



CODEYLABS

DRTE - ADD ON

Generate Multiple Template
Merge Document on Record

User Guide



DRTE

Generate DRTE Doc/Multiple Template Document Button

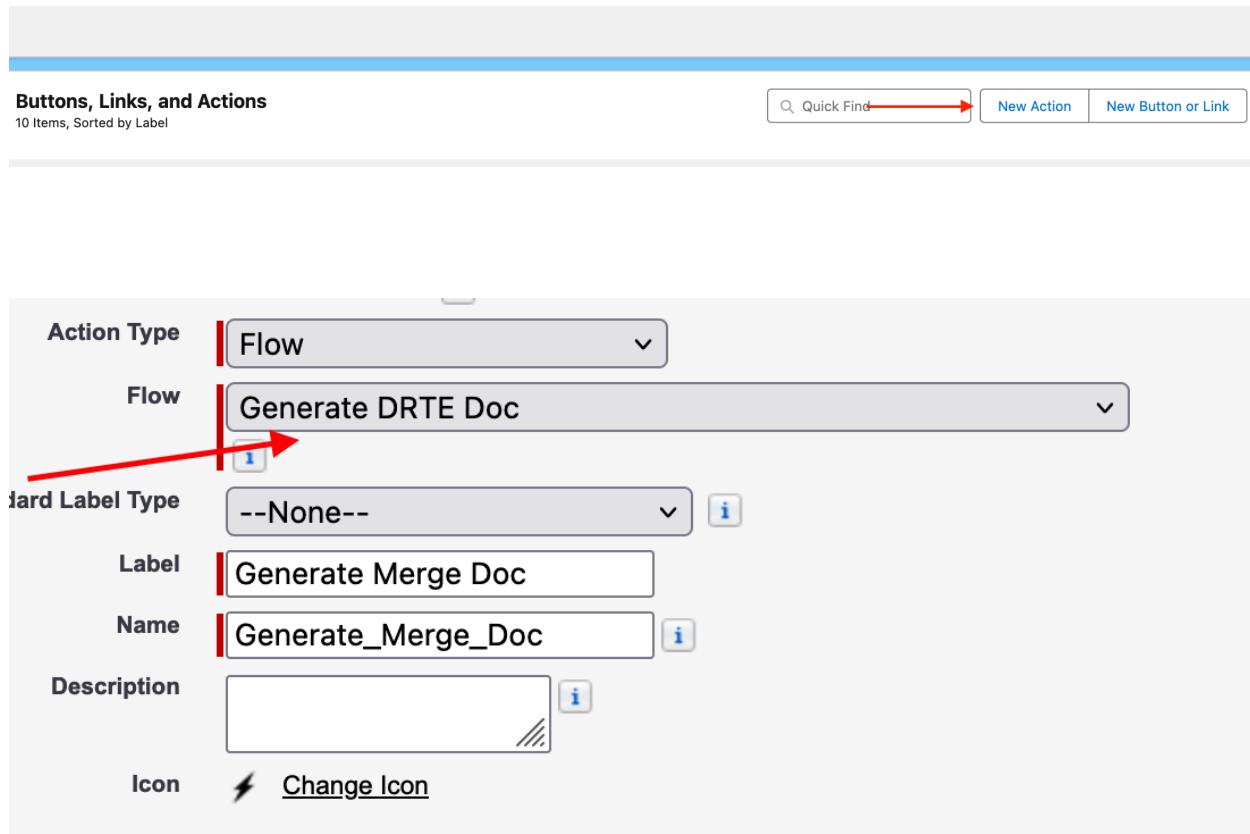
The **Generate DRTE Doc** feature allows users to generate and merge multiple document templates directly from a record. Once processed, the completed documents are automatically attached to the record's **Files** related list.

Setup Instructions

Follow these steps to enable the "Generate DRTE Doc" button on any object:

1. Create the Action:

- Navigate to the **Object Manager** and select the desired object.
- Go to **Buttons, Links, and Actions** and click **New Action**.
- **Action Type:** Select **Flow**.
- **Flow:** Select **Generate DRTE Doc**.
- **Label/Name:** Enter "Generate DRTE Doc" (or your preferred title).



The screenshot shows the 'Buttons, Links, and Actions' configuration screen. At the top, there is a header with 'Buttons, Links, and Actions' and '10 Items, Sorted by Label'. Below the header are buttons for 'Quick Find', 'New Action', and 'New Button or Link'. The main area contains a form for creating a new action. The 'Action Type' dropdown is set to 'Flow'. The 'Flow' dropdown is expanded, showing 'Generate DRTE Doc' as the selected option, indicated by a red arrow. Other fields in the form include 'Label' (set to 'Generate Merge Doc'), 'Name' (set to 'Generate_Merge_Doc'), 'Description' (empty), and 'Icon' (set to a lightning bolt icon with a 'Change Icon' link). Each field has an 'i' icon for information.

Add to Page Layout:

- Go to **Page Layouts** or use the **Lightning App Builder**.
- Add the newly created action button to the record page header or the "Mobile & Lightning Actions" section.

How to Use

Once the button is active, the process for users is simple:

1. **Click** the "Generate DRTE Doc" button on the record.
2. **Select** the relevant template(s) from the provided list.
3. **Click Proceed**. The system will automatically generate the files and save them directly to the record's **Files** section for easy access.

Key Benefits

- **Bulk Generation:** Select and merge multiple templates in one workflow.
- **Automatic Filing:** No manual uploading required; docs attach to the record instantly.
- **User-Friendly:** A simple, guided flow interface for end users.