

DirGen

Photo Directories from Salesforce Reports in Minutes

Salesforce-Native Managed Package | Report-Based Generation | Smart Photo Handling

FEATURE OVERVIEW

HOW IT WORKS

1 Select Report → 2 Choose Template → 3 Map Fields → 4 Generate PDF

1 Three Professional Templates

- 9-Up Grid — 9 records/page with photos & details
- Roster List — Compact rows for quick-reference
- Full-Page Profile — 1 record/page, large photo
- All templates tested with 1,000+ records

2 Smart Photo Handling

- Salesforce Files (ContentVersion) support
- Rich Text Area field parsing & extraction
- Automatic initials fallback when no photo
- No manual insertion or resizing required

3 4-Step Lightning Wizard

- Intuitive guided setup
- Live wireframe preview of field mappings
- Custom display labels for any mapped field
- 20-row preview before full generation

4 Saved Configurations

- Save report, template & field mappings
- One-click regeneration from dashboard
- Manage all directories in one place
- Share configs across your admin team

5 Report-Based Generation

- Works with any tabular or summary report
- Contacts, Leads, Users, or custom objects
- Sort by any mapped field
- Group by field for organized sections

6 Company Branding

- Add your logo to directory headers
- Custom brand color for accents
- Optional: let users toggle branding
- Lock mode: enforce brand on all directories