DRTE - ADD ON

Generate Multiple Template Merge Document on Record

User Guide

DRTE

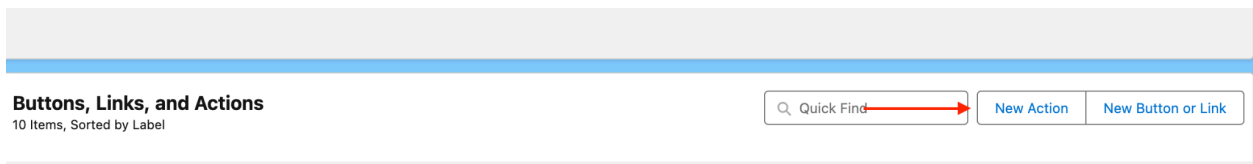# Generate DRTE Doc/Multiple Template Document Button

The **Generate DRTE Doc** feature allows users to generate and merge multiple document templates directly from a record. Once processed, the completed documents are automatically attached to the record's **Files** related list.

Setup Instructions

Follow these steps to enable the "Generate DRTE Doc" button on any object:

1. **Create the Action:**
   - Navigate to the **Object Manager** and select the desired object.
   - Go to **Buttons, Links, and Actions** and click **New Action**.
   - **Action Type:** Select `Flow`.
   - **Flow:** Select `Generate DRTE Doc`.
   - **Label/Name:** Enter "Generate DRTE Doc" (or your preferred title).

Add to Page Layout:

- Go to **Page Layouts** or use the **Lightning App Builder**.
- Add the newly created action button to the record page header or the "Mobile & Lightning Actions" section.

How to Use

Once the button is active, the process for users is simple:

1. **Click** the "Generate DRTE Doc" button on the record.
2. **Select** the relevant template(s) from the provided list.
3. **Click Proceed.** The system will automatically generate the files and save them directly to the record's **Files** section for easy access.

Key Benefits

- **Bulk Generation:** Select and merge multiple templates in one workflow.
- **Automatic Filing:** No manual uploading required; docs attach to the record instantly.
- **User-Friendly:** A simple, guided flow interface for end users.