



CODEYLABS

# DRTE

Developer Documentation: Generate Document Directly On Server using Preview Id



# DRTE

## 1. Functional Summary

The `generateDocumentDirectlyOnServer` (**Generate Document Directly On Server without Editor**) action is the "production" engine of DRTE. It accepts a temporary **Preview ID** (generated via the assembly service) and performs a server-side conversion into a permanent **Salesforce File (ContentVersion)**.

This method is "headless," meaning it requires no UI components. It is best suited for background automation, scheduled jobs, or record-triggered flows where a document must be archived or sent immediately upon a data change.

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## 2. Input Parameters

Parameter	API Name	Type	Required	Description
<b>Preview ID</b>	previewId	Text	<b>Yes</b>	The ID of the <code>pscdnyrichtext__Rich_Text_Preview__c</code> record containing the HTML to be converted.
<b>Record ID</b>	recordId	Text	<b>Yes</b>	The ID of the parent record (e.g., Account, Opportunity) where the file will be attached.
<b>Object API Name</b>	objectApiName	Text	<b>Yes</b>	The API Name of the target parent object (e.g., <code>Custom_Object__c</code> ). Used for security validation.
<b>File Name</b>	fileName	Text	No	The title of the file. Do not include extension. Defaults to <code>token.pdf</code> .

<b>Envelope Token</b>	token	Text	No	A unique identifier used for tracking and as a fallback filename.
<b>Footer Text</b>	footerText	Text	No	Injects custom text into the PDF footer region.
<b>Header Image</b>	headerImageURL	Text	No	Public URL of a logo to render in the PDF header.

## 5. Implementation in Flow Builder

### Integration Steps

- Generate Preview:** Use the `generateDocumentService` action first to obtain a `previewId`.
  - Invoke Server Action:** Add the **Generate Document Directly On Server** action.
  - Map Variables:** Use the output from step 1 as the `previewId` for this step.
  - Handle Output:** Assign the returned string to a variable.
    - Success:** The variable contains the `068...` ContentVersion ID.
    - Failure:** The variable contains a string starting with "Error:". Use a Decision element to check for this.
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## 6. Governor Limits & Constraints

- Callout Limits:** Since `getContentAsPDF()` is a callout-like operation, this method cannot be called after any DML (Insert/Update) has occurred in the same transaction.
  - Solution:** Use a "Pause" element in Flow or an `@future / Queueable` method in Apex to reset the transaction before calling this action.
- Heap Size:** Large documents with many images may approach the 6MB/12MB synchronous heap limit.