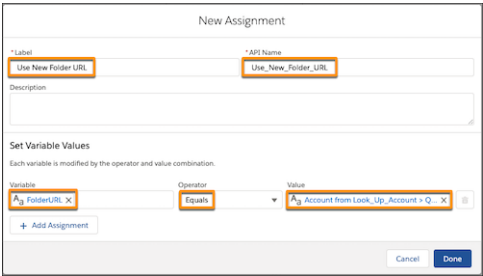
- b. Name the decision *Folder Exists?*.
 - c. Create outcomes for when the folder is already created and for when it's not.

Label	Condition Requirements to Execute Outcome	Resource	Operator	Value
Yes	All Conditions Are Met (AND)	{!\$Record.Account.Quip_Folder__c}	Is Null	False

- d. For the document exists outcome, set the Account Plan URL field reference to **Is Null**, and the Value to **False**. For the document doesn't yet exist outcome, set the Account Plan URL field reference to **Is Null**, and the Value to **True**.
- 8. If a folder exists, add Close Plans created from a template to it.
 - a. From the Elements tab, drag **Assignment** onto your flow's canvas.
 - b. Name the assignment *Use Existing Folder URL*.
 - c. For the Variable, click **New Resource**.



- d. Set the Resource Type to **Variable** and enter *FolderURL* as the API Name. Set the Data Type to **Text** and click **Done**.
- e. Set the variable values.



Variable	Operator	Value
FolderURL	Equals	{!\$Record.Account.Quip_Folder__c}

- f. Click **Done**.
- g. Connect the Decision and Assignment elements and set the Outcome to **Yes**.
- 9. If a folder doesn't exist, check to see the Opportunity's parent Account.
 - a. From the Elements tab, drag **Get Records** onto your flow's canvas.

New Get Records

Find Salesforce records and store their field values in flow variables.

*Label: Look Up Account *API Name: Look_Up_Account

Description:

Get Records of This Object

*Object: Account

Filter Account Records

Condition Requirements: All Conditions Are Met (AND)

Field	Operator	Value
Id	Equals	{!\$Record.Account.Id}

+ Add Condition

Cancel Done

- b. Enter a name for the action. Here, we use *Look Up Account*. Select **Account** as the Object, and set conditions. Here, we set **All Conditions to be met**, and Id to equal `{!$Record.Account.Id}`.
- c. Click **Done**.

10. If a folder doesn't exist, create one.

- a. From the Elements tab, drag a new action onto the canvas.
- b. Select **Quip** and enter *Create Quip Folder*.

New Action

Filter By: Category

All

Work Order

Service Appointment

Users

Product Request

Quip

Group

Appointment

Knowledge articles

Appointments

Case

Action: Create Quip Folder

Use values from earlier in the flow to set the inputs for the "Create Quip Folder" core action. To use its outputs later in the flow, store them in variables.

*Label: Create Quip Folder *API Name: Create_Quip_Folder

Description:

Set Input Values

F₀ Folder Name: {!\$Record.Account.Name}

F₁ Folder Color: ☐ Don't include

F₂ Parent Folder URL: <https://japan.quip.com/3a070wvQTF0j/All> ☒ Include

Advanced

☒ Manually assign variables

Store Output Values

F₃ Created Folder Title: Search variables...

F₄ Folder ID: {!Look_Up_Account.Quip_Folder__c}

Cancel Done

- c. Enter a name for the action. Here, we use *Create Quip Folder*.
- d. Enter `{!$Record.Account.Name}` as the Folder Name.
- e. Include the **Parent Folder URL** and enter the All Accounts folder URL.
- f. Under Advanced, click **Manually assign variables**.
- g. Enter `{!Look_Up_Account.Quip_Folder__c}` as the Folder ID.
- h. Click **Done**.
- i. Connect the Lock Up Account and Create Quip Folder actions on the canvas.

11. If a folder doesn't exist, add Close Plans created from a template to it.

- a. From the Elements tab, drag Assignment onto your flow's canvas.

- b. Name the assignment *Use New Folder URL*.

- c. Set the variable values.

Variable	Operator	Value
FolderURL	Equals	{!Look_Up_Account.Quip_Folder__c}

- d. Click **Done**.

- e. Connect the Create Quip Folder and Use New Folder URL elements on the canvas.

12. If a folder doesn't exist, update the Account with the new folder information.

- a. From the Elements tab, drag **Update Records** onto your flow's canvas.

- b. Name the action *Update the Account*.

- c. Select **Use the IDs and all field values from a record or record collection**.

- d. Under Select Record(s) to Update, enter `{!Look_Up_Account}`.

- e. Click **Done**.

- f. Connect the Use New Folder URL and Update the Account elements on the canvas.

13. Create Close Plans from a template.

- a. From the Elements tab, drag a new action onto the canvas.
- b. Select **Quip** and enter *Copy Quip Document* as the Quip action.

New Action

Filter By:
 Category:
 All
 Work Order
 Service Appointment
 Users
 Product Request
 Quip
 Group
 Appointment
 Knowledge articles
 Appointment

Action:
 Copy Quip Document

Use values from earlier in the flow to set the inputs for the "Copy Quip Document" core action. To use an output later in the flow, click Store in variables.

Label:
 Create Close Plan from Template

Description:

Set Input Values

Δ Document URL:
 {!\$Record.Url}

☐ Company Link Access:
 Don't include

Δ Content Record ID:
 Don't include

☐ Copy comments to new document:
 Don't include

Δ Member Emails:
 Don't include

Δ Member Folder URLs:
 {!FolderURL}

Δ Source Record ID:
 {!\$Record.Id}

Δ Target Record URL Field:
 Don't include

Δ Title:
 Don't include

Advanced
 ☒ Manually assign variables

Store Output Values

Δ Created Document Title:
 Search variables...

Δ Document ID:
 Search variables...

Δ Document Link:
 {!\$Record.Close_Plan__c}

Cancel Save

- c. Name the action *Create Close Plan from Template*.
 - d. Enter the Document URL for the Close Plan.
 - e. Include the **Member Folder URLs** and enter *{!FolderURL}*.
 - f. Include the **Source Record ID** and enter *{!\$Record.Id}*.
 - g. Under Advanced, click **Manually assign variables**.
 - h. For the Document Link, enter *{!\$Record.Close_Plan__c}*.
 - i. Connect the Use Existing Folder URL and Update the Account elements to the Create Close Plan from Template action.
- 14.** Update the Opportunity record with the new document URL.
- a. From the Elements tab, drag **Update Records** onto your flow's canvas.

- b. Name the action *Update the Opportunity*.
 - c. Select **Use the IDs and all field values from a record or record collection**.
 - d. Under Select Record(s) to Update, enter `{!$Record.}`.
 - e. Click **Done**.
 - f. Connect the Create Close Plan from Template action and Update the Opportunity element on the canvas.
15. Click **Save**. Name the flow. For this example, we use the name *Automate Account Folders*. To auto-create the API name, press Tab. Click **Save**.
 16. Click **Activate**.

Create an Opportunity

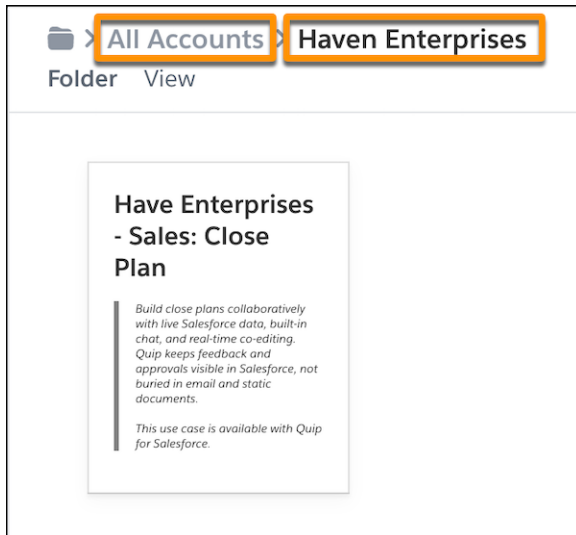
To see your flow in action and automatically create a Close Plan and add it to an Account folder, create an Opportunity in Lightning Experience.

1. In Salesforce, click **New Opportunity**.
2. Select **Simple Opportunity**, and then **Next**.
3. Enter your opportunity information and save the action.

EDITIONS

Available in: **Lightning Experience**

A Close Plan is automatically created and added to the Close Plan tab on the record. A new Account folder is created with the Account name to the All Accounts folder in Quip and the Close Plan is added to it.



Add Opportunity Team Members to a Close Plan

Automatically add an Opportunity's Team Members to a Close Plan when an Opportunity is created. Also add Opportunity Team Members to existing Close Plans already linked to an Opportunity so they always have a 360-degree view.

Use a flow to automatically populate add Opportunity Team Members to an Opportunity Close Plan. Use Process Builder to create a Close Plan from a template when an Opportunity is created. After you create a document from the template, the flow adds the Opportunity Team Members to the Close Plan. Process Builder then also adds Opportunity Team Members to an Opportunity's existing Close Plan.

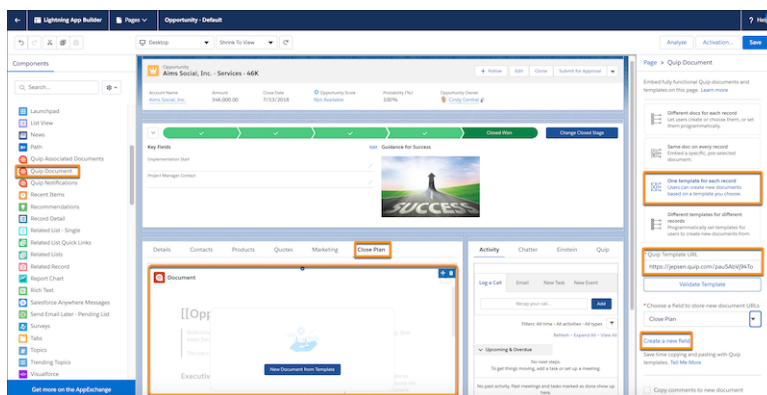
EDITIONS

Available in: **Lightning Experience**

Set Up the Quip Document Component

Set up the Quip Document component on the Opportunity page layout. Create a Close Plan custom URL field to store Close Plans created from your template.

1. Navigate to an Opportunity record in Lightning Experience.
2. Click the gear icon, and select **Edit Page** to go to the Lightning App Builder.
3. Create a new tab called Close Plan.
4. In the left pane, select **Quip Document** and drag it to your new tab.



5. Select **One template for each record**.



Note: *One template for each record* lets you add a template via Flow Builder or lets your users manually add a template. To use Flow Builder only, select **Different Docs for each record**.

6.



Click . You can either paste your Close Plan template URL or select a template from the Template Library.

7. Click **Next** and validate the template. The validation checks that you have access to the document, that link sharing is turned on, that the document is marked as a template, and that it isn't a slide.

8. To create a custom URL field to store the new document URLs, select **Create a new field**.

9. Enter *Close Plan* as the field label and the field name. You can make changes later from the Object Manager.

10. Save and activate the action.

To automatically add Opportunity Team Members to a Close Plan created from the embedded template, create an autolaunched flow.

Build a Flow to Add Opportunity Team Members to a Close Plan

Create an autolaunched flow in Flow Builder that automatically adds an Opportunity's team members when a Close Plan is created from the template.

1. From the Quick Find box in Setup, enter *Flows*.

2. Click **New Flow**.

3. Select **Autolaunched Flow** and click **Next**.

Flow Builder displays the flow in the Auto-Layout flow layout. You can access Interactions, Logic, and Data via the plus icon.

Process Builder later launches the flow when an Opportunity stage is changed.

4. From the Manager tab, click **New Resource**.

5. Select **Variable** as the Resource Type, enter the API name *OpportunityTeamMembers*, select **Record** as the Data Type, and select **Opportunity Team Member** as the Object. Select **Allow multiple values (collection)**, and then **Available for input** and **Available for output**, and click Done.

New Resource

* Resource Type
Variable

* API Name
OpportunityTeamMembers

Description

* Data Type
Record ☒ Allow multiple values (collection)

* Object
Opportunity Team Member

Availability Outside the Flow
☒ Available for input
☒ Available for output

Cancel Done

6. From the Manager tab, click **New Resource**.
7. Select **Variable** as the Resource Type.
8. Enter the API name *OpportunityRecord*.
9. Select **Record** as the Data Type.
10. Select **Opportunity** as the Object.
11. Select **Available for input** and click **Done**.
12. From the Elements tab, drag **Get Records** onto the canvas.
13. Enter a name for the action. Here, we use *Get Related Opportunity Team Members*. Select **Opportunity Team Member** as the Object, and set conditions. Here, we set All Conditions to be met, and *OpportunityId* to equal `{!OpportunityRecord.id}`.

Edit Get Records

Find Salesforce records and store their field values in flow variables.

Get Related Opportunity Team Mem... (Get_Related_Opportunity_Team_Mem...

Get Records of This Object

* Object
Opportunity Team Member

Filter Opportunity Team Member Records

Condition Requirements

All Conditions Are Met (AND)

Field: OpportunityId Operator: Equals Value: OpportunityRecord > Opportunit...

+ Add Condition

Sort Opportunity Team Member Records

Sort Order: Not Sorted ⚠ If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

☐ Only the first record
☒ All records

How to Store Record Data

☐ Automatically store all fields
☐ Choose fields and let Salesforce do the rest
☒ Choose fields and assign variables (advanced)

To use the returned Opportunity Team Member records in the flow, store their fields in variables.

Select Variable to Store Opportunity Team Member Records

* Record Collection
OpportunityTeamMembers

Select Opportunity Team Member Fields to Store in Variable

Field: ID
Field: UserId
+ Add Field

☒ When no records are returned, set specified variables to null.

Cancel Done

14. Under How Many Records to Store, select **All records**. Select **Choose fields and assign variables (advanced)**, then enter *OpportunityTeamMembers* collection as the Record Collection.
15. Under Select Opportunity Team Member Fields to Store in Variable, select **ID** and **UserId**
16. Select **When no records are returned, set specified variables to null**, then click **Done**.
17. Connect the elements on the canvas. Save the flow and enter a name. Here, we use *Add Opportunity Team Members to Close Plan*.
18. From the Elements tab, drag **Loop** onto the canvas.
19. Enter a name for the loop. Here, we use *Loop Through Opportunity Team Members*. Enter *OpportunityTeamMembers* as the Collection Variable, and select **First item to last item** as the Direction. Click **Done**.

New Loop

Start a loop path for iterating over items in a collection variable. For each iteration, the flow temporarily stores the item in the loop variable.

* Label: **Loop Through Opportunity Team Members** * API Name: **Loop_Through_Opportunity_Team_Members**

Description:

Select Collection Variable

* Collection Variable: **(!OpportunityTeamMembers)**

Specify Direction for Iterating Over Collection

* Direction:
☒ **First item to last item**
☐ Last item to first item

To use the current item in other elements in the loop, use the API name of the Loop element. Example: if your flow iterates over accounts with a Loop element named "My_Account_Loop" you can reference the current item from that loop element. Just start typing "My_Account_Loop" and select "Current Item from Loop My_Account_Loop".

20. Connect the Get Records and Loop elements on the canvas and click **Save**.

21. From the Manager tab, click **New Resource**.

22. Select **Variable** as the Resource Type, enter the API name *UserEmailAddresses*, and select **Text** as the Data Type. Select **Available for input** and **Available for output**, and click Done.

New Resource

* Resource Type: **Variable**

* API Name: **UserEmailAddresses**

Description:

* Data Type: **Text** ☐ Allow multiple values (collection) ⓘ

Default Value:

Availability Outside the Flow

☒ Available for input
☒ Available for output

23. From the Elements tab, drag **Get Records** onto the canvas.

24. Enter a name for the action. Here, we use *Get Opportunity Team User Record*. Select **User** as the Object, and set conditions. Here, we set All Conditions to be met, and *Id* to equal `{!Loop_Through_Opportunity_Team_Members.UserId}`.

New Get Records

Find Salesforce records and store their field values in flow variables.

* Label: **Get Opportunity Team User Record** * API Name: Get_Oppportunity_Team_User_Record

Description:

Get Records of This Object

* Object: **User**

Filter User Records

Condition Requirements: All Conditions Are Met (AND)

Field: **Id** Operator: **Equals** Value: **Current Item from Loop Loop_Th...**

+ Add Condition

Sort User Records

Sort Order: **Not Sorted** ⚠ If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

☒ Only the first record
☐ All records

How to Store Record Data

☐ Automatically store all fields
☐ Choose fields and let Salesforce do the rest
☒ Choose fields and assign variables (advanced)

To use the returned **User** records in the flow, store their fields in variables.

Where to Store Field Values

☐ Together in a record variable
☒ In separate variables

Select Variables to Store User Fields

Field: **Email** → Variable: **UserEmailAddresses**

+ Add Field

☒ When no records are returned, set specified variables to null.

Cancel Done

25. Under **How Many Records to Store**, select **Only the first record**. Select **Choose fields and assign variables (advanced)**, then select **In separate variables**.
26. Under **Select Variables to Store User Fields**, select **Email** and **UserEmailAddresses**.
27. Select **When no records are returned, set specified variables to null**, then click **Done**.
28. Connect the Loop and new Get Records action on the canvas. Select **For each item in the collection**, and click **Done**.
29. From the Elements tab, drag a new action onto the canvas.
30. Select **Quip** and enter *Add Members to Document*.
31. Name the action *Add Opportunity Members to Documents*.

New Action

Filter By: Category

Action: **Add Members to Document**

Use values from earlier in the flow to set the inputs for the "Add Members to Document" core action. To use its outputs later in the flow, store them in variables.

* Label: Add Opportunity Members to Document * API Name: Add_Oppportunity_Members_to_Docum...

Description:

Set Input Values

A₃ * Document URL: **{!OpportunityRecord.Close_Plan__c}**

A₃ Add Comment-Access Members by Email Address: ☐ Don't Include

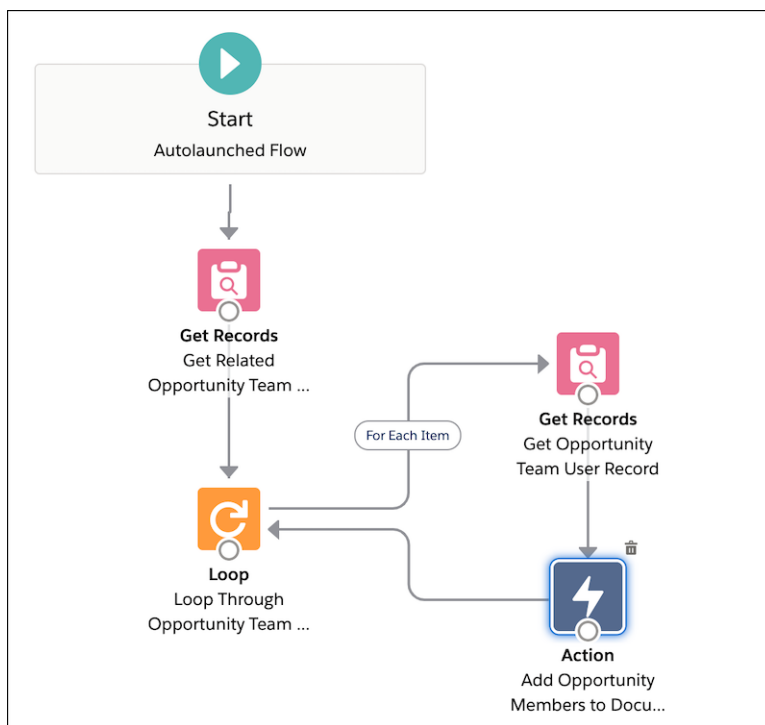
A₃ Add Edit-Access Members by Email Address: ☐ Don't Include

A₃ Add Full-Access Members by Email Address: **{!UserEmailAddresses}** ☒ Include

A₃ Add View-Access Members by Email Address: ☐ Don't Include

Cancel Done

32. For the Document URL, enter `{!OpportunityRecord.Close_Plan__c}`, where Close_Plan__c is the API name of your custom URL field.
33. To give Opportunity Team Members edit and sharing access to an Opportunity's Close Plans, include **Add Full-Access Members by Email Address**, and select **UserEmailAddresses**. Click **Done**.
34. Connect the **Get Opportunity Team User Record** Get Records element and your new action. To complete the flow, connect the action and the loop, then click **Save**.



35. Activate the flow.

Build a Process to Launch the Flow When an Opportunity Is Created

Create a process in Process Builder that automatically creates a Close Plan from a template when an Opportunity is created. Launch the previous flow to add the Opportunity's Team Members to new and existing Close Plans.

1. From the Quick Find box in Setup, enter *Process*. Select **Process Builder**.
2. Click **New**.

The screenshot shows the 'New Process' form in Salesforce Process Builder. The 'Process Name' field contains 'Create Close Plan' and the 'API Name' field contains 'Create_Close_Plan'. The 'Description' field is empty. The 'The process starts when' dropdown menu is set to 'A record changes'. At the bottom right, there are 'Cancel' and 'Save' buttons.

3. Name the process *Create Close Plan*. To auto-create the API name, press **Tab**.
4. Select **A record changes** as the process trigger. Click **Save**.
5. Click **+ Add Object** and select **Opportunity** as the object type. Start the process **only when a record is created** and click **Save**.
6. Click **+ Add Criteria**.

The screenshot shows the 'Define Criteria for this Action Group' form. The 'Criteria Name' is 'Close Plan URL is Null'. Under 'Criteria for Executing Actions', the 'Conditions are met' radio button is selected. Under 'Set Conditions', a table shows one condition: Field '[Opportunity]... Q', Operator 'Is null', Type 'Boolean', and Value 'True'. Under 'Conditions', the 'All of the conditions are met (AND)' radio button is selected. At the bottom are 'Save' and 'Cancel' buttons.

7. Name the criteria *Close Plan URL is Null*.
8. To determine when to trigger the process, select **Conditions are met**.
9. Set the conditions:

Field	Operator	Type	Value
[Opportunity].Close_Plan__c	Is null	Boolean	True

10. Under Conditions, click **All of the conditions are met (AND)**.
11. Click **Save**.
12. Click **+ Add Action**.
13. Select **Quip** as the Action Type, and name the action *Create Close Plan from Template*.

Select and Define Action

Action Type *
Quip

Action Name *
Create Close Plan from Template

Quip Action *
Copy Document

Document URL

Type * Value *
String https://jepsen.quip.com/pau5AbVj94To/OpportunityName-Close-Plan

14. Select **Copy Document** as the Quip Action, and enter the URL of the document you want to use as your Close Plan template.
15. Under Advanced, enter *[Opportunity].Id* as the Source Salesforce Record. To store Close Plans created from the template in your Close Plan custom field, select **Close Plan** as the Target Record URL Field.

Source Salesforce Record
[Opportunity].Id

Target Record URL Field *
Close Plan

16. Save the action.
17. To add Opportunity Team Members to existing documents linked to Opportunities, click **+ Add Criteria**.

Define Criteria for this Action Group

Criteria Name * ⓘ
Close Plan URL is Filled In

Criteria for Executing Actions *
☒ Conditions are met
☐ Formula evaluates to true
☐ No criteria—just execute the actions!

Set Conditions

Field *	Operator *	Type *	Value *
1 [Opportunity].Close_Plan__c	Is null	Boolean	False

+ Add Row

Conditions *
☒ All of the conditions are met (AND)
☐ Any of the conditions are met (OR)
☐ Customize the logic

Save Cancel Delete

- 18. Name the criteria *Close Plan URL is Filled In*.
- 19. To determine when to trigger the process, select **Conditions are met**.
- 20. Set the conditions:

Field	Operator	Type	Value
[Opportunity].Close_Plan__c	Is null	Boolean	False

- 21. Under Conditions, click **All of the conditions are met (AND)**.
- 22. Click **Save**.
- 23. Click **+ Add Action**.
- 24. Select **Flows** as the Action Type.
- 25. Name the action *Call Flow to Add Opportunity Team Members to Close Plan*.

Select and Define Action ⓘ

Action Type *
Flows

Action Name * ⓘ
Call Flow to Add Opportunity Team

Flow * ⓘ
Add Opportunity Team Membe
Select an existing flow. If none exist, create one.

Set Flow Variables

Flow Variable *	Type *	Value *
OpportunityRecord	Field Reference	[Opportunity]

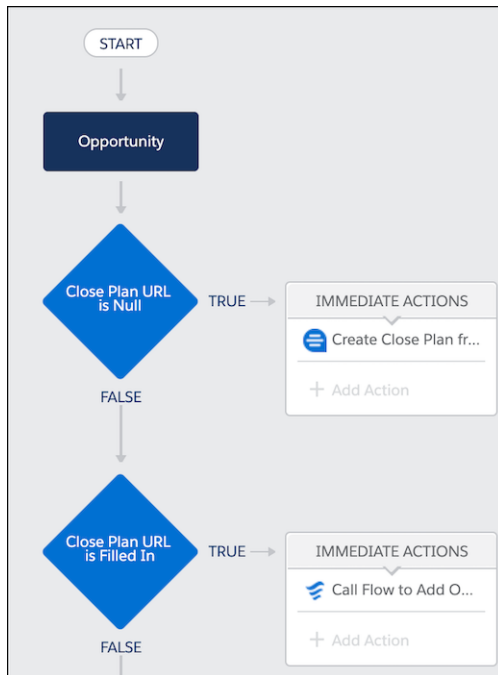
+ Add Row

- 26. Select the flow **Add Opportunity Team Members to Close Plan**.

27. Set the flow variables:


Flow Variable	Type	Value
OpportunityRecord	Field Reference	[Opportunity] Represents the Opportunity record that started the process.

28. Click **Save** and then **Activate**.



Your flow and process are ready to go! To see them in action, create an Opportunity in Salesforce.

- A Close Plan is automatically created and attached to the Opportunity record.
- The Opportunity Team Members are added to the Close Plan.

 **Note:** Make sure you have Opportunity Team Members set up and that their Salesforce emails match their Quip emails.

- If you edit an existing Opportunity with a linked Close Plan, the process launches your flow and adds the Opportunity Team Members to the Close Plan.

Automate Pricing Proposals with Flow Builder

Save time manually creating and filling out Pricing Proposals with templates in Flow Builder. Use Process Builder and Flow Builder to automatically add a Pricing Proposal template to an Opportunity and generate an auto-populated proposal when the Opportunity stage is set to Proposal/Quote. When the Opportunity is set to Closed/Won, export the proposal to a PDF and attach it to the Opportunity for record keeping.

EDITIONS

Available in: **Lightning Experience**

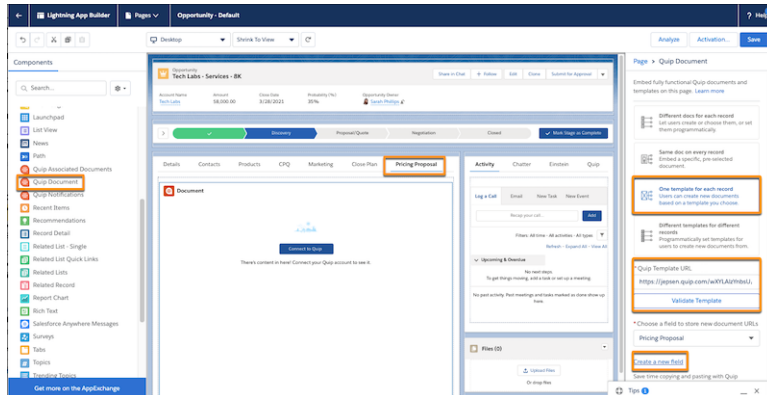
Set Up the Quip Document Component

Set up the Quip Document component on the Opportunity page layout. Create a Pricing Proposal custom URL field to store Pricing Proposals created from your template.

1. Navigate to an Opportunity record in Lightning Experience.
2. Click the gear icon, and select **Edit Page** to go to the Lightning App Builder.
3. Create a new tab called Pricing Proposal.
4. In the left pane, select **Quip Document** and drag it to your new tab.

EDITIONS

Available in: **Lightning Experience**



5. Select **One template for each record**.



Note: *One template for each record* lets you add a template via Flow Builder or lets your users manually add a template. To use Flow Builder only, select **Different Docs for each record**.

- 6.



Click . You can either paste your Pricing Proposal template URL or select a template from the Template Library.

7. Click **Next** and validate the template. The validation checks that you have access to the document, that link sharing is turned on, that the document is marked as a template, and that it isn't a slide.
8. To create a custom URL field to store the new document URLs, select **Create a new field**.
9. Enter *Pricing Proposal* as the field label and *Pricing_Proposal* field name. You can make changes later from the Object Manager.

Create a Custom Field

Add a custom URL field to store the documents created from a template. By default, Standard profiles have edit access. The custom URL field isn't added to your page layout. You can make changes later from the [Object Manager](#)

* Field Label

* Field Name

Description

Cancel

Save

10. Save and activate the page.

To add your Pricing Proposal template to the Quip Document component and to automate Pricing Proposal creation, create actions in Flow Builder and Process Builder.

Create a Pricing Proposal Template

Use Flow Builder to add your Pricing Proposal template to the Opportunity and to automatically populate Pricing Proposals created from it.

1. From the Quick Find box in Setup, enter *Flows*.
2. Click **New Flow**.
3. Select **Autolaunched Flow** and click **Next**.

Flow Builder displays the flow in the Auto-Layout flow layout. You can access Interactions, Logic, and Data via the plus icon. Process Builder later launches the flow when an Opportunity stage is changed.

4. Drag the Action element onto the canvas.
5. Select **Quip**.
6. Enter *Copy Quip Document* as the Quip action.
7. Name the action *Create Pricing Proposal from Template*. To auto-create the API name, press **Tab**.

EDITIONS

Available in: **Lightning Experience**

8. Enter the Document URL for the Pricing Proposal.
9. Include the Source Record ID. Under Source Record ID, click **+ New Resource**.
10. Select **Variable** as the Resource Type.
11. Enter the API name *OpportunityRecord*.

New Resource

* Resource Type
Variable

* API Name
OpportunityRecord

Description

* Data Type
Record ☐ Allow multiple values (collection)

* Object
Opportunity

Availability Outside the Flow
☒ Available for input
☐ Available for output

Cancel Done

12. Select **Record** as the Data Type.

13. Select **Opportunity** as the Object.

14. Select **Available for input** and click **Done**.

15. When you get the “Data type of the resource you entered isn’t compatible” error for the Source Record ID, enter `.id` after OpportunityRecord. Select **Opportunity ID**.

Pricebook2
Price Book ID

AccountId
Account ID

CloneSourceId
Clone Source

ContactId
Contact ID

CreatedById
Created By ID

**Id
Opportunity ID**

LastModifiedById
Last Modified By ID

OwnerId
Owner ID

Pricebook2Id
Price Book ID

{!OpportunityRecord.Id}

16. Under Advanced, select **Manually assign variables**. Under Store Output Values, click **Document Link** and select **+ New Resource**.

Advanced

☒ Manually assign variables

Store Output Values

Created Document Title
Search variables...

Document ID
Search variables...

Document Link
{!NewDocumentURL}

17. Select **Variable** as the Resource Type.

New Resource

* Resource Type
Variable

* API Name
NewDocumentURL

Description

* Data Type
Text

Allow multiple values (collection)

Default Value
Enter value or search resources...

Availability Outside the Flow
☒ Available for input
☒ Available for output

Cancel Done

18. Enter *NewDocumentURL* as the API Name.
19. Select **Text** as the Data Type. Click **Done**, then **Done**.
20. Drag the Update Records onto the canvas.
21. Name the action *Update Opportunity Record*. To auto-create the API name, press **Tab**.

New Update Records

Update Salesforce records using values from the flow.

* Label
Update Opportunity Records

* API Name
Update_Oppportunity_Records

Description

How to Find Records to Update and Set Their Values
☐ Use the IDs and all field values from a record or record collection
☒ Specify conditions to identify records, and set fields individually

Update Records of This Object Type
 * Object
 Opportunity

Filter Opportunity Records
 Condition Requirements for Records to Update
 All Conditions Are Met (AND)

Field	Operator	Value
Id	Equals	{!OpportunityRecord.Id}

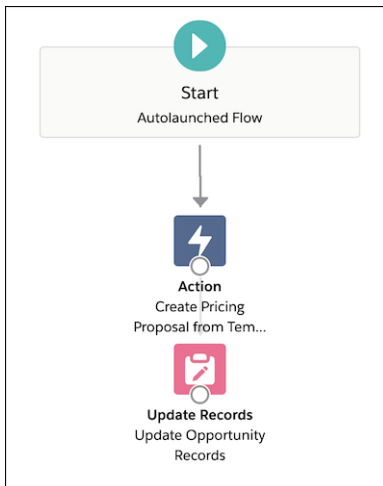
+ Add Condition

Set Field Values for the Opportunity Records

Field	Value
Pricing_Proposal__c	{!NewDocumentURL}

Cancel Done

22. Select **Specify conditions to identify records, and set fields individually**.
23. Enter *Opportunity* as the Object.
24. Under Filter Opportunity Records, enter *Id* as the Field, select **Equals**, and enter *{!OpportunityRecord.Id}*.
25. Under Set Field Values for the Opportunity Records, enter *Pricing_Proposal__c* as the Field and *{!NewDocumentURL}* as the Value. Click **Done**.
26. Connect the elements and click **Save**.



27. Name the flow. For this example, we use the name *Create Pricing Proposal from Template*. To auto-create the API name, press **Tab**. Click **Save**.

28. Click **Activate**.

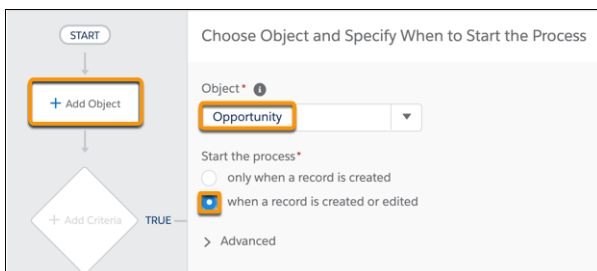
Trigger the Process

Create a process that launches the Pricing Proposal flow when an Opportunity stage is changed to Proposal/Quote. When a user updates the Opportunity stage to Proposal/Quote, a Pricing Proposal is created from the attached template and autopopulated based on the Opportunity's data.

EDITIONS


Available in: **Lightning Experience**

1. From the Quick Find box in Setup, enter *Process*. Select **Process Builder**.
2. Click **New**.
3. Name the process *Create Pricing Proposal*. To auto-create the API name, press **Tab**.
4. Select **A record changes** as the process trigger. Click **Save**.
5. Click **+ Add Object** and select **Opportunity** as the object type.



6. Start the process **when a record is created or edited**. Click **Save**.
7. Click **+ Add Criteria**.

Define Criteria for this Action Group

Criteria Name * 

Opportunity Stage Change

Criteria for Executing Actions *

☒ Conditions are met

☐ Formula evaluates to true

☐ No criteria—just execute the actions!

Set Conditions

	Field *	Operator *	Type *	Value *
1	[Opportunity].... Q	Equals	Picklist	Proposal/Price Quo ×
2	[Opportunity].... Q	Is changed	Boolean	True ×

+ Add Row

Conditions *

☒ All of the conditions are met (AND)

☐ Any of the conditions are met (OR)

☐ Customize the logic

> Advanced

Save **Cancel**

8. Name the criteria *Opportunity Stage Change*.
9. To determine when to trigger the process, select **Conditions are met**.
10. Set the conditions:

Field	Operator	Type	Value
[Opportunity]Stage	Equals	Picklist	Proposal/Quote

11. Click **+ Add Row** and set conditions:

Field	Operator	Type	Value
[Opportunity]Stage	Is changed	Boolean	True

12. Under Conditions, click **All of the conditions are met (AND)**.
13. Click **Save**.
14. Click **+ Add Action**.
15. Select **Flows** as the Action Type.
16. Name the action *Call Flow to Create Document from Template*.
17. Select the flow **Create_Pricing_Proposal_from_Template**.
18. Set the flow variables, where [Opportunity] is the Opportunity record that started the process:

Flow Variable	Type	Value
OpportunityRecord	Field Reference	[Opportunity]

19. Click **Save** and then **Activate**.

When your users update an Opportunity stage to Proposal/Quote, a Pricing Proposal is automatically created and data from the opportunity is autopopulated. The created document is then stored in the Pricing Proposal field added to the Opportunity layout.

Create a Pricing Proposal Checkbox

To let your users mark when the Pricing Proposal is completed and ready for the customer, add a checkbox field to the Opportunity layout. After your users select it, it launches the flow to export the Pricing Proposal to a PDF and attaches it to the Opportunity.

1. From Salesforce Setup, go to the Object Manager, and select **Opportunity**.
2. Select **Fields & Relationships**, and then **New**.
3. Select **Checkbox**, and then **Next**.
4. Enter *Pricing Proposal Complete*, and then **Next**.
5. Select the profiles that can edit the field, and click **Next**.
6. Select the page layouts where you want the field to appear. Here, we deselected all layouts except the Opportunity layout.
7. Save the action.

EDITIONS

Available in: **Lightning Experience**

Export to PDF and Attach to the Opportunity

After a user marks the Pricing Proposal as completed, export the document to a PDF to keep a record of it and attach it to the Opportunity. Post a message in Chatter to let the user know when the PDF was attached.

1. From the Quick Find box in Setup, enter *Flows*.
2. Click **New Flow**.
3. Select **Record-Triggered Flow** and click **Next**.
Flow Builder displays the flow in the Auto-Layout flow layout. You can access Interactions, Logic, and Data via the plus icon.
Process Builder later launches the flow when an Opportunity stage is changed.
4. Under Trigger, click **Edit**. Set the flow to trigger when **a record is created or updated**, and run the flow **after the record is saved**. Click **Done**.
5. Click **Choose Object**.

EDITIONS

Available in: **Lightning Experience**

6. Select **Opportunity** as the object and set the conditions for when to launch the flow.

Field	Operator	Value
Pricing_Proposal__c	Is Null	False

Pricing_Proposal_Complete__c	Equals	True
StageName	Equals	Proposal/Quote

7. Set the flow to run **only when a record is updated to meet the condition requirements**, and click **Done**.
8. Drag the Action element onto the canvas.
9. Select **Quip**.
10. Enter *Export Quip Document to PDF* as the Quip action.
11. Name the action *Export to PDF*.
12. For the Source Document URL, enter `{!$Record.Pricing_Proposal__c}`.
13. Include the Salesforce Org ID. [Where do I find my org Id?](#)
14. Include the Target Record ID, and enter `{!$Record.Id}`.
15. Click **Done**.
16. Drag the Action element onto the canvas.
17. Enter *Post to Chatter* as the core action.

The screenshot shows the 'New Action' configuration window in Salesforce Flow Builder. On the left, a sidebar lists various categories like 'All', 'Work Order', 'Service Appointment', etc., with 'Quip' selected. The main area is titled 'New Action' and shows the 'Action' dropdown set to 'Post to Chatter'. Below this, there's a description: 'Use values from earlier in the flow to set the inputs for the "Post to Chatter" core action. To use its outputs later in the flow, store them in variables.' There are fields for 'Label' (set to 'Update Users in Chatter') and 'Description'. Under 'Set Input Values', there are three rows: 'A1 *Message' with the value 'Pricing Proposal is complete. A PDF version is', 'A2 *Target Name or ID' with the value '{!\$Record.Id}', and 'A3 *Experience Cloud Site ID' which is empty. A 'Don't Include' toggle is turned off. At the bottom, there's a 'Target Type' dropdown set to 'Record' and 'Cancel'/'Done' buttons.

18. Name the action *Update Users in Chatter*, and enter a custom message. Here, we say *Pricing Proposal is complete. A PDF version is being generated and will be attached within a few minutes*.
19. For the Target Name or ID, enter `{!$Record.Id}`.
20. Click **Done**.
21. Connect the elements, and click **Save**. Name the flow *Export PDF to Opportunity*, and save the action.
22. Activate the flow.



Your flows and process are ready to go! To see them in action, go to an Opportunity page and change the stage to Proposal/Quote. A Pricing Proposal document is automatically created from the template. After the user fills it out and confirms the details with their customer, they can mark the Pricing Proposal as complete. Flow then posts a message in Chatter to let the user a PDF is being generated, and the PDF is attached to the opportunity for recordkeeping.

It can take a couple of minutes for the PDF to be added to the record. You can find it in the record’s Notes and Attachments component or in its Files component.

Add a Competitive Analysis Section to an Existing Account Plan

Use Flow Builder to automatically add a section to the document associated a record each time the record is updated. For example, if you create an Account Plan template and associate it with the Account object, you can use the Edit Quip Document action to add a Competitive Analysis section.

- 1. Open Flow Builder.
From Setup, you can type *Flows* in the Quick Find box, select **Flows**, and then click **New Flow**.
- 2. In the New Flow dialog box, select **Record-Triggered Flow**, and then click **Create**.

- 3. Fill in the fields using the following values, and then click **Done**.

Field	Description
Object	Object associated with the document that you want to add content to, for example, <i>Account</i> .
Trigger the Flow When	A record is created or updated

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To create or change custom fields:

- Customize Application

To open, edit, or create a flow in Flow Builder:

- Manage Flow

Field	Description
Condition Requirements	None Alternatively, you can create a custom field on the object and set the Condition Requirements to check for an update to the custom field.
Run the Flow	After the record is saved

4. In the Flow Builder canvas, add the **Edit Quip Document** action.

5. In the New Action dialog box, fill in the fields, and then click **Done**.

For example, to replace a section titled Section A with a section titled Competitive Analysis, enter the following values.

Field	Description
Label	A name for the action, for example, <i>Edit Doc</i>
Content Location	Location where you want to add content. For example, to replace an existing section, enter <i>replace_section</i> .
Document URL	Link to the document where you're adding the document range. For example, to specify the document in the Quip Document URL field on a record, enter <i>{!\$Record.Quip_URL__c}</i> .
Document Type	<i>document</i>
Content	The content to add to the document, for example: <pre><h2>Competitive Analysis</h2><p>Specify the strengths and weaknesses of current and potential competitors.</p></pre> Set the field to Include.
Content Format	<i>html</i>
Section Match Type	<i>prefix</i>
Section Style	<i>heading</i>
Section Text	<i>Section A</i>

Field	Description
Section Type	<i>textmatch</i>
Document Link	<i>{!\$Record.Quip_URL__c}</i>

6. Connect the start of the flow to the action.

7. Click **Save**.

8. Activate the flow.

The next time an Account record associated with the Account Plan is updated, a new Competitive Analysis section appears in the Account Plan.

Automate Exporting a Quip Document to PDF

Use Flow Builder to export a Quip document to PDF anytime the record associated with the document is updated.

1. From Setup, create a custom field labeled *Generate_PDF* for the object you want to export a Quip document from.

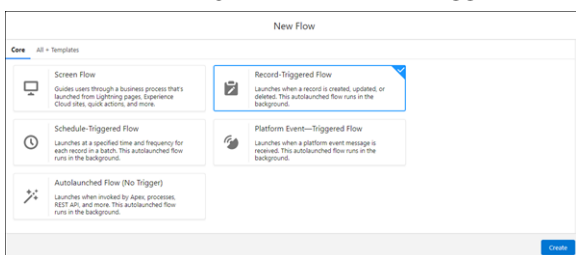
For example, to export a Quip document to PDF from the Account object, click **Objects and Fields > Object Manager > Account > Fields & Relationships > New**, and follow the steps to create the field.

The field name is autopopulated as *Generate_PDF__c*.

2. Open Flow Builder.

From Setup, you can type *Flows* in the Quick Find box, select **Flows**, and then click **New Flow**.

3. In the New Flow dialog box, select **Record-Triggered Flow**, and then click **Create**.



4. Fill in the fields using the following values, and then click **Done**.

Field	Description
Object	Object that you want to export the PDF from, for example, <i>Account</i> .
Trigger the Flow When	A record is updated
Condition Requirements	All Conditions Are Met (AND)
Field	<i>Generate_PDF__c</i>
Operator	Equals

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To create or change custom fields:

- Customize Application

To open, edit, or create a flow in Flow Builder:

- Manage Flow

Field	Description
Value	True
When to Run the Flow for Updated Records	Every time a record is updated and meets the condition requirements
Optimize the Flow for	Actions and Related Records

5. In the Flow Builder canvas, add the **Export Quip Document to PDF** action, and connect the start of the flow to the action.

6. Click **Save**.

7. Activate the flow.


The next time an Account record associated with the Account Plan is updated, a new Competitive Analysis section appears in the Account Plan.


Quip Actions in Process Builder

Create documents, chat rooms, and folders when important events occur. Attach a document to a record so that your users have information in context. Update your spreadsheets with the latest Salesforce data. Send a message to a chat room or document. Add new slides to a deck, copy documents, add members to a document or chat, lock document edits, and more.

EDITIONS

Available in: **Lightning Experience**

 **Important:** To better focus on our Salesforce integrations and innovations, Quip is retiring slides on January 31, 2021. Existing slide decks remain available and viewable but can't be edited after this date. After this date, slides no longer work in Process Builder and Flow Builder actions. We also can't provide technical support, issue fixes, or enhancements. To preserve your content, we recommend that you convert your presentations to documents. [Tell Me More](#)

 **Note:** To replace the existing Process Builder processes and Workflow Rules with flows before Process Builder and Workflow Rules reach end of support, see [Quip Actions in Flow Builder](#).


- [Sample Process: Managing Documents](#)
- [Create a Document, Folder, or Chat Room for a Process](#)
- [Add a Document to a Folder from a Process](#)
- [Add Members to a Document or Chat from a Process](#)
- [Add Members with Different Access Levels to a Document from a Process](#)
- [Add a Live App to a Template from a Process](#)
- [Remove a Document from a Process](#)
- [Remove Document Members from a Process](#)
- [Copy a Document from a Process](#)
- [Copy Content from a Process \(Retired\)](#)
- [Copy Content with Live Paste from a Process](#)
- [Copy Comments from a Process](#)
- [Edit a Document from a Process](#)
- [Edit a Spreadsheet from a Process](#)


- [Edit a Slide from a Process \(Retired\)](#)
- [Update Content Based on a Document Range from a Process](#)
- [Update a Template Section from a Process](#)
- [Attach a Document to a Record from a Process](#)
- [Lock Document Edits from a Process](#)
- [Lock Section Edits from a Process](#)
- [Export a Document to a PDF from a Process](#)
- [Send a Message from a Process](#)

Quip Actions in Flow Builder

Quip provides several core actions for organizing, creating, and copying your Quip content in flows. To add one of these actions to your flow, drag an Action element onto the canvas. Then select the **Quip** category, and search for the appropriate action.

 **Important:** Quip core actions don't support system-run flows or automated process users.

 **Important:** To better focus on our Salesforce integrations and innovations, Quip is retiring slides on January 31, 2021. Existing slide decks remain available and viewable but can't be edited after this date. After this date, slides no longer work in Process Builder and Flow Builder actions. We also can't provide technical support, issue fixes, or enhancements. To preserve your content, we recommend that you convert your presentations to documents. [Tell Me More](#)

 **Note:** To replace the existing Process Builder processes and Workflow Rules with flows before Process Builder and Workflow Rules reach [end of support](#), see [Quip Actions in Flow Builder](#).

- [Create Quip Document](#)
- [Create Quip Folder](#)
- [Create Quip Chat](#)
- [Add Quip Document to Folder](#)
- [Add Members to Quip Document](#)
- [Remove Members from Quip Document](#)
- [Remove Quip Document from Folder](#)
- [Remove Members from Quip Chat](#)
- [Attach Quip Document to Record](#)
- [Copy Quip Content \(Retired\)](#)
- [Copy Quip Document](#)
- [Copy with Live Paste](#)
- [Edit Quip Document](#)
- [Lock Quip Document](#)
- [Lock Quip Section](#)
- [Export Quip Document to PDF](#)
- [Send Message in Quip Chat](#)
- [Send Message in Quip Document](#)

EDITIONS

Available in: **Lightning Experience**

Quip Lightning Components

Use Quip Lightning components, like the Quip Associated Documents component, to get the best out of Quip features in Lightning Experience.

Here are some ways that integrating Quip into Salesforce enriches collaboration.

- Bring free-form content directly into Salesforce. The Quip Document component gives your team a shared place for everyday work, right on your Salesforce pages. All documents created in the Quip Document component are auto-attached as files to the Salesforce record.
- Use templates to streamline your Salesforce workflows. You can set up templates in Quip and share them with users through the Quip Template Library. For example, you can create an Account Plan template for your sales team and a Project Plan template for your project management team. Users can access the Template Library from Quip Lightning components to create and embed documents in Salesforce records. Documents created from templates with mail merge syntax are automatically populated with standard and custom fields from the Salesforce record.
- Edit rich documents, spreadsheets, and slides without switching apps. Collaborate on documents directly on your Salesforce pages, or expand documents into a window view for a richer editing experience. You can see the edit history, contribute to the document conversation, and share the document with new collaborators without leaving your browser tab.

Quip Associated Documents Component

Keep your documents in context with the Quip Associated Documents component. Associate related documents to records in Salesforce to make important information easy to find. See documents linked to related records and child accounts so you're always getting the complete picture. Get smart document suggestions of documents that may be related to a record based on the record's name.

Quip Document Component

With the Quip Document Lightning component you can work with fully functional documents and spreadsheets directly within Salesforce records. All of your favorite features are there—comments, @mentions, live apps, and more. It's all the collaboration that you need, right where you need it.

EDITIONS

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited** Editions

EDITIONS

Available in: **Lightning Experience**

Quip Associated Documents Component

Keep your documents in context with the Quip Associated Documents component. Associate related documents to records in Salesforce to make important information easy to find. See documents linked to related records and child accounts so you're always getting the complete picture. Get smart document suggestions of documents that may be related to a record based on the record's name.

See a record's related documents without leaving Salesforce. With the Quip Associated Documents component, the most relevant information is linked to the Salesforce record and can be opened and edited from the record itself. You can attach account plans to your Account pages to keep your users in the know. Give your users Edit access to let them collaborate, edit, or add their own related documents.

EDITIONS

Available in: **Lightning Experience**

Add the Quip Associated Documents Component

Add the Quip Associated Documents component to your page layouts so that documents are easy to access. You can add the component to accounts, opportunities, leads, most other standard objects, and your custom objects.

Organize Content with the Quip Associated Documents Component


With the Quip Associated Documents component, your documents, spreadsheets, and slides are easier to access and find.

Preview Documents in Salesforce

View and edit your documents without leaving Salesforce.

Add the Quip Associated Documents Component

Add the Quip Associated Documents component to your page layouts so that documents are easy to access. You can add the component to accounts, opportunities, leads, most other standard objects, and your custom objects.

 **Note:** The Quip Associated Documents component isn't available for user record pages or file details pages, nor when a record page is viewed from within an Experience Cloud site.

To add the Quip Associated Documents component:

1. From the Setup menu on a record page, click **Edit Page**.
2. Under Components, select **Quip Associated Documents**.
3. Drag the component to the column on the right.
4. Click **Save** and then click **Activation**.
5. On the Activation: Account Record Page, click **Assign as Org Default** and close the page.

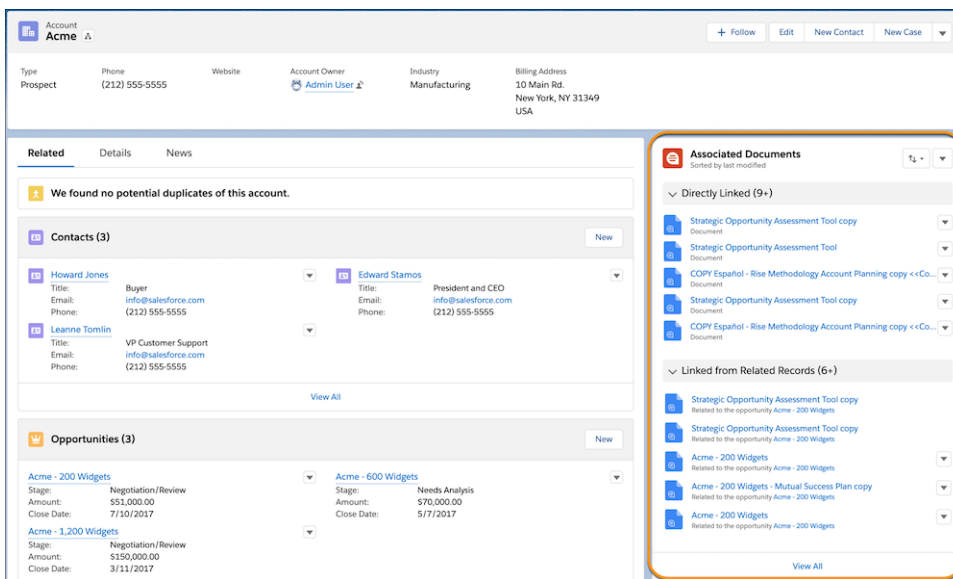
EDITIONS

Available in: **Lightning Experience**

USER PERMISSIONS

To add the Quip Lightning component:

- Administrator Permissions



Organize Content with the Quip Associated Documents Component

With the Quip Associated Documents component, your documents, spreadsheets, and slides are easier to access and find.

To directly link a document to a record, click **Link Quip Document**. You can search for any document you have access to or add the document by URL. You can also link a suggested document. Quip shows documents you have access to that reference the record in the title.

To create documents from the component, click **New Document** or **New Spreadsheet**. Documents and spreadsheets created from a record's Associated Document component are directly linked to that record by default.

To see documents linked from related records, click the **Linked from Related Records** tab. To open an expanded view that supports rich text editing without leaving the record, click a document. To link a related document to the record, click **Link Directly**. The Associated Document Component looks at 20 records per related list and up to 1000 records total.

EDITIONS

Available in: **Lightning Experience**

After the Quip component is populated, collaboration is a breeze. You can search for docs and share links to docs. Sending a link doesn't give users access to a file. For security reasons, you can set sharing permissions separately.

Link a Document Based on a Template

Access the Quip Template Library in Salesforce to quickly create a new Quip document that's automatically linked to a Salesforce record. If the template contains mail merge syntax, it's populated with Salesforce data automatically.

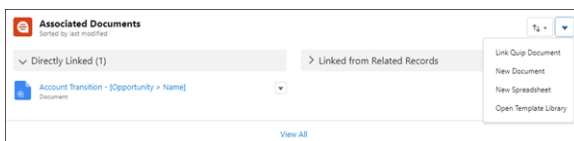
Link a Document Based on a Template

Access the Quip Template Library in Salesforce to quickly create a new Quip document that's automatically linked to a Salesforce record. If the template contains mail merge syntax, it's populated with Salesforce data automatically.

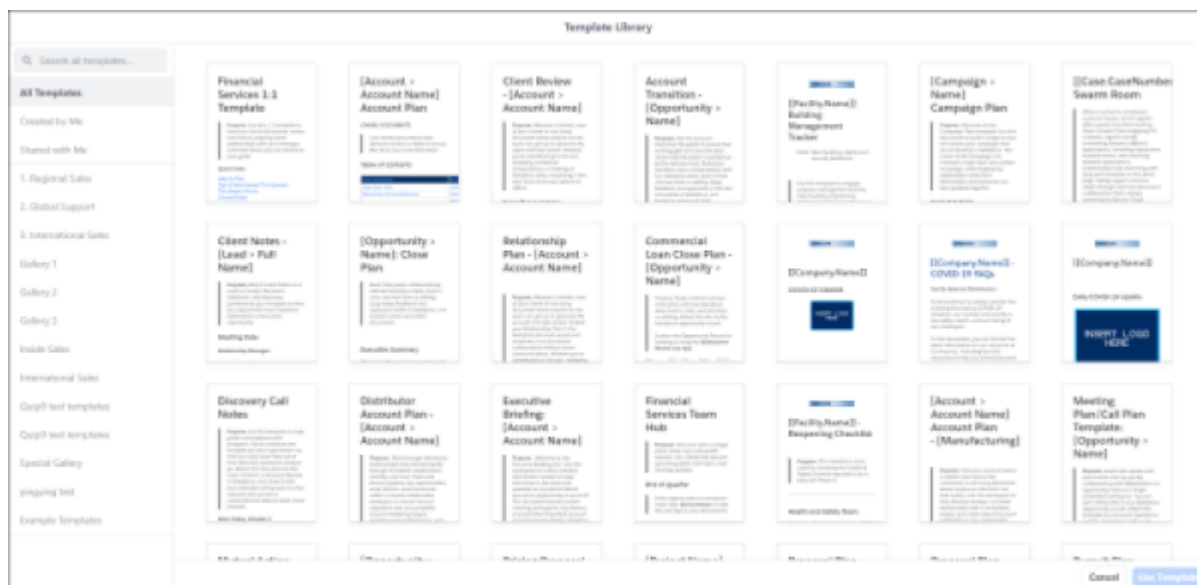
Ensure that you or your admin created the template that you want to use. You can only create templates in Quip.

Ensure that you completed the connection from Quip to Salesforce in the Salesforce tab of the Quip Account Settings window.

1. In the Quip Associated Documents component, click **Open Template Library** from the dropdown.



2. In the Template Library, select the template to use, and click **Use Template**.



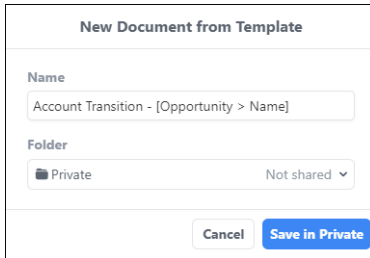
You can search by name across all galleries, or you can narrow your search to a specific gallery.

The New Document from Template window appears.

3. Select the Quip folder where you want to save the document.

EDITIONS

Available in: Lightning Experience



To preserve any mail merge syntax, the document name isn't editable.

4. Click **Save in**.

Your new document appears in the Quip canvas.

If the template contains mail merge syntax, your new document is populated with Salesforce data right away. Link sharing also takes effect immediately.

In the background, Salesforce works on linking the document to the record and setting up any synced sharing that you configured. When the link to the record is complete, the document is listed in the Associated Documents component.

5. Edit the document as needed, and then close the Quip canvas.

SEE ALSO:

[Template Library](#)

Preview Documents in Salesforce












View and edit your documents without leaving Salesforce.

Documents, sheets, and slides previews are available:

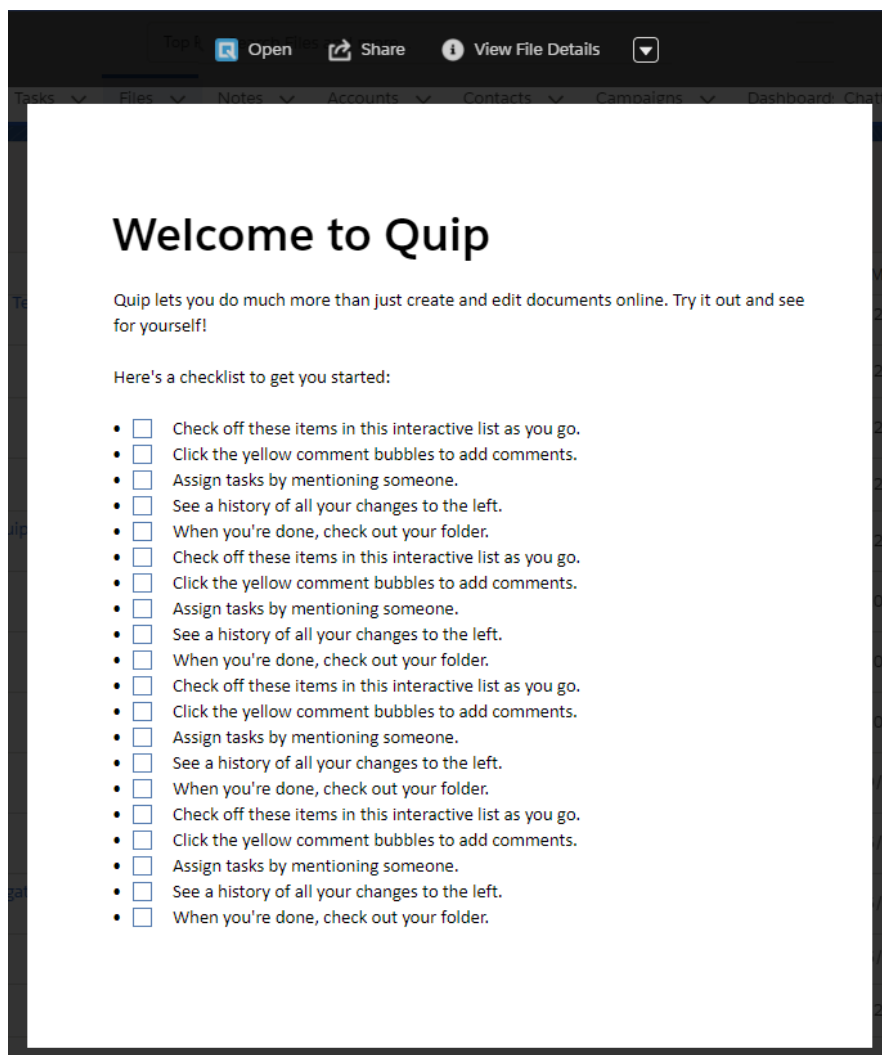
- From the Quip Associated Documents component.
- When you click an attached document in a Chatter feed.
- On the File Details page.
- From Files Home.
- From the Notes and Attachments component.

EDITIONS

Available in: both **Lightning Experience** and in **Salesforce Mobile**

Sales Home Opportunities ▾ Leads ▾ Tasks ▾ Files ▾ Notes ▾	
Files	
Owned by Me	
96 items • Sorted by Last Modified Date	
Owned by Me	TITLE
Shared with Me	 Setup UI Todo List Quip 
Recent	 Quip Preview Test Plan Quip 
Following	 Quip Setup Test Plan Quip 
Libraries	 test doc Quip 
CONNECTED SOURCES	
 Quip	 [Spike] Quip component in Classic Quip 

If you don't have permission to view the file, open Quip and request access.



Quip Document Component

With the Quip Document Lightning component you can work with fully functional documents and spreadsheets directly within Salesforce records. All of your favorite features are there—comments, @mentions, live apps, and more. It's all the collaboration that you need, right where you need it.

The Quip Document component is part of the original Aura Lightning Components programming model.

EDITIONS

Available in: Lightning Experience

Quip Document Component Configuration Options

Use the Lightning App Builder to add the Quip Document component to a Salesforce Lightning page. You can choose whether to use the same or different documents for each record, or whether users can use templates to create documents. Depending on the chosen option, you also create one or two custom fields on the associated object to store the document or template URLs.

Table 5: Quip Document Component Configuration Options

Configuration Option in Lightning App Builder	Description	Required Custom Fields
Use the same document for every record	Admins can choose a single, pre-existing document that is embedded on every record associated with a given object.	None
Allow different documents for each record	Users can attach different documents to different records, or create and embed new documents from scratch or from the Quip Template Library. Admins can also programmatically attach pre-selected documents to different records on the same object.	One field to store the Quip Document URL
Use a template to create documents for each record	Admins specify a template from which users can create and embed new documents on a per-record basis. You can use any document as a template. You can use mail-merge syntax in the template to prefill documents with information from the record.	One field to store the Quip Document URL
Use different templates for different records	Admins can specify different templates for different records on the same object. This option requires admins to programmatically prepopulate the component field with different template URLs rather than manually choose a single template URL.	Two fields, one to store the Quip Document URL and the other to store the Quip Template URL

Size Recommendations for Embedded Documents

For best performance, use the recommended sizes for the different document types embedded in Salesforce Lightning page layouts.

Table 6: Quip Document Size Recommendations

Quip Document Type	Location	Size
Document	Main page section	900 pixels
Document	Page sidebar	600 pixels
Slide Deck	Main page section	900 pixels
Chat Room	Main page section	600 pixels
Chat Room	Page sidebar	600 pixels

Next Steps

- If necessary, [create a custom field to hold the document or template URL](#) on page 200.

- Optionally, [create a template](#) on page 204 or [mark a document as a template](#) on page 226.
- Use Lightning App Builder to [add the Quip Document component to a Lightning page](#) on page 208.
- To make sure that your template is properly configured before you share it with your users, validate it, and address any errors.
- If necessary, create an Apex trigger on the custom field that stores the document or template.

Your users can now [work with documents without leaving Salesforce](#) on page 212.

Create Custom Fields for the Document and Template URL

If you want to use different documents or templates for your Salesforce records, create a custom field. Quip stores the URL of the embedded document or template in the custom field of the Salesforce object. If each record uses the same document, you don't need to create the fields.

Templates and Dynamic Fields

Templates save time copying and pasting, standardize your business practices, and help you get the most out of your Salesforce data. To auto-fill your embedded templates with data from a Salesforce record, you can use Salesforce Template Data Mentions or mail merge syntax.

Mail Merge Examples

Use templates to prepopulate documents with content that's specific to the Salesforce record they're embedded in. For example, you want to use a document to store an Account Plan for each account. When a user creates an Account Plan, you want it to include the same boilerplate content for every account. But you also want to include specific field values from the account, such as the account name and description.

Add the Quip Document Component to a Lightning Page

You can use the Lightning App Builder to add the Quip Document component to a Salesforce Lightning page.

Sample Apex Trigger to Specify Documents or Templates

Use an Apex trigger to programmatically specify a document or template in a custom URL field. You must add a field if you selected the **Different templates for different records** option when you added the Quip Document component to a Lightning page.

Use the Quip Document Component

After you add the Quip Document component to a Lightning page, your users can create and edit documents directly in Salesforce. If they prefer, users can also edit the document on your Quip site. Both options provide the same rich collaborative environment.

Create Custom Fields for the Document and Template URL

If you want to use different documents or templates for your Salesforce records, create a custom field. Quip stores the URL of the embedded document or template in the custom field of the Salesforce object. If each record uses the same document, you don't need to create the fields.

You can create a custom URL field from the Object Manager, or create one from the Quip Document component in the Lightning App Builder.

Create a Custom URL Field from the Object Manager

Store documents created from a template in custom URL fields. Manage access to the custom URL field.

Create a Custom URL Field from the Quip Document Component

Create a custom URL field for your documents and templates without leaving the Lightning App Builder.

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To create or change custom fields:

- Customize Application

Create a Custom URL Field from the Object Manager

Store documents created from a template in custom URL fields. Manage access to the custom URL field.

1. Navigate to the Salesforce page that you want to create a custom field for, such as a customer's Account page.
2. Click the gear icon, and select **Edit Object** to go to Object Manager.
3. On the left, click **Field & Relationships**.
4. Click **New**.
5. Select **URL**, then click **Next**.
6. Enter a field label and name, and optionally a description, and click **Next**.
7. Select the profiles that can edit the new field, and click **Next**.
Users who use documents or clone templates must be able to edit the field.
8. If you have Dynamic Forms-enabled Lightning record pages for the object, ensure all are deselected, then click **Next**.
If you don't have any Dynamic Forms-enabled Lightning record pages for the object, this step doesn't appear.
9. Deselect all page layouts, and click **Save**.
You deselect the Lightning pages and page layouts because you don't want the new field to display in the Lightning page yet.
10. If users can use different templates for different records, create a second custom field to store the template.

Create a Custom URL Field from the Quip Document Component

Create a custom URL field for your documents and templates without leaving the Lightning App Builder.

Before you create a custom field:

- Navigate to the Salesforce page where you want to add a Quip Document component, such as a customer's Account page.
- Click the gear icon, and select **Edit Page** to go to the Lightning App Builder.
- Add the Quip Document component to your page layout.

Standard profiles have edit access to this field. Custom URL fields created from the Quip Document component aren't added to the page layout. You can make changes later from the Object Manager. Creating a field from the Lightning App Builder isn't supported for the **same doc on every record** option.

1. From the Quip Document component, select **Create a new field**.

Page > Quip Document

Embed fully functional Quip documents and templates on this page. [Learn more](#)

Different docs for each record
Let users create or choose them, or set them programmatically.

Same doc on every record
Embed a specific, pre-selected document.

One template for each record
Users can create new documents based on a template you choose.

Different templates for different records
Programmatically set templates for users to create new documents from.

* Quip Template URL

<https://corp.quip.com/uk9tAgOVjKL6/Publi>

Validate Template

* Choose a field to store new document URLs

This field is required.

[Create a new field](#)

Save time copying and pasting with Quip templates. [Tell Me More](#)

2. Enter a field label and field name. You can make changes later from the Object Manager.

Create a Custom Field

Add a custom URL field to store the documents created from a template. By default, Standard profiles have edit access. The custom URL field isn't added to your page layout. You can make changes later from the [Object Manager](#).

* Field Label

* Field Name

Description

Cancel Save

3. Save the action.

If you selected **Different templates for different records**, create a second field to store your new document URLs.

Templates and Dynamic Fields

Templates save time copying and pasting, standardize your business practices, and help you get the most out of your Salesforce data. To auto-fill your embedded templates with data from a Salesforce record, you can use Salesforce Template Data Mentions or mail merge syntax.

What are Salesforce Template Data Mentions?

EDITIONS

Available in: Lightning Experience

Salesforce Template Data Mentions let you insert placeholders for Salesforce record fields in templates without going to the Object Manager to find an object's field names. Salesforce Template Data Mentions use simple picklists to show you which fields you can use right from the template. When a user creates a document from an embedded template, the Salesforce Data Mentions automatically populate with record's data and continue to stay up to date.

What is Mail Merge Syntax?

Mail merge templates include variables called merge fields where data from your Salesforce records—for example a contact's name and address—displays in the generated document. When a user creates a document from an embedded template, the current Salesforce data is populated, but doesn't dynamically update. Quip supports basic mail merge syntax for auto-filling data from Salesforce records. This syntax supports standard and custom fields that are directly on the Salesforce object, and lookup fields up to one level. You can find available mail merge fields in the Object Manager under an object's Field Name.

Salesforce Template Data Mentions and Mail Merge Features

	Salesforce Template Data Mentions	Mail Merge Syntax
Shows available Salesforce record fields during template creation	✓	✗
Supports standard and custom fields	✓	✓
Lets users search Salesforce field names during template creation	✓	✗
Supports up to 250 fields, with no more than 20 lookup fields, per template	✓	✓
Uses available fields from a specific Salesforce org when you add them to a template*	✓	✗
Auto-fills Salesforce record field data on document creation in Salesforce	✓	✓
Doesn't populate Salesforce data when data is unavailable on record	✓	✓
Lets you populate images	✗	✓
Lets you add a custom message when data is unavailable on the record	✗	✓
Works in templates and documents**	✗	✓
Continually updates Salesforce data to keep documents up to date	✓	✗
Allows searching for titles containing Salesforce data in Quip	✓	✓
Displays titles containing Salesforce data in the Associated Documents and Files components	✗	✓
Styles Salesforce data in a distinct manner to make data recognizable	✓	✗

	Salesforce Template Data Mentions	Mail Merge Syntax
Lets user hover over Salesforce data to see additional record details	✓	✗
Lets users update Salesforce data in a document and automatically sync changes to Salesforce	✓	✗
When Mirrored Salesforce Permissions are on, users see only the populated fields that they have access to in Salesforce	✓	✗

*When you add a template data mention to a template, you choose which Salesforce org the data mention pulls data from. If you embed that template in a record in a different Salesforce org, the data mentions can't recognize the Salesforce org and end users receive an error.

**Salesforce Template Data Mentions work only in templates. You can use mail merge syntax and regular Salesforce Data Mentions in templates, documents, and spreadsheets.

Considerations for Choosing Between Data Mentions and Mail Merge

In general, we recommend using Salesforce Template Data Mentions to streamline your business processes. Consider using mail merge syntax if:

- You want to create and test your templates in Sandbox before moving them to your production Salesforce org. Templates using Salesforce Template Data Mentions are tied to the org they're created in.
- You don't want users to update populated fields from within documents.
- You want documents created from a template to capture a moment in time and don't want them to update with the latest Salesforce data.
- You have [Mirrored Salesforce Permissions](#) turned on, but want to give users access to Salesforce data in Quip that they don't have access to in Salesforce.
- You want to embed a document or spreadsheet instead of a [template](#). Salesforce Template Data Mentions work only in documents marked as templates.
- You want to use Template Mode for Salesforce live apps, like the Salesforce List live app, or for Salesforce reports. Template Mode supports only mail merge syntax and not data mentions.

Mail Merge Examples

Use templates to prepopulate documents with content that's specific to the Salesforce record they're embedded in. For example, you want to use a document to store an Account Plan for each account. When a user creates an Account Plan, you want it to include the same boilerplate content for every account. But you also want to include specific field values from the account, such as the account name and description.

Quip supports basic mail merge syntax for auto-filling data from Salesforce records. This syntax supports standard and custom fields that are directly on the Salesforce object, and lookup fields up to one level. You can use any document as a template—nothing special is required. For the best templating experience, use the template format to [create a template](#) on page 223 or [mark a document as a template](#) on page 226.



Tip: Use Object Manager to determine the names of the fields of your Salesforce object. Click the gear icon, select **Edit Object**, and click **Field & Relationships** on the left.

EDITIONS

Available in: Lightning Experience

Standard Fields

To include the value of a standard field of an object in a Quip template, use this syntax:

```
[ [objectname.fieldname] ]
```

This example pulls data from the standard Description field of the Account standard object.

```
[ [Account.Description] ]
```

Standard Lookup Fields

To include standard lookup fields, use this syntax:

```
[ [objectname.lookupfieldname.referencefieldname] ]
```

For example, the Contact standard object has an AccountId lookup field that references the Account standard object. This example pulls the Account name into a template that you're embedding in the Contact object.

```
[ [Contact.Account.Name] ]
```

Custom Lookup Fields

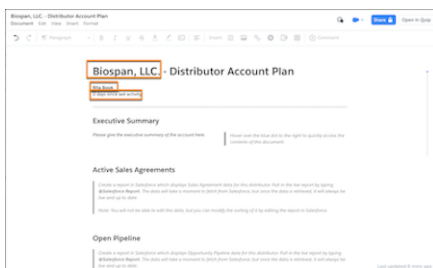
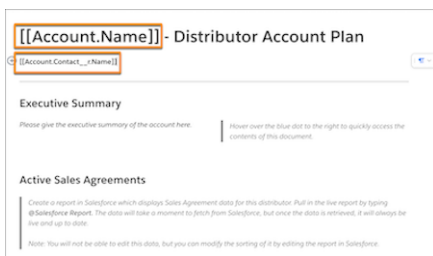
If your record doesn't have a standard field that links it to another record, such as `[[Account.Contact.Name]]`, create a custom lookup field. Make sure that you use the correct field name, which usually has `__c` at the end. This example uses a lookup field in Accounts to pull in Contacts associated with this Account.



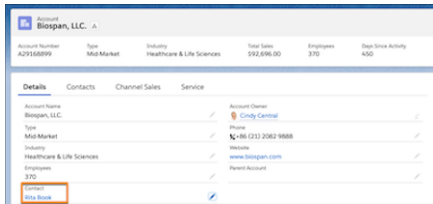
Example: `Contact__c` is a custom Contact lookup field.

Field Name	Field Type	Relationship Name	Relationship Type
Account	Lookup (Contact)	AccountContact	1:1
Contact	Lookup (Account)	AccountContact	1:1
Contact Location	Text (Contact)	AccountContact	1:1
Contact Location	Text (Contact)	AccountContact	1:1

To add name of a Contact related to an Account, enter `[[Account.Contact__r.Name]]`. The `__c` is replaced with an `__r` in the mail merge syntax.



The field must be exposed in the user interface and populated with a Contact for the mail merge to work.



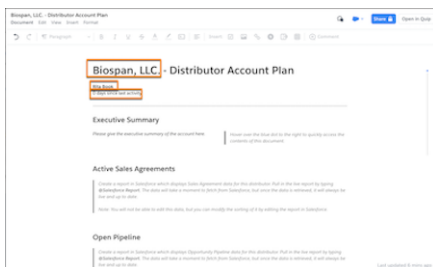
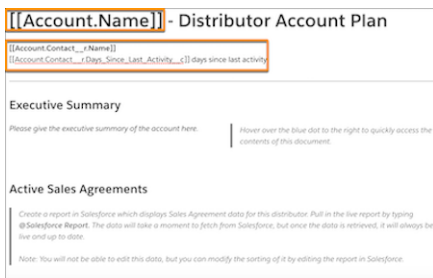
Custom Reference Fields

To include custom reference fields, use this syntax:

```
[[objectname.lookupfieldname__r.customfield__c]]
```




Example: To use mail merge to pull a Contact's days since last activity as it relates to an Account, use `[[Account.Contact__r.Days_Since_Last_Activity__c]]`.

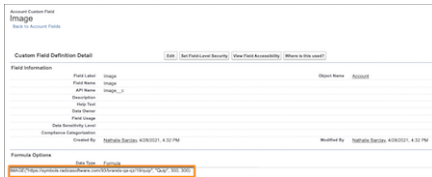


Images

To use mail merge syntax to add an image to a template, like a logo, use a formula field in Salesforce. You can pull in an image URL field into the formula, or add the image URL directly. Images can't be resized.

In a template, use `[[ObjectName.CustomImageField__c]]` where CustomImageField__c is a formula field of type text.

 **Example:** Image__c is a custom formula field of type text on the Account object. To add a Quip logo to the formula, use `IMAGE("https://symbols.radिकासoftware.com/93/brands-qa-qz/19/quip", "Quip", 300, 300)`. If you have a separate Image URL field for the logo, use `IMAGE(ImageURL__c, "Quip", 300, 300)`.




In a template, enter the mail merge field `[[Account.Image__c]]`.



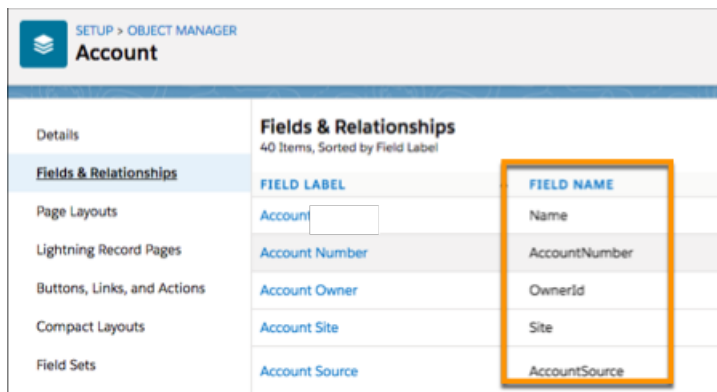
Default States

To add a user-friendly mail merge state to your templates if the mail merge field doesn't match the Salesforce record field, add a default state in single or double straight or curly (smart) quotes. If the mail merge field matches a Salesforce record field, the default state doesn't show.

 **Example:** To replace mail merge syntax with "Account Owner Phone Number Default" when the field doesn't exist in Salesforce, enter `[[Account.Owner.PhoneNumber, "Account Owner Phone Number Default"]]`.

Template Tips and Considerations

- When you reference a field in your template, use its field name. Don't use its field label. Object Manager displays both values.



- The document is auto-filled based on data at the time of its creation. When data changes occur, the document doesn't automatically update.
- You can have up to 250 fields, with no more than 20 lookup fields.
- Mail merge defaults don't support smart, or curly, quotes. To include a mail merge default state, use straight quotes.

Sample Templates

Here are some sample templates to help you get started with your own.


- [Account Planning Template](#)
- [Territory Planning Template](#)
- [Account Transitions Template](#)
- [Call Plans Template](#)
- [Customer Success Plans Template](#)
- [Customer/Partner Matrix Template](#)
- [Swarm Room Template](#)
- [Root Cause Analysis Template](#)
- [Service Manager Performance Review Template](#)
- [Tier 3 Case Escalation Template](#)

Add the Quip Document Component to a Lightning Page

You can use the Lightning App Builder to add the Quip Document component to a Salesforce Lightning page.

Before you add a document:

- To configure different documents for a Salesforce record, [create a custom field](#) on page 200. To configure different templates, you can create a second custom field to store the template URL.
- [Connect your Quip and Salesforce accounts](#) on page 90.

 **Important:** Quip is retiring slides on January 31, 2021. After this date, existing slides are view-only and new ones can't be created. [Tell Me More](#)

1. Navigate to the Salesforce page where you want to add a Quip Document component, such as a customer's Account page.
2. Click the gear icon, and select **Edit Page** to go to the Lightning App Builder.
3. In the left pane, select **Quip Document** (1) and drag it to your canvas (2). The right pane shows the four Quip Document component configuration options with the "One template for each record" option (3) selected.

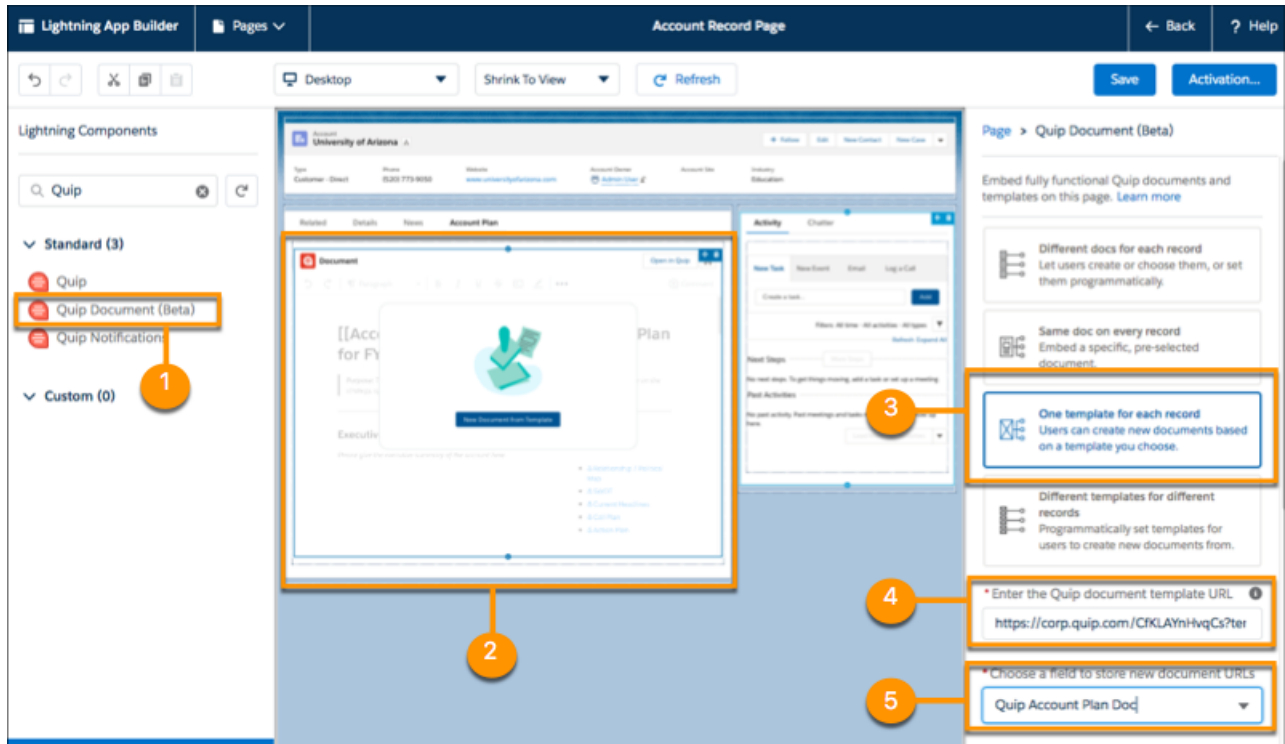
EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To add the Quip Lightning component:

- Administrator Permissions



4. In the right pane, select a configuration option that describes [how you want the document to behave](#) on page 198, and enter values into the required fields. The required fields depend on the option you chose.

Option

Description

Different docs for each record

Enter the name of the [custom field](#) on page 200 that stores the document URL. Users can either embed existing documents or create and embed new documents from scratch or from templates. Administrators can optionally pre-populate a field with a specific document if they create an Apex trigger on the field or use Flow Builder or Process Builder.

Same doc on every record

Enter the URL of the document. For users, the document is embedded on the page and every record associated with it.


One template for each record

Select a template from the Template Library or enter the template URL(4). Select or create the custom field that stores the document URL (5). Users create documents on each record based on the template.

Different templates for different records

Enter the name of the custom field that stores the document URL and the name of the field that stores the URL of the Quip template. Administrators are required to prepopulate the template field. They can create an Apex trigger on the field or use Flow Builder or Process Builder. Users choose which template to create a document from.

- 5.

If you selected **One template for each record**, click .

- a. To choose a template in the Template Library, use the Template Library section. Select a gallery name, then the template name, and click **Next**.

- b. To enter a template URL, select **Template URL**. Enter the URL and click **Next**.
- c. To make sure that your template is ready to add to the component, validate the template. The validation checks that you have access to the document, that link sharing is turned on, that the document is marked as a template, and that it isn't a slide.

- To create a document from a template, users need view access to the source template. To turn on view-only link sharing for your document from the Lightning App Building, click **Turn On Link Sharing**.
- To differentiate regular documents from templates and keep your templates organized, click **Go to Quip**, and [mark your document as a template](#) on page 226.
- After you address the errors, click **Validate Template**, and click **Done**.

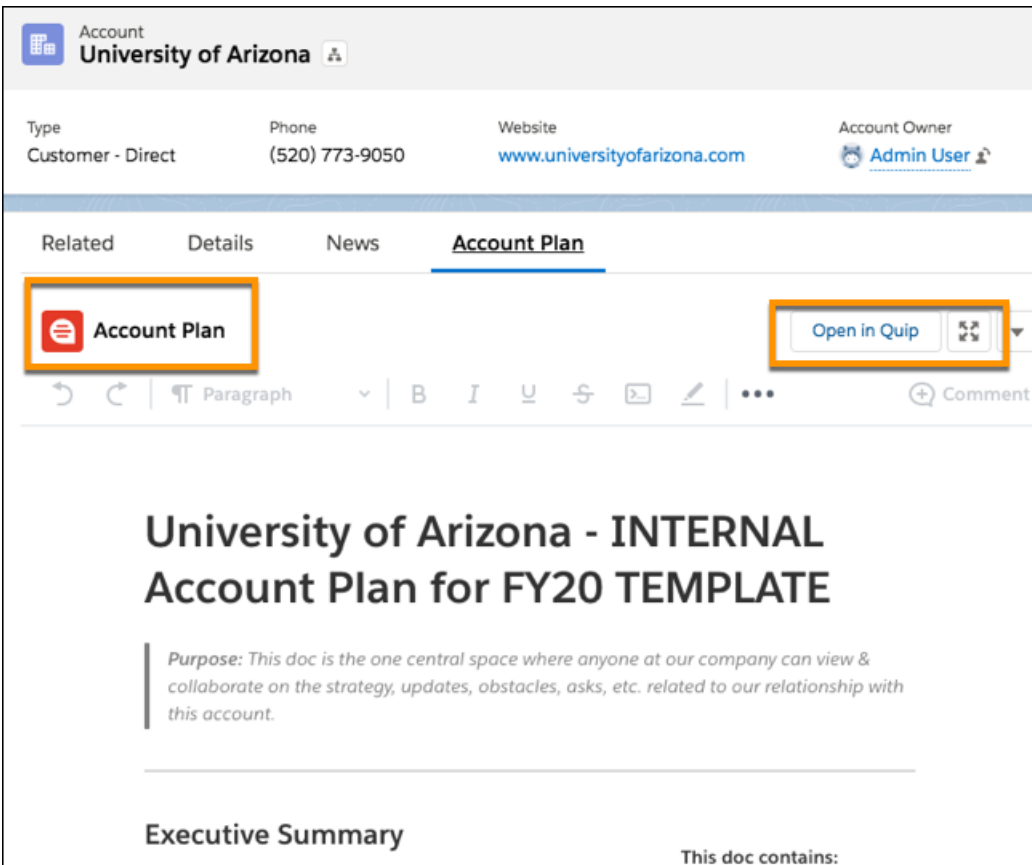
6. Specify whether other users can view, edit, or request access to documents created from the template.



Tip: Turn on Synced Sharing to manage user access to documents created from a template or linked to a Salesforce record. [Tell Me More](#) on page 114

7. (Optional) Enter a custom label for the embedded document in the Custom Component Label field.
8. Enter the component's pixel height. [See Component Size Recommendations](#) on page 198
9. Click **Save**, and click **Activation**.

10. On the Activation: Account Record Page, click **Assign as Org Default** and close the page.
11. To exit Lightning App Builder, click **Back**. The Quip Document component appears where you dragged it.



If you select **Different templates for different records**, create an Apex trigger on the template field to prepopulate it with the template URL. You can also use Flow Builder or Process Builder. This step is optional if you select **Different docs for each record**.

Sample Apex Trigger to Specify Documents or Templates

Use an Apex trigger to programmatically specify a document or template in a custom URL field. You must add a field if you selected the **Different templates for different records** option when you added the Quip Document component to a Lightning page.

This example sets the QuipTemplateUrl custom field of the Account object to the template located at the URL `https://mycompany.quip.com/E5FSAel9xIsB`. The trigger fires before you insert an account.

EDITIONS

Available in: Lightning Experience

```
// Sample Code for setting a Quip template URL programmatically using Apex
trigger AddQuipTemplate on Account(before insert)
{
    for(Account a : Trigger.New) {
        // Set the QuipTemplateUrl custom field to the Quip template document
        a.QuipTemplateUrl__c = 'https://mycompany.quip.com/E5FSAel9xIsB';
    }
}
```

}

Use the Quip Document Component

After you add the Quip Document component to a Lightning page, your users can create and edit documents directly in Salesforce. If they prefer, users can also edit the document on your Quip site. Both options provide the same rich collaborative environment.

Depending on how you configured the Quip Document component, users interact with it in different ways on the Salesforce pages that include it.

- Users pick which documents go on which records. Users choose the documents to embed into Salesforce records. They can choose existing documents or create them directly from a Salesforce record.
- Users create documents from templates. Users can only embed documents based on a template that you previously created. This option works well for account plans, creative briefs, and other documents that your team uses repeatedly.
- Administrators preselect documents. Sometimes you, the administrator, knows best, so you preselect the documents that are appropriate for each Salesforce record. Users can't change the embedded document, but depending on their permissions, they can edit it. This option is best for wikis, contact lists, and other reference documents.

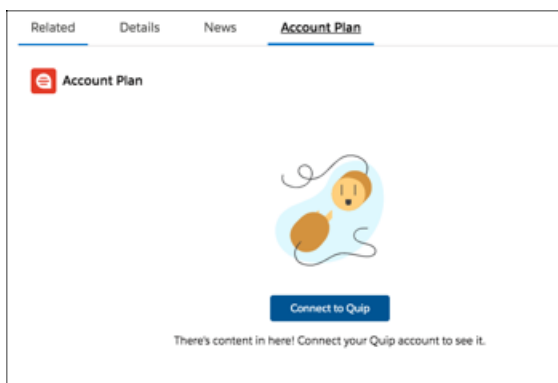
Your users can work with an embedded document the same way they work with any other Quip document. They can edit text, insert images, leave comments, check off checklist items, update spreadsheets, @mention colleagues, and more.

EDITIONS

Available in: Lightning Experience

Connect to Quip

Users must be connected to their Quip account to use Quip in Salesforce. If they haven't already connected their Quip and Salesforce accounts, a button in the Quip Document component prompts them to do so.



[Add an Existing Document](#)

Search for or provide the link to an existing Quip document to link it to a Salesforce record.

[Add a Blank Document](#)

Create a blank Quip document that's automatically linked to a Salesforce record.

[Add a Document Based on a Template](#)

Access the Quip Template Library in Salesforce to quickly create and embed a new Quip document that's automatically linked to a Salesforce record. If the template contains mail merge syntax, it's populated with Salesforce data automatically.

Considerations for Working with Embedded Documents

You can generally work with an embedded document like any other document, and there are a few things to keep in mind.

SEE ALSO:

[Mail Merge Examples](#)

Add an Existing Document

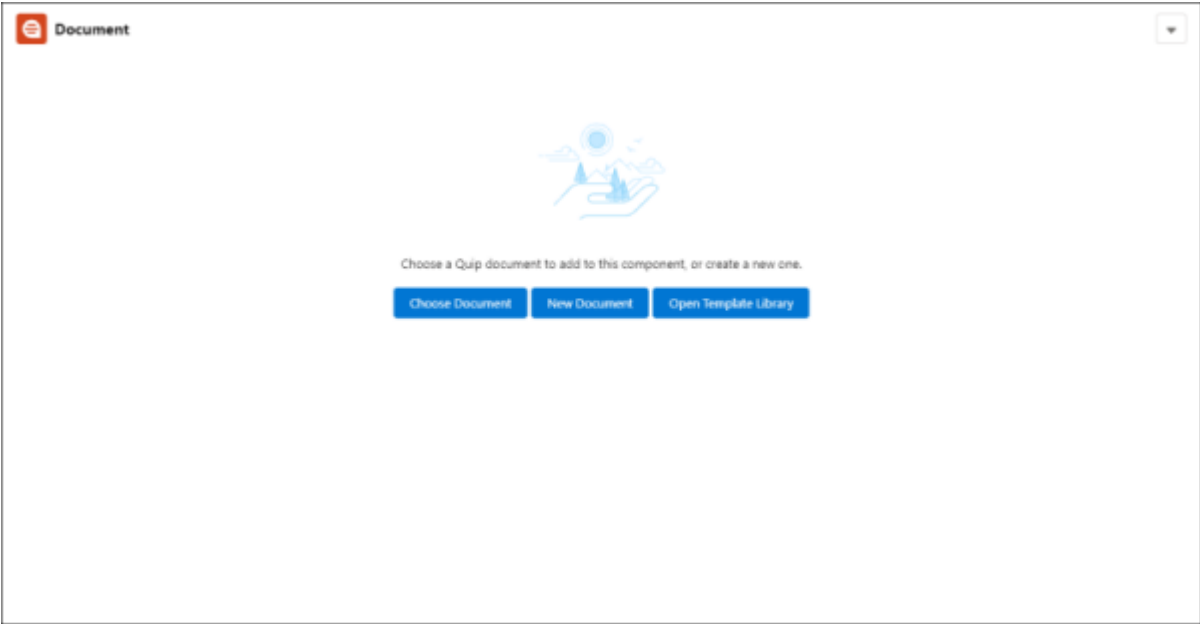
Search for or provide the link to an existing Quip document to link it to a Salesforce record.

You can add a document to the Quip Document component only if your admin configured the component to let you do so.

- 1. In the Quip Document component, click **Choose Document**.

EDITIONS

Available in: Lightning Experience



- 2. Search for your document, or provide the URL to it in the Add By URL tab.

Link Quip Document

Search

Add by URL

Search Quip...

Cancel

3. Click **Update**.

The document appears in the Quip Document component.

In the background, Salesforce links the document to the record. If the record also includes the Quip Associated Documents component, the document is listed there when the link is complete.

SEE ALSO:

[Considerations for Working with Embedded Documents](#)

Add a Blank Document

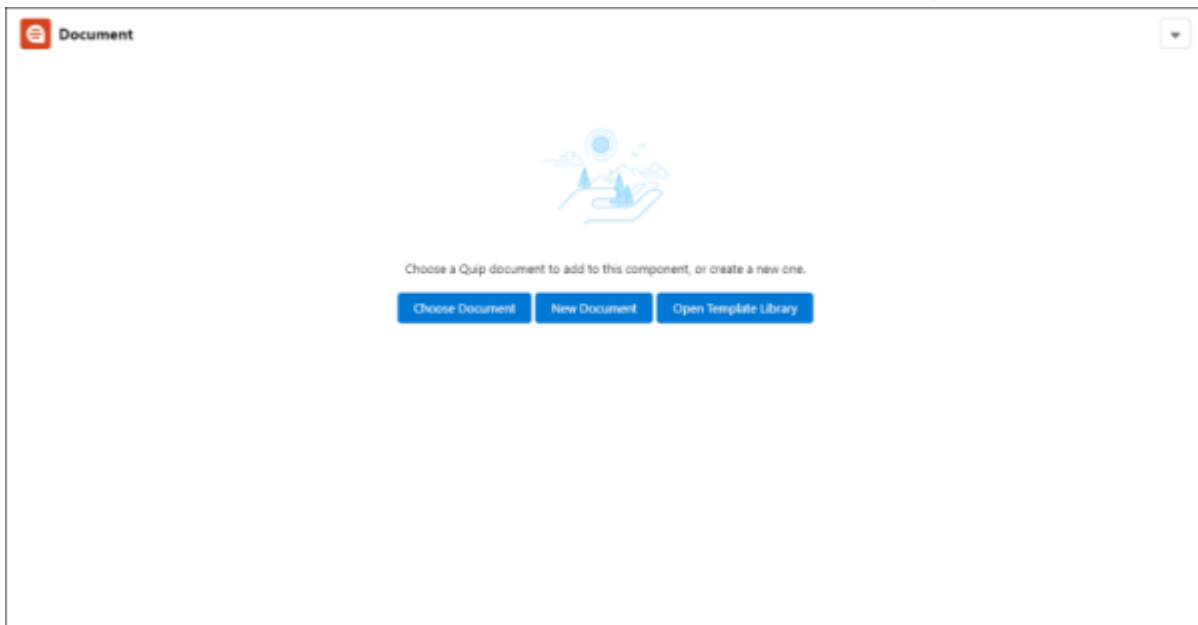
Create a blank Quip document that's automatically linked to a Salesforce record.

You can add a document to the Quip Document component only if your admin configured the component to let you do so.

1. In the Quip Document component for a record, click **New Document**.

EDITIONS

Available in: Lightning Experience



2. Give your new document a title, and click **Create**.

A screenshot of the "New Quip Document" dialog box. It has a title bar that says "New Quip Document". Below the title bar is a text input field labeled "Title" with a cursor inside. At the bottom right are two buttons: "Cancel" and "Create".

Your new document appears in the Quip Document component.

In the background, Salesforce links the document to the record. If the record also includes the Quip Associated Documents component, the document is listed there when the link is complete.

SEE ALSO:

[Considerations for Working with Embedded Documents](#)

Add a Document Based on a Template

Access the Quip Template Library in Salesforce to quickly create and embed a new Quip document that's automatically linked to a Salesforce record. If the template contains mail merge syntax, it's populated with Salesforce data automatically.

You can add a document to the Quip Document component only if your admin configured the component to let you do so.

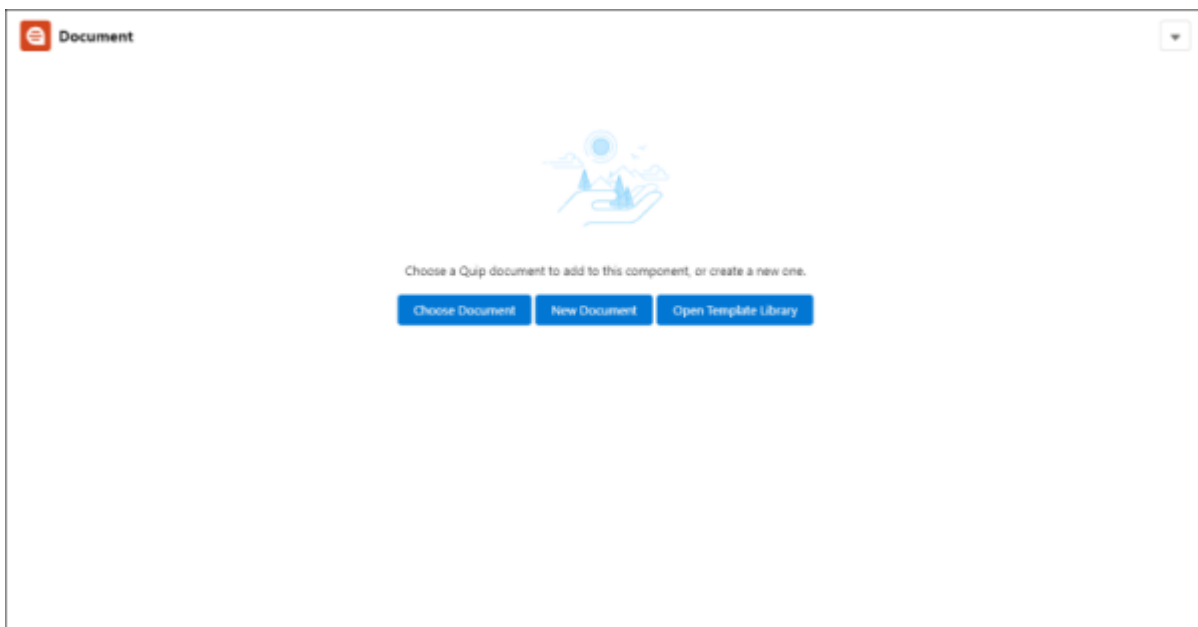
Ensure that you or your admin created the template that you want to use. You can only create templates in Quip.

Ensure that you completed the connection from Quip to Salesforce in the Salesforce tab of the Quip Account Settings window.

EDITIONS

Available in: Lightning Experience

1. In the Quip Document component, click **Open Template Library**.



Alternatively, click **Open Template Library** from the dropdown.

2. In the Template Library, select the template to use, and then click **Use Template**.



You can search by name across all galleries, or you can narrow your search to a specific gallery.

The New Document from Template window appears.

3. Select the Quip folder where you want to save the document.

To preserve any mail merge syntax, the document name isn't editable.

4. Click **Save in**.

Your new document appears in the Quip canvas.

If the template contains mail merge syntax, your new document is populated with Salesforce data right away. Link sharing also takes effect immediately.

In the background, Salesforce works on linking the document to the record and setting up any synced sharing that you configured. When the link to the record is complete, the document is listed in the Associated Documents component.

5. Edit the document as needed, and then close the Quip canvas.

SEE ALSO:

[Considerations for Working with Embedded Documents](#)

[Mail Merge Examples](#)

Considerations for Working with Embedded Documents

You can generally work with an embedded document like any other document, and there are a few things to keep in mind.

- To view and participate in the document conversation of an embedded document, click the expand button (⌵) at the top right of the component.
- To view and edit the live apps in a document, click **Open in Quip** at the top right.
- To work with the document in Quip rather than in Salesforce, click **Open in Quip**.

EDITIONS

Available in: Lightning Experience

Quip Global Quick Actions

Add Quip global quick actions to almost any page that supports actions. Use global actions to let your users create documents without leaving the page that they're on.

EDITIONS

Available in: Lightning Experience

[Set Up the New Document Global Action](#)


To let your users create a document no matter where they are in Lightning Experience, add the New Document global quick action to your global publisher layouts.

[Create a Document in Lightning Experience](#)

Create a document no matter where you are in Lightning Experience and link it to a record. Use the New Document global action to take freeform notes that stay open as you move around Lightning Experience.

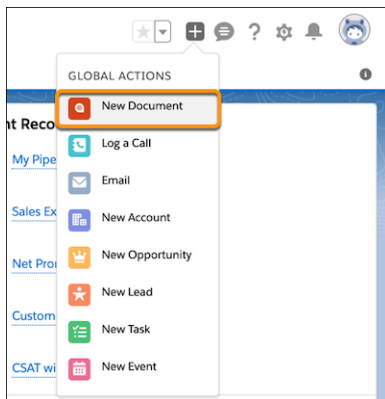
Set Up the New Document Global Action

To let your users create a document no matter where they are in Lightning Experience, add the New Document global quick action to your global publisher layouts.

With the New Document action, your users can click  and select **New Document** from anywhere in Lightning Experience. Users can link their documents to Salesforce records, collaborate with their team, and add the things they know and love such as @mentions, Salesforce data mentions, and spreadsheets.

EDITIONS

Available in: Lightning Experience



[Add the New Document Global Action to All Global Publisher Layouts](#)

To let your users create a document no matter where they are in Lightning Experience, add the New Document global quick action to all of your global publisher layouts automatically.

Add the New Document Global Action Manually

To let your users create a document no matter where they are in Lightning Experience, add the New Document global quick action manually to individual global publisher layouts.

Add the New Document Global Action to All Global Publisher Layouts

To let your users create a document no matter where they are in Lightning Experience, add the New Document global quick action to all of your global publisher layouts automatically.

1. From Setup, enter *Quip* in the Quick Find box, and then select **Quip(Salesforce Anywhere)**.
2. Under Create a Document from Anywhere, click **Add Global Action**.

The New Document global quick action is automatically added to all global publisher layouts.

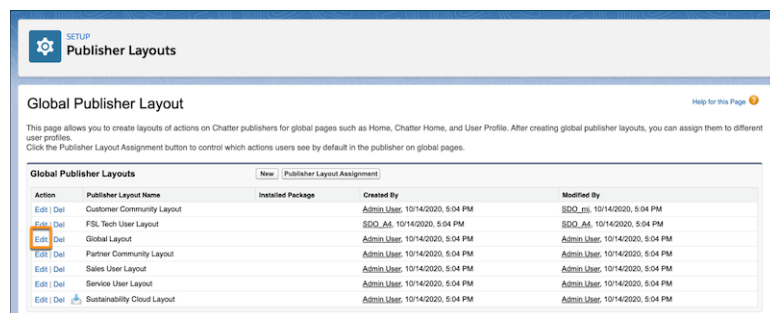
SEE ALSO:

[Create a Document in Lightning Experience](#)
[Action Limits and Limitations](#)

Add the New Document Global Action Manually

To let your users create a document no matter where they are in Lightning Experience, add the New Document global quick action manually to individual global publisher layouts.

1. In Salesforce Setup, from the Quick Find box, enter *Publisher Layouts*, and then select **Publisher Layouts**.
2. Under Global Publisher Layout, find Global Layout, and click **Edit**.



3. Select **Mobile & Lightning Actions** (1). Find **New Document** (2) and drag it to the Salesforce Mobile and Lightning Experience palette (3).

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To create actions:

- Customize Application

To customize action layouts and page layouts:

- Customize Application

To view page layouts:

- View Setup

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To create actions:

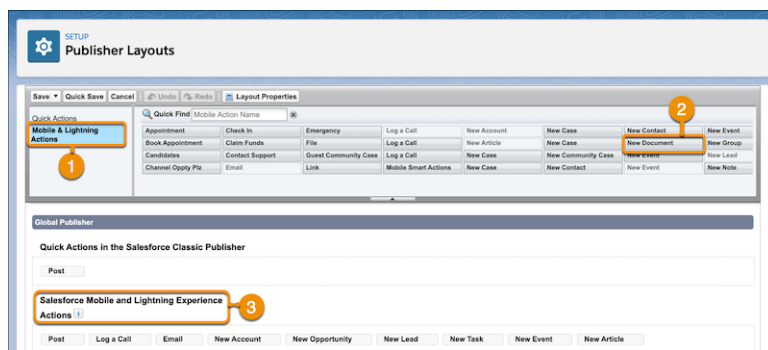
- Customize Application


To customize action layouts and page layouts:

- Customize Application

To view page layouts:

- View Setup



 **Note:** If it's your first time editing the Salesforce Mobile and Lightning Experience palette, select **override the predefined actions**.

4. To reorder your actions, select an action and drag it to a new position.
5. Save the action.

SEE ALSO:

[Create a Document in Lightning Experience](#)

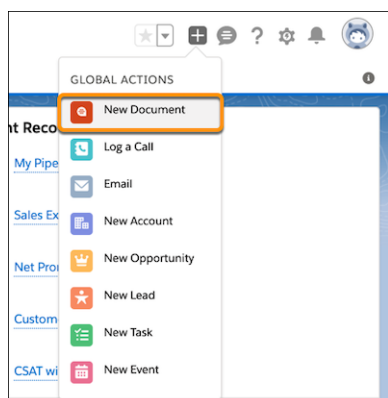
[Action Limits and Limitations](#)

Create a Document in Lightning Experience

Create a document no matter where you are in Lightning Experience and link it to a record. Use the New Document global action to take freeform notes that stay open as you move around Lightning Experience.

To create a document from the Global Actions menu, an admin must add the New Document global quick action to your publisher layouts.

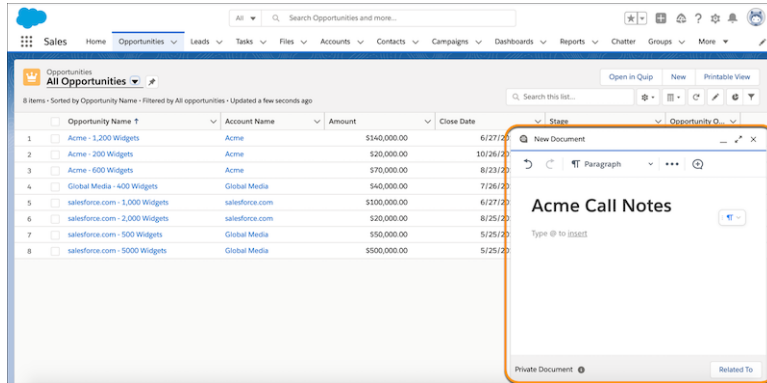
1. From a Lightning page, click , and select **New Document**.



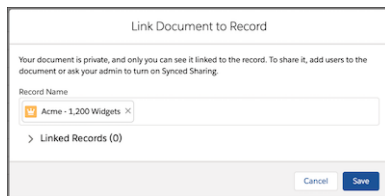
2. Add content to your new document. You can @mentions users, documents, spreadsheets, folders, Salesforce data mentions, checklists, and more. For the best editing experience, expand the document.

EDITIONS

Available in: Lightning Experience



- By default, your document is saved to your Private folder in Quip and to the Quip section in the Files tab. When you're ready to share your document, click **Link & Share**.



- To link your document to record, select an object type, then enter a record name. If Synced Sharing is enabled, users with access to the record can access its linked documents. [Tell Me More](#) on page 110
- Save the action.

SEE ALSO:

[Add the New Document Global Action Manually](#)

[Add the New Document Global Action to All Global Publisher Layouts](#)

Templates

Use document templates to streamline your business practices within the context of your Salesforce data, without compromising on customization.

Account Plans keep your reps organized and accountable but can be tedious. Without a template, Account Plans can vary considerably by rep and can lead to confusion, disorganization, and even lost deals. To streamline your business practices and make sure that your reps are all on the same page, use Account Plan templates that auto-fill with Salesforce data. Your reps save time writing their Account Plans and spend more time selling.

Embed your custom template in a Salesforce Account record and maximize cross-functional collaboration without siloed communication. Your embedded template auto-populates with content that's specific to the Salesforce record they're embedded in.

To easily find and use documents used as templates, mark them as templates from Quip. You can also keep templates more secure from accidental edits and indicate that the template is ready to use with template locking.

To find templates in Quip, use the Template Library. There, your users can find the templates they created and shared in private galleries, like the Created by Me and Shared with Me galleries, or they can get started with sample templates.

EDITIONS

Available in: Lightning Experience

To see what documents are embedded in Salesforce objects and convert them to templates, use the Template Manager in Salesforce.

[Template Configuration](#)

Learn about templates, identify your template requirements, and create a template in Quip.

[Template Library](#)

Make it easy to find and create templates in Quip. With the Template Library, users can create and share templates in private galleries, like the Created by Me and Shared with Me galleries, or get started with example templates.

[Manage Templates in Salesforce](#)

Surface documents embedded in Salesforce records from the Template Manager. Open a preview of the document in Quip and mark it as a template.

SEE ALSO:

[Automation with Quip in Salesforce](#)

[Quip Document Component](#)

Template Configuration

Learn about templates, identify your template requirements, and create a template in Quip.

[Template Requirements Gathering](#)

Turn your best practices into standard processes and apply them at scale with templates. Here are some things to keep in mind as you decide what templates your users must be successful.

[Mark a Document as a Template](#)

To differentiate documents that your team uses as templates, mark your documents as templates in Quip. See what documents are embedded in Salesforce based on the object, convert your embedded documents to templates, and access them from the Template Library in Quip.

[Create Document Ranges in Your Templates](#)

Add headings to your templates to create defined sections, called document ranges, and see how your templates are structured.

[Configure Your Template](#)

After you finish gathering your template requirements, build a template in Quip and add the Salesforce data that your company needs.

[Get Feedback and Iterate on Your Templates](#)

As you create templates for your users, get feedback and iterate to make sure that they're working as intended.

Template Requirements Gathering

Turn your best practices into standard processes and apply them at scale with templates. Here are some things to keep in mind as you decide what templates your users must be successful.

What are templates?

Templates are documents that streamline your business practices within the context of your Salesforce data, without compromising on customization. You can add dynamic fields with mail merge syntax or Salesforce Template Data Mentions that auto-fill based on the Salesforce record. [Tell Me More](#) on page 278

EDITIONS

Available in: **Lightning Experience**

Why use a template?

Templates can be customized to specific company processes and use cases, and they can help guide your users through common workflows. Without a template, Account Plans can vary considerably by rep and can lead to confusion, disorganization, and even lost deals. To streamline your business practices and make sure that your reps are aligned, use Account Plan templates that auto-fill with Salesforce data. Your reps save time writing their Account Plans and spend more time selling.

How do you create a template?

You can [mark any document](#) on page 226 as a template. A Salesforce admin then embeds the template in an object's page layout and choose how they want their users to be able to create documents from it: manually, through Flow Builder, or both.

Where do documents created from a template go?

By default, documents created from an embedded template are added to the user's Private folder in Quip. A Salesforce admin can also use actions in Process Builder or Flow Builder to automatically add created documents to assigned folders and grant access to the right users at the right time.

How do dynamic fields added to a template work?

To auto-fill your embedded templates with data from the Salesforce record, you can use Salesforce Template Data Mentions or mail merge syntax. Both options support the embedded object's custom and standard fields and lookup fields up to one level. [Tell Me More](#) on page 278

What dynamic Salesforce data can you add to a template?

The [Salesforce Record live app](#) on page 261, [Salesforce List live app](#) on page 256, [CRM Analytics live app](#) on page 268, [Salesforce Report](#) on page 287, and [Salesforce Data Mentions](#) on page 283 have template options. After you set up your templated fields, they auto-fill based on the Salesforce record.

Define Your Use Case

Identify a high impact use case for a template.

- What existing process could be improved by using templates in Salesforce?
- Who are the key players that would benefit from process change?
- What goals are you hoping to achieve through this process change?
- What strategic initiative does this process change map to?

Gather Your Template Requirements

Identify what data must be in your template.

- What data lives in Salesforce that you want pulled into your template?
- How is that data structured today (standard field, custom field, custom view, list, related list, report, and so on)?
- What data lives outside of Salesforce that you want pulled into your template?
- Where is that data updated today (emails, notebooks, note apps, and so on)?
- Create a list of all Requirements and Business Impact for each requirement. Here's an example:

Use Case	What It Looks Like Today	Requirement Name	Business Impact	Report Required?	Salesforce Data Required?	Where It Lives Today	Salesforce Automation Required?
Account Planning	Folders are organized in Sharepoint with the appropriate access designated per user.	Document access restrictions	Documents must not be accessible by anyone outside of the project team.	✗	✗	✗	Every Account Plan should be added to an Account folder and the Account team members should be @mentioned when the document is created.
Account Planning	Account Planning PowerPoint	Customer Overview	✗	✓	Name Location Spend	Account record	✓
Account Planning	Account Planning PowerPoint	Account Team	✗	✓	Name	must create fields in Salesforce	✓
Account Planning	Account Planning PowerPoint	Open Opportunities	As a business executive, I want to see each opportunity and related milestones.	✓	Opportunity Name Amount Owner Close Date Health Score Milestones	Opportunity record	✓
Account Planning	Account Planning PowerPoint	Customer's Goals	✗	✗	✗	Should be free-form text	✓
Account Planning	Account Planning PowerPoint	SWOT	✗	✗	✗	Should be free-form text	✓
Account Planning	Account Planning PowerPoint	Growth Strategies	✗	✗	✗	Should be free-form text	✓
Account Planning	Account Planning PowerPoint	Action Plan	✗	✗	✗	Should be free-form text	✓

Use Case	What It Looks Like Today	Requirement Name	Business Impact	Report Required?	Salesforce Data Required?	Where It Lives Today	Salesforce Automation Required?
Account Planning	Account Planning PowerPoint	Relationship Mapping	✗	✗	Contact Name Title	Contact record	✓

Identify Your Current Process

- What is the process today?
- What tools are used for the process?
- Who manages the process?
- Who are the key stakeholders?
- How often does the process get updated?
- What works well for this process?
- How do you document how users experience the process today?

Define Your Ideal Process

- What are the pain points of your current process?
- What could be better about this process?
- What information could be added to Salesforce that isn't currently there?
- What information do your users must update on an ongoing basis?
- What can be removed from the current process?
- What reporting do you need?



Note: If reporting is required, it must be through Salesforce's reports and dashboards. Quip doesn't have a way to report on free-form text.

- Optional. What validations or rules are required for your data?

Identify Your End Users

- Who is your target audience?
- What tools do they use on a daily basis?
- How do they feel about their current process?
- How do they feel about Salesforce today?
- Have you rolled out any new processes in the last three months? If so, how did it go and what would you do differently?
- Have you rolled out any new tools in the last three months? If so, how did it go and what would you do differently?
- Who are your pilot users and how can they provide feedback?

What Salesforce data should you use?

Salesforce Data Type	Pros	Cons	Considerations	Use Case
Salesforce Template Record on page 261	<p>After they auto-fill with data, they bidirectionally sync with Salesforce.</p> <p>Can edit and view records on the Quip mobile app.</p>	<p>Only supported in documents marked as templates.</p> <p>Shows only one record. If you want to view all opportunities or contacts, you need a Salesforce Record live app for each. To view all records, we recommend you use the Salesforce List live app.</p>	<p>Template Records work in Lightning Experience only. You can't add the Salesforce Record live app to a document on mobile.</p>	<p>Set up one or more live apps in an embedded template. They all auto-populate based on the same record.</p> <p>Account Overview details like the Account Name, Current Spend, Territory, Location.</p>
Salesforce Template Related List on page 256	<p>After they auto-fill with data, they bidirectionally sync with Salesforce.</p> <p>You can edit and view list views on the Quip mobile app.</p>	<p>Only supported in documents marked as templates.</p> <p>You can't add columns from Quip if not already configured on the list view in Salesforce.</p>	<p>Template Related Lists work in Lightning Experience only.</p> <p>Dynamic filters can be set only for related list views.</p> <p>You can't update lookup fields.</p> <p>You can't add the Salesforce List live app to a document on mobile.</p>	<p>Set up one or more live apps in an embedded template. They all auto-populate based on the same record.</p> <p>Opportunity lists, Contact lists, and so on.</p>
Salesforce Report on page 287	<p>One-directional view of live Salesforce reports in Quip.</p> <p>You can view reports on the Quip mobile app.</p>	<p>You can't edit a report in Quip. To update Salesforce data in Quip and save it to Salesforce, we recommend using the Salesforce List live app.</p>	<p>Template Mode works in Lightning Experience only.</p> <p>You can't add or edit Salesforce reports on mobile.</p> <p>Comments and columns aren't tied to the Salesforce data. If you add a comment to a report cell and the data moves to another cell on refresh, the comment doesn't move with it.</p> <p>If you want to have live data and Quip-only columns, we recommend you filter the report by time so all new rows are</p>	<p>Activity lists filtered by the last 30 days and a user or keyword. You can use hashtags for activity reports on key initiatives.</p>

Salesforce Data Type	Pros	Cons	Considerations	Use Case
			added to the bottom of the spreadsheet.	
Salesforce Template Data Mention	After they auto-fill with data, they bidirectionally sync with Salesforce.	Only supported in documents marked as templates.	<p>You can't view or add Salesforce Template Data Mentions on Quip mobile.</p> <p>You can view and edit regular Salesforce Data Mentions on mobile.</p>	Data mentions stay up to date even after they populate with Salesforce data. End users who want to mention a record or record field can use regular Salesforce Data Mentions in their notes.

Mark a Document as a Template

To differentiate documents that your team uses as templates, mark your documents as templates in Quip. See what documents are embedded in Salesforce based on the object, convert your embedded documents to templates, and access them from the Template Library in Quip.

Templates have all the same great functionality of a document, but can be locked and unlocked to protect against accidental edits. Indicate that the template is ready to use with template locking.

To make edits to it later, unlock it. After you mark a document as a template, share it with others

and find it in your Created by Me private gallery. Users and admins with full access to a document can mark it as a template.

EDITIONS

Available in: Lightning Experience

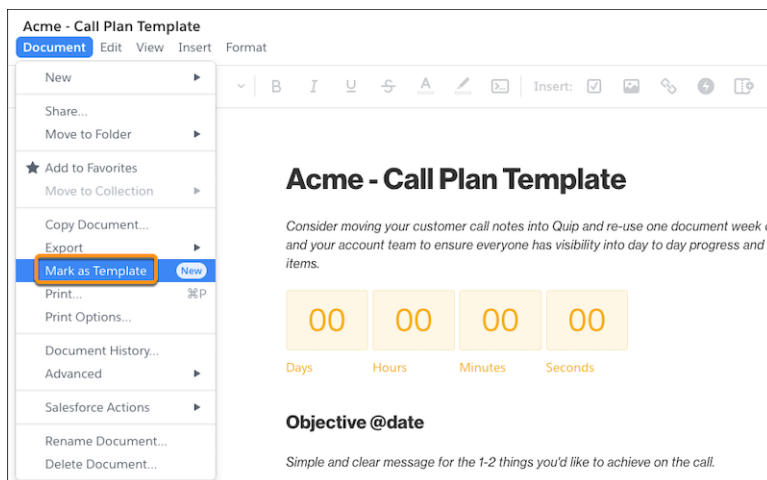
Mark a New Document as a Template

To create a template, create a document and mark it as a template.

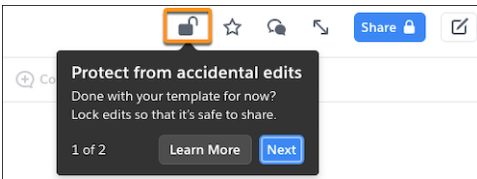
Important: After you mark a document as a template, you can't reset it. If you're not sure you want to irreversibly mark your document as a template, make a copy of the document, and mark the copy as the template.

You can mark only documents as templates. Spreadsheets and slides aren't supported.

1. From your document, click the **Document** dropdown, and select **Mark as Template**. Only users with full access to the document can mark it as a template.

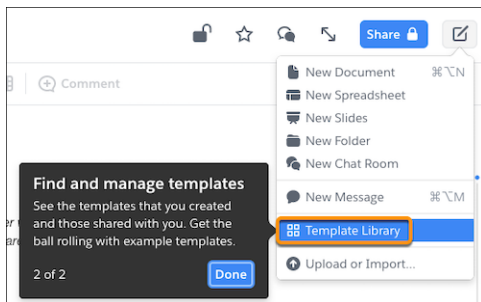


- To confirm you want to irreversibly mark the document as a template, click **Mark as Template**.
New templates are unlocked by default.
- If your document is ready to share and to protect it from accidental edits, click the lock icon, and lock template edits. To edit your template later, you can unlock and relock it at any time. Only users with full access to a template can change the lock status.



- Your new template is added to your private Created by Me gallery in the Template Library. To share it and collaborate with others, click **Share**, and grant Quip users access to the template.

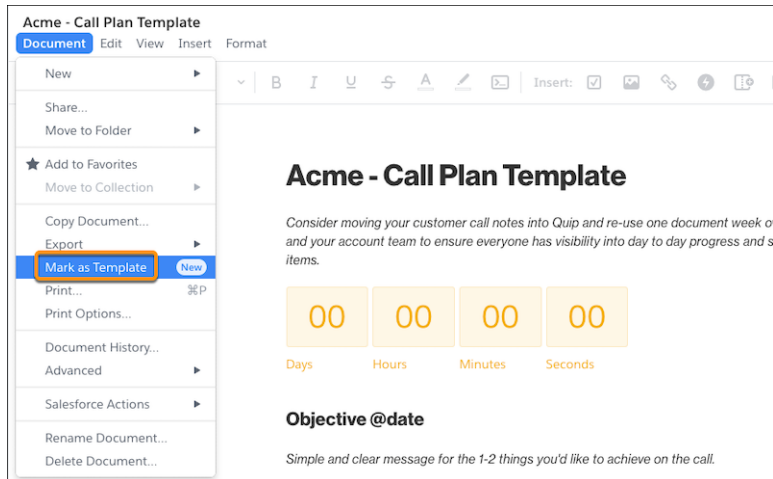
To access your new template, click the **Compose** button, and select **Template Library**.



Convert an Existing Document to a Template

To convert an existing document to a template, mark it as a template.

- Identify which documents are used as templates.
You can mark only documents as templates. Spreadsheets and slides aren't supported.
 - To surface documents embedded in Salesforce via the Quip Document component, use the [Template Manager in Salesforce](#) on page 240.
 - Find documents used as templates in Quip.
- Choose a template creator. The person who converts the document to a template is considered the template creator—the template is added to their Created by Me gallery in the Template Library. Users shared on the document can see it only in their Shared with Me gallery.
- Mark your documents as templates. From your document, click the **Document** dropdown, and select **Mark as Template**. Only users with full access to the document can mark it as a template.

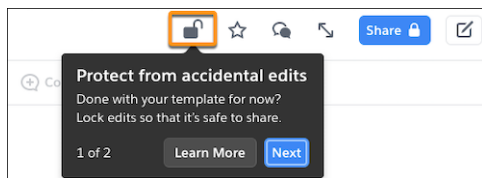


Marking an existing document as a template doesn't change the document's sharing settings. Users previously added to the document retain document access, and Synced Sharing and link sharing settings aren't affected. Documents embedded in Salesforce that are converted to templates aren't affected.

4. To confirm you want to irreversibly mark the document as a template, click **Mark as Template**.

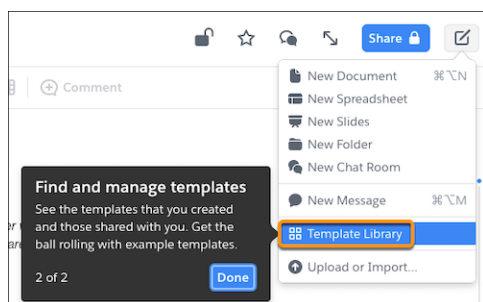
Important: After you mark a document as a template, you can't reset it. If you're not sure you want to irreversibly mark your document as a template, make a copy of the document, and mark the copy as the template.

5. If your document is ready to share and to protect it from accidental edits, click the lock icon, and lock template edits. To edit your template later, you can unlock and relock it at any time. Only users with full access to a template can change the lock status.



6. Your template is added to your private Created by Me gallery in the Template Library. To share it and collaborate with others, click **Share**, and grant Quip users access to the template.
7. If you converted a copy of a document embedded in the Quip Document component, update the Quip Template URL, and [validate the template](#) on page 240 to make sure it's ready to use.

To access your new template, click the **Compose** button, and select **Template Library**.



Create Document Ranges in Your Templates

Add headings to your templates to create defined sections, called document ranges, and see how your templates are structured.

Document ranges are supported only in documents and templates. **Show Document Range** is supported only in templates.

Heading Type	Document Range
Small Heading	A document range defined by a small heading includes only the content under that small heading, and ends at the start of the next heading.
Medium Heading	A document range defined by a medium heading includes the content and small headings under it, and ends at the start of the next medium or large heading.
Large Heading	A document range defined by a large heading includes the content under that large heading, and ends at the start of the next large heading. Template titles use large headings.

1. In a template, add headings to define the different sections. The heading names become your document range names.



Tip: To add content via automation to your templates based on a document range, choose heading names that are consistent and shared across your business.

2. To see your document range, click the header menu, and select **Show Document Range**.
3. To keep your headings safe from accidental edits, lock them. Click the header menu, and select **Lock Edits**.

To update content with Flow Builder based on a document range, use the Edit Document or Copy Content with Live Paste actions, and select a document range placement.

Considerations for Document Ranges

As you set up document ranges in your templates, keep in mind these considerations.

SEE ALSO:

- [Flow Core Action for Quip: Edit Quip Document](#)
- [Flow Core Action for Quip: Copy with Live Paste](#)

Considerations for Document Ranges

As you set up document ranges in your templates, keep in mind these considerations.

Template Format

You can see your document ranges only in templates. You can add automation to documents based on a document range, but you can't click **Show Document Range** in a document to see the defined sections.

EDITIONS

Available in: **Lightning Experience**

EDITIONS

Available in: **Lightning Experience**

Document ranges aren't supported in spreadsheets or slides.

Document Range Identification

Document ranges are defined only by headers. Paragraphs, checklists, and other formats don't define the start or end of a document range.

If a header used for automation is edited, the automation can't find the document range. To avoid broken automation, lock edits to headers you want to use for document ranges.

@Mentions, data mentions, and mail merge syntax don't work well with document range automation. For the best experience, use static headers to define your document ranges.

If a document or template has multiple headers of the same name, automation endpoints use the first instance of that header.

If a document or template has multiple columns, showing a document range from a column highlights the document width. Automation based on the document range header still works as expected.

Configure Your Template

After you finish gathering your template requirements, build a template in Quip and add the Salesforce data that your company needs.

1. Create a document in Quip.
2. Use headers to create an outline of required template sections. Refer to what data you identified needs to be in your template.
3. Identify sections that require Salesforce data.
4. Add context to relevant sections for your users.



Note: Keep it simple. Too much formatting can be intimidating for your users and can lead to time lost on formatting rather than content. Try using a checklist or bulleted list.

5. Mark the document as a template. [Tell Me How](#) on page 226
6. Add templated Salesforce data:
 - a. [Add dynamic Salesforce records](#) on page 261.
 - b. [Add dynamic Salesforce related lists](#) on page 256.
 - c. [Add dynamic Salesforce reports](#) on page 287.
 - d. [Add a Salesforce Template Data Mention](#) on page 283.
 - e. [Add mail merge syntax](#) on page 204.
7. To let your users create a document from the template, turn on link sharing. From the template, click **Share**, and then include a shareable link. Click **Link Settings** and set access to **View only**.
8. By default, the template is added to your Created by Me private template gallery. You can also share it with specific users or move it to a folder to organize your templates thematically.
 - a. From the template, click **Share**.
 - b. Enter the name of a folder or person and set the level of access.



Tip: To keep your sandbox templates organized while you test them, we recommend creating a Sandbox Templates folder.

EDITIONS

Available in: **Lightning Experience**

9. Click **Done**.

Get Feedback and Iterate on Your Templates

As you create templates for your users, get feedback and iterate to make sure that they're working as intended.

1. Define your template's key features and share a [template user guide](#).
2. Share your initial template with key stakeholders and [get feedback](#).
3. Recommended. Create a launch plan for a pilot group of users.
 - a. Create a test group of up to 25 users.
 - b. Host an enablement session on embedded templates.
 - c. Gather feedback via surveys.
 - d. Iterate on the template and process as needed.
4. Finalize your template.
5. Create a communications channel to manage end-user communications.

EDITIONS

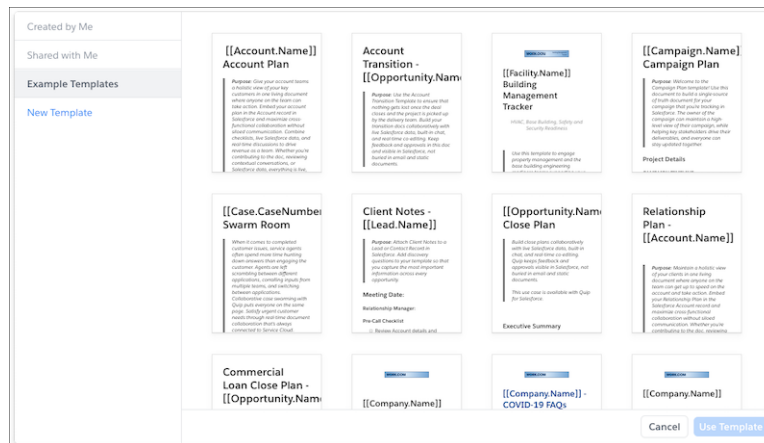
Available in: **Lightning Experience**

Template Library

Make it easy to find and create templates in Quip. With the Template Library, users can create and share templates in private galleries, like the Created by Me and Shared with Me galleries, or get started with example templates.

EDITIONS

Available in: **Lightning Experience**



Easily find your templates in the Created by Me private gallery, make changes, and create a document from a template. To collaborate on a template shared with you, go to your Shared with Me private gallery. You and your team can edit an unlocked template and tailor it to your business needs before you share it with others. Get up and running with some popular example templates, like Account Plans and Mutual Close Plans. They're prefilled with mail merge syntax to save time and give you a head start in template creation.

Create a Document from a Template

Create a document from a template in the Template Library.

Create a Template

Use the template format to safely create and share a template in Quip.

Edit a Template

Safely update templates from the Template Library.

Share Templates with Your Team

Choose how you want to roll out and share templates with your users.

Template Library Considerations

As you use the Template Library in Quip, keep in mind these considerations.

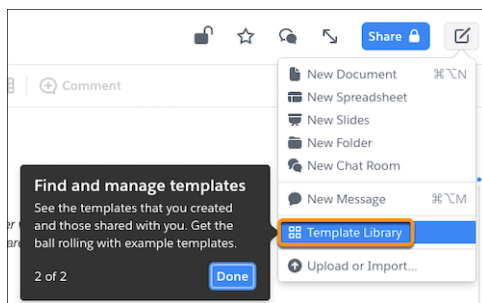
Template Library for Administrators

Quip site admins can create custom galleries, called company galleries, to organize templates thematically and publish them for their Quip site users.

Create a Document from a Template

Create a document from a template in the Template Library.

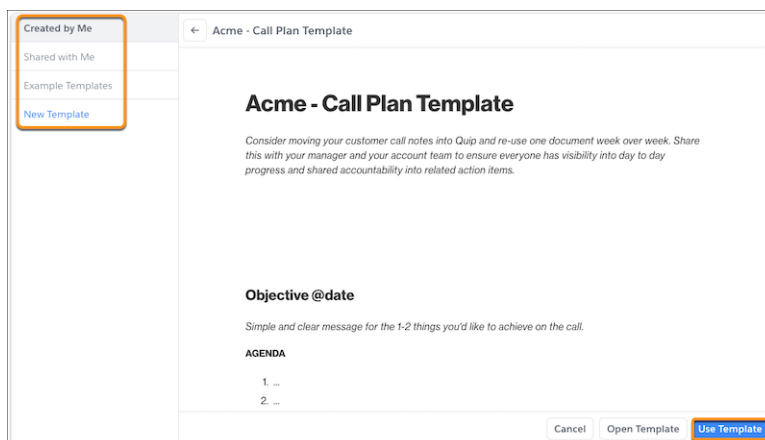
1. To access your available templates, click the **Compose** button, and select **Template Library**.



EDITIONS

Available in: Lightning Experience

2. Find the template you want to use:



- a. To create a document from a template that you created, select **Created by Me**.
- b. To create a document from a template shared with you, select **Shared with Me**.
- c. To use a sample template from quip.com/templates, select **Example Templates**.

d. To use an admin-approved company template, select the company gallery name.

3. Click **Use Template**.

4. Name your document and choose which folder to save it to.

After you embed the template in a Salesforce record and create a document from it, any Salesforce Template Data Mentions or mail merge fields added to the template autopopulate with the Salesforce record data.

SEE ALSO:

[Add a Salesforce Template Data Mention](#)

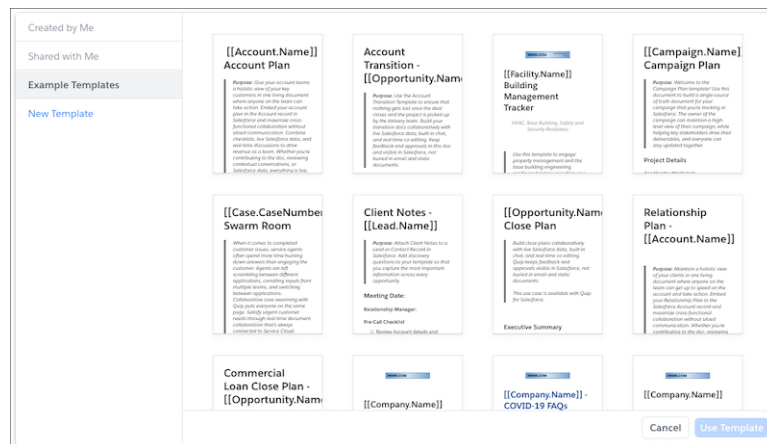
[Decide Between Template Data Mentions and Mail Merge](#)

[Mail Merge Examples](#)

Create a Template

Use the template format to safely create and share a template in Quip.

1. From Quip, click the **Compose** button, and select **Template Library**.
2. Select **New Template**.



EDITIONS

Available in: Lightning Experience

3. Name your template and choose which folder to save it to.

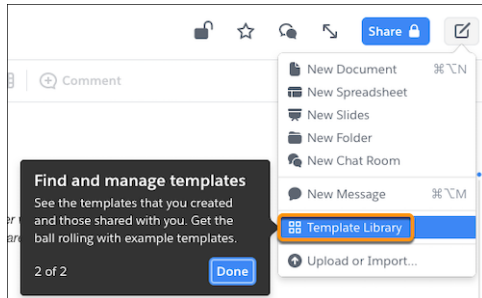
Tip: If you opened the Template Library from your Private folder or from a document saved to your Private folder, your template is automatically saved in your Private folder. You can rename your template and change the folder later.

4. Build your template in the unlocked state. For example, add Salesforce live apps and mail merge syntax to your Salesforce Account Plan templates.
5. To prevent accidental changes, after you edit the template, lock the template. After you lock the template, share it with users so they can create documents from it.

Edit a Template

Safely update templates from the Template Library.

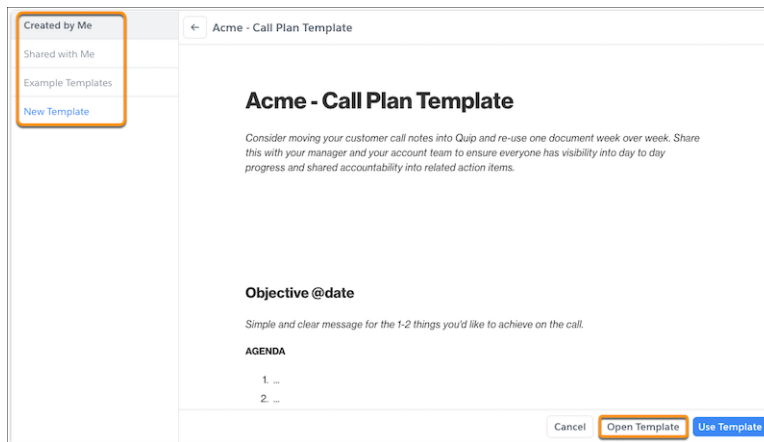
1. To access your available templates, click the **Compose** button, and select **Template Library**.



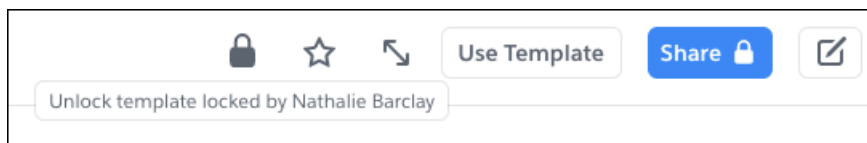
EDITIONS

Available in: Lightning Experience

2. Find the template you want to edit. To unlock a template, you need full access to it.



3. Click **Open Template**.
4. Click the **lock icon** and unlock the template.



5. Add your changes to the template.
6. To prevent accidental changes after you edit, lock the template. After you lock the template, users can create documents from it.

Share Templates with Your Team

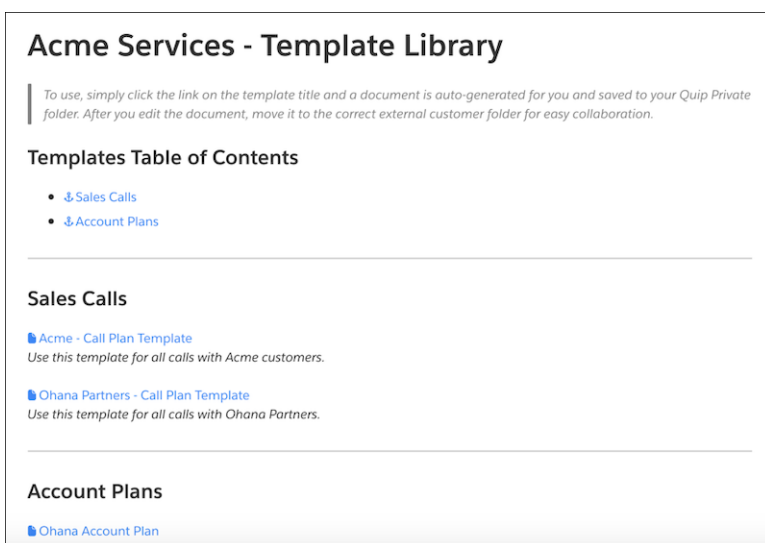
Choose how you want to roll out and share templates with your users.

To share your new and converted templates with your team, pick the solution that best meets your business needs. Give your users access to a list of templates in a specific order with more background information.

1. Set link sharing to View only for the templates to share and disable requests to edit.
2. Create a document and add links to the templates in the desired order.

EDITIONS

Available in: Lightning Experience



3. Add background information to the document.
4. Share the document with individual users or add it to a shared folder.
5. If your templates are for a specific team's needs, add your templates to a shared folder or add individual users to the templates. Set the access level to Can View.
Users shared on the template can access it from their Shared with Me private gallery in the Template Library.

Template Library Considerations

As you use the Template Library in Quip, keep in mind these considerations.

Mobile Support

Templates and the Template Library aren't currently supported on the Quip mobile app. On mobile, you can:

- view an unlocked template as a regular document
- view a locked template as a regular locked document

You can't mark a document as a template, lock or unlock a template, or open the Template Library from the Quip mobile app.

Document Type

You can mark only documents as templates. Marking a spreadsheet or slide as a template isn't supported.

Example Templates

Templates in the Example Templates private gallery are from <https://quip.com/templates> and aren't customizable by admins. Documents, spreadsheets, and slides added to your site by Quip Support are surfaced in the Example Templates gallery.

Example templates aren't available by default for VPCs.

Mail merge syntax in example templates autopopulates with data only if the field exists on the record that the template is embedded in and matches your API names. To make sure that the example template's mail merge syntax is replaced with the correct Salesforce data, check the record's available fields and your API names.

Embedded Documents

To autofill mail merge fields and templated live apps and reports, templates must be [embedded in a Salesforce record](#) on page 208. Copying a template doesn't autofill it with Salesforce data.

When you create a document in a Quip Lightning component, it can take Salesforce several minutes to complete the link between the document and the Salesforce record. It can also take some time for synced sharing to work. You can continue working and refresh the record page periodically while you wait.

Mail merge syntax in embedded or linked documents created from templates can fail if a user doesn't complete the link between Quip and Salesforce. To complete the link, users can go to the Salesforce tab of the Quip Account Settings window.

Template Library for Administrators

Quip site admins can create custom galleries, called company galleries, to organize templates thematically and publish them for their Quip site users.

[Manage Admin Roles for the Template Library](#)

Enable key business stakeholders to create company galleries and publish templates from the Quip Admin Console.

[Publish Templates to the Template Library](#)

To publish company-wide templates to your Quip site's Template Library, create a company gallery and publish templates to it.

[Edit or Delete Published Templates](#)

To edit or delete a published template, you must first unpublish it.

[Template Library for Admins Considerations](#)

As you publish templates to the Template Library in Quip, keep in mind these considerations.

EDITIONS

Available in: Lightning Experience

Manage Admin Roles for the Template Library

Enable key business stakeholders to create company galleries and publish templates from the Quip Admin Console.

Give your template stakeholders publishing access to templates in the Quip Admin Console. You can choose whether to give them admin access, or just to give them access to the Templates section of the Quip Admin Console. Users with Templates access only can't see other parts of the Quip Admin Console.

- Quip Site Admins and Super Admins have Edit Templates access enabled by default.
- Only Quip Site Admins with Edit access to Admin Roles and Site Settings can create a Template admin role.

1. Go to <https://admin.quip.com>.

EDITIONS

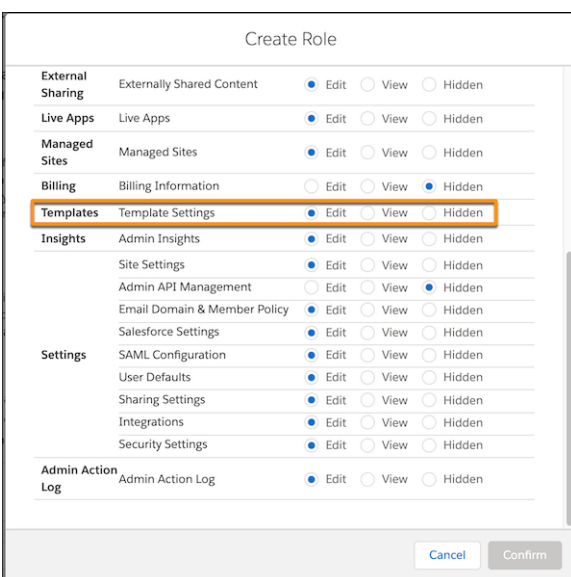
Available in: Lightning Experience

- Log in using your Quip admin email and password.
- Click **Settings** and then **Site Settings**.
- Under Admin Roles, click **Create New Role**.



- Under Templates, select the level of access you want to assign the role, and click **Confirm**.

Category	Edit Permission	View Permission	Hidden Permission
Templates	User can create, edit, and remove galleries, and publish templates and unpublish templates.	User can only see the Template Library section in the Quip Admin Console.	User can't see the Template Library section in the Quip Admin Console.



- To assign the new Templates role to a user, click **Site Members**, find the user, and modify the existing admin role or assign the new one.

Publish Templates to the Template Library


To publish company-wide templates to your Quip site's Template Library, create a company gallery and publish templates to it.

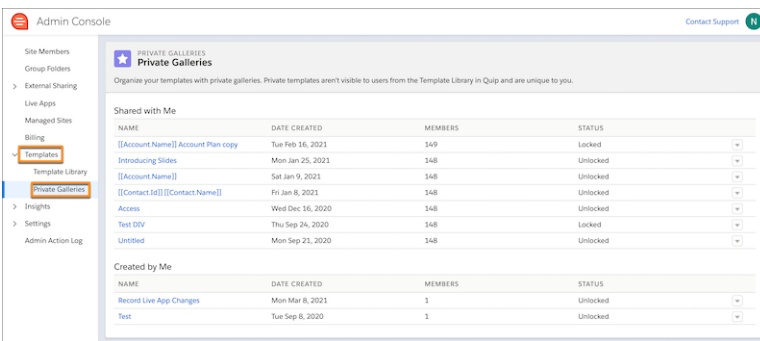
To publish a template to the Template Library in Quip, you must:

- Have [Template permissions](#) on page 236 in the Quip Admin Console
- Be the template creator or have Full Access to it

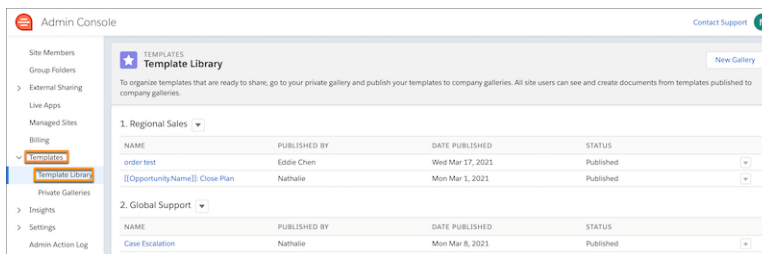
After you publish a template to a company gallery, link sharing is enabled and all users in the Quip site can use the template. The template is removed from your private gallery and users shared on the template are removed. External link sharing settings aren't affected—external users with link sharing access to a template can still view it after it's published.

1. Go to <https://admin.quip.com>.
2. Log in using your Quip admin email and password.
3. Decide which templates you want to publish and how you can organize them thematically. To see your available templates, click **Templates**, then **Private Galleries**.

 **Note:** You can only publish templates in your Shared with Me or Created by Me gallery.



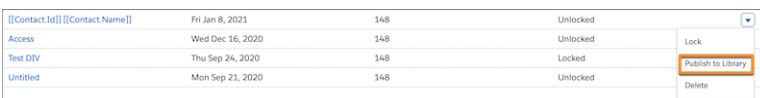
4. To group your templates thematically, create company galleries.
 - a. Under Templates, click **Template Library**.



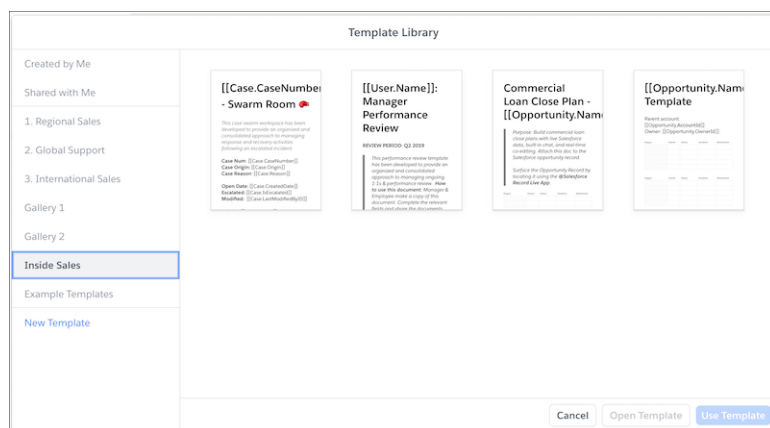
- b. Click **New Gallery**. Enter a name and save the action.

 **Tip:** Company galleries are shown in alphabetical order.

5. From your Private Galleries, click the dropdown next to the template you want to publish, and click **Publish to Template Library**. Your template is removed from your private gallery and added to the company gallery you selected.



Your template is now published and shared with your users via the Template Library in Quip. Templates are sorted within a gallery from most recently published to oldest.

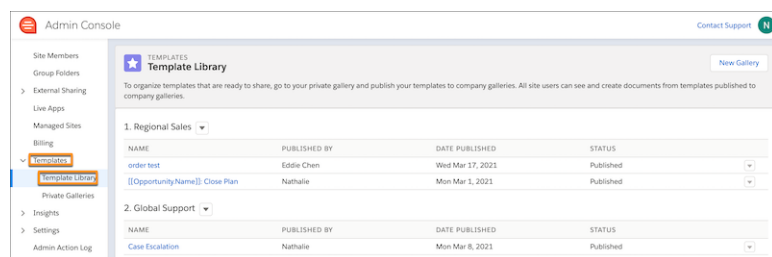


Edit or Delete Published Templates

To edit or delete a published template, you must first unpublish it.

To unpublish a template from the Template Library in Quip, you must have [Edit Template permissions](#) in the Quip Admin Console

1. Go to <https://admin.quip.com>.
2. Log in using your Quip admin email and password.
3. Under Templates, click **Template Library**.



4. Click the dropdown next to the template you want to edit or delete, and click **Unpublish Template**.
The template is removed from the Template Library in Quip and readded to your Created by Me private gallery. You can also find the template in your Private folder in Quip.
5. From Quip, unlock the template to make edits or delete it.

Template Library for Admins Considerations

As you publish templates to the Template Library in Quip, keep in mind these considerations.

Template Library in Quip Considerations

[Template Library in Quip general considerations](#) on page 235

Template Admin Permissions

Only Quip site admins users with [Edit Template permissions](#) on page 236 in the Quip Admin Console can publish templates to the Template Library. Regular Quip users can't create company galleries or publish templates to them.

Company Galleries

- Only users with [Edit Template permissions](#) on page 236 can create a company gallery.
- Quip site users can see all company galleries and their published templates in Quip. You can't create private or hidden company galleries.
- You can't delete a company gallery with templates in it. To remove access to your published templates, move them to another gallery or unpublish them instead.

Publishing Behavior

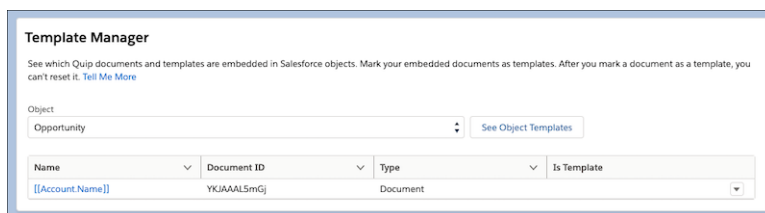
- Only an admin with Full Access to a template can publish, lock, or unlock a template from the Quip Admin Console. Any admin with Edit Template permissions can unpublish a template.
- You can publish only templates that are in your Created by Me or Shared with Me private galleries.
- After a template is published, link sharing is enabled and all users in the Quip site can see the template via the Template Library. The template is removed from the publishing admin's private gallery and users shared on the template are removed. External link sharing settings aren't affected—external users with link sharing access to a template can still view it after it's published.
- You can't edit or delete a published template. To make changes, you must first [unpublish it](#) on page 239.
- After a template is unpublished, it's not reshared with the original users, and only the unpublishing admin is added to the template.

Manage Templates in Salesforce

Surface documents embedded in Salesforce records from the Template Manager. Open a preview of the document in Quip and mark it as a template.

See the documents and templates embedded in Salesforce objects that you have access to. You can mark as templates only the documents that you have full access to.

1. From Setup, in the Quick Find box, enter *Quip*, and then select **Quip**.
2. From the Template Manager, select a Salesforce object, and click **See Object Templates**.




EDITIONS

Available in: **Lightning Experience**

USER PERMISSIONS

To manage templates in Salesforce:

- [Customize Application](#)

3. To preview an object's embedded documents, click the document title. The document opens in Quip.
4. To mark an embedded document as a template, click  and select **Mark as Template**. The Template Manager redirects you to Quip where you can [mark the document as a template](#) on page 226. After you convert a document to a template, you can't reset it.



Note: You can mark as templates only the embedded documents with a blank `Is Template` status.

5. To refresh the Template Manager and update the `Is Template` status after you mark a document as a template, click **See Object Templates**.

Live Data in Quip

See which live data applications work in Quip. Learn more about live apps, like the Salesforce Record live app or the Calendar live app, as well as other live data, like Salesforce reports or Salesforce data mentions.

[How Does Live Data Work in Quip?](#)

Learn about the different live data integrations you can add to your documents, spreadsheets, and templates.

[Live Data on the Quip Mobile App](#)

Learn about which live data integrations work on the Quip mobile app.

[Supported Fields in Salesforce Live Apps and Data Mentions](#)

To add Salesforce live apps and data mentions to your documents, check which Salesforce fields are supported.

[Salesforce Live Apps](#)

Bring your freeform content and your Salesforce data together with Salesforce live apps in documents. Collaborate on list views, records, dashboards, and maps, and sync your changes to Salesforce.

[Salesforce Data Mentions](#)

Add live Salesforce data to your documents, spreadsheets, and Account Plans without getting in the way of your formatting. With in-line data mentions, data reads like normal text but stays up to date and syncs with Salesforce. Edit the record fields from the data mentions, making it easier to keep your Salesforce work in Quip.

[Filtered Salesforce Reports in Quip](#)

Apply your Salesforce report's custom filters to tailor your report view in Quip. Use filters to sort your reps' open opportunities by region or track your reps' progress. You can even dynamically filter live Salesforce reports based on the record they're embedded in.

How Does Live Data Work in Quip?

Learn about the different live data integrations you can add to your documents, spreadsheets, and templates.

Live Data	What It Does	How It Works	Refresh Behavior	Export to PDF	Considerations
Calendar Live App	Add a calendar to your documents to coordinate projects and work.	@Mention <i>Calendar</i> in a document. You can @mention people, dates, and documents in a calendar event. Drag and drop events to rearrange them.	NA	<ul style="list-style-type: none"> @Mentions are clickable and open in Quip. You can't open comments. 	<ul style="list-style-type: none"> Supported only in documents and templates. Users aren't notified of @mentions in live apps, only attached comments. Doesn't sync with third-party calendars like Google or iCal. You can build these integrations with the Quip API.

Live Data	What It Does	How It Works	Refresh Behavior	Export to PDF	Considerations
Countdown Live App	Add a countdown clock to your documents to highlight important deadlines.	@Mention <i>Countdown</i> in a document. You can set the end date and see it count down in real time.	NA	<ul style="list-style-type: none"> • @Mentions are clickable and open in Quip. • You can't open comments. 	<ul style="list-style-type: none"> • Supported only in documents and templates. • Doesn't sync with third-party applications. • Comments aren't sticky to the individual time elements but to the countdown live app as a whole.
Kanban Board Live App	Add a kanban board to your documents to easily track tasks.	@Mention <i>Kanban Board</i> in a document. You can create columns, create cards, and set card colors. To move cards to another column, simply drag.	NA	<ul style="list-style-type: none"> • @Mentions are clickable and open in Quip. • You can't open comments. 	<ul style="list-style-type: none"> • Supported only in documents and templates. • Doesn't sync with third-party applications. • Doesn't support upvoting. • Users are notified of @mentions in the kanban card and comments. • Salesforce recommends a maximum of 50 cards in a Kanban board.
Poll Live App	Add a voting poll to your documents to get quick and lightweight feedback.	@Mention <i>Poll</i> in a document. You can set voting to single or multiple votes, add comments to poll options, and set poll option colors.	NA	<ul style="list-style-type: none"> • @Mentions are clickable and open in Quip. • You can't open comments. 	<ul style="list-style-type: none"> • Supported only in documents and templates. • Doesn't sync with third-party applications. • Poll votes are shown in the Conversation pane.

Live Data	What It Does	How It Works	Refresh Behavior	Export to PDF	Considerations
					<ul style="list-style-type: none"> Users aren't notified of @mentions in the poll option, only attached comments.
Process Bar Live App	Add a process bar to your documents to track a step-by-step or phased process.	@Mention <i>Process Bar</i> in a document. You can add steps, set a process bar color, and add comments to steps. To mark a step as the current step, click the dropdown.	NA	<ul style="list-style-type: none"> @Mentions are clickable and open in Quip. You can't open comments. 	<ul style="list-style-type: none"> Supported only in documents and templates. Doesn't sync with third-party applications. Users are notified of @mentions in the step and comments. You can set different steps to different colors.
Project Tracker Live App	Add a project tracker spreadsheet to your documents to track projects, set project owners, set deadlines, and link to relevant files.	@Mention <i>Project Tracker</i> in a document. You can add projects, edit or add new columns, and customize the different project statuses. Columns can be set to people, dates, status, files, or plain text. To @mention a document in Quip, use a text column.	NA	<ul style="list-style-type: none"> @Mentions are clickable and open in Quip. You can't open comments. 	<ul style="list-style-type: none"> Supported only in documents and templates. Doesn't sync with third-party applications. Users are notified of @mentions in the text columns and people columns. Setting deadlines doesn't create a task for the project owner. Salesforce recommends a maximum of 50 cards in a project tracker.

Live Data	What It Does	How It Works	Refresh Behavior	Export to PDF	Considerations
Relationship Map Live App on page 269	Add a lightweight relationship map to your documents to map out key stakeholders, easily identify deal detractors and influencers, and more.	@Mention <i>Relationship Map</i> in a document. You can create custom and Salesforce cards to manage customer relationships, key stakeholders, and relationship health from a document. Add fields, rearrange cards, and add color indicators to your custom and Salesforce cards.	<ul style="list-style-type: none"> If Mirrored Salesforce Permissions are off, the Relationship Map live app doesn't automatically refresh on page load. The live app must be manually refreshed. If Mirrored Salesforce Permissions are on, the Relationship Map live app automatically refreshes on page load based on the viewing user's level of access. The live app can also be manually refreshed. 	<ul style="list-style-type: none"> Salesforce record fields and records aren't clickable. Some formatting doesn't align. You can't open comments. 	<ul style="list-style-type: none"> Considerations for the Relationship Map Live App on page 275 Supported only in documents and templates. Supports only integrations with Salesforce and not third-party applications. You can't @mention users or documents in the Relationship Map live app. To use @mentions, add comments.
Salesforce Record Live App on page 261	Add an embedded Salesforce record to your documents to get the latest record information, collaborate on Salesforce data in context, and save edits to Salesforce from Quip.	@Mention <i>Salesforce Record</i> in a document or template.	<ul style="list-style-type: none"> If Mirrored Salesforce Permissions are off, the Salesforce Record live app automatically refreshes on page load based on the permissions of the user who inserted it. The live app can also be manually refreshed by users with full or 	<ul style="list-style-type: none"> The Salesforce record name is clickable and opens the record in Salesforce. Salesforce record fields aren't clickable. Some formatting doesn't align. You can't open comments. 	<ul style="list-style-type: none"> Supported only in documents and templates. Supported Fields in Salesforce Live Apps on page 249 You can't @mention people or documents in the Salesforce Record live app. To use @mentions, add comments.

Live Data	What It Does	How It Works	Refresh Behavior	Export to PDF	Considerations
			<p>partial access to the record's fields.</p> <ul style="list-style-type: none"> If Mirrored Salesforce Permissions are on, the Salesforce Record live app automatically refreshes on page load based on the viewing user's level of access. The live app can also be manually refreshed. 		<ul style="list-style-type: none"> Supports only integrations with Salesforce and not third-party applications. Updates to the Salesforce Record live app don't appear in the document's conversation pane. You can change Salesforce Data Permissions from the Quip Admin Console.
Salesforce List Live App on page 251	Add an embedded Salesforce list view or related list view to your documents to do bulk updates, sync your changes to Salesforce, and add list view filters. You can even add notes and next steps that you can share with your team.	@Mention <i>Salesforce List</i> in a document or template.	<ul style="list-style-type: none"> If Mirrored Salesforce Permissions are off, the Salesforce List live app automatically refreshes on page load based on the permissions of the user who inserted it. The live app can also be manually refreshed by any user with access to the document. If Mirrored Salesforce Permissions are on, the Salesforce List live app automatically refreshes on 	<ul style="list-style-type: none"> The Salesforce list view name is clickable and opens the list view in Salesforce. Salesforce records aren't clickable. Some formatting doesn't align. You can't open comments. 	<ul style="list-style-type: none"> Supported only in documents and templates. Considerations for List Views in Quip on page 252 Supported Fields in Salesforce Live Apps on page 249 You can't @mention people or documents in the Salesforce List live app. To use @mentions, add comments. Supports only integrations with Salesforce and not third-party applications. You can change Salesforce Data Permissions from

Live Data	What It Does	How It Works	Refresh Behavior	Export to PDF	Considerations
			page load based on the viewing user's level of access. The live app can also be manually refreshed.		the Quip Admin Console.
CRM Analytics Live App on page 264	Add an embedded CRM Analytics dashboard to your documents to update dashboard filters, interact with components, and collaborate on Salesforce data.	@Mention <i>CRM Analytics</i> in a document or template.	NA	NA	<ul style="list-style-type: none"> Supported only in documents and templates. Supported Fields in Salesforce Live Apps on page 249 CRM Analytics Live App Considerations on page 267 You can't @mention people or documents in the CRM Analytics live app. To use @mentions, add comments. Supports only integrations with Salesforce and not third-party applications.
Live Salesforce Reports on page 286	Add an embedded Salesforce report to your documents to get the latest report information, collaborate on Salesforce data in context, and add custom Quip filters to your reports.	@Mention <i>Salesforce Report</i> in a document or template.	<ul style="list-style-type: none"> If Mirrored Salesforce Permissions are off, Salesforce reports automatically refresh on page load based on the permissions of the user who inserted it. Reports can also 	<ul style="list-style-type: none"> Salesforce records in the report are clickable and open in Salesforce. You can't open comments. 	<ul style="list-style-type: none"> Supported only in documents and templates. Considerations for Salesforce Reports in Quip on page 287 You can't save changes to filters made in Quip to Salesforce.

Live Data	What It Does	How It Works	Refresh Behavior	Export to PDF	Considerations
			<p>be manually refreshed by any user with access to the document.</p> <ul style="list-style-type: none"> If Mirrored Salesforce Permissions are on, Salesforce reports don't automatically refresh on page load. Salesforce reports can also be manually refreshed based on the viewing user's level of access. 		<ul style="list-style-type: none"> You can't @mention people or documents in reports. To use @mentions, add comments. Supports only integrations with Salesforce and not third-party applications. You can change Salesforce Data Permissions from the Quip Admin Console.
Salesforce Data Mentions on page 277	Add live Salesforce data to your documents, spreadsheets, and templates. With in-line data mentions, data reads like normal text but stays up to date and syncs with Salesforce. Edit the record fields from the data mentions, making it easier to keep your Salesforce work in Quip.	@Mention <i>Salesforce Data Mention</i> in a document, spreadsheet, or template.	<ul style="list-style-type: none"> If Mirrored Salesforce Permissions are off, Salesforce data mentions refresh on a page load or through a manual data mention reload based on the permissions of the user who inserted it. Data mentions can also be manually refreshed by any user with access to the document. If Mirrored Salesforce Permissions are on, live data mentions (LDM) are refreshed only during two 	<ul style="list-style-type: none"> Data mentions don't expand and aren't clickable. You can't open comments. 	<ul style="list-style-type: none"> Considerations for Salesforce Data Mentions on page 284 You can't @mention people or documents in Salesforce data mentions. To use @mentions, add comments. Supports only integrations with Salesforce and not third-party applications. You can change Salesforce Data Permissions from the Quip Admin Console.

Live Data	What It Does	How It Works	Refresh Behavior	Export to PDF	Considerations
			scenarios. Either the user loads a document with a given LDM based on the viewing user's level of access, and the record hasn't been refreshed in the last 10 minutes, or, the user manually refreshes a data mention.		

Live Data on the Quip Mobile App

Learn about which live data integrations work on the Quip mobile app.

Live Data	iOS	View	Insert	Edit	Stage Edits	Save to Salesforce	Considerations
Calendar Live App	✓	✓	✓	✓	NA	NA	Use the Calendar Actions section to cut, copy, or delete the live app. You can also set the default month.
Countdown Live App	✓	✓	✗	✗	NA	NA	Use the Countdown Actions section to cut, copy, or delete the live app. Not all actions are supported on mobile, like changing the colors or dates.
Kanban Board Live App	✓	✓	✓	✓	NA	NA	Use the Kanban Actions section to cut, copy, or delete the live app. You can also add columns.
Poll Live App	✓	✓	✓	✓	NA	NA	Use the Poll Actions section to cut, copy, or delete the live app. You can also add poll options and set voting to single or multiple. Not all actions are supported on mobile, like setting the poll option colors.
Process Bar Live App	✓	✓	✓	✓	NA	NA	Use the Process Bar Actions section to cut, copy, or delete the live app. You can also add steps.
Project Tracker Live App	✓	✓	✓	✓	NA	NA	Use the Project Tracker Actions section to cut, copy, or delete the live app. You

Live Data	iOS	View	Insert	Edit	Stage Edits	Save to Salesforce	Considerations
							can also add rows. Column dropdowns aren't supported.
Relationship Map Live App on page 269	✓	✓	✗	✗	✗	✗	The Relationship Map live app is view-only on mobile.
Salesforce Record Live App on page 261	✓	✓	✗	✓	✓	✓	Use the Salesforce Record Actions section to save your changes to Salesforce, refresh the data, open the record in Salesforce, or discard your changes. Not all actions are supported on mobile, like configuring fields after you add a record to a document.
Salesforce List Live App on page 251	✓	✓	✗	✓	✓	✓	Use the Salesforce List Actions section to save your changes to Salesforce, refresh the data, open the list view in Salesforce, or discard your changes. You can also select a different list view and select the visible fields. Not all actions are supported on mobile, like configuring fields after you add a record to a document.
CRM Analytics Live App on page 264	✓	✓	✗	✗	✗	✓	On mobile devices, the CRM Analytics live app redirects to the CRM Analytics mobile app. Tap any dashboard embedded in a document to launch CRM Analytics for mobile. You must be signed in to the Quip and CRM Analytics mobile apps with the same username and org.
Live Salesforce Reports on page 286	✓	✓	✗	✗	✗	✓	Salesforce reports are view-only on mobile.
Salesforce Data Mentions on page 277	✓	✓	✓	✓	✗	✓	Click the data mention to see all record fields and make edits. Edited fields are saved to Salesforce and can't be staged.

Supported Fields in Salesforce Live Apps and Data Mentions

To add Salesforce live apps and data mentions to your documents, check which Salesforce fields are supported.

EDITIONS

Available in: **Lightning Experience**

Field Type	Extra Type Info	Record Live App	List Live App	Relationship Map Live App	Data Mentions
Boolean	NA	Edit	Edit	Edit	Edit
Currency	NA	Edit	Edit	Edit	Edit
Date	NA	Edit	Edit	Edit	Edit
DateTime	NA	Edit	Edit	Edit	Edit
DependentPicklist	NA	View	View	View	Edit
Double	NA	Edit	Edit	Edit	Edit
Email	NA	Edit	Edit	Edit	Edit
Encrypted String	NA	View	View	✖	Edit
Location	NA	✖	✖	View	Edit
Lookup	NA	View	View	View	View
MultiPicklist	NA	Edit	Edit	View	Edit
Number	NA	Edit	Edit	Edit	Edit
Percent	NA	Edit	Edit	Edit	Edit
Phone	NA	Edit	Edit	Edit	Edit
Picklist	NA	Edit	Edit	Edit	Edit
Reference	NA	View	View	View	View
String	NA	Edit	Edit	Edit	Edit
TextArea	PlainTextArea	Edit	Edit	Edit	Edit
TextArea	RichTextArea	View	View	✖	View
URL	NA	Edit	Edit	Edit	Edit

Salesforce Live Apps

Bring your freeform content and your Salesforce data together with Salesforce live apps in documents. Collaborate on list views, records, dashboards, and maps, and sync your changes to Salesforce.

[Salesforce List Views in Quip](#)

See your Salesforce list views and related lists in Quip. You can do bulk updates, sync your changes to Salesforce, and add list view filters. You can even add notes and next steps that you can share with your team.

[Salesforce Records in Quip](#)

See your Salesforce records and customize your record views in Quip. You can do bulk updates and sync your changes to Salesforce. You can even add notes and next steps that you can share with your team.

EDITIONS

Available in: **Lightning Experience**

[CRM Analytics Dashboards in Quip](#)

Add live CRM Analytics dashboards to your documents and templates. You can update dashboard filters, interact with the components, and collaborate with your team on live Salesforce data.

[Relationship Map Live App](#)

Add lightweight org charts and relationship maps to your documents. Build relationship maps in your Account Plans with imported Salesforce record data. Create custom and Salesforce cards to manage customer relationships, key stakeholders, and relationship health from an Account Plan.

Salesforce List Views in Quip

See your Salesforce list views and related lists in Quip. You can do bulk updates, sync your changes to Salesforce, and add list view filters. You can even add notes and next steps that you can share with your team.

Quip brings your free-form content together with your Salesforce data. With the Salesforce List live app, your data is always up to date and syncs seamlessly to Salesforce. You can update your Opportunity and Case lists in the same place that you work. To add context and save time switching between Quip and Salesforce, import your list views into Quip. List views in Quip make it easier to see the bigger picture, split work as a team, and stay on top of your to-do's.

EDITIONS

Available in: **Lightning Experience**

[List Views in Quip: Supported Objects and Lists](#)

To add live list views to your documents, check which objects, values, and fields are supported for your Salesforce org.

[Considerations for List Views in Quip](#)

As you add the Salesforce List live app to your documents, keep in mind these considerations.

[Add a Salesforce List View in Quip](#)

Bulk update your Salesforce list views, add next steps, and keep your team in the know. The Salesforce List live app uses live Salesforce data so that your list views are always current.

[Add a Salesforce Related List in Quip](#)

Add record-specific related lists to a document with the updated Salesforce List live app. Stay on top of deals and cases with in-line editing, comments, and bi-directional syncing to Salesforce.

[Add a Salesforce Template Related List](#)

As you set up your templates, use Template Related Lists. When a user creates a document from your embedded template, the Salesforce template related lists automatically populate with the record's data and continue to stay up to date. Configure the Salesforce List live app in Quip to auto-populate with a list of Opportunities related to an Account.

[Filter a List View in Quip](#)

To see only the data that's relevant to you, add filters to your list views in Quip.

List Views in Quip: Supported Objects and Lists

To add live list views to your documents, check which objects, values, and fields are supported for your Salesforce org.

Object Types

The Salesforce List live app uses the Salesforce User Interface API to determine which objects are supported. Objects that are not supported in the UI API are grayed out in the Salesforce List live app.

EDITIONS

Available in: **Lightning Experience**

Picklist Values

To see the filtered set of picklist values for a list view, the viewing user must be logged in to the same Salesforce org as the list. Users logged in to a different org than the list view see an unfiltered set of picklist values.

List Fields

List view fields are based on the layout of the list view owner. Users with different layouts in Salesforce than the list view owner see the fields that the list view owner has access to. If [Mirrored Salesforce Permissions](#) on page 109 are enabled, users see only the data that they have access to in Salesforce.



Note: *Owner* refers to the user who the list view is based on.

- The *owner* of a list view added manually to a document is the user who added it.
- The *owner* of a list view added by copying a template is the user who copied it.
- The *owner* of a list view added using Process or Flow Builder is the first user to open the document.

Considerations for List Views in Quip

As you add the Salesforce List live app to your documents, keep in mind these considerations.

New Records

You can't create a record from a list view in Quip.

Limits

The Salesforce List live app version 1.4.0 and later include these limits.

- Record Lists can include a maximum of 1,999 records.
- Related Lists can include a maximum of 500 records.

If you exceed a limit, a warning message appears.

You can see the version of the live app in the Salesforce List menu. Version 1.4.0 was released in April 2022. Prior versions of the Salesforce List live app support a maximum of 4,000 records.

Template Related Lists

- Some related list types aren't available in List Mode and must be added via Manual Mode. Reasons include:
 - The object isn't set up as a related list in the selected record's layout.
 - The authenticated user doesn't have access to this data.
 - The UI API isn't returning the data, possibly because it doesn't support the related list type.

Filters

- You can filter a field by a string, picklist, or numbered range value.
- String value filters use "includes" filter logic.
- Picklist value filters use "exact match" filter logic.
- String value filters are case insensitive.

- You can add filters only to a list view with loaded Salesforce data. Filters in Quip aren't dynamic and can't be added to a templated list view.
- You can apply filters only to visible fields.
- Removing a field from a list view removes the field's filter.
- Filters added in Quip aren't saved in Salesforce.
- Filters applied to a list view are visible to all users with access to the document. Filters aren't specific to the viewing user.
- If Mirrored Salesforce Permissions are enabled, users without access to a field can't see or edit filters added to it.
- You can't add or update filters on mobile.

Locked Fields

You can't change locked fields in Quip.

Refresh and Sync Functionality

- The *owner* of a list view added manually to a document is the user who added it.



Note: *Owner* refers to the user whom the list view is based on.

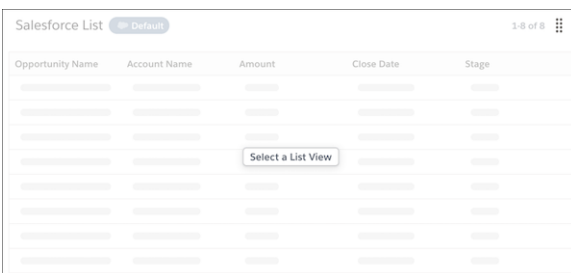
- The *owner* of a list view added by copying a template is the user who copied it.
- The *owner* of a list view added using Process or Flow Builder is the first user to open the document.
- When the Salesforce List live app refreshes, it uses the data that the list view *owner* has access to. To check who owns a list view, click **Salesforce List** in the top left-hand corner, and see which org and user the list view is connected to.
- Any user can edit and comment on the list view fields in Quip. Only users with access to the fields in Salesforce can sync edits to Salesforce.
- A list view *owner* can choose to discard or save changes made by non-owners.

Add a Salesforce List View in Quip

Bulk update your Salesforce list views, add next steps, and keep your team in the know. The Salesforce List live app uses live Salesforce data so that your list views are always current.

When you import a list view into Quip, you see only the data that you have access to. You can see records that you own, have read or write access to, or are shared with you. List views also include records owned by or shared with users in roles below you in the hierarchy. The fields you see depend on your page layout and field-level security settings.

1. In a document, enter `@Salesforce List`.




2. Click **Select a List View**.

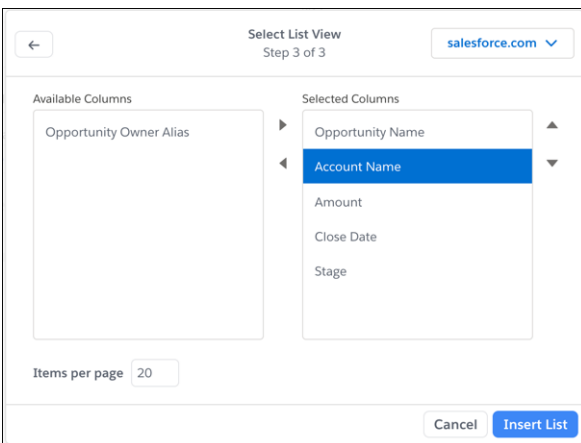
EDITIONS


Available in: Lightning Experience


3. To import a Salesforce record list view, select **Record List**, and click **Next**.
4. Search for the list you want to import by object type, and click **OK**.

 **Tip:** You can add list views from different Salesforce orgs to the same document. To import a list view from a different org, click the org name in the left-hand corner, and select the org you want to pull data from.

5. Select the columns that you want to appear in your list view by using the arrows to move them from **Available Columns** to **Selected Columns**.



 **Tip:** For easier viewing of longer list views, limit the number of rows per page. In **Rows per page**, enter the number of rows you want to show per list view page. You can change the configuration later by selecting **Configure List View** from the Salesforce List dropdown.

6. Click **OK**.
7. To update a list view field, click , and enter your new text. Edited fields appear in yellow.
8. To save your changes to Salesforce, click **Save to Salesforce**. To revert your list view to its original state, click **Discard All Changes**.
9. To add comments and next steps, click the **comment bubble**, and place the yellow dot where you want to leave your comments.

See [Salesforce List live app considerations and limitations](#) on page 252

SEE ALSO:

[Supported Fields in Salesforce Live Apps and Data Mentions](#)

[List Views in Quip: Supported Objects and Lists](#)

[Add a Salesforce Template Related List](#)

Add a Salesforce Related List in Quip

Add record-specific related lists to a document with the updated Salesforce List live app. Stay on top of deals and cases with in-line editing, comments, and bi-directional syncing to Salesforce.

When you import a list view into Quip, you see only the data that you have access to. You can see records that you own, have read or write access to, or are shared with you. List views also include records owned by or shared with users in roles below you in the hierarchy. The fields you see depend on your page layout and field-level security settings.

EDITIONS

Available in: Lightning Experience

1. In a document, enter *@Salesforce List*.

Opportunity Name	Account Name	Amount	Close Date	Stage

2. Click **Select a List View**.
3. To import a Salesforce list view of records related to a specific object, select **Related List**.
4. Search for the related list you want to import by object type.

To find a list view of cases related to a specific account, search for the Account name and then select the related list view type Cases.

←

Select A List
Step 2 of 3

salesforce.com ▼

Accounts

Opportunities

Contacts

Leads

Cases

More ▼

Q ohana

Ohana

The Ohana Companies Llc

Camp Ohana Foundation

Q Search list views...

Notes

Files

Notes & Attachments

Contracts

Contracts

Orders

Transactions

Reference Activities

Cases

Red Accounts

Cancel


Select List

5. Click **OK**.



Tip: You can add list views from different Salesforce orgs to the same document. To import a related list from a different org, click the org name in the left-hand corner and select the org you want to pull data from.

6. Select the columns you want to appear in your list view by using the arrows to move them from **Available Columns** to **Selected Columns**.

 **Tip:** For easier viewing of longer list views, limit the number of rows per page. In **Rows per page**, enter the number of rows you want to show per list view page. You can change the configuration later by selecting **Configure List View** from the Salesforce List dropdown.

7. Click **Insert List**.

8. To update a list view field, click  and enter your new text. Edited fields appear in yellow.

9. To save your changes to Salesforce, click **Save to Salesforce**. To revert your related list to its original state, click **Discard All Changes**.

10. To add comments and next steps, click the **comment bubble** and place the yellow dot where you want to leave your comments.

See [Salesforce List live app considerations and limitations](#) on page 252

SEE ALSO:


[Supported Fields in Salesforce Live Apps and Data Mentions](#)

[List Views in Quip: Supported Objects and Lists](#)

[Add a Salesforce Template Related List](#)

Add a Salesforce Template Related List

As you set up your templates, use Template Related Lists. When a user creates a document from your embedded template, the Salesforce template related lists automatically populate with the record's data and continue to stay up to date. Configure the Salesforce List live app in Quip to auto-populate with a list of Opportunities related to an Account.

 **Important:** Salesforce Template Related Lists are available only in templates. To use template related lists, [mark the document as a template](#) on page 226 and make sure that the template is unlocked.

1. In a document, enter `@Salesforce List`.

2. Select **Template Related List**.

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To configure the Salesforce List live app:

- Customize Application

Select list view
Step 1 of 3

Select a Salesforce list view type.

Record List
Update, comment on, and share a filtered list of records related to an object.

Related List
Update, comment on, and share a filtered list of records related to a record.

Template Related List ✓
Add a related list to a template embedded in a record. Template related lists auto-populate based on the Salesforce record.

Cancel Next

3. Select the object of the record your template is embedded in and then its related list type. For example, to set up an Opportunities list view for an Account object, select **Account** as the Object and **Opportunities** as the related list type. Click **OK**.

Select an available related list type
Step 2 of 3

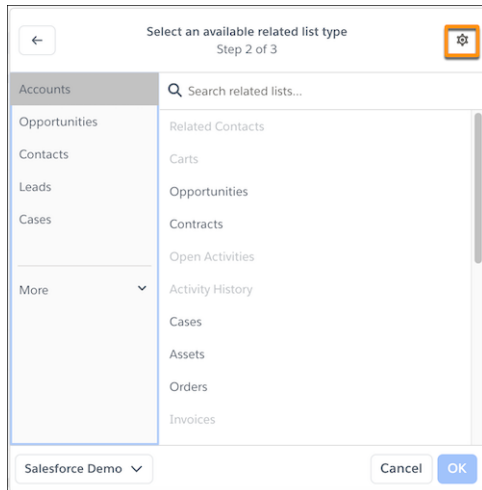
Accounts Opportunities Contacts Leads Cases More

Search related lists...

Related Contacts
Carts
Opportunities
Contracts
Open Activities
Activity History
Cases
Assets
Orders
Invoices

Salesforce Demo Cancel OK


4. If you don't see the related list, select **Manual Mode** and enter the information manually.



- a. To dynamically update the Salesforce List live app based on a record type, enter the Record ID with [mail merge syntax](#) on page 278.



Tip: Mail merge syntax is case-sensitive. To auto-populate the Opportunity's Account Id using mail merge syntax, enter `[[Opportunity.Account.Id]]` and not `[[Opportunity.Account.ID]]`.

- b. To set up the Salesforce List live app for a list related to the previously selected object, enter the related list's API name. To make sure that the related list type is supported in your org, check its [supported objects](#) on page 251.
- c. Enter the number of rows to show in your related list view.
- d. To return to List Mode, click .
5. Select which column to show and populate with Salesforce record data.

Tip: You can select which columns to show only for related lists added via List Mode and not Manual Mode.

- Click **OK**. After the template related list is set up, the columns appear but their values are blank.

Name	Stage	Amount	Close Date	Opportunity Type

- After you finish configuring your template, add it to the Quip Document component.

Filter a List View in Quip

To see only the data that's relevant to you, add filters to your list views in Quip.

Available in: Lightning Experience

Filters added in Quip aren't saved in Salesforce.

Supported filter types:

- Picklist values
- String values
- Numbered range values

String value filters use "includes" filter logic. Picklist value filters use "exact match" filter logic.

String values are case insensitive.

- In a document, enter `@Salesforce List`, and select a Salesforce list view.
- To filter a list view field, hover over the column name, and click

Account Name	Partner Ty... ↓	Partner Program Le...	Partner Certification	Region
Acme Partners	Partner	Gold	Elite Partner	West
Meridian Partners	Service Provider	Bronze	Certified Partner	West
Pinnacle Partners	Reseller	Silver	Certified Partner	Central
Summit Resellers	Alliance Partner	Gold	Elite Partner	West
Zenith Distributors	Distributor	Gold	Certified Partner	West

3. For a picklist field, select one or more picklist values, and click **Apply**.

Apply a filter

FILTER PARTNER TYPE BY VALUES Clear Select All

Select values...

☒ Alliance Partner 1

☐ Distributor 1

☒ Partner 1

☐ Reseller 1

☐ Service Provider 1

Remove Filter Cancel Apply

Multi-picklist field filter values surface all results that include at least one selected filter value.

4. For a string field, like Account Name, Date, or Currency, enter one or more values, and click **Apply**.

Apply a filter

FILTER ACCOUNT NAME BY VALUES ⓘ

Enter values... Add

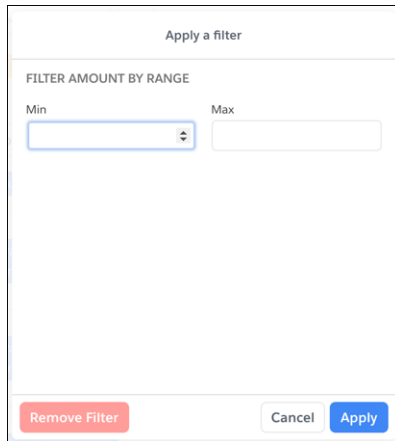
Acme ×

Zenith ×

Partners ×

Remove Filter Cancel Apply

5. For a numbered range field, like Amount, enter a minimum and maximum value, or enter a single value, and click **Apply**.



Salesforce Records in Quip

See your Salesforce records and customize your record views in Quip. You can do bulk updates and sync your changes to Salesforce. You can even add notes and next steps that you can share with your team.

Quip brings your free-form content together with your Salesforce data. With the Salesforce Record live app, your data is always up to date and syncs seamlessly to Salesforce. To make sure you and your team have the data you must collaborate, import your records into Quip.

[Add a Salesforce Template Record in Quip](#)

As you set up your templates, use Template Records. When a user creates a document from your embedded template, the Salesforce template records automatically populate with the record's data and continue to stay up to date. Control the fields that your users see to keep information relevant and boost Account Plan adoption.

Add a Salesforce Template Record in Quip

As you set up your templates, use Template Records. When a user creates a document from your embedded template, the Salesforce template records automatically populate with the record's data and continue to stay up to date. Control the fields that your users see to keep information relevant and boost Account Plan adoption.

Important: Salesforce Template Records are available only in templates. To use template records, [mark the document as a template](#) on page 226 and make sure that the template is unlocked.

1. In a document, enter `@Salesforce Record`. Click **Insert**.
2. Select **Template Record**.

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To configure the Salesforce Record live app:

- Customize Application

Select a Salesforce record

Record
Update, comment on, and share a Salesforce record.

Template Record
Add a record to a template embedded in a record. Template records auto-populate based on the Salesforce record.

Cancel Next

3. Select the object of the record your template is embedded in. For example, to set up an Account Plan for an Account object, select **Account**, and then **Next**.

Select an available object type
Step 1 of 2

Search object types...

- Account History
- Account Partner
- Account**
- Asset History
- Asset Relationship History
- Asset Relationship
- Asset
- Associated Location History
- Authorization Form Consent History
- Authorization Form Data Use History
- Authorization Form History
- Authorization Form Text History

Salesforce Demo ▼ Cancel Next

4. If you don't see the object or to reference a related object, select **Manual Mode** and enter the information manually.


Select an available object type
Step 1 of 2

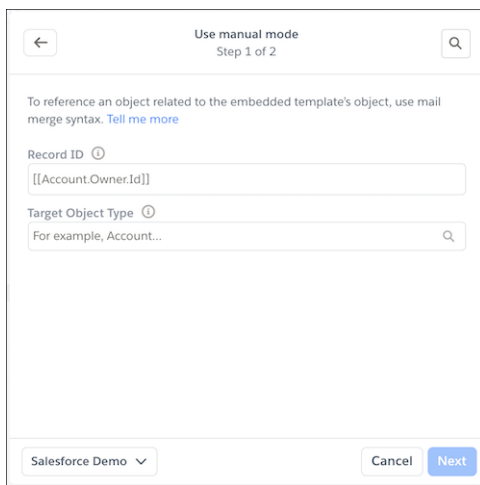
Search object types...

- (Deprecated) Buffer Duration
- AB Test
- Account Brand
- Account Contact Relationship
- Account History
- Account Insight Article
- Account Insight
- Account Partner/Relationship
- Account Team Member
- Account
- Address
- Agent Helper Setting

Salesforce Demo ▼ Cancel Next

- a. To dynamically update the Salesforce Record live app based on a Salesforce field, enter the Record ID with [mail merge syntax](#) on page 278.

 **Tip:** Mail merge syntax is case-sensitive. To auto-populate the Account Owner Id using mail merge syntax, enter `[[Account.Owner.Id]]` and not `[[Account.Owner.ID]]`.



Use manual mode
Step 1 of 2

To reference an object related to the embedded template's object, use mail merge syntax. [Tell me more](#)

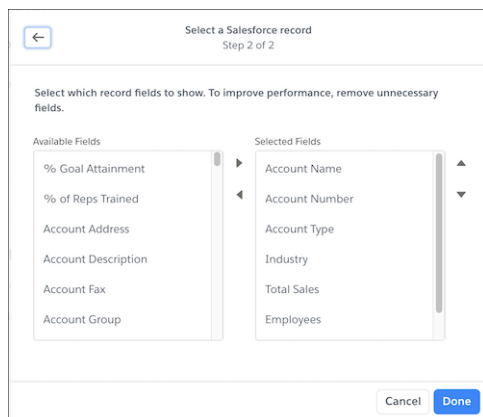
Record ID ⓘ
[[Account.Owner.Id]]

Target Object Type ⓘ
For example, Account...

Salesforce Demo ▾ Cancel Next

- b. To set up the Salesforce Record live app for an object related to the Record ID, select the target object type.
- c. To return to List Mode, click .

5. Select which fields to show and populate with Salesforce record data.



Select a Salesforce record
Step 2 of 2

Select which record fields to show. To improve performance, remove unnecessary fields.

Available Fields

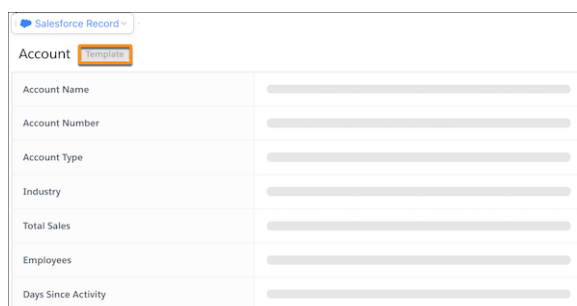
- % Goal Attainment
- % of Reps Trained
- Account Address
- Account Description
- Account Fax
- Account Group

Selected Fields

- Account Name
- Account Number
- Account Type
- Industry
- Total Sales
- Employees

Cancel Done

6. Click **Done**. After the template record is set up, the fields appear but their values are blank.



Salesforce Record

Account	Template
Account Name	
Account Number	
Account Type	
Industry	
Total Sales	
Employees	
Days Since Activity	

- After you finish configuring your template, add it to the Quip Document component so that users can create documents that autopopulate with the record's data, such as Account Plans.

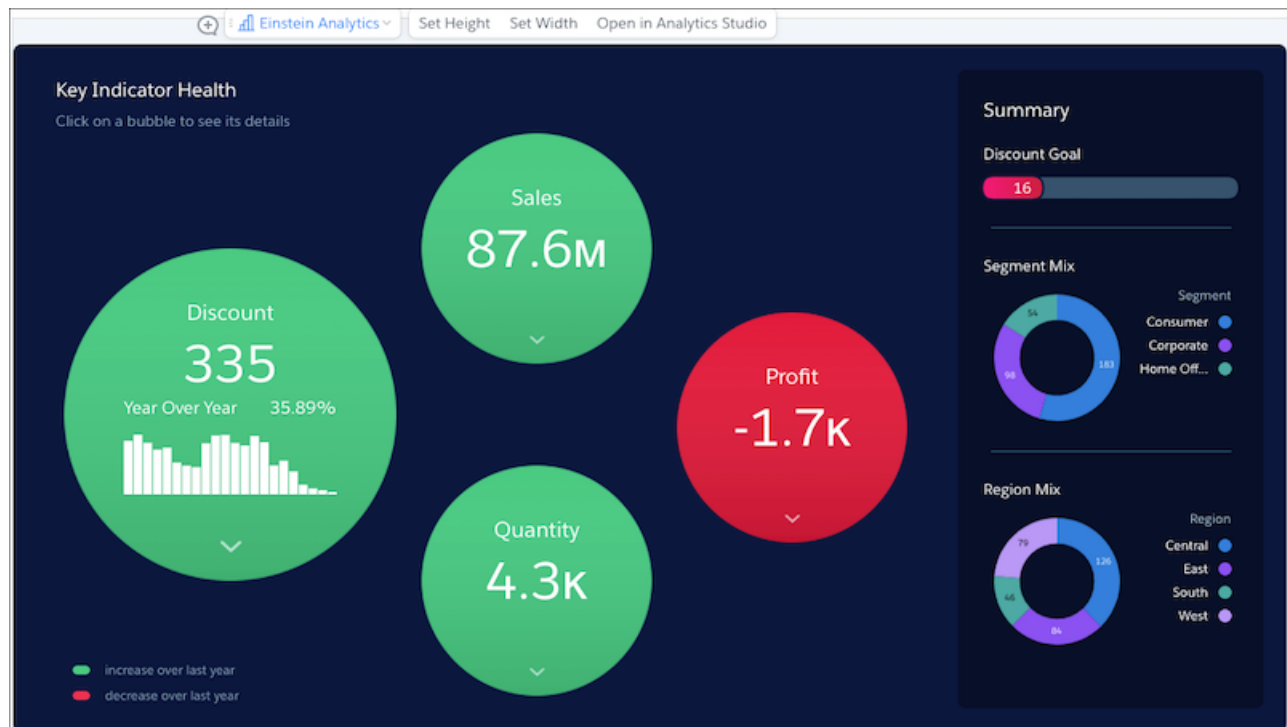
As you add Salesforce template records to your templates, keep in mind these considerations:

- When you set up Salesforce template records, you see all available fields for an object type. The Salesforce Record live app doesn't filter out fields not on the embedded record's layout.

CRM Analytics Dashboards in Quip

Add live CRM Analytics dashboards to your documents and templates. You can update dashboard filters, interact with the components, and collaborate with your team on live Salesforce data.

Available in: Lightning Experience



Keep all of your account information in one place with CRM Analytics dashboards in your Account Plans. With interactive filtering, you can get personalized dashboards that help you focus on closing your opportunities. Your Account Plans combine the power of free-form content and Salesforce data, saving you time switching between Quip and Salesforce.

Make your CRM Analytics dashboards dynamic with Template Mode. After you set it up using [mail merge syntax](#) on page 278, dashboards added to an embedded document auto-populate based on the Salesforce record.

[Set Up the CRM Analytics Live App in Quip](#)

Set up your organization to use CRM Analytics dashboards in Quip. After you set it up, users can see and update filters directly in their documents and slides.

CRM Analytics Live App Considerations

As you add live CRM Analytics dashboards to your documents, be aware of these considerations.

Filter CRM Analytics Dashboards Based on a Salesforce Record

Use Template Mode to add live CRM Analytics dashboards to your templates that auto-filter based on the Salesforce record they're embedded in.

Set Up the CRM Analytics Live App in Quip

Set up your organization to use CRM Analytics dashboards in Quip. After you set it up, users can see and update filters directly in their documents and slides.

To access the CRM Analytics live app in Quip, users need a CRM Analytics Growth or CRM Analytics Plus license.

1. In Salesforce, go to the Setup page.
2. In the Quick Find box, enter `CORS` and click **New**.
3. For the Origin URL Pattern, enter `https://*.quipelements.com`

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To configure the CRM Analytics live app:

- Customize Application

The screenshot shows the Salesforce Setup interface for configuring CORS. At the top, there's a header with a shield icon and the text "SETUP CORS". Below this is a section titled "Allow an Origin" with instructions: "To add an origin to the CORS whitelist, enter a URL pattern that identifies the origin. The URL pattern must include https:// and a domain name, and may include a port. The wildcard character (*) is supported and must be in front of a second-level domain name, for example, https://*.example.com." Below the instructions is a table titled "CORS Allowed Origin List Edit" with "Save" and "Cancel" buttons. The table has one row with the label "Origin URL Pattern" and a text input field containing "https://*.quipelements.com". Below the table are "Save" and "Cancel" buttons.

4. In the Quick Find box, enter `Analytics`.
5. Under Analytics, click **Allowlist**, and then **New**.

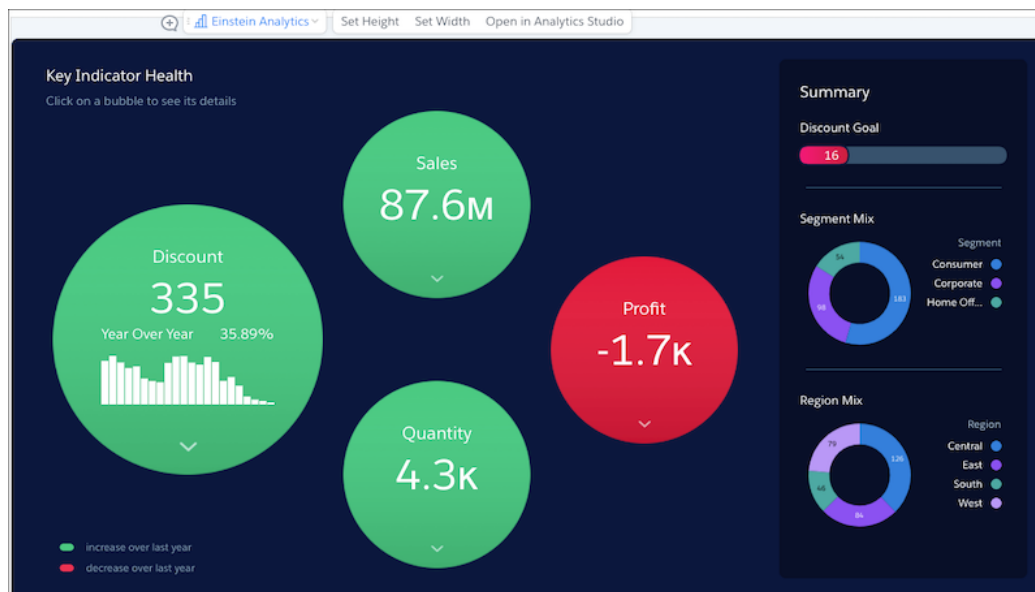
6. Enter a site name. To make it easier to identify later, we recommend naming it *TableauCRMQuip*.
7. For the site URL, enter *https://element-e-w-j-aj-a-hh-o-xa.quipelements.com*.
8. Click **Save and New**.
9. Enter your Quip site name.
10. Enter your Quip site URL using the format *https://yourquipsite.quip.com*. Save the action.
11. In Setup, add these URLs as Trusted URLs with all Content Security Policy (CSP) directives selected. For details, see [Manage Trusted URLs](#).
 - *https://*.salesforce-experience.com*
 - *https://yourquipsite.quip.com*
 - *https://*.salesforce.com*
 - *https://*.force.com*

If *https://*.force.com* is already a CSP trusted site, don't readd it.

 - *https://*.site.com*
 - *https://*.salesforce-sites.com*

Your users can now add CRM Analytics dashboards to their documents with a simple @CRM Analytics.

 Example:



CRM Analytics Live App Considerations

As you add live CRM Analytics dashboards to your documents, be aware of these considerations.

CRM Analytics Limits

The CRM Analytics live app in Quip has the same limitations as CRM Analytics, like limits to internationalization, scheduled updates, and SAQL query limitations. [Tell Me More](#).

CRM Analytics Licenses

Only users with CRM Analytics Growth or CRM Analytics Plus licenses can insert and view the CRM Analytics live app in Quip.

Analytics on Quip Mobile and Desktop Apps

CRM Analytics dashboards aren't supported in the Quip mobile or desktop apps. The only supported access to CRM Analytics is via your browser or Lightning app pages.

Export to PDF

Exporting CRM Analytics dashboards in a document to a PDF is not currently supported.

Sync Changes to Salesforce

Filter configurations made in Quip aren't saved in Analytics Studio.

Offline Access

To check that a user has a CRM Analytics license, users can access the CRM Analytics live app only when connected to the internet.

Quick Actions

Quick actions added to Salesforce objects like Log a Call or New Task aren't available from the CRM Analytics live app.

Template Mode Filters

When you set up Template Mode for the CRM Analytics live app, only global filters added in Analytics Studio are supported. You can't use filters added from the Lightning App Builder in Template Mode.

You can configure Template Mode filters only before you clone a document from a template. Edits to Template Mode filters after the document is cloned aren't reflected in the document dashboards.

Salesforce Connection

Your Quip site's connected Salesforce org and your embedded document's Salesforce org must be the same for Template Mode to work.

Filter CRM Analytics Dashboards Based on a Salesforce Record

Use Template Mode to add live CRM Analytics dashboards to your templates that auto-filter based on the Salesforce record they're embedded in.

To configure the CRM Analytics live app in Quip, you need a CRM Analytics Growth or CRM Analytics Plus license.

1. In a document, enter `@CRM Analytics`. Click **Insert**.
2. Select the dashboard you want to dynamically filter based on a record, and click **Choose Dashboard**.
3. To set up Template Mode, click the **CRM Analytics** dropdown and select **Template Mode**.

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To configure the CRM Analytics live app:

- Customize Application

Configure Template Filters

Filter your Einstein Analytics dashboards based on the Salesforce record. To make your filter values dynamic, use [mail merge syntax](#).

Dataset	Dataset Field
Sample_Superstore_with_Goals	Category

Operator
in

Value
[[Account.Id]]

2. Sample_Superstore_with_Goals Segment Equals All

- To dynamically update your CRM Analytics dashboard global filters based on a Salesforce record, click the **edit pencil** and enter the filter values using [mail merge syntax](#) on page 278.



Tip: Mail merge syntax is case-sensitive. To auto-filter the Category filter using mail merge syntax, enter `[[Account.Id]]` and not `[[Account.ID]]`.

- Click **Apply** and **Done**.
- After you finish configuring your template, add it to the Quip Document component.

After a user creates a document from a template in Salesforce, the CRM Analytics live app auto-filters based on that record.

Relationship Map Live App

Add lightweight org charts and relationship maps to your documents. Build relationship maps in your Account Plans with imported Salesforce record data. Create custom and Salesforce cards to manage customer relationships, key stakeholders, and relationship health from an Account Plan.



[Watch a Demo](#) (English only)

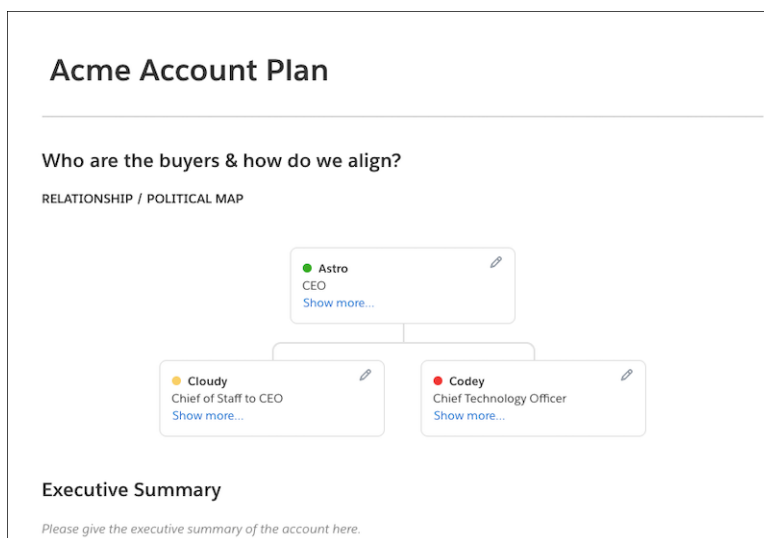
Create custom relationship maps in a document. Your users can map out key stakeholders, easily identify deal detractors and influencers, and more.

Help your sales reps be proactive in account planning with customizable Salesforce relationship maps. Create cards from Salesforce Contact records to visualize key stakeholders and sync edits back to Salesforce. Add custom cards to your Salesforce maps to organize data that doesn't exist in Salesforce or that doesn't belong there. Your map's Salesforce data stays up to date so that your team is always in sync and can collaborate effectively.

EDITIONS

Available in: **Lightning Experience**

Add relationship maps to Account Plans so that your sales reps can easily pinpoint an account's important contacts and history. Add color indicators to a card based on a custom field to make information scannable. For deal detractors, create a Relationship field with a Detractor picklist option, and associate Detractor with the color red. After you mark a user's card as a Detractor, it appears with a red color status indicator.



[Create a Custom Relationship Map in Quip](#)

Build a lightweight relationship map with custom data in your documents.

[Create a Salesforce Relationship Map](#)

Use Salesforce data to build a lightweight relationship map in your documents. Create a map with Salesforce record data or add custom cards to build a hybrid map.

[Considerations for the Relationship Map Live App](#)

As you use the Relationship Map live app, keep in mind these considerations.

[Relationship Map Live App Glossary](#)

Search for terms and brush up on your Quip Relationship Map live app knowledge.

Create a Custom Relationship Map in Quip

Build a lightweight relationship map with custom data in your documents.

1. In a document, enter `@Relationship Map`.
A placeholder relationship map is added to your document.
2. To build a new map or edit the current one, click **Build Custom Map**.

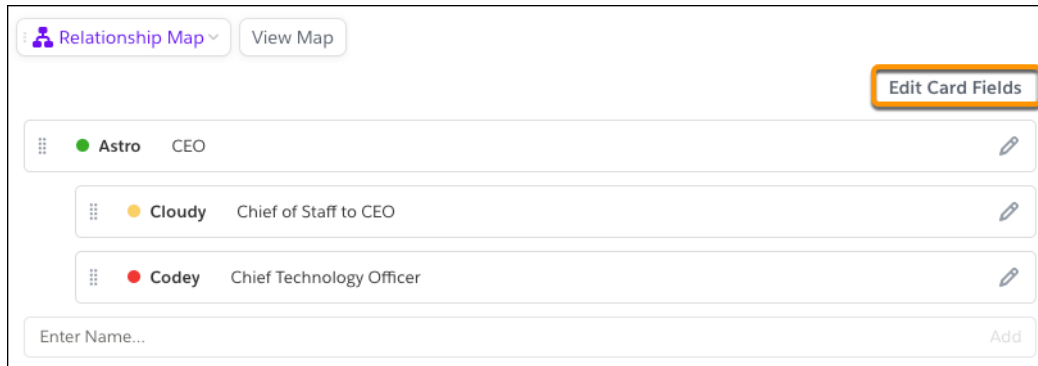


Tip: Use Quick Update to edit a map's field values but not the fields themselves. From the Tree Map, click **the edit pencil** on the card that you want to edit.

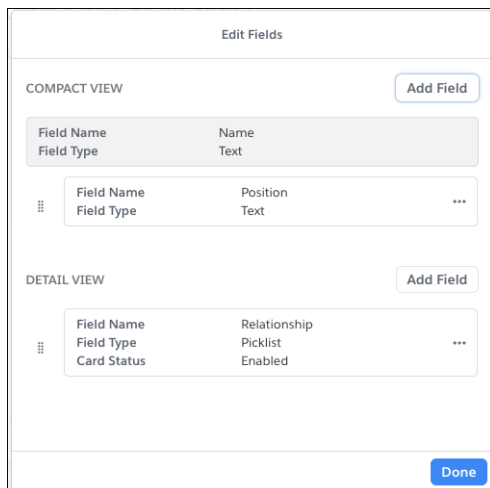
3. Choose which fields appear on the relationship map cards from the Map Builder. To edit or add fields, click **Edit Card Fields**.


EDITIONS

Available in: Lightning
Experience



4. To customize the fields that show on a card, edit the fields in the Compact View section. You can add more fields in the Detail View section—these fields show when you click **More...** on the card.



- a. To add a field, click **Add Field**. Enter a field name, and select a field type.
- b. To reorder fields or move a field to a different view, use  to drag the field.
- c. To add a colored dot on a card that indicates its status, add a picklist field, and select **Display a card's status based on the picklist option**. Add picklist options and choose a status color for each.

Important: Only one field per map can determine the card status.

- After you set up your fields, add new cards to your map in the Map Builder. To create a card, enter a name, and click **Add**.

- Fill in the fields you created and click **Done**.
- From the Map Builder, drag cards to create a hierarchy. To see what it looks like in the Tree Map, click **View Map**.

Tip: To keep your relationship map lightweight and to avoid document scrolling, we recommend adding up to 10 columns.

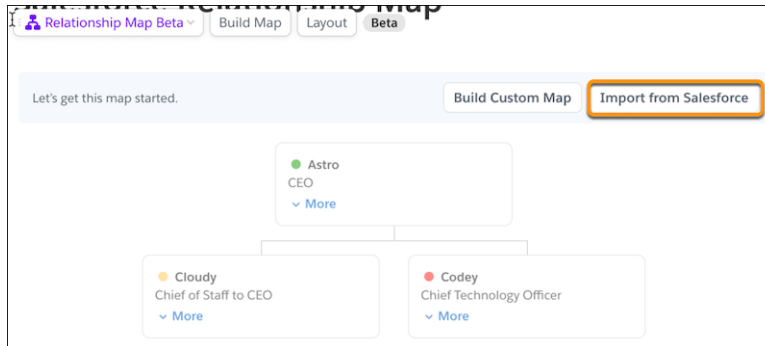
Your relationship map is ready to go! To stay on top of an account's health and keep in touch with stakeholders, add it to your Account Plans.

Create a Salesforce Relationship Map

Use Salesforce data to build a lightweight relationship map in your documents. Create a map with Salesforce record data or add custom cards to build a hybrid map.

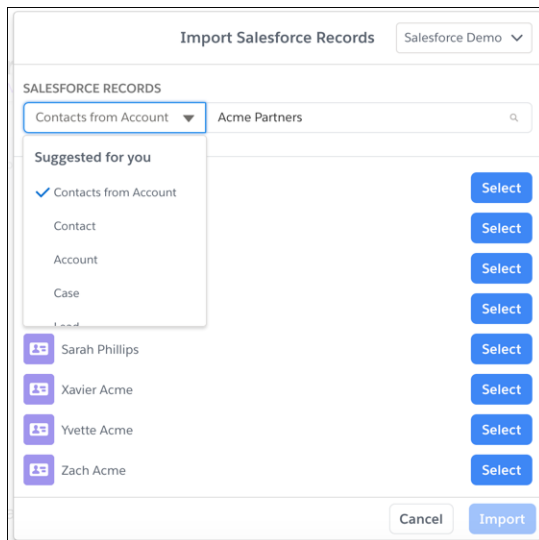
- Create relationship map cards from Salesforce records.
- Add records from different object types to the same relationship map.
- Customize which record fields appear on your relationship map cards.

1. In a document, enter `@Relationship Map`.



A placeholder relationship map is added to your document.

2. To build a map with Salesforce data, click **Import from Salesforce**.
3. To create cards based on Salesforce records, select a Salesforce object and enter the record name.



Tip: You can select multiple records at once from multiple objects. For example, to import multiple contacts from the Acme Partners account, select **Contacts from Account**, enter *Acme Partners*, and select the contacts you want to add. To also add a card for the Acme Partners account, change the object to Account, enter *Acme Partners*, and select **Acme Partners**.

EDITIONS

Available in: Lightning Experience

Import Salesforce Records Salesforce Demo

SALESFORCE RECORDS

Account acme partners

Acme Dispatcher X Zach Acme X Yvette Acme X

Xavier Acme X

Acme Partners Select

Cancel Import

4. Click **Import**.
5. Choose which fields appear on your relationship map cards from the Map Builder. To edit or add fields, click **Edit Card Details**, and select the object template you want to customize.

Import Salesforce Records

Edit Card Details

- Customized Template
- Contact Template
- Account Template

Xavier Acme Acme Partners

Yvette Acme Acme Partners

Acme Dispatcher Acme Partners

Zach Acme Acme Partners

Acme Partners Partner

Enter Name... Add

6. To customize the fields that show on a card, edit the fields in the Compact View section. You can add more fields in the Detail View section—these fields show when you click **More** on the card.

Edit Card Fields

OBJECT TYPE

Contact

COMPACT VIEW Add Field

Field Name	Field Type	Record Header Name	Text
Field Name	Field Type	Account ID	Reference
Field Name	Field Type	Title	Text
Field Name	Field Type	Business Phone	Phone

Done

7. To add a field from the record, click **Add Field**. Select a field and save the action.
8. To change the fields in the compact and detail views, delete and readd the fields.
9. To add a colored dot on a card that indicates its status, add or edit a picklist field, and select **Display a card's status based on the picklist option**. Choose a status color for each picklist option and save.

Important: Only one field per map can determine the card status.

10. After you set up your fields, add new cards to your map in the Map Builder. To import more Salesforce records, click **Import Salesforce Records**. To create a custom card, enter a name, and click **Add**.
11. To edit your Salesforce cards in the Tree Map or Map Builder, click the card's **edit pencil**, and update the fields. Save the changes to Salesforce.
12. To edit your custom card fields, click **Edit Card Details**, and select **Customized Template**.
13. From the Map Builder, drag cards to create a hierarchy. To see it in the Tree Map, click **View Map**. To resize the card layout, click **Layout**, and select a layout.

Tip: To keep your relationship map lightweight and to avoid document scrolling, we recommend adding up to 10 columns to the map or dividing it into several smaller maps.

14. To make sure that your map is up to date with the latest Salesforce data, from the Tree Map, click **Refresh Records**.

Your relationship map is ready to go! To stay on top of an account's health and keep in touch with stakeholders, add it to your Account Plans.

Considerations for the Relationship Map Live App

As you use the Relationship Map live app, keep in mind these considerations.

Mobile Support

The Relationship Map live app is view-only on mobile and shows only the Map Builder view.

Live Paste

You can't live paste a relationship map. To copy the live app, copy and paste it.

Salesforce Data

- You can create cards only from existing Salesforce data. You can't create a record from the Relationship Map live app.
- You can import records from only one Salesforce org per relationship map. You can't add cards from different Salesforce orgs to the same relationship map.
- By default, cards created from Salesforce records show the record's primary compact layout fields. If an object with multiple record types has multiple compact layouts, some fields can be marked as unsupported. This labeling is necessary when the primary compact layout doesn't match a specific record's compact layout.
- If Mirrored Salesforce Permissions are disabled, the relationship map doesn't automatically refresh. To get the latest Salesforce data, manually refresh it. To see when the relationship map was last refreshed, check the refresh timestamp.

Supported Objects

The Relationship Map live app supports standard Salesforce objects and all custom objects that are searchable, queryable, and retrievable.

Map Sizing

There aren't any size limitations for your relationship maps. For the best performance and to prevent document scrolling, keep your relationship maps lightweight. You can also split up a larger map into multiple smaller ones, or collapse the cards in the Tree Map.

Relationship Map Live App Glossary

Search for terms and brush up on your Quip Relationship Map live app knowledge.

Relationship Map Live App Terms

Build Custom Map

Button that lets you create a custom map with custom fields and cards.

Build Map

Button that takes you to the Map Builder view.

Card Status

Color indicator for the status or health of a card. Only picklist fields support card statuses. You can have only one field per map determine the card status.

Compact View

The default view of a card in the Tree Map. You can see only two compact view fields in the Map Builder.

Detail View

The expanded view of a card's fields in the Tree Map. To see more than the compact view, click **Show more....** You can't see detail view fields in the Map Builder.

Field Type for Custom Cards

Input type. Supported field types are:

- Text
- Picklist
- Link. To enter a link, include `https://` or `http://` in the link address.

Import from Salesforce

Button that lets you create a map from Salesforce record data.

Map Builder

Map editing view. From the Map Builder, you can edit card fields, add or delete cards, create a map structure, and set a card status.

Quick Update

Edit a card's field values from the Tree Map. To add or remove fields, go to the Map Builder.

Tree Map

Relationship map card view. From the Tree Map, you can edit field values with Quick Updates, add comments, and see a compact and detail views of the card fields.

View Map

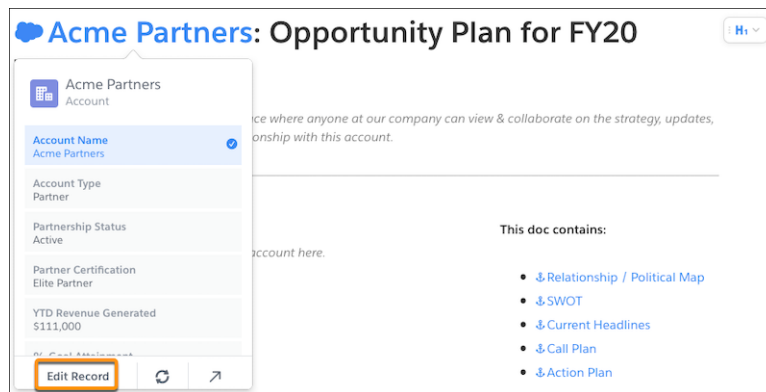
Button that takes you to the Tree Map view.

Salesforce Data Mentions

Add live Salesforce data to your documents, spreadsheets, and Account Plans without getting in the way of your formatting. With in-line data mentions, data reads like normal text but stays up to date and syncs with Salesforce. Edit the record fields from the data mentions, making it easier to keep your Salesforce work in Quip.

EDITIONS

Available in: Lightning Experience



Keep your Account Plans up to date and account specific. Use live Salesforce data mentions to create a hybrid Quip and Salesforce experience. Create a custom spreadsheet in Quip that pulls data from multiple sources and includes live Salesforce data mentions at the field level. Collaboration with other teams is a breeze when all your data is in one place.

[Decide Between Template Data Mentions and Mail Merge](#)

Templates save time copying and pasting, standardize your business practices, and help you get the most out of your Salesforce data. To auto-fill your embedded templates with data from a Salesforce record, you can use Salesforce Template Data Mentions or mail merge syntax.

[Set Up Salesforce Data Mentions](#)

Let users @mention Salesforce data in documents in line without manually refreshing it.

Add a Salesforce Data Mention

Use Salesforce data seamlessly in your documents and spreadsheets with Salesforce Data Mentions. Mention live data from Salesforce to see dynamic fields that stay updated with the latest Salesforce data. Update fields from your documents and spreadsheets and sync them to Salesforce.

Add a Salesforce Template Data Mention

As you set up your templates, use Salesforce Template Data Mentions instead of mail merge syntax. When a user creates a document from your embedded template, the Salesforce Data Mentions automatically populate with record's data and continue to stay up to date.

Considerations and Limitations for Salesforce Data Mentions

As you use Salesforce Data Mentions and Salesforce Template Data Mentions, keep in mind these considerations.

Decide Between Template Data Mentions and Mail Merge

Templates save time copying and pasting, standardize your business practices, and help you get the most out of your Salesforce data. To auto-fill your embedded templates with data from a Salesforce record, you can use Salesforce Template Data Mentions or mail merge syntax.

What are Salesforce Template Data Mentions?

Salesforce Template Data Mentions let you insert placeholders for Salesforce record fields in templates without going to the Object Manager to find an object's field names. Salesforce Template Data Mentions use simple picklists to show you which fields you can use right from the template. When a user creates a document from an embedded template, the Salesforce Data Mentions automatically populate with record's data and continue to stay up to date.

What is Mail Merge Syntax?

Mail merge templates include variables called merge fields where data from your Salesforce records—for example a contact's name and address—displays in the generated document. When a user creates a document from an embedded template, the current Salesforce data is populated, but doesn't dynamically update. Quip supports basic mail merge syntax for auto-filling data from Salesforce records. This syntax supports standard and custom fields that are directly on the Salesforce object, and lookup fields up to one level. You can find available mail merge fields in the Object Manager under an object's Field Name.

Salesforce Template Data Mentions and Mail Merge Features

	Salesforce Template Data Mentions	Mail Merge Syntax
Shows available Salesforce record fields during template creation	✓	✗
Supports standard and custom fields	✓	✓
Lets users search Salesforce field names during template creation	✓	✗
Supports up to 250 fields, with no more than 20 lookup fields, per template	✓	✓
Uses available fields from a specific Salesforce org when you add them to a template*	✓	✗
Auto-fills Salesforce record field data on document creation in Salesforce	✓	✓

EDITIONS

Available in: Lightning Experience

	Salesforce Template Data Mentions	Mail Merge Syntax
Doesn't populate Salesforce data when data is unavailable on record	✓	✓
Lets you populate images	✗	✓
Lets you add a custom message when data is unavailable on the record	✗	✓
Works in templates and documents**	✗	✓
Continually updates Salesforce data to keep documents up to date	✓	✗
Allows searching for titles containing Salesforce data in Quip	✓	✓
Displays titles containing Salesforce data in the Associated Documents and Files components	✗	✓
Styles Salesforce data in a distinct manner to make data recognizable	✓	✗
Lets user hover over Salesforce data to see additional record details	✓	✗
Lets users update Salesforce data in a document and automatically sync changes to Salesforce	✓	✗
When Mirrored Salesforce Permissions are on, users see only the populated fields that they have access to in Salesforce	✓	✗

*When you add a template data mention to a template, you choose which Salesforce org the data mention pulls data from. If you embed that template in a record in a different Salesforce org, the data mentions can't recognize the Salesforce org and end users receive an error.

**Salesforce Template Data Mentions work only in templates. You can use mail merge syntax and regular Salesforce Data Mentions in templates, documents, and spreadsheets.

Considerations for Choosing Between Data Mentions and Mail Merge

In general, we recommend using Salesforce Template Data Mentions to streamline your business processes. Consider using mail merge syntax if:

- You want to create and test your templates in Sandbox before moving them to your production Salesforce org. Templates using Salesforce Template Data Mentions are tied to the org they're created in.
- You don't want users to update populated fields from within documents.
- You want documents created from a template to capture a moment in time and don't want them to update with the latest Salesforce data.

- You have [Mirrored Salesforce Permissions](#) turned on, but want to give users access to Salesforce data in Quip that they don't have access to in Salesforce.
- You want to embed a document or spreadsheet instead of a [template](#). Salesforce Template Data Mentions work only in documents marked as templates.
- You want to use Template Mode for Salesforce live apps, like the Salesforce List live app, or for Salesforce reports. Template Mode supports only mail merge syntax and not data mentions.

SEE ALSO:

[Knowledge Article: The Quip Document Component for Salesforce: A Guide for Admins](#)

Set Up Salesforce Data Mentions

Let users @mention Salesforce data in documents in line without manually refreshing it.

Salesforce Data Mentions are installed by default for all Salesforce orgs with connected Quip sites. With the Winter '21 Salesforce release, all new and existing Salesforce orgs connected to Quip are assigned the Quip Integration Access user permission. The user permission allows Quip to automatically refresh data mentions with the latest Salesforce data and isn't assigned to individual users.

By default, the Quip Integration Access user has Read and View All Records permissions on Salesforce objects. The Quip Integration Access user permission doesn't control which users can use Salesforce Data Mentions. It controls only the objects that users can automatically refresh.

Automatic refreshing of Salesforce data works only if the Salesforce org is connected to Quip by a Salesforce admin from the Quip setup page in Salesforce. Salesforce orgs connected to Quip by users aren't assigned the Allow Quip Integration Object Access permission set and don't automatically refresh with the latest Salesforce data.


To customize which objects can be automatically refreshed or to revoke object access, edit the object settings for the Allow Quip Integration Object Access permission set.

1. From Setup, in the Quick Find box, enter *Permission Sets*, then select **Permission Sets**.
2. Select **Allow Quip Integration Object Access**, then **Object Settings**.
3. To change which objects can be automatically refreshed with the latest data, select the object, and click **Edit**.

After your users connect their Salesforce accounts to Quip, they can add Salesforce data mentions to their documents.

Turn Off Salesforce Data Mentions

To turn off Salesforce Data Mentions, disconnect your Salesforce org from Quip. Disconnecting your Salesforce orgs from Quip turns off all Salesforce integration features in Quip.

1. Go to <https://admin.quip.com>
2. Log in using your Quip admin email and password.
3. From Settings, select **Salesforce**.
4. Turn on **Control Access to Your Salesforce Orgs**.
5. To disconnect an org, click  next to the org that you want to disconnect, and click **Remove Org**.

EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To edit Salesforce Data Mentions permissions:

- **Manage Users**

Add a Salesforce Data Mention

Use Salesforce data seamlessly in your documents and spreadsheets with Salesforce Data Mentions. Mention live data from Salesforce to see dynamic fields that stay updated with the latest Salesforce data. Update fields from your documents and spreadsheets and sync them to Salesforce.

To add a Salesforce Data Mention to a document or spreadsheet, you need view access to the Salesforce record or field. To edit the data mention, you need edit access in Salesforce.

To insert a Salesforce Data Mention, you can:

- @Mention *Salesforce Data Mention* and enter the record name.
- @Mention the record name and select the field.
- Select **Salesforce Data Mention** from the Insert menu.
- Paste a Salesforce record URL in a document. You can then choose to show the URL as a Salesforce data mention and decide whether to mention the record or a specific record field.

SEE ALSO:

[How Does Live Data Work in Quip?](#)

[Live Data on the Quip Mobile App](#)

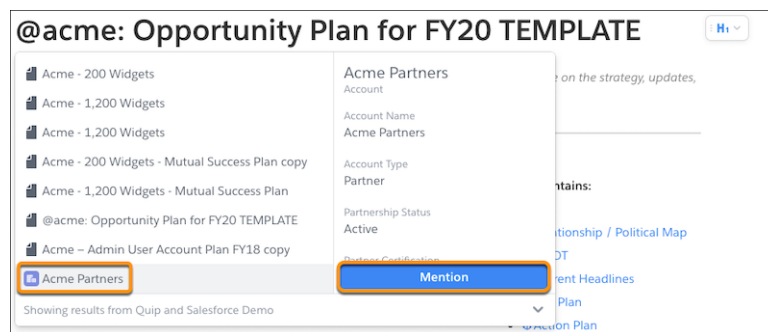
EDITIONS

Available in: Lightning Experience

Add a Salesforce Data Mention to a Document

Mention live data from a Salesforce record or field in your documents without breaking the flow of your content.

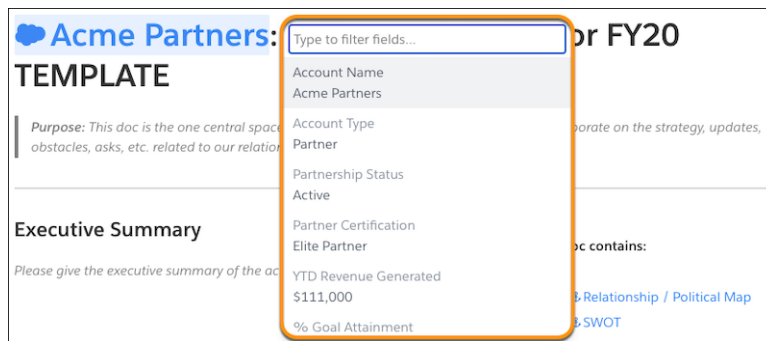
1. To add a data mention starting from a record, @mention the record name in a document.



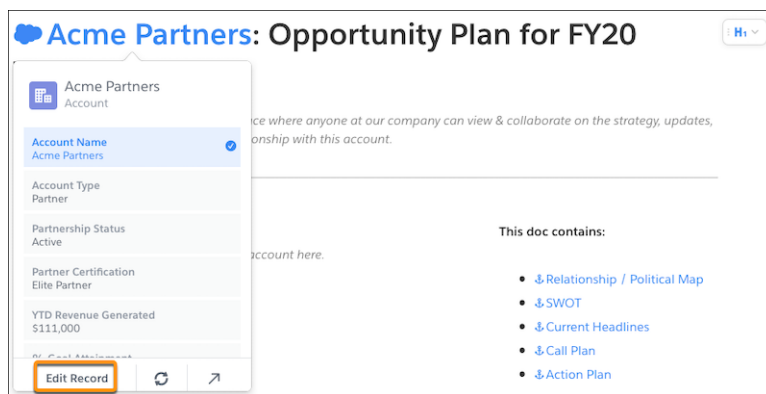
2. Click **Mention**.
3. To mention a record field, enter or select the field name.

EDITIONS

Available in: Lightning Experience



- To see a compact layout of the record, hover over the data mention. To update record fields, click **Edit Record**.



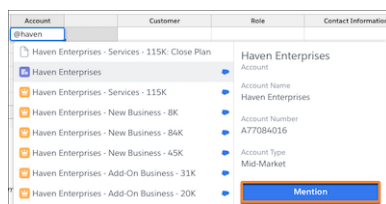
- To add available fields from the record to your layout, edit the fields or click **Customize Layout**.
- Click **Save to Salesforce**. Edits that aren't saved to Salesforce are lost.

Salesforce Data Mentions added to your documents update automatically with the latest Salesforce data.

Add a Salesforce Data Mention to a Spreadsheet

Mention live data from a Salesforce record or field in your spreadsheets to keep calculations and more up to date.

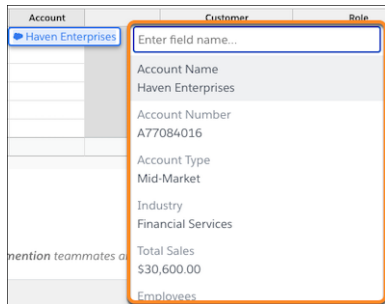
- To add a data mention starting from a record, @mention the record name in the spreadsheet.



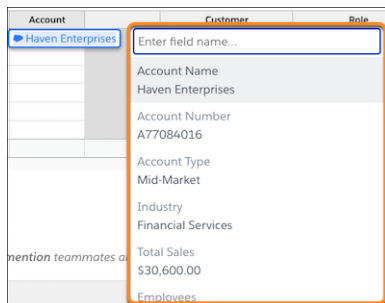
- Click **Mention**.
- To mention a record field, enter or select the field name.

EDITIONS

Available in: Lightning Experience



4. To see a compact layout of the record, hover over the data mention. To update record fields, click **Edit Record**.



Salesforce Data Mentions added to your spreadsheets update automatically with the latest Salesforce data.


Add a Salesforce Template Data Mention

As you set up your templates, use Salesforce Template Data Mentions instead of mail merge syntax. When a user creates a document from your embedded template, the Salesforce Data Mentions automatically populate with record's data and continue to stay up to date.

▶ [Watch a Demo](#) (1 minute)

Salesforce Template Data Mentions are available in documents [marked as a template](#) on page 226 and embedded in a record. To insert a Salesforce Template Data Mention, you can:

- @Mention **Salesforce Template Data Mention**.
 - Select **Salesforce Template Data Mention** from the Insert menu.
1. To add a template data mention to a template, @mention *Salesforce Template Data Mention*
 2. Click *Mention*.
 3. Select an object type, then select a field. Click *Insert*.

 **Note:** When creating the template, you can insert any field on the object's record layout. When a user creates a document from the template, only the fields that the user has access to populate.

The data mentions in documents created from the [template embedded in a record](#) on page 208 update automatically with the latest Salesforce data. Salesforce Template Data Mentions autopopulate only if they match the embedded record's fields.

EDITIONS

Available in: Lightning Experience

Considerations and Limitations for Salesforce Data Mentions

As you use Salesforce Data Mentions and Salesforce Template Data Mentions, keep in mind these considerations.

EDITIONS

Available in: Lightning Experience

Salesforce Data Mentions Auto-Enabled

All Quip sites have Salesforce Data Mentions and Salesforce Template Data Mentions enabled.

Quip Integration Access User Permission

With the Quip Integration Access user permission, users can refresh Salesforce Data Mentions manually through the live app or by refreshing the Quip document for particular Salesforce objects. Assign the permission to an entire Salesforce org rather than to individual users. By default, the Quip Integration Access user has Read and View All Records permissions on Salesforce objects.

With Winter '21, all Salesforce orgs connected to Quip are assigned the Quip Integration Access user permission.

The permission doesn't control which users can create Salesforce Data Mentions. Any Quip user with access to a Salesforce org connected to Quip can create Salesforce Data Mentions.

For example, if your org is assigned the Quip Integration Access permission, a user can create a Salesforce Data Mention in Quip for the Account Name field of an account in Salesforce. Quip refreshes the data mention when the document is reloaded to show changes made in Salesforce in the Quip document. However, if you remove the Quip Integration Access permission or update it to exclude the Account object, Quip doesn't refresh the data mention or show the corresponding Salesforce information after a page refresh or manual refresh of the data mention.

Salesforce Data Permissions

If Mirrored Salesforce Permissions (MSP) aren't enabled:

- Users with access to a Salesforce record or field can mention it in a document.
- Users with access to the document can see its data mentions regardless of their own Salesforce permissions. Access to Salesforce Data Mentions is based on the inserting user's access level, not the viewing user's level.
- Only users with edit permissions in Salesforce can sync changes to Salesforce.

If MSP is enabled:

- Users that are logged in to Salesforce but don't have Salesforce access to the record can't see any of its data.
- Users that are logged in to Salesforce but don't have access to certain fields of a record can't see those fields.
- Users that aren't logged in to Salesforce can't see any data mentions or data.
- The Salesforce data mention refreshes on page load or manual live app refresh. Every time the data mention refreshes, it checks the viewing user's access to the record and data.
- Only users with edit permissions in Salesforce can sync changes to Salesforce.

If MSP is enabled, live data mentions (LDM) are refreshed only in these two scenarios.

- The user loads a document with a given LDM and the record hasn't been refreshed in the last 10 minutes.
- The user manually refreshes a data mention.

Document, Chat Room, and Spreadsheet Limitations

Data mentions added to the body of a document, a chat room, or a spreadsheet aren't searchable.

Salesforce Data Mentions data is hidden in the conversation pane and appear as Data Mention.

You can't insert a data mention in a comment, conversation pane, or chat.

You can only use Salesforce Template Data Mentions in spreadsheets embedded in a document.

The following spreadsheet functionality isn't available when Mirrored Salesforce Permissions are enabled:

- You can't filter or sort Salesforce Data Mentions in a spreadsheet.
- If a formula uses a Salesforce Data Mention you don't have access to, you don't see the calculated value.
- Spreadsheets and documents exported to a PDF show empty cells for Salesforce Data Mentions.

Salesforce Template Data Mentions

- When you create a Salesforce Template Data Mention, you can display fields in the @mentioned object or fields in objects that are linked to the @mentioned object. For example, you can create a Salesforce Template Data Mention that displays the Account Name field of an Account that's linked to an Opportunity by the Account ID field (**Opportunity > Account ID > Account > Account Name**). However, you can't display fields in objects that are linked to the @mentioned object by more than one lookup field or two other types of fields. For example, you can't create a Salesforce Template Data Mention that displays the Owner of the Account mentioned in the previous example (**Opportunity > Account ID > Account > Owner ID > Owner**).
- When you create a document from a template that includes Salesforce Template Data Mentions, the @mentioned fields can be empty in Salesforce. If an @mentioned field is empty when you create a document, Quip automatically populates it when a user populates it in Salesforce unless the field is a lookup field.

User-Connected Salesforce Orgs

Salesforce orgs connected to Quip by users, and not by an admin in Salesforce, aren't automatically assigned the Quip Integration Access user permission. Users can still use Salesforce Data Mentions from that Salesforce org, but the data doesn't automatically refresh.

Staged Edits

You can't stage edits for Salesforce Data Mentions. Any unsaved edits are lost.

Redacted Fields

Data that is redacted or hidden because of permissions are still saved in Quip's database.

Field Visibility

Quip uses Salesforce page layouts to obtain field data for Salesforce Data Mentions. Before you can @mention a Salesforce field, it must appear in a page layout that you can modify with the original page layout editor. If a field is on a Lightning page but isn't part of a page layout, Salesforce Data Mentions of the field don't work.

SEE ALSO:

[Customize Page Layouts with the Original Page Layout Editor](#)

Filtered Salesforce Reports in Quip

Apply your Salesforce report's custom filters to tailor your report view in Quip. Use filters to sort your reps' open opportunities by region or track your reps' progress. You can even dynamically filter live Salesforce reports based on the record they're embedded in.

EDITIONS

Available in: Lightning
Experience

Quip is where your free-form and structured data meet. Import your filtered Salesforce reports into Quip to keep your data in context, make inline comments, and collaborate with your team.

[Customize Your Salesforce Report Filters in Quip](#)

Apply your Salesforce report's custom filters in Quip. Edit filter values to create a customized report view that you can share and collaborate on with your team.

[Dynamically Filter Live Salesforce Reports from Quip](#)

Save time tailoring your master report to each individual by automatically filtering your reports based on your users, region, and more. Add a filtered Salesforce report to a document embedded in a Salesforce record. Embedded reports dynamically filter based on the record's data.

[Considerations for Salesforce Reports in Quip](#)

As you add Salesforce reports to your documents, keep in mind these considerations.

Customize Your Salesforce Report Filters in Quip

Apply your Salesforce report's custom filters in Quip. Edit filter values to create a customized report view that you can share and collaborate on with your team.


Available in: Lightning Experience

1. In a document, enter *@Salesforce Report*.

2. Select the report you want to import to Quip and click **Next**.



Tip: You can add reports from different Salesforce orgs to the same Quip document. To import a report from a different org, click the org name in the right-hand corner and select the org you want to pull data from.

3. To edit your report's custom filters, click  next to the filter name. Enter a new value and click **Apply**. Repeat this step for each filter you want to edit and then click **Next**.



Note: Customizing filters in Quip doesn't affect your report filters in Salesforce.

4. To keep your report's data up-to-date with the latest Salesforce data, select **Live Data**. To import a snapshot of your report's current data, select **Spreadsheet**.



Note: After opening a document, report data automatically refreshes approximately every two hours for up to 36 hours. After the document is open for 36 hours, you can manually refresh the report data by clicking **Refresh Now**.

5. To show a summary view of your report, select **Hide detail rows**.

6. Click **Import Report**.

SEE ALSO:

[How Does Live Data Work in Quip?](#)

[Live Data on the Quip Mobile App](#)

Dynamically Filter Live Salesforce Reports from Quip

Save time tailoring your master report to each individual by automatically filtering your reports based on your users, region, and more. Add a filtered Salesforce report to a document embedded in a Salesforce record. Embedded reports dynamically filter based on the record's data.

To embed a document in a Salesforce record, add the Quip Document component to your page layout.

1. In a template, enter `@Salesforce Report`.



Tip: Any document can be used as a template. Add mail merge syntax to auto-fill your document with information specific to the Salesforce record on which it's embedded.

2. Select the report you want to add to your template. Click **Next**.
3. To view and edit your report's existing custom filters in Quip, click the pencil icon.



Note: Only custom filters are supported in imported Salesforce reports.

4. Under Advanced, select the checkbox **Reapply filters based on the Salesforce record**. This setting is what enables dynamic filtering. For example, a report filtered by Account Owner and added to a user's record would refilter based on the accounts owned by that user.
5. Use mail merge syntax to update the filter's Value. Using the Account Owner example from above, to filter a report by the Account Owner, enter `[[Account.Owner.Name]]`.
6. Click **Apply**. You can apply up to 20 filters to your imported report. After you've configured your report's filters, click **Next**.
7. To keep your report updated with the latest Salesforce data, select **Live Data**.



Note: After opening a document, report data automatically refreshes approximately every two hours for up to 36 hours. After the document is open for 36 hours, you can manually refresh the report data by clicking **Refresh Now**.

8. To show a summary view of the report and improve report performance, select **Hide detail rows**. Click **Done**.

Your templated report is ready to use. Add your template to different Salesforce records to have your report's filters dynamically reapply.

SEE ALSO:

[Decide Between Template Data Mentions and Mail Merge](#)
[Quip Document Component](#)

Considerations for Salesforce Reports in Quip

As you add Salesforce reports to your documents, keep in mind these considerations.

Row Limits

You can see up to 2,000 rows for Salesforce reports in Quip.

Performance Recommendations

- Include no more than 20 live reports and data references in a document.
- In large documents and documents that include both Salesforce reports and data references, disable automatic refresh.

EDITIONS

Available in: Lightning Experience

For reports, you can do so from the Salesforce Report menu in the formula bar. For data references, you can do so from the More Options menu. To get an up-to-date view of your reports and data references, use the Refresh option in the same menu where you disabled automatic refresh.

- If a document contains more than 50,000 spreadsheet cells, split it into smaller documents to improve reliability and performance.
- Grant edit access to as few members of a document as possible. Document members with full access can revoke edit access as needed. Having many users with edit access causes frequent refreshes, which can negatively impact performance.

Salesforce Report Filters

- Only custom Salesforce filters are currently supported in Quip. You can't see your report's standard filters in Quip.
- Filter operators (like `equals` and `greater than`) can't be modified.
- You can't add or remove filters in Quip. You can only modify existing filters.
- You can't change locked filters in Quip.
- After you change your report's filter values within Quip, they won't update with the latest Salesforce values. To use the updated Salesforce filter values, reimport the Salesforce report and configure the filters during setup.
- Customizing filters in Quip doesn't affect your report filters in Salesforce.

Refresh Behavior

After opening a document, report data automatically refreshes approximately every two hours for up to 36 hours. After the document is open for 36 hours, you can manually refresh the report data by clicking **Refresh Now**.

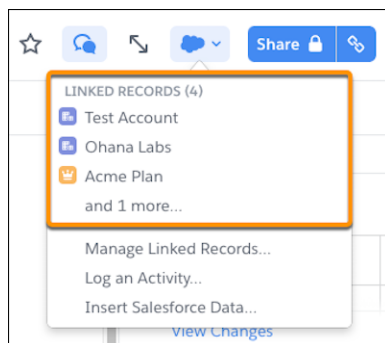
Document Linking in Quip

Link important documents to your Salesforce records. Make it easier to find your documents in Salesforce by linking them to related Salesforce records.

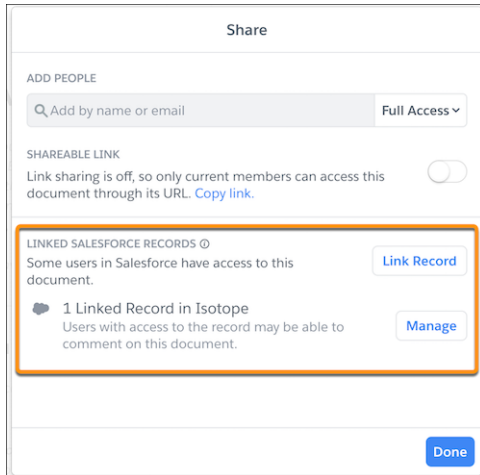
Manage your Account Plans by linking them to the related Account in Salesforce. You can easily access the linked document from the Account page in Salesforce, or see which records a document is linked to from the document in Quip.

EDITIONS

Available in: **Enterprise, Performance, Professional, Developer, and Unlimited** Editions



Document linking in Quip also makes it easier to see when documents are shared with others via Synced Sharing. From the Share window, users can see which Salesforce orgs have Synced Sharing enabled and what the level of access is set to.



When a document is linked to the record in Lightning Experience via the Quip Associated Documents component, you can also see the linked record from the document.

Considerations for Document Linking

As you link your documents to Salesforce records, keep in mind these considerations.

Link a Document to a Record from Quip

To manage documents related to Salesforce, link them to a record. You can see which documents are linked to the record from the document or from the record itself.


SEE ALSO:

[Synced Sharing](#)

Considerations for Document Linking


As you link your documents to Salesforce records, keep in mind these considerations.


Connected Salesforce Orgs

A user can see  and link a document only if they connected their Salesforce org to Quip.

- From the user profile in Quip, click **Salesforce**.
- Click **Connect** and log in to Salesforce.

Document Access

- Only users with Full Access to a document can link it to a record from Quip.
- Only users with Edit Access or Full Access to a document can open the Share window and see its linked records.
- Only users with Edit Access or Full Access to a document can see  and the document's linked records.
- A user with less than Full Access to a document can link it to a record from the Quip Associated Documents component in Lightning Experience.
 - Users who can view a document can copy its URL, go to a record in Lightning Experience, and link it to the record via the Quip Associated Documents component.

- If the user who linked the document via the Quip Associated Documents component has less than Edit Access, they can't see  or the linked record from the document.

Record Access

Users can see only the linked records in Quip that they have access to in Salesforce. If User A with Full Access to a document links it to a record that User B doesn't have access to, User B doesn't see the linked record. This is true even if User B is the document creator.

Object Types

- You can't link a document to a User record, like a Contact.
- You can't link to a [Chatter group](#), [content library](#), [Experience Cloud site](#), or [Organization](#) object.

Synced Sharing

- Synced Sharing is only enabled for a linked document if the user who links it has Full Access to it.
- Because document linking isn't supported for User records, Synced Sharing for User records also isn't supported.

Remove Record Link

You can't remove the record link from the document in Quip. To remove it, open the document in Salesforce, and remove it from the record via the Quip Associated Documents component or the Files component.

Link a Document to a Record from Quip

To manage documents related to Salesforce, link them to a record. You can see which documents are linked to the record from the document or from the record itself.

To link a document to a record, in Lightning Experience, you must click **Take the Last Step**.

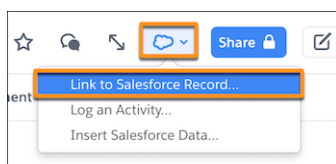
EDITIONS

Available in: **Enterprise**, **Performance**, **Professional**, **Developer**, and **Unlimited** Editions

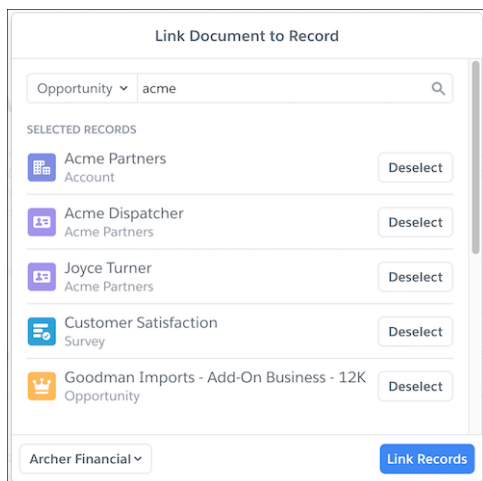
 You're almost there... to collaborate on Salesforce data wherever you are, get started with Quip. **Take the Last Step**

If [Synced Sharing](#) on page 110 is enabled for your Salesforce org, a message lets you know what level of access users have to your linked document before and after you link it.

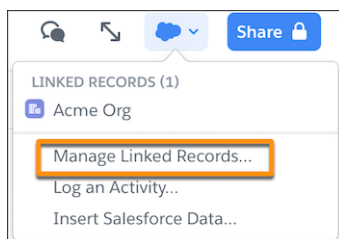
1. From a document in Quip, click .
2. Select **Link to Salesforce Record**.



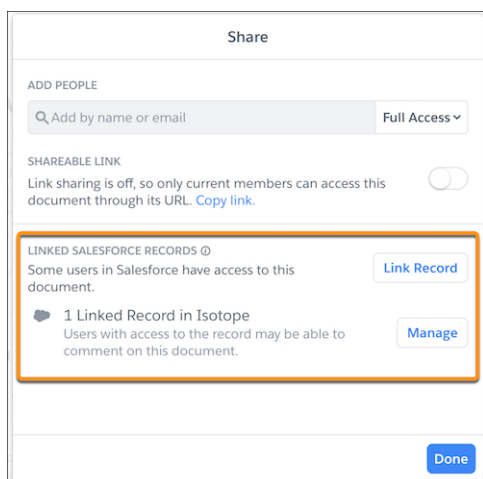
- Choose an object type, enter a record name, and select the records that you want to link your document to. You can select records from multiple object types. Click **Link Records**.




- If Synced Sharing is enabled, confirm that you want users with access to the record to be able to access your linked document.
- To see which records the document is linked to, click and see its linked records. To manage which records the document is linked to and to link another record, click **Manage Linked Records**.



- To see what level of access Salesforce users may have to your linked document, from the document, click **Share**, and check the Synced Sharing level of access.



 **Note:** [Synced Sharing](#) on page 110 is an org-wide level of sharing for documents linked to Salesforce records. Depending on the Synced Sharing access level set by the Quip admin, users with access to the record may be able to view, comment on, edit, or share its linked documents.

After you link a document to a Salesforce record, it appears in the Quip Associated Documents component. If there's no Quip Associated Documents component set up, the document is added to Files and Attachments component.

SEE ALSO:

[Organize Content with the Quip Associated Documents Component](#)

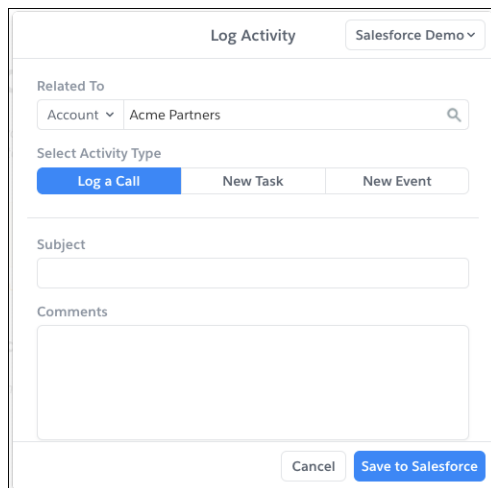
[Synced Sharing](#)

Salesforce Activities in Quip

Log calls, set up tasks, and schedule events from a Quip document. Get credit for your activity in the same place that you take notes, track your progress, and collaborate on your Account Plans.

EDITIONS

Available in: Lightning
Experience



Take notes during an important customer meeting and easily log the call, create follow-up tasks, and schedule an upcoming meeting, all without leaving your Quip document. Activities logged from Quip appear in the related record's Activity Timeline.

[Log a Call, Schedule a Task, and Add an Event from Quip](#)

Use the Log a Call, New Task, and New Event Salesforce activities on standard and custom objects without leaving your document.

[Considerations for Salesforce Activities in Quip](#)

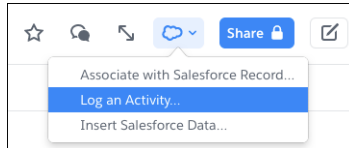
As you log your Salesforce activities from Quip, keep in mind these considerations.

Log a Call, Schedule a Task, and Add an Event from Quip

Use the Log a Call, New Task, and New Event Salesforce activities on standard and custom objects without leaving your document.

Tip: To use text from your document in the Log a Call comments section without copying and pasting, highlight the text before you click **Log an Activity**. The highlighted text automatically appears in the Comments field.

1. In a document, click the **Salesforce Actions cloud**.



2. Select **Log an Activity**.
3. Select an object type. Object types are listed by the Object API name.

4. To log activity related to a record, enter a record name.
5. Select the activity type you want to track in Salesforce. Log a Call, New Task, and New Event are available only if they're enabled for the object type.
6. Complete the remaining activity fields.
7. Save the action.

Your activity now appears in the related record's Activity Timeline.

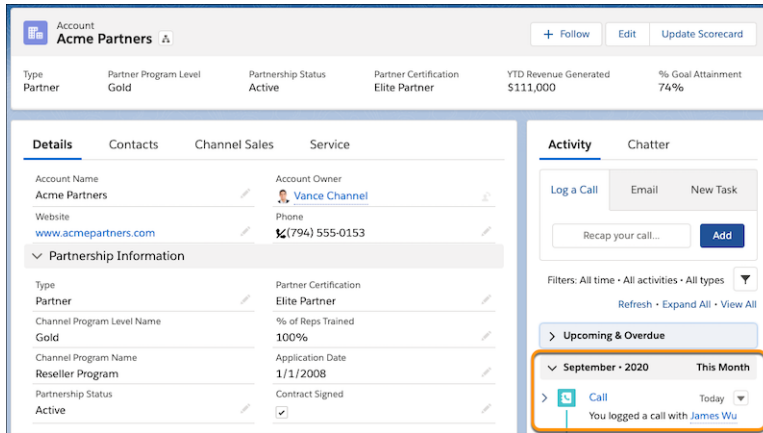
EDITIONS

Available in: Lightning Experience

USER PERMISSIONS

To log an activity in Salesforce

- Access Activities



Considerations for Salesforce Activities in Quip

As you log your Salesforce activities from Quip, keep in mind these considerations.

Activity Types

Only the Log a Call, New Task, and New Event activity types are currently supported in Quip.

Activity Type Fields

Only the fields available in the Log a Call, New Task, and New Event Quick Actions are available in Quip.

Mobile Support

Log Activity isn't available on the Quip mobile app.

Document Type

You can log activities only from Quip documents and spreadsheets. The Salesforce Actions cloud isn't available from a Quip slide or chat room.