



Developer Documentation: Generate Document Directly On Server using Preview Id



1. Functional Summary

The **generateDocumentDirectlyOnServer** (**Generate Document Directly On Server without Editor**) action is the "production" engine of DRTE. It accepts a temporary **Preview ID** (generated via the assembly service) and performs a server-side conversion into a permanent **Salesforce File (ContentVersion)**.

This method is "headless," meaning it requires no UI components. It is best suited for background automation, scheduled jobs, or record-triggered flows where a document must be archived or sent immediately upon a data change.

2. Input Parameters

Parameter	API Name	Type	Required	Description
Preview ID	previewId	Text	Yes	The ID of the pscdnyrichtext__ Rich_Text_Preview__c record containing the HTML to be converted.
Record ID	recordId	Text	Yes	The ID of the parent record (e.g., Account, Opportunity) where the file will be attached.
Object API Name	objectApiName	Text	Yes	The API Name of the target parent object (e.g., Custom_Object__c). Used for security validation.
File Name	fileName	Text	No	The title of the file. Do not include extension. Defaults to token.pdf .

Envelope Token	token	Text	No	A unique identifier used for tracking and as a fallback filename.
Footer Text	footerText	Text	No	Injects custom text into the PDF footer region.
Header Image	headerImageURL	Text	No	Public URL of a logo to render in the PDF header.

5. Implementation in Flow Builder

Integration Steps

1. **Generate Preview:** Use the `generateDocumentService` action first to obtain a `previewId`.
2. **Invoke Server Action:** Add the **Generate Document Directly On Server** action.
3. **Map Variables:** Use the output from step 1 as the `previewId` for this step.
4. **Handle Output:** Assign the returned string to a variable.
 - **Success:** The variable contains the `068...` ContentVersion ID.
 - **Failure:** The variable contains a string starting with "Error:". Use a Decision element to check for this.

6. Governor Limits & Constraints

- **Callout Limits:** Since `getContentAsPDF()` is a callout-like operation, this method cannot be called after any DML (Insert/Update) has occurred in the same transaction.
 - *Solution:* Use a "Pause" element in Flow or an `@future / Queueable` method in Apex to reset the transaction before calling this action.
- **Heap Size:** Large documents with many images may approach the 6MB/12MB synchronous heap limit.