



# **Document Generator**

## Document Generator Admin Guide

Date : Mar 28,2023

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## About This Guide

This Guide provides the step by step process to set up the Document Generator, Export Related Records and Export List View components to use their functionality.

## Document Generation Configuration

Docx Template records data are used to provide the template format and the data that needs to be displayed on the template.

### Create Docx template and Query records

- 1) Go to tabs and open the Docx template object
- 2) Create a new Docx template record with the following fields.

| Field         | Value                                                                                            |
|---------------|--------------------------------------------------------------------------------------------------|
| Name          | Name of the Document Template Record                                                             |
| Parent Object | Subject Name of the Parent record on which the document needs to be generated by the sales user. |
| Merge Values  | Api Names of the fields of parent records which are present in the Document template             |
| Description   | Description for the Record                                                                       |


**Docx File**  
**Doc For Opportunity**

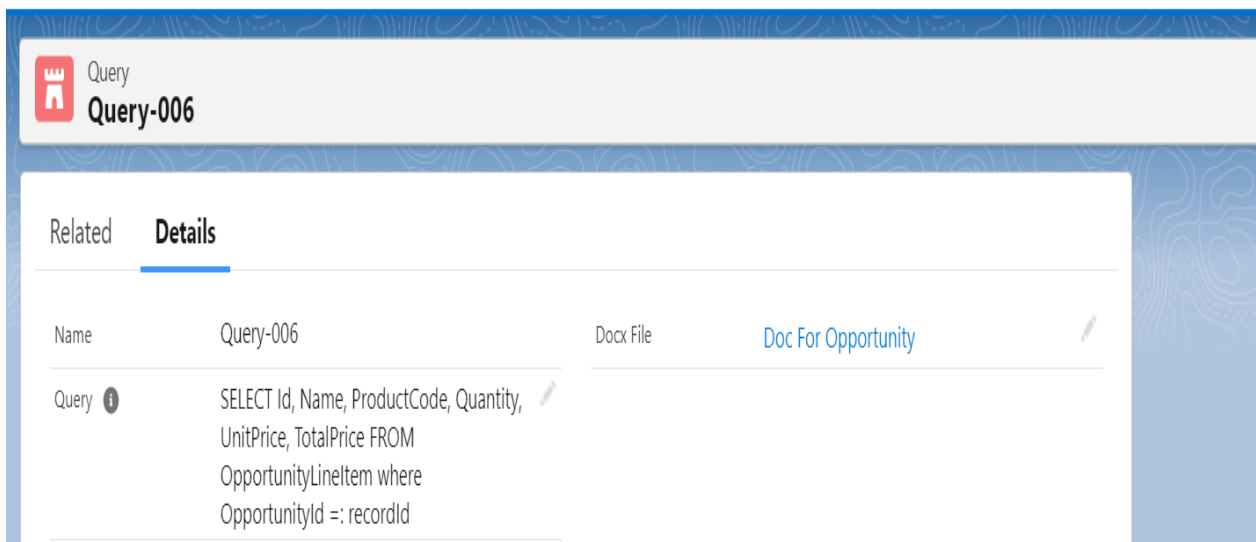
Related

Details

|             |                            |               |                                   |
|-------------|----------------------------|---------------|-----------------------------------|
| Name        | Doc For Opportunity        | Merge Values  | Account.Name,StageName,LeadSource |
| Description | Document for Opportunities | Parent Object | Opportunity                       |

- 3) In the related list, go to Query records and create new record with following fields

| Field     | Value                                                                   |
|-----------|-------------------------------------------------------------------------|
| Query     | SOQL query string ,we specify the Id of the parent object by recordId . |
| Docx File | Relation for Docx_File__c object                                        |



The screenshot shows the Salesforce interface for a record named 'Query-006'. The 'Details' tab is selected, displaying the following information:

- Name:** Query-006
- Docx File:** [Doc For Opportunity](#)
- Query:** SELECT Id, Name, ProductCode, Quantity, UnitPrice, TotalPrice FROM OpportunityLineItem where OpportunityId =: recordId

- 4) Once the query and docx template records get created, Add the Queries\_\_c records and AutoNumber Name to the Docx Template in the Ms Word above each respective table .


Query  
**Query-006**

Related
Details

Name

Query-006

Query ⓘ

SELECT Id, Name, ProductCode, Quantity,  
UnitPrice, TotalPrice FROM  
OpportunityLineItem where  
OpportunityId =: recordId

##Query-006##

| Product Name | Product Code  | Quantity   | Unit Price  | Total Price                |
|--------------|---------------|------------|-------------|----------------------------|
| @Name@       | @ProductCode@ | @Quantity@ | @UnitPrice@ | @TotalPrice@               |
| Total Amount |               |            |             | @CurrencyIsoCode@ @Amount@ |

- 5) In the Docx File record related list, go to files and upload the word document. Steps to Create the document are :
- Create a New MS word Document with Merge Fields .
  - Merge Fields are annotated with 2 `@` and API name of the Field  
Like : **@CustomField\_\_c@** .
  - For Currencies add **-NN.NN** at the end of the Merge Field.  
Like : **@TotalPrice-NN.NN@**.
  - Add the Table Headers and one Row with the API Names of the Child object fields .
  - Add this child Object to the Query records and relate them in Docx File Template.
  - Place the query Name above the Table in the Document.
  - Queries are annotated with 2 `##` and Record AutoNumber API name.  
Like : **##Query-006##**.

## 6) Conditional Display Configuration : Steps to Conditionally render the content in the word document.

- To render content in the template we should use **boolean** type field values. We can also create our own conditions using **Formula Fields**.
- To render content in the body of the document we use start and end tags with the format , start tag - `##Con-fieldApiName##` and end tag - `##/ConEnd##` .  
Like : **##Con-FieldApiName\_\_c##** some content **##/ConEnd##**
- To Conditionally render the table columns & rows we use tags with the format, For Rows - `##TrCon-fieldApiName##` and For Columns - `##TcCon-fieldApiName##` .
- We can place the row tag in any of the columns in the same row, but for the column tag we must place it within the first row.

**Note : 1.** The FieldApiName\_\_c is nothing but the formula field API Name we have created or the Boolean API field we have. (we must mention these fieldApiNames in the merge fields in the DocxFile) .

**2.** We don't have an end tag for the Table Row & Column tag.

- Sample Template :

##Con-Condition2\_\_c## @Description@ ##/ConEnd##

##Con-Condition1\_\_c##

Capitalized terms used in this Service Order and not otherwise defined shall have the meaning ascribed to them in theSchedule to the Agreement. Total Amount is @Amount@

##/ConEnd##

##Query-000##

| Product Name    | Product Code  | ##TcCon-Condition2__c##<br>Quantity | Unit Price  | TotalPrice                         |
|-----------------|---------------|-------------------------------------|-------------|------------------------------------|
| @Product2.Name@ | @ProductCode@ | @Quantity@                          | @UnitPrice@ | @TotalPrice@                       |
| Total Amount    |               |                                     |             | ##TrConCondition3__c##<br>@Amount@ |

## Add the Lightning component on Parent object

Component provides the ability to generate the template in word and pdf formats and export the records in excel.

1. Open the record page of the Object and click on the Edit Page .
2. Drag and drop the DocxComponent in the Page.
3. Configure the below fields in the Component .

| Field                                   | Description                                                                                                                                                                                                                                                                                            |
|-----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Title of the Component                  | Title which appears as Heading over the Component                                                                                                                                                                                                                                                      |
| Child Object Api Name                   | <p>Api Name of the Child Object (i.e Related child object to the parent) and Relationship Field (Lookup/Master Detail to Parent Object) separated by : Delimiter<br/> {ChildObjectApiName} : {RelationshipFieldApiName}</p> <p><b>Note:</b> If the value is blank, the Excel Button will be hidden</p> |
| Default Fields                          | Api Names of the fields of Child Object, these fields will be pre-selected while exporting the records as excel.                                                                                                                                                                                       |
| Button Label for Excel Generation       | Button Label for Excel Button which invokes Excel File Generation                                                                                                                                                                                                                                      |
| Button Label for Docx Generation        | Button Label for Docx Button which invokes Docx File Generation                                                                                                                                                                                                                                        |
| Button Label for Docx/Pdf File Download | Button Label for Docx Button which invokes Docx /PDF File Conversion                                                                                                                                                                                                                                   |

|                                                   |                                                                                                             |
|---------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
| Generated Docx and PDF File should be Downloaded? | If it is checked, then the Generated Docx or PDF File will be automatically downloaded to the local system. |
|---------------------------------------------------|-------------------------------------------------------------------------------------------------------------|

Export Records

Catalog Page

Edit

Closed Won

Change Closed Stage

Generate Proposals

Generate D...

Download ...

Export Data

Page > DocxComponent

Title of the Component ⓘ

Generate Proposals

Child Object Api Name ⓘ

Opportunitylineitem : Opportunityid

Default Fields of Child Object ⓘ

Quantity, ListPrice

\* Button Label for Excel Generation ⓘ

Export Data

\* Button Label for Docx Generation ⓘ

Generate Docx

\* Button Label for Docx/PDF File Download ⓘ

Download Docx/PDF

☒ Generated Docx and PDF File should be Downloaded? ⓘ

## Export Related Records Configuration

There are two ways to export the records in excel

1. Custom Metadata Type - Excel will be generated based on data mentioned in custom metadata "ExcelFieldSelectionMetadata\_mdt"
2. Without Custom Metadata - : Excel will be generated by the data provided in the childObjectApiName and defaultFieldsApiNames Flow Variables in "ExportExcelFieldSelectionFlow"

## Custom Metadata Type

### Create a quick action for export excel

1. Go to Setup and from Object Manager go to the object (Parent Object) on which sales users can export the excel.
2. Go to Buttons, Links and Actions on the object ,create a Quick Action on the Parent object by clicking on the New Action button
3. Provide the action type as Flow and choose any flow provided in the list (We will change the Flow after the new flow gets created).

### Steps to create a Custom Metadata Type Record

1. Go to Setup and in Quick find enter Custom Metadata Types.
2. Click on the manage records button beside the Excel Field Selection Metadata.
3. Create a record in the ExcelFieldSelectionMetadata\_mdt Custom Metadata Type by clicking on new button and for the enter values as specified below in these fields:

| Field | Value                                                                                                                                         |
|-------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| Label | Give parent object api name and quick action name created on parent object in the below format.<br>{ParentObjectApiName}.{NameofQuickaction}. |

|                       |                                                                                                                                                                                                                                   |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Child Object Api Name | <p>Api Name of the Child Object (i.e Related child object to the parent) and Relationship Field (Lookup/Master Detail to Parent Object) separated by : Delimiter</p> <p>{ChildObjectApiName} :<br/>{RelationshipFieldApiName}</p> |
| Default Fields        | <p>Api Names of the default fields (fields which are pre-selected while exporting the records as excel) of Child Object (Related Object) in comma-separated form.</p> <p>If there are no such fields leave it as blank.</p>       |

- Click on Save.

### Steps to create a flow

- Go to Setup and in Quick find, enter flows.
- Open the Export Excel Field Selection Flow from the List of flows.
- Click on the Toggle Toolbox icon on the top left corner to see the variables in flow.

| Flow Variable      | In Default Value field                                                                                                                                                                      |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| buttonname         | <p>Replace the sample value (which was provided) with the Label (MasterLabel) i.e ParentObjectApiName}.{NameofQuickaction} of the Custom Metadata Type record which we created earlier.</p> |
| childObjectApiName | <p>It should be blank (not even spaces should be present in it) and If any sample value is present, remove it and leave it as blank.</p>                                                    |

|                       |                                                                                                                                   |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| defaultFieldsApiNames | It should be blank (not even spaces should be present in it) and If any sample value is present, remove it and leave it as blank. |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------|

- Click on done after setting value for each variable.
- Click on Save as and Enter the Flow Label with the name of your choice (Remember this flow label because we should change the flow in quick action which we created earlier).
- Activate the flow.

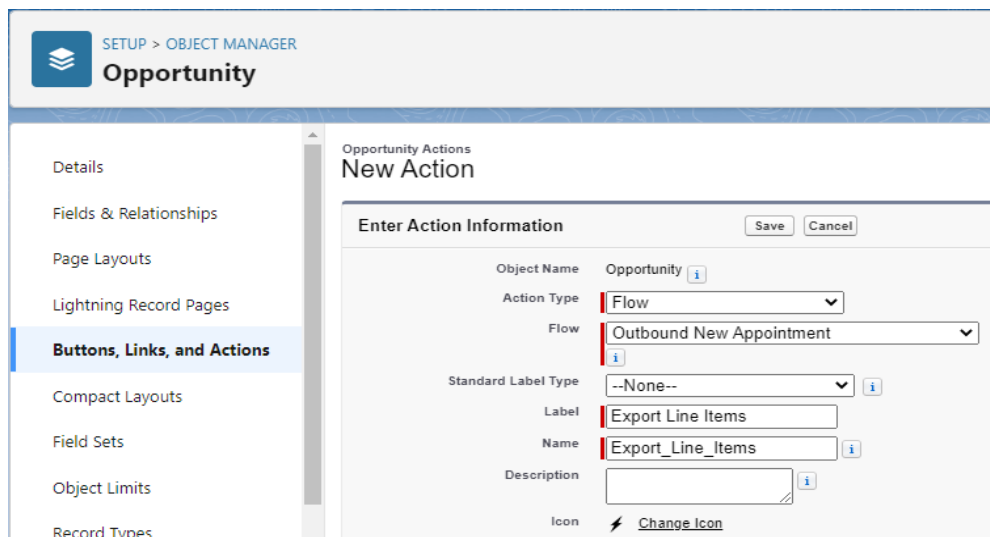
### Steps to associate the flow to quick action

- Go to the parent object where we have created the quick action earlier and open the quick action.
- Click on the edit button and choose the flow which we have created.
- Click on Save button.
- Add the quick action in the page layout by dragging the quick action from the Mobile & Lightning Actions section to the Salesforce Mobile and Lightning Experience Actions.
- Click on Save button.

### Example:

Export the OpportunityLineItem records related to a Opportunity record. Here the Parent Object is Opportunity and the Child Object (Related Object) is OpportunityLineItem.

## 1. Creating a Quick Action with action type as flow and choose any flow



SETUP > OBJECT MANAGER

### Opportunity

Opportunity Actions  
New Action

Enter Action Information Save Cancel

Object Name: Opportunity i

Action Type: Flow

Flow: Outbound New Appointment i

Standard Label Type: --None-- i

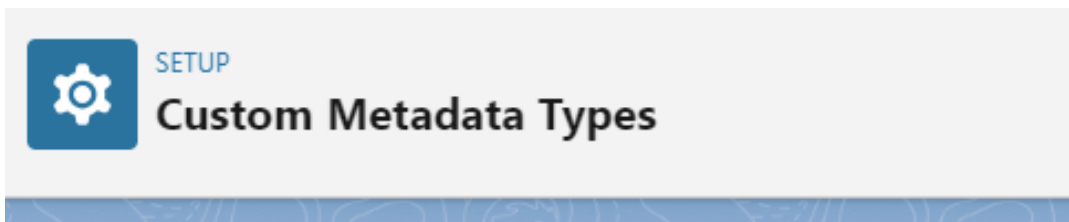
Label: Export Line Items

Name: Export\_Line\_Items i

Description:  i

Icon: ⚡ [Change Icon](#)

## 2. Create a Custom Metadata Type Record



## Excel Field Selection Metadata

### Excel Field Selection Metadata Detail

Edit Delete Clone

|                                     |                                     |
|-------------------------------------|-------------------------------------|
| Label                               | Opportunity.Export_Line_Items       |
| Excel Field Selection Metadata Name | Opportunity_Export_Line_Items       |
| Child Object Api Name               | OpportunityLineItem : OpportunityId |
| Default Fields                      | Quantity, Product2Id                |

### 3. Create a flow and set the flow variables

Set the button name variable (Label i.e {ParentObjectApiName}.{NameofQuickaction} of the Custom Metadata Type record which we created).

#### Edit Variable

buttonname 

\* Data Type 

Text ▼

☐ Allow multiple values (collection) 

Default Value

Opportunity.Export\_Line\_Items

Availability Outside the Flow

☒ Available for input

☐ Available for output

Cancel

Done

Set the childObjectApiName and defaultFieldsApiNames variable as blank.

#### Edit Variable

childObjectApiName 

\* Data Type 

Text ▼

☐ Allow multiple values (collection) 

Default Value

Enter value or search resources... 

Availability Outside the Flow

☒ Available for input

☐ Available for output

Cancel

Done

## 4. Save the flow

Save as a new flow

 Create a flow using this template as a starting point.

\* Flow Label

Export Opportunity Line Items From Custom Metadata

\* Flow API Name

Export\_Opportunity\_Line\_Items\_From\_Custom\_Metadata

Description

[Show Advanced](#)

Cancel

Save

## 5. Associate the flow to quick action



SETUP > OBJECT MANAGER

**Opportunity**

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

**Buttons, Links, and Actions**

Compact Layouts

Field Sets

Object Limits

Edit Opportunity Action

**Export Line Items**

Enter Action Information

Save

Cancel

Object Name Opportunity 

Action Type Flow

Flow

Export Opportunity Line Items From Custom Metadata ▾



Standard Label Type

--None-- 

Label

Export Line Items

Name

Export\_Line\_Items 

Description



Icon

 [Change Icon](#)

## Through the Flow Variables

### Create a flow

1. Go to Setup and in Quick find, enter flows.
2. Open the Export Excel Field Selection Flow from the List of flows.
3. Click on the Toggle Toolbox icon on the top left corner to see the variables in flow.

| Flow Variable         | In Default Value field                                                                                                                                                                                                                 |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| buttonname            | It should be blank (not even spaces should be present in it) and If any sample value is present, remove it and leave it as blank.                                                                                                      |
| childObjectApiName    | Api Name of the Child Object (i.e Related child object to the parent) and Relationship Field (Lookup/Master Detail to Parent Object) separated by : Delimiter<br><br>{ChildObjectApiName} :<br>{RelationshipFieldApiName}              |
| defaultFieldsApiNames | Api Names of the default fields (fields which are pre-selected while exporting the records as excel) of Child Object (Related Object) in comma-separated form.<br><br>If there are no such fields leave it as blank and click on done. |

4. Click on done after setting value for each variable.
5. Click on Save as and Enter the Flow Label with the name of your choice (Remember this flow label because we should add this flow in quick action which we will create now).
6. Activate the flow.

## Associate the flow to quick action

1. Go to Buttons, Links and Actions on the object ,create a Quick Action on the Parent object by clicking on the New Action button with the action type as Flow and choose the flow which we have created earlier in the flow list.
2. Click on Save button.
3. Add the quick action in the page layout by dragging the quick action from the Mobile & Lightning Actions section to the Salesforce Mobile and Lightning Experience Actions.
4. Click on Save button.

## Example

If we want to export the OpportunityLineItem records related to a Opportunity record.

Here the Parent Object is Opportunity and the Child Object (Related Object) is OpportunityLineItem.

1. Create a flow and set the flow variables

Set the childObjectApiName variable as Api Name of the Child Object (i.e Related child object to the parent) and Relationship Field (Lookup/Master Detail to Parent Object) separated by : Delimiter.

{ChildObjectApiName : RelationshipFieldApiName}

Edit Variable

childObjectApiName 

\* Data Type 

Text

☐ Allow multiple values (collection) 

Default Value

OpportunityLineItem : OpportunityId

Availability Outside the Flow

- ☐ Available for input
- ☐ Available for output

Cancel

Done

Set the defaultFieldsApiNames variable (Api names of the fields present in the OpportunityLineItem Object in comma-separated form).

### Edit Variable

defaultFieldsApiNames 

\* Data Type 

Text

☐ Allow multiple values (collection) 

Default Value

Name, ListPrice, Quantity

**Availability Outside the Flow**

☒ Available for input

☐ Available for output

Cancel

Done

Set the button name variable as blank

### Edit Variable

buttonname 

\* Data Type 

Text

☐ Allow multiple values (collection) 

Default Value

Enter value or search resources...



**Availability Outside the Flow**

☒ Available for input

☐ Available for output

Cancel

Done

## 2. Save the flow

Save as a new flow

 Create a flow using this template as a starting point.

**\* Flow Label**

**\* Flow API Name**

Description

[Show Advanced](#)

Cancel

Save

## 3. Associate the flow to quick action



SETUP > OBJECT MANAGER

### Opportunity

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Opportunity Actions

### New Action

Save

Cancel

**Enter Action Information**

Object Name

Opportunity 

Action Type

Flow 

Flow

Export Line Items from Flow Variables 

Standard Label Type

--None-- 



Label

Export Line Items

Name

Export\_Line\_Items\_Var 

Description



Icon

 [Change Icon](#)

**Note:** The running user needs to have at least read access on the Child Object and the Relationship Field (Lookup/Master) in Child Object to export records.

**Note:** If you set both button name variable and childObjectApiName variable in flow, then the childObjectApiName will have the highest precedence, so the records of the related object mentioned in the childObjectApiName variable will be exported and the default fields mentioned in defaultFieldsApiNames variable will have the highest precedence, so if any default fields present in the defaultFieldsApiNames variable, those fields will be pre-selected.

## Export List View Configuration

### Steps to create a List View Button with Flow URL

1. Go to Setup and in Quick find, enter flows.
2. Click on the actions button beside the Export List View Flow and click on the View Details and Versions.
3. Copy the URL of the flow
4. Now go to the object on which sales users can export the excel and create a List Button action from Buttons, Links and Actions tab by clicking on the New Button or Link Button.
5. Enter any label of your choice and set the values as specified below.

| Field        | Value                                                                                                                                                                                                                                                                                                                                                                     |
|--------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Display type | List Button                                                                                                                                                                                                                                                                                                                                                               |
| Behavior     | Display in existing window without sidebar or header                                                                                                                                                                                                                                                                                                                      |
| Content      | URL                                                                                                                                                                                                                                                                                                                                                                       |
| URL Box      | <p>Paste the URL which you have copied earlier and append the retUrl to the flow url at the end. The final URL looks like:</p> <p><a href="/flow/Fsys/ListViewFlow?retURL=/lightning/o/{ObjectApiName}/home">/flow/Fsys/ListViewFlow?retURL=/lightning/o/{ObjectApiName}/home</a></p> <p>ObjectApiName: Api Name of object on which sales users can export the excel.</p> |

|  |                                                                                                                                 |
|--|---------------------------------------------------------------------------------------------------------------------------------|
|  | Note: Namespace will be automatically provided by the package, do not change it.<br>(Just add the retURL and Remove {} braces ) |
|--|---------------------------------------------------------------------------------------------------------------------------------|

- Click on Save button

## Steps to add the button in List View Button Layout

- Go to the List View Button Layout tab on Object and edit the List View by clicking on the edit button.
- Move the detail page button which we have created earlier from Available Buttons to Selected Buttons.
- Click on Save button.

## Example

Export the Opportunity records from a Opportunity List View.

## Copy the flow URL by clicking on View Details and Versions beside ListView Flow


**SETUP**  
**Flows**

Flow

### List View Flow

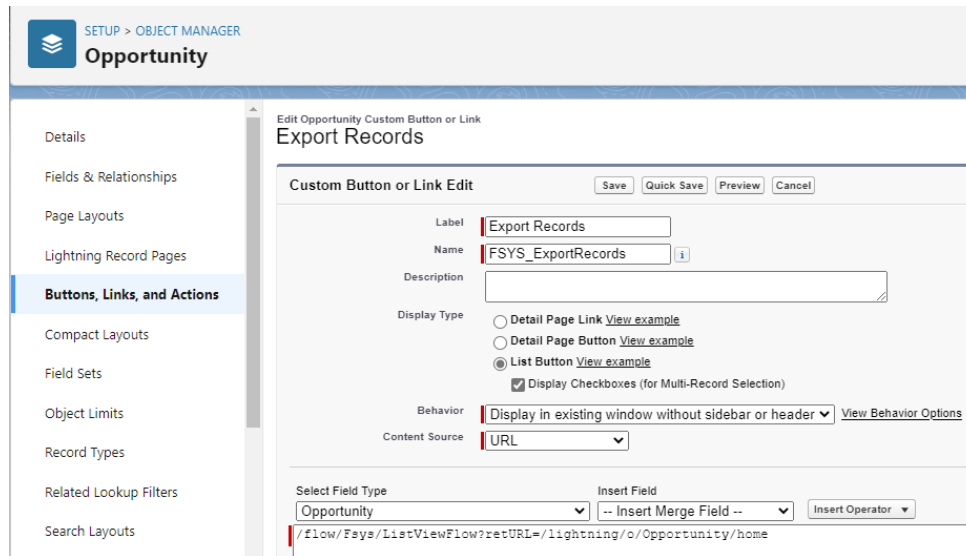
[« Back to List: Flows](#)

Flow Detail

Edit
Run

|              |                |                  |                         |
|--------------|----------------|------------------|-------------------------|
| Flow Label   | List View Flow | Flow API Name    | ListViewFlow            |
| Description  |                | Namespace Prefix | Fsys                    |
|              |                | Type             | Screen Flow             |
| Environments | Default        | URL              | /flow/Fsys/ListViewFlow |

## Create a Detail page button and append the retURL



SETUP > OBJECT MANAGER

**Opportunity**

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

**Buttons, Links, and Actions**

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Edit Opportunity Custom Button or Link

**Export Records**

Custom Button or Link Edit

Save Quick Save Preview Cancel

Label: Export Records

Name: FSYS\_ExportRecords

Description:

Display Type:

☐ Detail Page Link [View example](#)

☐ Detail Page Button [View example](#)

☒ List Button [View example](#)

☒ Display Checkboxes (for Multi-Record Selection)

Behavior: Display in existing window without sidebar or header [View Behavior Options](#)

Content Source: URL

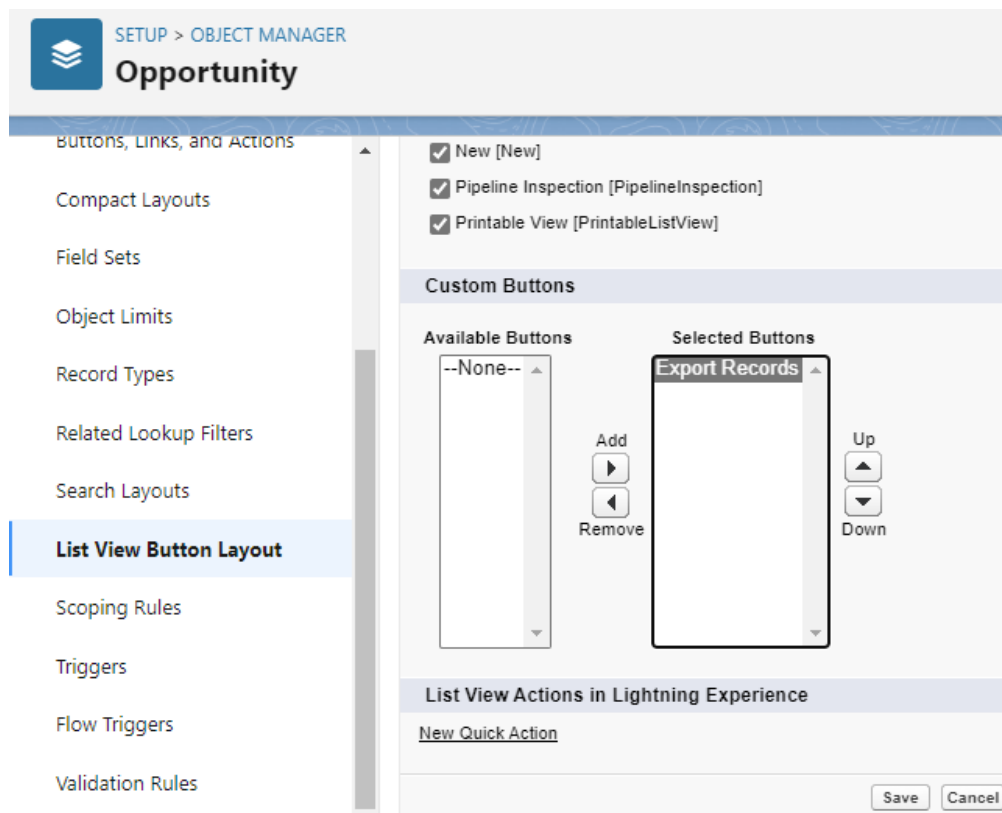
Select Field Type: Opportunity

Insert Field: -- Insert Merge Field --

Insert Operator:

/flow/Fsys/ListViewFlow?retURL=/lightning/c/Opportunity/home

## Add the detail page button to the List View Button Layout



SETUP > OBJECT MANAGER

**Opportunity**

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

**List View Button Layout**

Scoping Rules

Triggers

Flow Triggers

Validation Rules

☒ New [New]

☒ Pipeline Inspection [PipelineInspection]

☒ Printable View [PrintableListView]

**Custom Buttons**

Available Buttons

--None--

Add

Remove

Selected Buttons

Export Records

Up

Down

**List View Actions in Lightning Experience**

[New Quick Action](#)

Save Cancel

**Note:** In Export Related Records functionality or Export List View functionality, if any relationship field (like OpportunityId) is selected, then the name field of Parent Object (Opportunity) i.e Opportunity Name will be exported, make sure the user has access to the name field of the Parent Object. If any other field from Parent Object should be exported, then create a custom formula field in Child Object (OpportunityLineItem) which references the required Parent Object field and select that formula field while exporting and for the Polymorphic fields like OwnerId etc the Id value will be exported.

## Override Success and Error Messages

Document Generator functionality's success or error messages can be overridden by editing these custom labels using Translator Workbench.

| Custom Label           | Use                                                                                                                                                            |
|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Success Label          | Message defined in this label will appear as toast message when excel successfully gets downloaded in Export Related Records functionality                     |
| No Child Records Label | Message defined in this label will appear on screen when there are no child records (Related records) to parent record in Export Related Records functionality |
| Error Label            | Message defined in this label will appear on screen when any unexpected error occurs                                                                           |
| No Records Label       | Message defined in this label will appear on screen when there are no records selected in List View to download in Export List View functionality              |

## Permission Set

The Permission Set “Docx\_Permissions” has all the required permissions to use the Document Generator functionality.

Permission set needs to be assigned to the admin user to access the Document Generator functionality.