



Document Generator

Document Generator User Guide

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Table of Contents

About This Guide.....	3
Export Excel through Quick Action.....	3
Export Excel through Component.....	3
Export List View.....	4
Merge Document.....	4
Conversion of Docx to PDF.....	4

About This Guide

Users can export the data in excel with selectable fields using the quick action from the records.

Users can Merge the document template with original field values and can convert the generated docx to Pdf .

Export Excel Through Quick Action

Users can export the data in excel with selectable fields using this quick action from the records.

1. Go to the Object record and click on the Quick Action which is used to export the records.
2. Now select the fields which the user wants to export.
3. Move the selected fields from Available Fields box to Selected Fields box
4. Click on Export Button.
5. Excel will be downloaded with the fields data selected.

Export Excel Through Component

Users can export the data in excel with selectable fields using this Export excel button from the component.

1. Go to the Object Record and click on the Export button on the component which exports the records.
2. Select the fields which the user wants to export.
3. Move the selected fields from Available Fields box to Selected Fields box
4. Click on Export Button.
5. Excel will be downloaded with the fields data selected.

Export List View as Excel

1. Go to the Object tab and select any List View.
2. Click on the Export Records button which is used to export the records.
3. Select the fields which the user wants to export.

4. Move the selected fields from Available Fields box to Selected Fields box
5. Clicks on Export Button.
6. Excel will be downloaded with the fields data selected.

Merge Document

Users can merge the document template with the actual record fields .

1. Go to the Parent Object Record and click on the Merge button on the component which opens a modal.
2. Select the Document Template records associated with the record and click Merge Button.
3. If there is no error, then a successfully saved toast will appear, else an error message toast will appear on screen.

Conversion of Docx to Pdf

Users can convert the merged document to Pdf and can download it

1. Go to the Parent Object Record and click on the Download Docx/Pdf button on the component which opens a modal with all the docx files attached to the record .
2. Select the docx file and click the Convert Pdf to convert it to Pdf .
3. After successful conversion you get a success toast , if error occurs you get an error toast.
4. Now you can download the PDF or DOCX version of the file by clicking the Docx and Pdf buttons which respectively download the files to the System.