

TS Documents - Field Merge Guide

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Base Object Field Merge

You can merge the baes object field as below,

- ex : {!ObjectName.FieldName}
1. {!Opportunity.Name}
 2. {!Custome_Object__c.Name}
 3. {!Opportunity.Parent__r.Name}
 4. {!Opportunity.Active==true,☐,☐}
 5. {!Custome_Object__c.PickList__c~toLabe} // get the picklist label

Child Object Field Merge

You can merge the child object field in your template. Inorder to display the child object record in template you will required to use google docs table format to show child object records. Below is the example,

Ex: Below table will return the list of opportunity lines

Product	Price	Qty.	Total
{!Opportunity.r.OpportunityLineItems.Product2.Name}	{!Opportunity.r.OpportunityLineItems.UnitPrice}	{!Opportunity.r.OpportunityLineItems.Quantity}	{!Opportunity.r.OpportunityLineItems.TotalPrice}
Total:			{!Opportunity.Amount}

Ex: Below table will return the list child object from parent object.

Header text	Header Text
{!Opportunity.r.Parent_Field__c-r-ChildRelation__r.Field__c}	{!Opportunity.r.Parent_Field__c-r-ChildRelation__r.Field1__c}

Filters and Order By

You can filter the child object to display in your generated documents as below,

Product
{!Opportunity.r.OpportunityLineItems.Product2.Name~ProductCode='ABC' AND Active = true~ORDER BY Name ASC}

Above table will show only those products which has Product code = 'ABC' and Active = true

Product
{!Opportunity.r.OpportunityLineItems.Product2.Name~ProductCode='ABC'AND Active = true~ORDER BY Name ASC}

Separator

Filter Field

Filter Field Value

Index base records

You can retrieve the child object record based on the index, this way you can merge the child object fields anywhere in the documents. No need to have table format.

Product 1 = {!Opportunity.r.OpportunityLineItems.Product2.Name~Active = true#0}

Product 2 = {!Opportunity.r.OpportunityLineItems.Product2.Name~Active = true#1}

Merge Image from RichText OR Image Formula field

{!Custome_Object__c.Image_Field__c~image~200} // 200 is the height and width ratio

Aggregate Results

{!Opportunity.r.OpportunityLineItems.TotalPrice#sum}

{!Opportunity.r.OpportunityLineItems.TotalPrice#min}

{!Opportunity.r.OpportunityLineItems.TotalPrice#max}

{!Opportunity.r.OpportunityLineItems.TotalPrice#avg}

TS Global

{!Today.Date}

{!Today.Month}

{!Today.Day}

{!Today.Year}