



Developer Documentation: Build Document and Return Preview ID



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

### Output Value

Type	Description
String (List)	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.
  - Set `parentRecordId` to `{!recordId}`.
  - 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**.
  - Pass `varPreviewId` into the component's `recordId` property.
  - This allows the user to see the assembled data and make manual edits.