



CODEYLABS

DRTE - ADD ON

Generate Multiple Template
Merge Document on Record

User Guide



DRTE

Generate DRTE Doc/Multiple Template Document Button

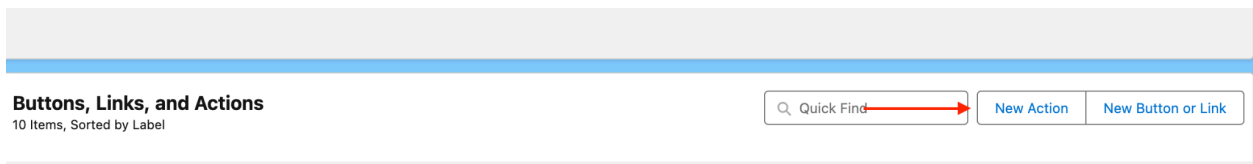
The **Generate DRTE Doc** feature allows users to generate and merge multiple document templates directly from a record. Once processed, the completed documents are automatically attached to the record's **Files** related list.

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).



This screenshot shows the configuration form for a new action. The form has the following fields and values:

- Action Type:** Flow (selected in a dropdown menu)
- Flow:** Generate DRTE Doc (selected in a dropdown menu)
- Standard Label Type:** --None-- (selected in a dropdown menu)
- Label:** Generate Merge Doc
- Name:** Generate_Merge_Doc
- Description:** (empty text area)
- Icon:** Change Icon (with a lightning bolt icon)

A red arrow points to the 'Generate DRTE Doc' option in the 'Flow' dropdown menu.

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.