



CODEYLABS

# DRTE

Developer Documentation: Build Document and Return Preview ID



# DRTE

## 1. Overview

The `generateDocumentService` (**Build Document and return Preview Id**) is a high-performance Invocable Method that serves as the entry point for the DRTE assembly engine. It performs a "Just-In-Time" merge of Salesforce data into a structured template.

Instead of generating a permanent file immediately, this method creates a **temporary HTML Preview record**. This allows users to review, edit, or adjust the document content within the Salesforce UI before committing to a final PDF or e-signature request.

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## 2. Input & Output Interface

### Input Variables

The method expects a list of the `input` wrapper. In a Flow context, you provide these as single variables, and Salesforce handles the collection wrapping.

Variable	API Name	Type	Required	Description
<b>Parent Record ID</b>	<code>parentRecordId</code>	ID	<b>Yes</b>	The context record (e.g., Account, Case) used to filter SOQL data via <code>{pv0}</code> .
<b>Template ID</b>	<code>documentTemplateId</code>	ID	<b>Yes</b>	The ID of the <code>pscdnyrichtext__PSC_Document_Template__c</code> record defining the structure.

### Output Value

Type	Description
<b>String (List)</b>	The 18 or 15 -character Salesforce ID of the generated <code>pscdnyrichtext__Rich_Text_Preview__c</code> record.

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## 4. Flow Implementation Guide

### Scenario: "Preview & Edit" Button

To allow a user to preview a contract before sending, follow this Flow pattern:

1. **Get IDs:** Use a Screen Flow to capture the current `recordId`.
2. **Call Action:** Add the "**Build Document and return Preview Id**" action.
  - o Set `parentRecordId` to `{!recordId}`.
  - o Set `documentTemplateId` to your specific Template ID.
3. **Store Output:** Map the result to a text variable, e.g., `varPreviewId`.
4. **Display Screen:** Add a Screen element containing the **DRTE Editor LWC**.
  - o Pass `varPreviewId` into the component's `recordId` property.
  - o This allows the user to see the assembled data and make manual edits.