

DirGen

Photo Directories from Salesforce Reports

Get from installation to your first directory in about 5 minutes.

What You Need Before You Start

Salesforce Edition	Any edition with Salesforce Platform (Professional, Enterprise, Unlimited, Performance, or Developer Edition)
Permissions	System Administrator profile (required to install managed packages)
A Salesforce Report	Any tabular or summary report containing the records you want in a directory. Step 4 walks you through setting one up if you don't have one yet.

1 Install DirGen

1. Go to the **DirGen listing on AppExchange** and click **Get It Now**.
2. The Account Picker will display your connected Salesforce orgs. Select the org where you want to install DirGen.
3. Click **Install in Production**. To test in a sandbox first, click **Try It** instead.
4. Review the terms and conditions, then click **Confirm and Install**.
5. Log in to Salesforce if prompted.
6. When asked who to install for, select **Install for Admins Only**. This is the recommended option — you'll control access through permission sets in the next step.
7. Click **Install**. Installation usually takes less than a minute. You'll receive a confirmation email when it's complete.
8. Click **Done**.

2 Assign Permission Sets

DirGen includes two permission sets. Neither is assigned automatically — you'll need to assign them manually after installation.

Permission Set	Who Gets It	What It Does
DirGen Admin	You and other Salesforce admins	Full access including the Setup tab and the ability to manage all saved directory configurations
DirGen User	Anyone who needs to generate directories	Access to create, download, and save directories, and to manage their own saved configurations — but no admin settings

To assign a permission set:

1. Go to **Setup** → search for **Permission Sets**.
2. Click **DirGen Admin**.
3. Click **Manage Assignments** → **Add Assignment**.
4. Select yourself (and any other admins), then click **Assign**.
5. Repeat for **DirGen User**, adding anyone who should be able to generate directories.

Tip: If users report they can't see DirGen in the App Launcher, the most likely cause is a missing permission set assignment.

3 Configure Admin Settings

Before anyone generates a directory, take a minute to set your org-wide defaults.

1. Open the **App Launcher** (the grid icon in the top-left corner of Salesforce).
2. Search for **DirGen** and click to open the app.
3. Navigate to the **Setup** tab. This tab is only visible to users with the DirGen Admin permission set.

Photo Method

Choose your organization's default method for how DirGen finds photos:

- **Salesforce Files** — Photos are stored as files attached to records (ContentVersion). DirGen pulls the most recently attached image file (JPG, PNG, or GIF).
- **Rich Text Area** — Photos are embedded in a Rich Text Area field on the record. DirGen parses the field's HTML and extracts the first image automatically.

This sets the org-wide default. Users can override the photo method when generating individual directories, though they'll see a confirmation prompt when doing so.

Good to know: When either photo method is active and a record has no photo, DirGen automatically generates an initials avatar (the first letter of the primary name field) instead of leaving a blank space.

Company Branding (Optional)

You can optionally configure branding that applies to generated directories:

- **Company Logo** — Upload a Salesforce-hosted image to display in directory headers.
- **Company Color** — Pick a brand color (hex value) used in directory headers and accents.
- **Enable Branding** — Makes the logo and color available as a toggle when generating directories.
- **Lock Branding** — Requires all directories to use the company logo and color. The toggle still appears but users cannot change it.

If you skip branding setup, directories will generate with clean, unbranded templates.

4 Prepare Your Report

DirGen generates directories from standard Salesforce tabular or summary reports. You can use an existing report or create a new one — but it needs to include the right fields.

Required: Add the Record ID Field

Every report used with DirGen must include the record's ID field. This is what allows DirGen to link each row to the correct record and its photo.

1. Open (or create) the report you want to use in **Report Builder**.
2. Add the **Record ID** field to the report. For Contact reports, this is **Contact ID**. For custom objects, look for **[Object Name] ID**.
3. Save the report.

If Using Rich Text Area Photos: Add the Rich Text Field

If your org stores photos in a Rich Text Area field, you also need to include that field as a column in the report.

1. In Report Builder, add the Rich Text Area field that contains photos (e.g., *Photo*, *Headshot*, *Bio Image*, or whatever your org uses).
2. Save the report.

Tip: Not sure where your photos are stored? Check a few records. If you see a photo displayed inside a text field on the record detail page, that's a Rich Text Area. If photos appear in the Files related list or Notes & Attachments, use the Salesforce Files method.

5

Generate Your First Directory

Open **DirGen** from the App Launcher. You'll land on the directory wizard, which walks you through everything in four stages:

Select Data



Choose Template



Map Fields



Preview

5a

Select Your Report

Search for a report by name using the search bar, select one from the dropdown, or paste a Report ID directly (the ID starts with 000). DirGen works with any tabular or summary report.

5b

Choose a Template

Choose from three professional layouts:

9-Up Directory	Roster List	Profile Details
3x3 grid with square photos, names, and up to 6 lines of detail	Compact table layout with small photos and up to 6 fields per entry	One record per page with a large photo and up to 12 lines of detail
<i>Staff directories, membership rosters</i>	<i>Phone lists, quick-reference sheets</i>	<i>Board members, VIPs, personnel files</i>

If your admin has configured company branding (Step 3), you'll see an **Enable Branding** toggle at the bottom. Turn it on to include your company logo and colors. If branding is locked by the admin, the toggle will still appear but cannot be changed.

5c

Map Your Fields

This is where you tell DirGen what data goes where in the template:

- **Directory Title** — Enter a title for the directory (e.g., "Staff Directory — Spring 2026").
- **Photo Source** — Choose how DirGen finds photos for this directory:
 - **Rich Text Column** — Photos embedded in a Rich Text Area field. That field must be a column in your report.
 - **Use Latest File (ContentVersion)** — DirGen pulls the most recent photo file attached to each record.
 - **No Photos** — Generate a text-only directory without photos or initials.
- **Photo Column** — If you chose Rich Text Column, select the report column that contains the photos.
- **Row 1 (Primary/Name) through Row 6 (or Row 12 for Profile Details)** — Map report columns to each line of the directory entry. Row 1 is emphasized and typically used for names.
- **Sort** — Choose a report column to sort entries by.

- **Group By** (optional) — Group entries by a column value (e.g., department, location). Each group gets its own header.

A **Layout Preview** on the right side of the screen shows how entries will be arranged as you map fields.

5d Preview and Download

DirGen generates a live preview using the first 20 records from your report, along with an estimated generation time for the full directory. From here you can:

- **Refresh** — Regenerate the preview if you've changed your report data.
- **Download Full Report** — Generate and download the complete directory as a print-ready PDF.
- **Save Full Report** — Generate the PDF and save it directly to Salesforce Files.
- **Save Configuration** — Save this directory's settings so you can regenerate it with one click next time.
- **Back to Mapping** — Go back and adjust your field mappings or template selection.

That's it! Your first directory should take about 5 minutes from opening DirGen to downloading the PDF. DirGen supports up to 1,000 records per directory.

What's Next

- **Save your configuration.** On the Preview step, click **Save Configuration** to store your report, template, and field mappings. Saved configurations appear in the **Saved Directories** tab, where you can regenerate any directory with one click.
- **Explore templates.** Try all three templates with the same report to see which layout works best for your use case.

Troubleshooting

"I can't find DirGen in the App Launcher."

Your System Administrator needs to assign you the DirGen User (or DirGen Admin) permission set. See Step 2.

"My report isn't showing up in DirGen."

DirGen works with tabular and summary reports only. Matrix and joined reports are not supported. Also confirm the report is saved in Salesforce (not just open in Report Builder) and that you have access to it.

"Photos aren't appearing in my directory."

Check three things: (1) The photo source you selected in Step 5c matches how your org stores photos. (2) If using Rich Text Column, the Rich Text field must be added as a column in the report itself — not just on the record page layout. (3) The records actually have photos. Records without photos will display an initials avatar instead.

"I see a warning when changing the photo source."

This is expected. The admin sets an org-wide default photo method in Setup (Step 3). Users can override it per directory, but DirGen shows a confirmation to make sure the change is intentional.

"The generated PDF is blank or missing records."

Make sure the Record ID field is included in your report (see Step 4). Without it, DirGen can't connect report rows to records and their photos.

"I want to regenerate a directory I made before."

If you saved the configuration in Step 5d, go to the **Saved Directories** tab in DirGen to regenerate it with one click. If you didn't save it, you'll need to run through the wizard again.

Need Help?

support@dirgenapp.com