360 SmartDocs

# Feature & User Guide

USER GUIDE • VERSION 1.0

## Table of Contents

# 1. Introduction

## 1.1 About This Guide

This guide is designed for **end users, sales representatives, managers, and administrators** who use 360 SmartDocs on a daily basis. It provides step-by-step instructions for every feature of the application, from template management to bulk document generation and email delivery.

For installation and initial setup instructions, please refer to the **360 SmartDocs Installation & Setup Guide**.

**Related Documentation:**

- **360 SmartDocs Installation & Setup Guide** — Step-by-step instructions for installing the package, configuring OAuth, assigning permissions, and creating buttons.
- **360 SmartDocs Word Add-In User Guide** — Detailed instructions for building templates in Microsoft Word, including fields, conditions, views, images, and tag syntax.

**New to 360 SmartDocs?** Start with the End-to-End Example (Section 8) for a quick walkthrough of the complete document generation process from template design to final output.

## 1.2 Navigating the 360 SmartDocs App

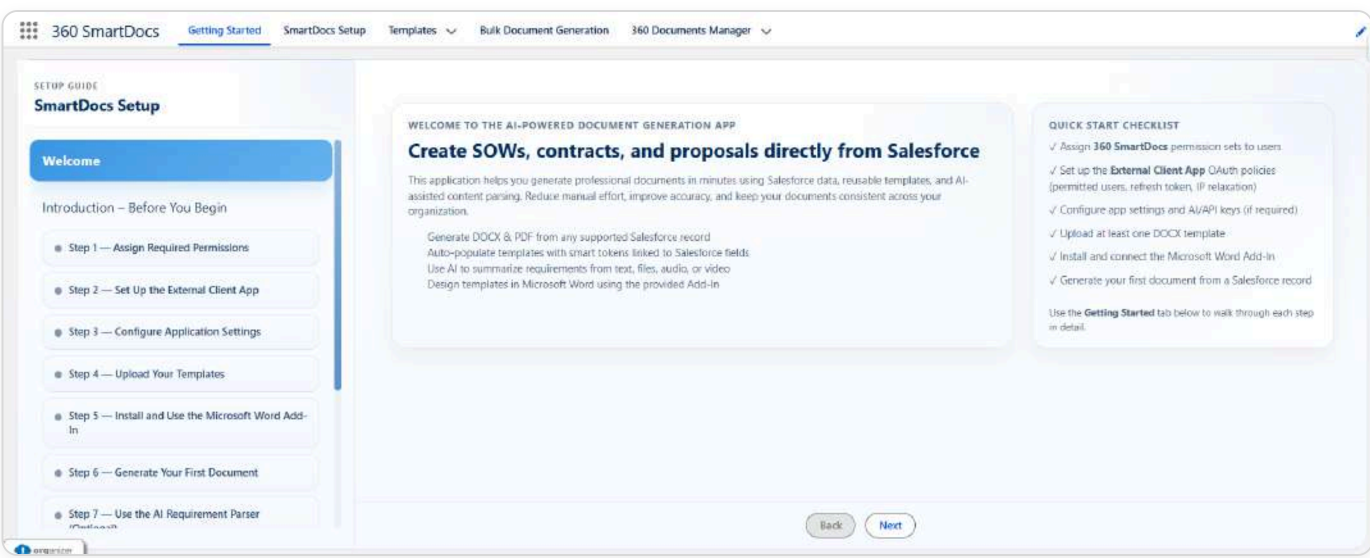
360 SmartDocs is a Salesforce Lightning app accessible from the **App Launcher**. To open the app:

1. Click the **App Launcher** icon (the 9-dot grid) in the top-left corner of the Salesforce navigation bar.
2. Type **"360 SmartDocs"** in the search bar.

3 Click on **"360 SmartDocs"** to open the application.

Once open, you will see **five tabs** in the navigation bar:

| Tab | Purpose | Who Uses It |
|---|---|---|
| **Getting Started** | Interactive setup guide and onboarding wizard with step-by-step instructions | Admins (initial setup) |
| **Smart Docs Setup** | Configuration hub for license sync, permission sets, object configuration, and button management | Admins |
| **Templates** | View, create, and manage document templates | Admins, template designers |
| **Bulk Document Generation** | Generate documents for multiple records at once using reports or list views | All users |
| **360 Document Manager** | View all generated document records and their statuses | All users |




*360 SmartDocs app navigation bar with all five tabs. The "Getting Started" tab is currently active.*

# 2. App Navigation

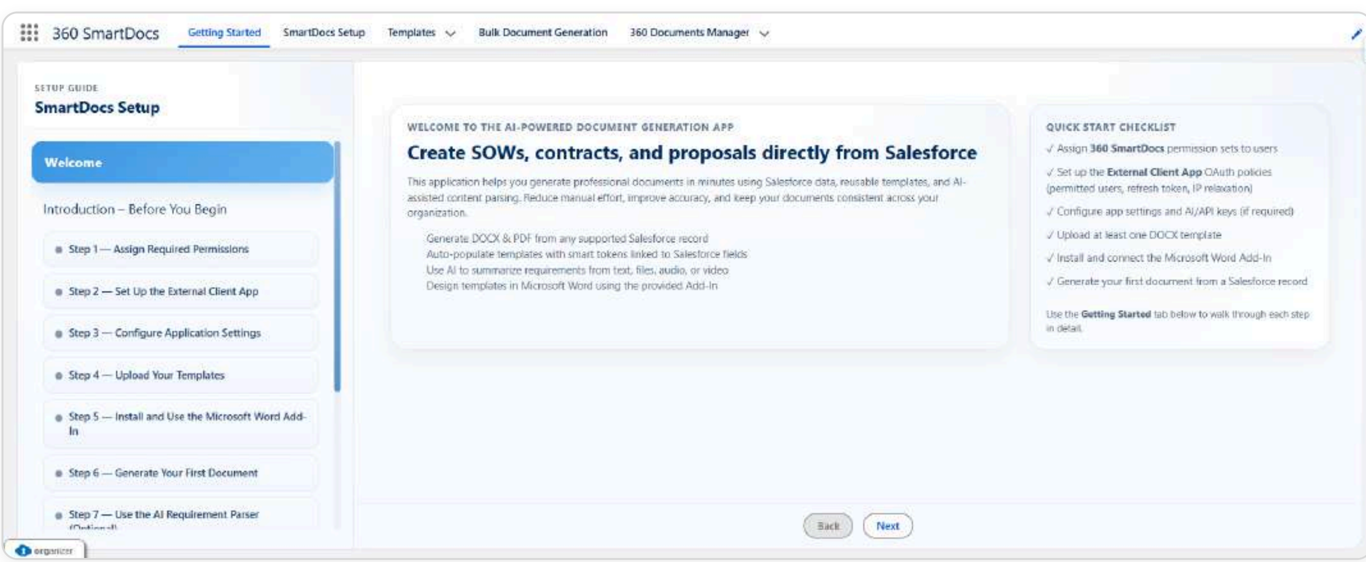
## 2.1 Getting Started Tab

The **Getting Started** tab provides a comprehensive, interactive setup guide to help administrators configure 360 SmartDocs step by step. It features a **left sidebar menu** with expandable sections and a **main content panel** on the right.

The guide covers:

- **Welcome** — Product overview and quick-start checklist
- **Introduction — Before You Begin** — What the app does, with expandable sub-steps:
  - Step 1: Assign Required Permissions
  - Step 2: Set Up the External Client App
  - Step 3: Configure Application Settings
  - Step 4: Upload Your Templates
  - Step 5: Install and Use the Microsoft Word Add-In
  - Step 6: Generate Your First Document
  - Step 7: Manage Templates & Versions
  - Step 8: Advanced Configurations
  - Step 9: Troubleshooting & Support
- **Automation & Integrations** — Advanced topics for power users

Use the **Back** and **Next** buttons at the bottom to navigate sequentially through the steps, or click any section/sub-step in the sidebar to jump directly to it.

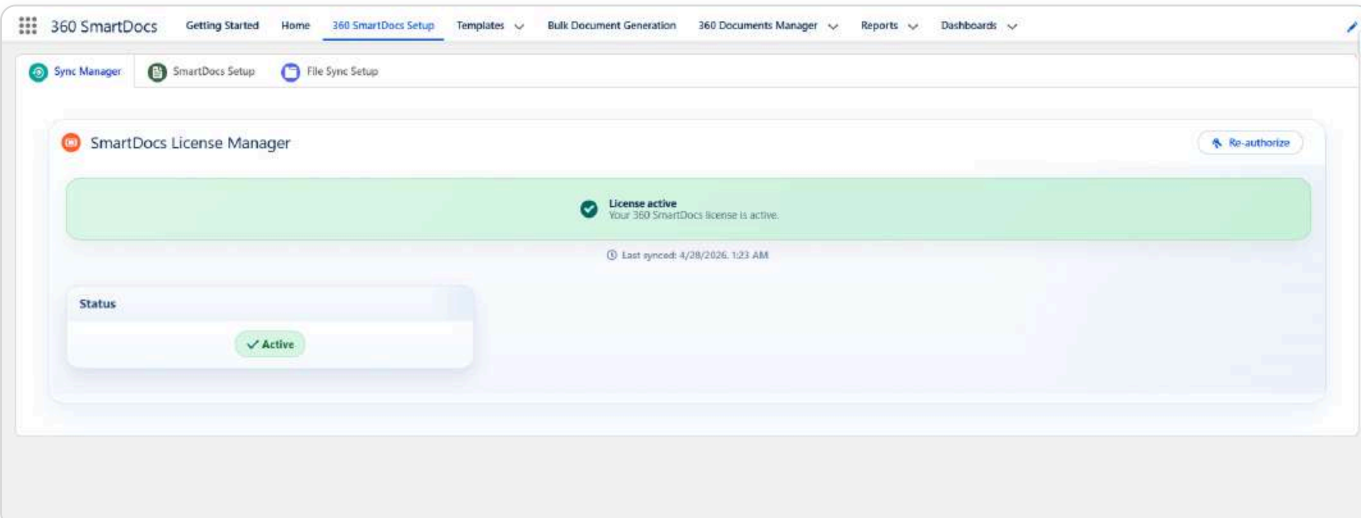



*Getting Started tab showing the Welcome panel with the quick-start checklist and sidebar navigation.*

## 2.2 SmartDocs Setup Tab

The **Smart Docs Setup** tab is the central configuration hub for administrators. It uses a **sidebar navigation** layout with three main sections:

- **License Details** — Activate and sync your SmartDocs license, view license status and credit details
- **Permission Set Assignment** — Assign `X360_SmartDocs_Admin` and `X360_SmartDocs_User` permission sets to users
- **Template Sharing Rules** — Configure Sharing Rules on `x360dc__Template__c` in Salesforce Setup so that end users can see the templates they need (see the Installation Guide, Step 4 for detailed instructions)
- **Configuration** — Two sub-steps:
    - **Step 1: Salesforce Object Support** — Enable/disable objects for document generation
    - **Step 2: Manage Buttons** — Create and manage Quick Actions, URL Buttons, and List View Buttons



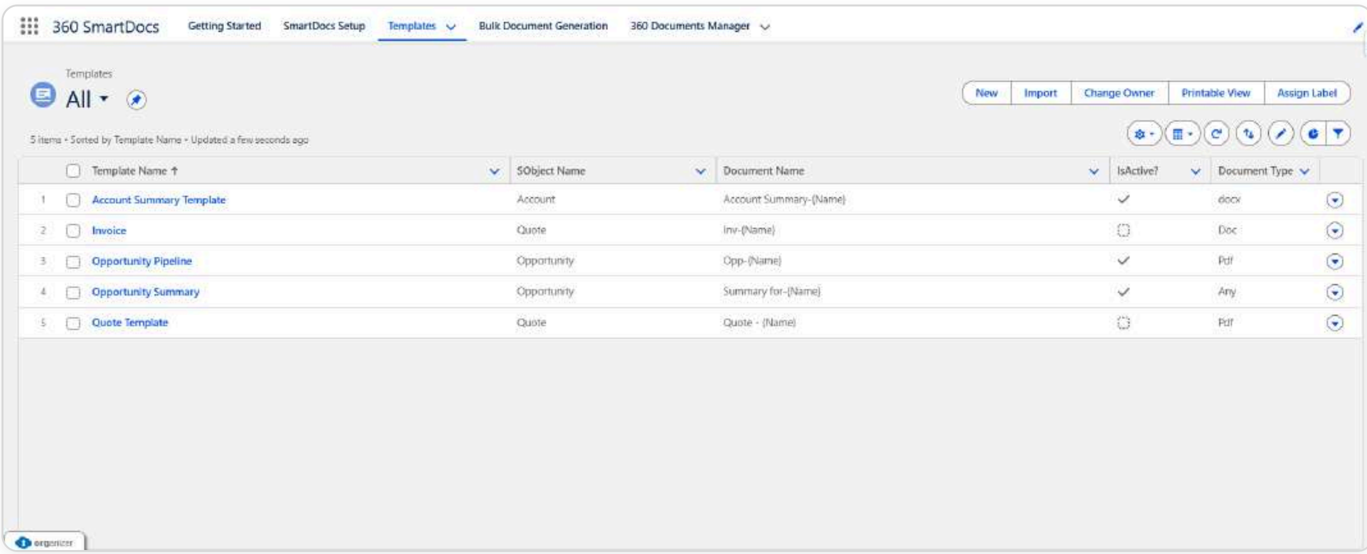

*Smart Docs Setup tab showing the License Details panel with an active license for Acme Corporation.*

## 2.3 Templates Tab

The **Templates** tab displays a list view of all Template records in your org. From here, you can:

- View all templates with their names, associated objects, document types, and active status
- Click on a template to open its detail page
- Click **"New"** to create a new template
- Use list view filters to find specific templates

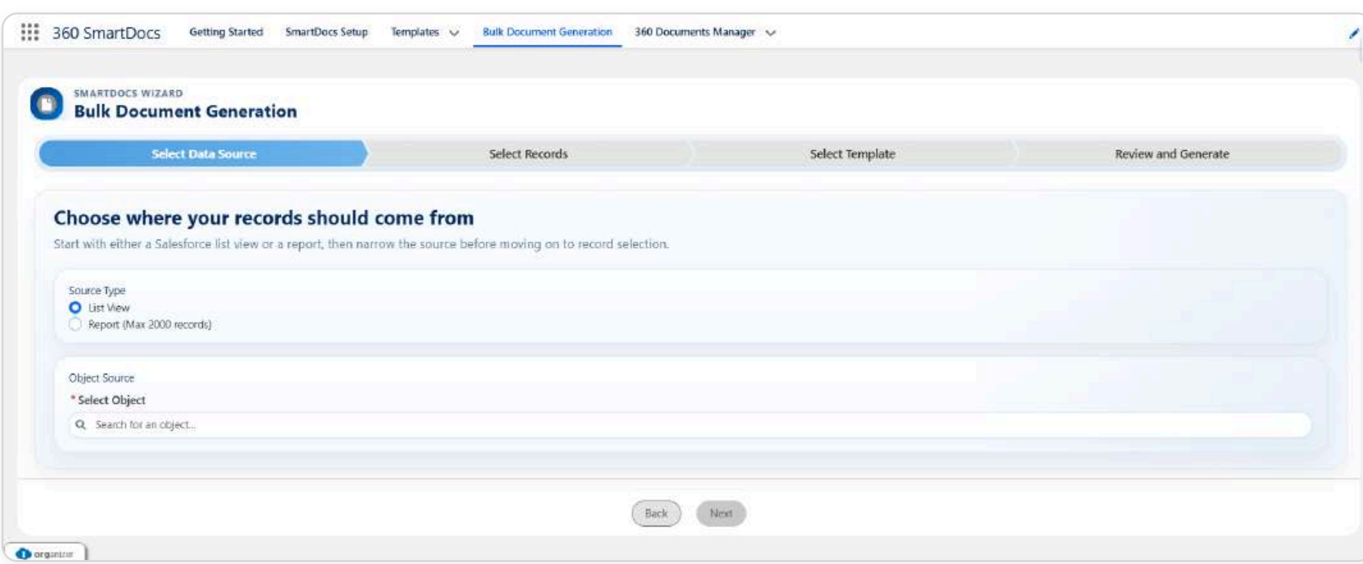
**Note for Admins — Template Visibility:** End users with the `X360_SmartDocs_User` permission set do **not** have "View All" access on `x360dc__Template__c`. They will only see templates that have been shared with them via **Sharing Rules**. As an admin, you must configure Sharing Rules on the x360dc__Template__c object (in Salesforce Setup → Sharing Settings) to grant read access to the appropriate user groups. Without this step, end users will see an empty template list when generating documents. See the **Installation Guide, Step 4: Template Sharing Rules** for detailed setup instructions.




*Templates list view showing template records with Name, SObject, Document Type, IsActive status, and Last Modified columns.*

## 2.4 Bulk Document Generation Tab

The **Bulk Document Generation** tab opens a multi-step wizard for generating documents for multiple records at once. The wizard guides users through selecting a data source, choosing records, picking a template, and generating documents in bulk.

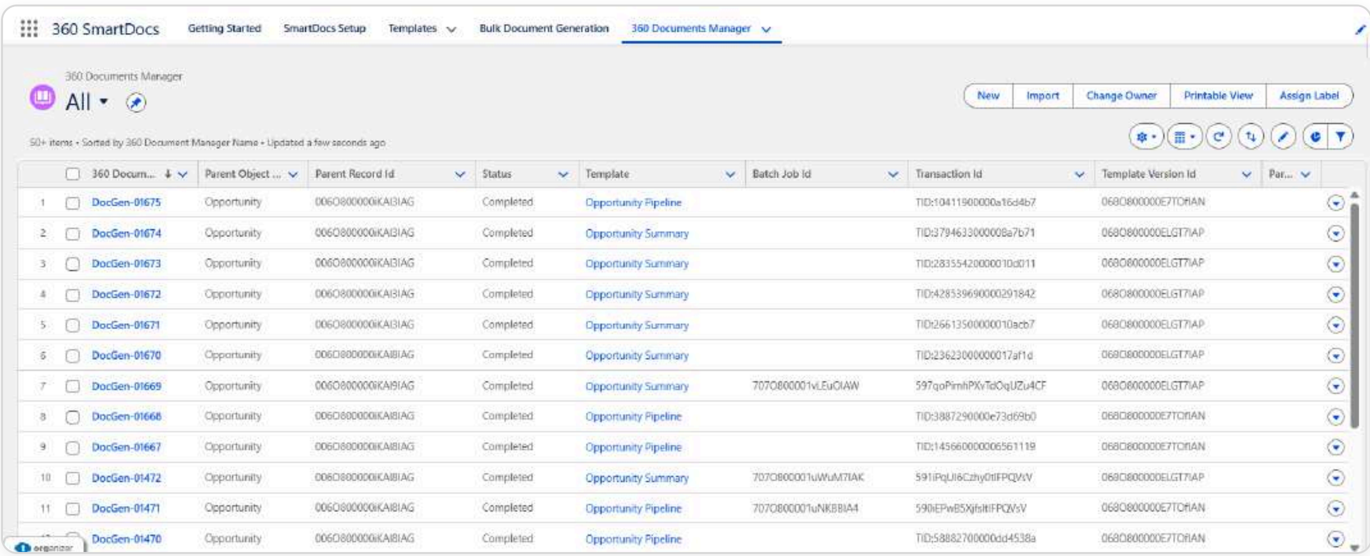



*Bulk Document Generation wizard showing the 4-step progress path.*

## 2.5 360 Document Manager Tab

The **360 Document Manager** tab shows a list view of all `x360dc__X360_Document_Manager__c` records — each representing a generated document or a document generation request. You can:

- View the status of all document generations (Completed, In Progress, Failed, etc.)
- Click on a record to see its details, including the parent record, template used, and the generated file
- Use list view filters to find specific document records




*360 Document Manager list view showing document records with color-coded status badges.*

# 3. Template Management

Templates are the foundation of 360 SmartDocs. A template is a **Microsoft Word (.docx) file** containing dynamic merge fields (tokens) that are replaced with actual Salesforce data when a document is generated. This section covers the full lifecycle of template management.

> **Important:** Templates must be created and edited in **Microsoft Word using the 360 SmartDocs Word Add-In** (see Section 4). The Add-In provides a visual interface for inserting Salesforce merge fields, previewing documents with real data, and publishing templates to Salesforce. Do not attempt to create templates with merge fields directly within Salesforce — this will result in incorrect template structure, missing merge fields, or unusable documents. You may also upload a pre-made sample `.docx` template file if one is provided. For detailed guidance on template design, refer to the **360 SmartDocs Word Add-In User Guide**.

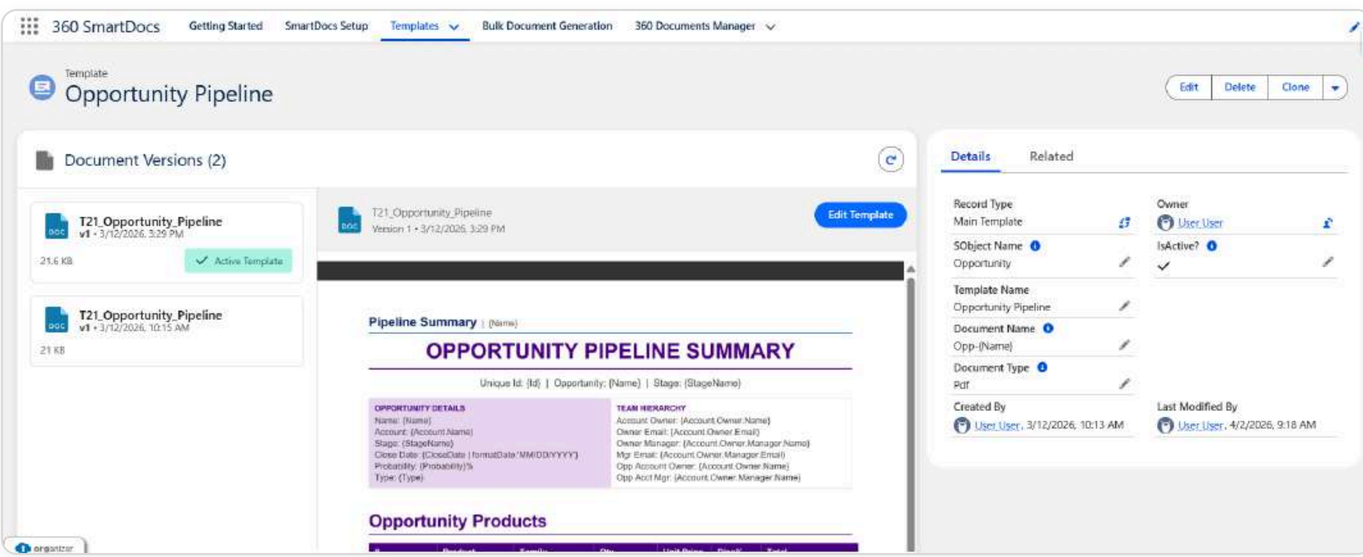
## 3.1 Viewing Templates

1. Navigate to the **Templates** tab in the 360 SmartDocs app.

2. The list view displays all templates with key information:
   - **Template Name** — The descriptive name of the template
   - **SObject Name** — The Salesforce object this template is associated with (e.g., Opportunity, Account)
   - **Document Type** — The output format (Doc, Pdf, or Any)
   - **IsActive** — Whether the template is currently active and available for document generation

3. Click on any **Template Name** to open the template's record detail page.

4. On the detail page, you can see:
   - All template fields and settings
   - The **Preview Attached Files** component showing uploaded template files and versions
   - Related lists for Document Manager records generated using this template




*Template record detail page showing fields, the Preview Attached Files component with file versions, and the document preview panel.*

## 3.2 Creating a New Template

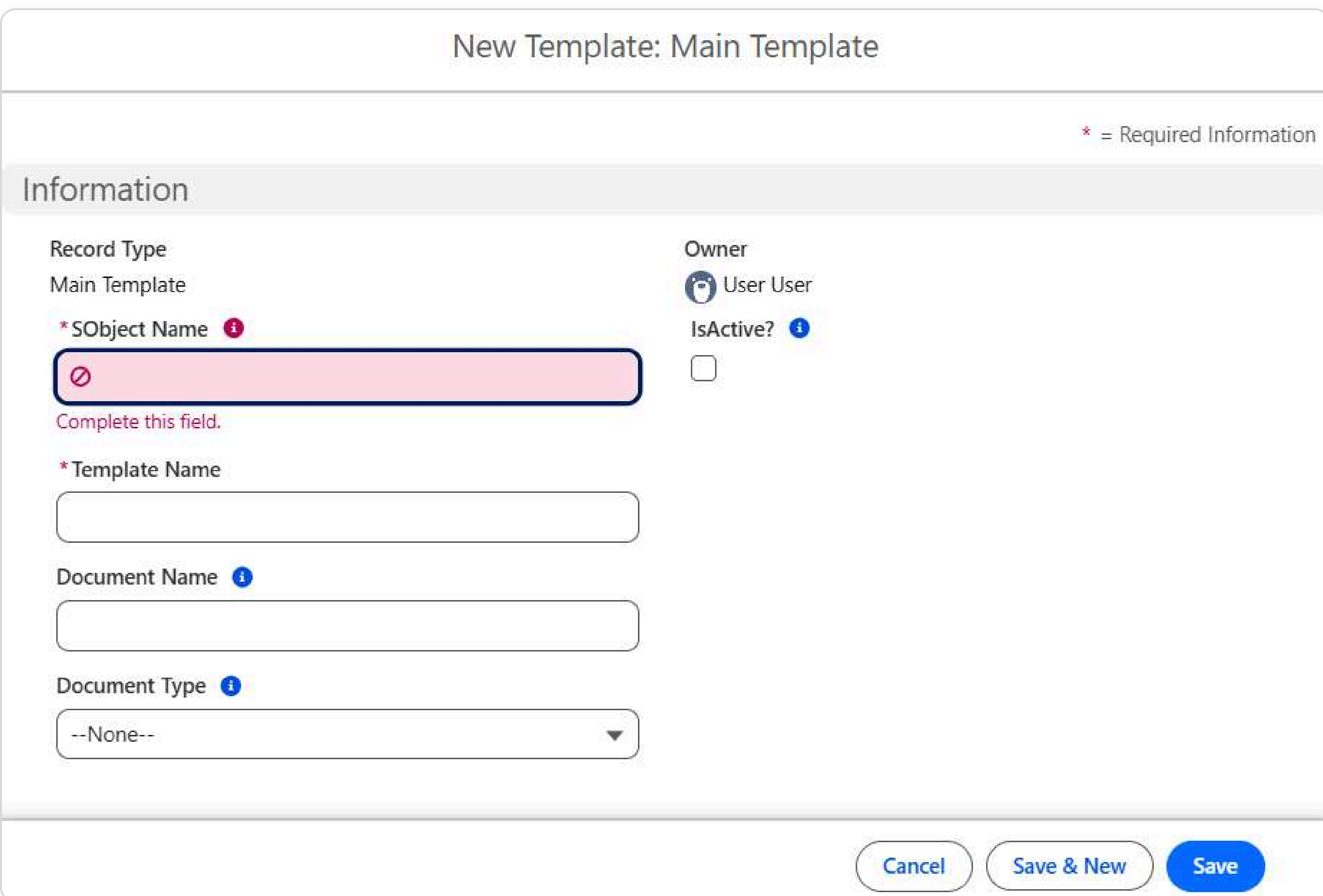
1. Navigate to the **Templates** tab.

2. Click the **"New"** button at the top-right of the list view.

3. The **New Template** dialog appears with the option: **"Create New Template"**. Click on this option card to proceed.

4. You will be taken to the standard Salesforce new record form. Fill in the following fields:
   - **Template Name** (required) — A clear, descriptive name (e.g., "SOW — Standard Implementation")
   - **SObject Name** (required) — Select the Salesforce object this template will be used with (e.g., Opportunity, Account, Case). Only objects enabled in Object Configuration will appear.
   - **Document Type** — Select the output format: **Doc** (DOC), **Docx** (DOCX), **Pdf** (PDF), or **Any** (user chooses at generation time)
   - **Document Name** — A naming pattern for generated documents (e.g., "SOW - {Account.Name}")
   - **Record Type** — Select **Main Template** for standard templates or **Sub Template** for templates used as sections within a main template

5. Click **"Save"** to create the template record.




*Template creation form with Template Name, SObject Name, Document Type, Document Name, and Record Type fields.*

**Tip:** Use clear naming conventions for templates, such as "SOW — Implementation — Standard" or "MSA — Global — v1.0". This helps users quickly find the right template during document generation.

## 3.3 Uploading Template Files

After creating a template record, you need to upload the actual Word document (.docx) file that serves as the template.

1. Open the template record you just created.
2. In the **Files** related list or the file upload area, click **"Upload Files"**.
3. Select a **.docx** file from your computer. This file should contain merge field tokens (placeholders) that will be replaced with Salesforce data during generation.
4. The file is uploaded as a **ContentVersion** and linked to the template record.
5. After uploading, the file appears in the **Preview Attached Files** component on the template record page.

**Note:** Template files must be in **.docx** format (Microsoft Word). The maximum file size is **3 MB**. Other file formats (PDF, DOC, etc.) are not supported as template source files.

## 3.4 Activating and Deactivating Templates

Only **active** templates appear in the template selection dropdown during document generation. To activate or deactivate a template:

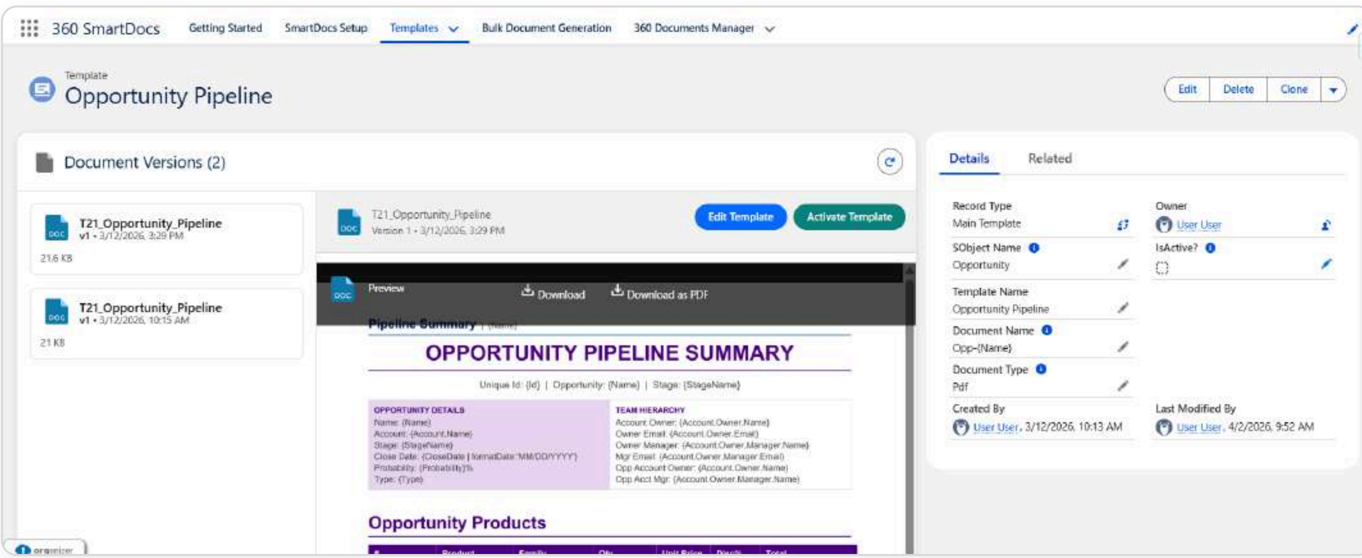
### Using the Preview Attached Files Component (Recommended)

1. Open the template record page.
2. In the **Preview Attached Files** component, select the file version you want to activate by clicking on its card in the left panel.

3. Click the **"Activate Template"** button in the right panel header. This sets the selected file version as the active template version.

4. The file card will now display an **"Active Template"** badge.

> **Note:** You can also activate/deactivate a template by editing the Template record directly. Set the **"IsActive"** checkbox to `true` to activate, or `false` to deactivate. **Important:** If you are activating a template by editing the record directly, you must also populate the **"x360dc__Active_Version_Id__c"** field with the `ContentDocument` ID of the template file version you want to make active. If this field is left blank, the template will not function correctly even if `IsActive` is checked. The recommended approach is to use the Preview Attached Files component (Method 1 above), which handles this automatically.




*Preview Attached Files showing the "Activate Template" button. The "Activate Template" button will not be visible for already activated version.*

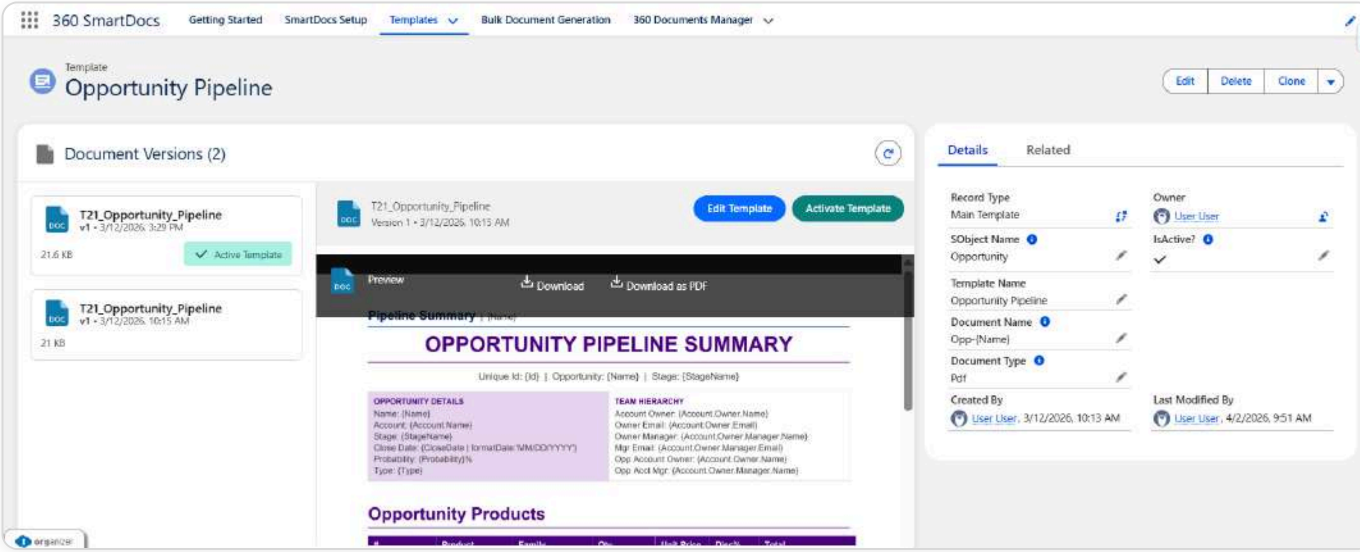
> **Warning:** Deactivating a template will immediately prevent users from selecting it during document generation. Ensure no active workflows depend on the template before deactivating.

## 3.5 Template Versioning

Every time you upload a new file to a template record, it creates a **new version**. The Preview Attached Files component shows all versions and lets you activate any specific version.

- Each file card shows the **version number** (e.g., v1, v2, v3) and the **last modified date**
- The **file size** is displayed for each version

- Only one version can be **active** at a time (indicated by the green "Active Template" badge)
- You can **activate a previous version** to roll back to an older template design — see [Section 3.4](#) for activation steps




*Preview component showing two file versions (first version is active, second is selected for viewing). The Activate button is available to promote second version to active.*

> **Tip:** Always test new template versions in a sandbox or with a limited user group before activating them in production. Keep previous versions available for quick rollback if needed.

## 3.6 Using the Preview Attached Files Component

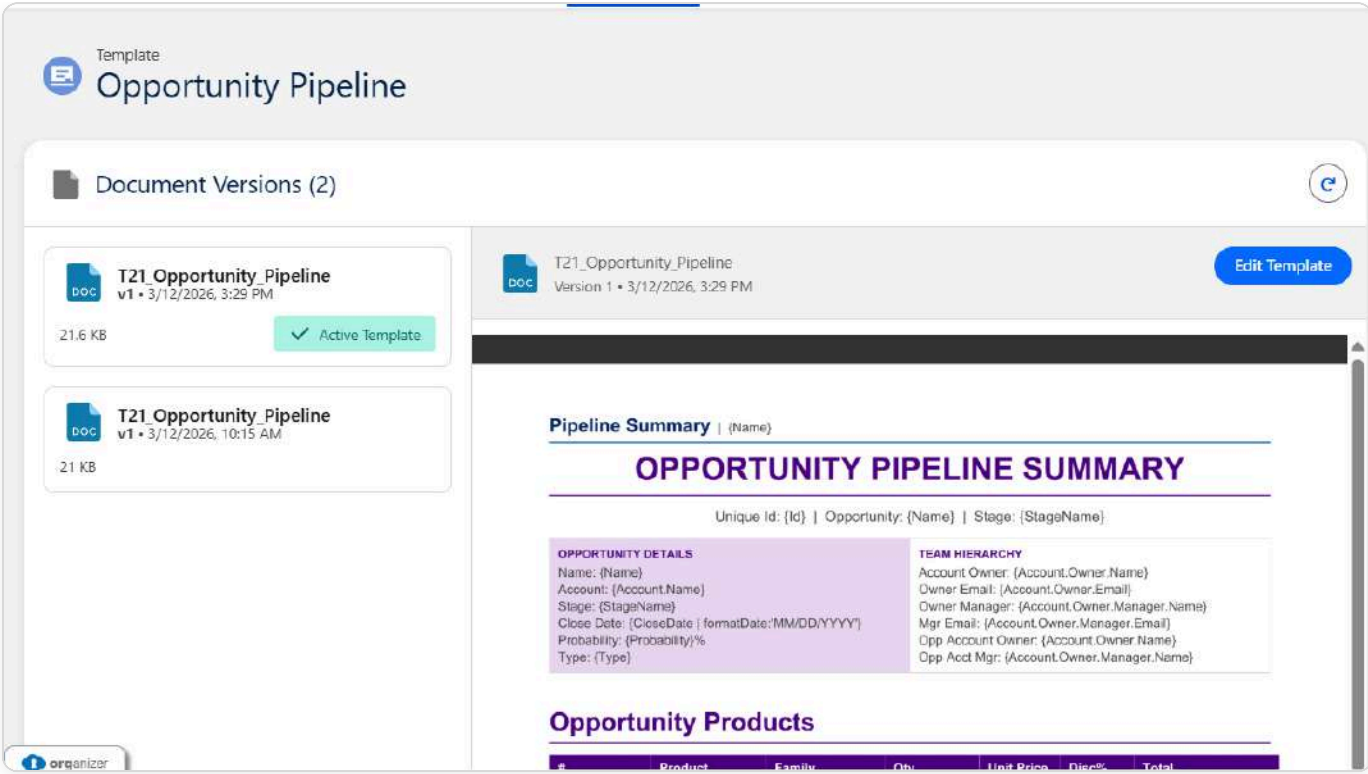
The **Preview Attached Files** component is a two-panel interface available on every template record page:

### Left Panel — File List

- Displays all uploaded file versions as clickable cards
- Each card shows: file icon, file title, version number, last modified date, file size
- Active version displays a green **"Active Template"** badge
- Click a card to select it and see its preview in the right panel

### Right Panel — Preview & Actions

- **Header:** Shows the selected file name and version info
- **Action Buttons:**
  - **Edit Template** — Opens the template in the Word Add-In for editing (requires a valid server connection)
  - **Activate Template** — Sets the selected version as the active template (see [Section 3.4](#) for details)
- **Preview Area:** Shows a rendered preview of the document in an iframe
- **Refresh button** in the top-right corner to reload the file list




*Full Preview Attached Files component with file cards in the left panel and a document preview in the right panel.*

# 4. Microsoft Word Add-In

> **Detailed Guide Available:** This section provides a quick overview of the Word Add-In. For comprehensive instructions on building templates — including conditions, views, images, formatting options, and tag syntax — see the **360 SmartDocs Word Add-In User Guide**.

The 360 SmartDocs Word Add-In allows you to design and edit document templates visually in Microsoft Word. It provides a sidebar within Word for browsing Salesforce objects and fields, inserting merge tokens, previewing documents, and saving templates directly back to Salesforce.

The Add-In follows a three-step workflow:

- **Create** — Design your template by inserting merge fields and formatting the document layout
- **Preview** — Preview the document with actual Salesforce data to verify the output before publishing
- **Live** — Save and activate the template in Salesforce, making it available for document generation

## 4.1 Installing the Add-In

1. Open **Microsoft Word** (desktop version — Microsoft 365 or Office 2019 or later).

2 Click the **"Insert"** tab in the Word ribbon.

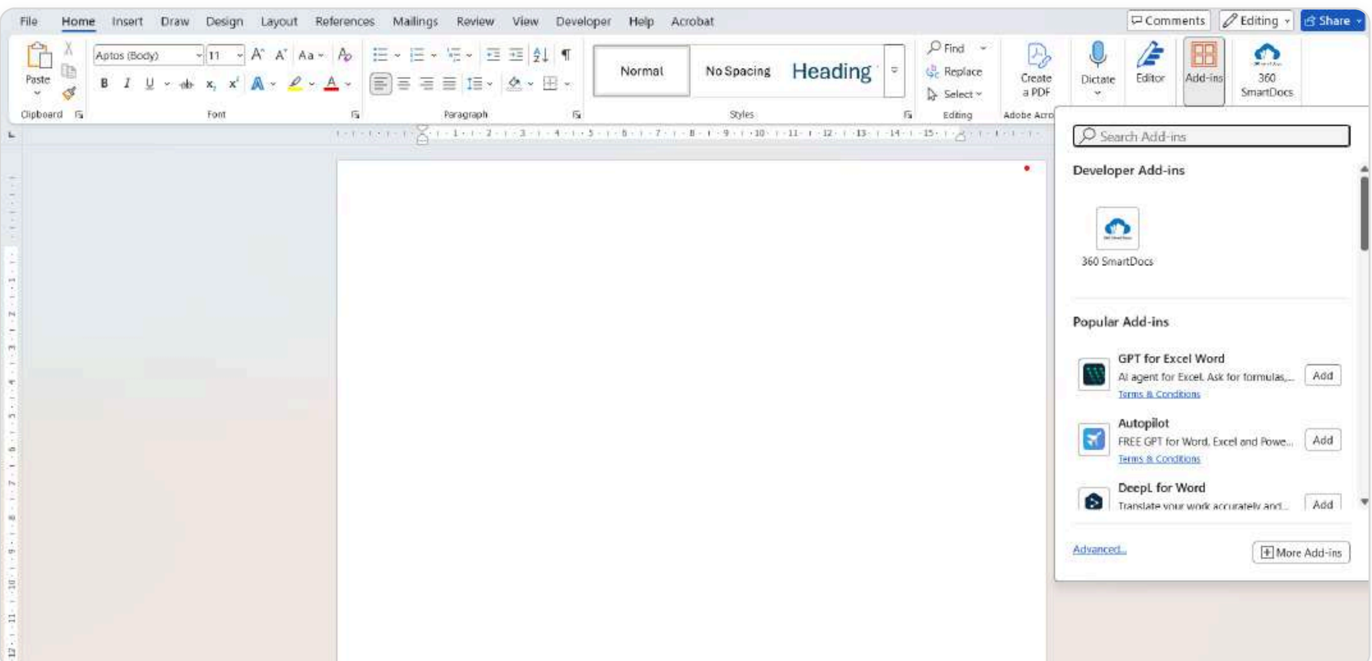
3 Click **"Get Add-ins"** (or **"Office Add-ins"**).

4 In the Office Add-ins dialog, switch to the **"Store"** tab.

5 Search for **"360 SmartDocs"**.

6 Click **"Add"** next to the 360 SmartDocs Add-In.

7 The Add-In installs and appears in the Word ribbon.




*Microsoft Word ribbon with the "Insert" tab active and the "Get Add-ins" button highlighted.*

## 4.2 Connecting to Salesforce

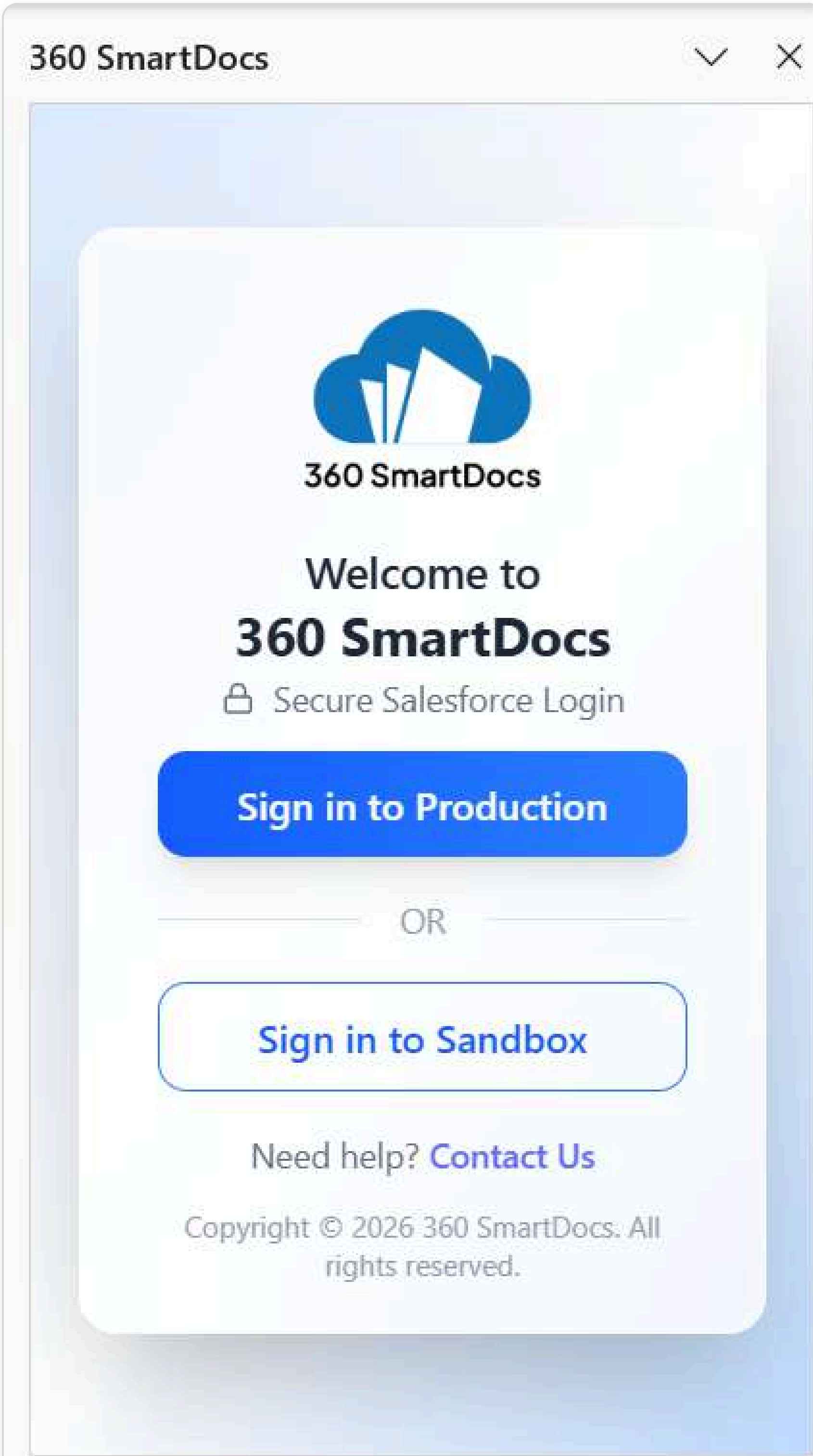
1 Click the **360 SmartDocs icon** in the Word ribbon to open the Add-In sidebar.

2 The sidebar displays a login screen. Click the Salesforce environment (**Production** or **Sandbox**) you want to connect to.

3. A Salesforce login popup appears. Enter your **Salesforce username and password**.

4. If prompted, approve the OAuth authorization request.

5. Once connected, the sidebar shows a success message and loads the template management interface.



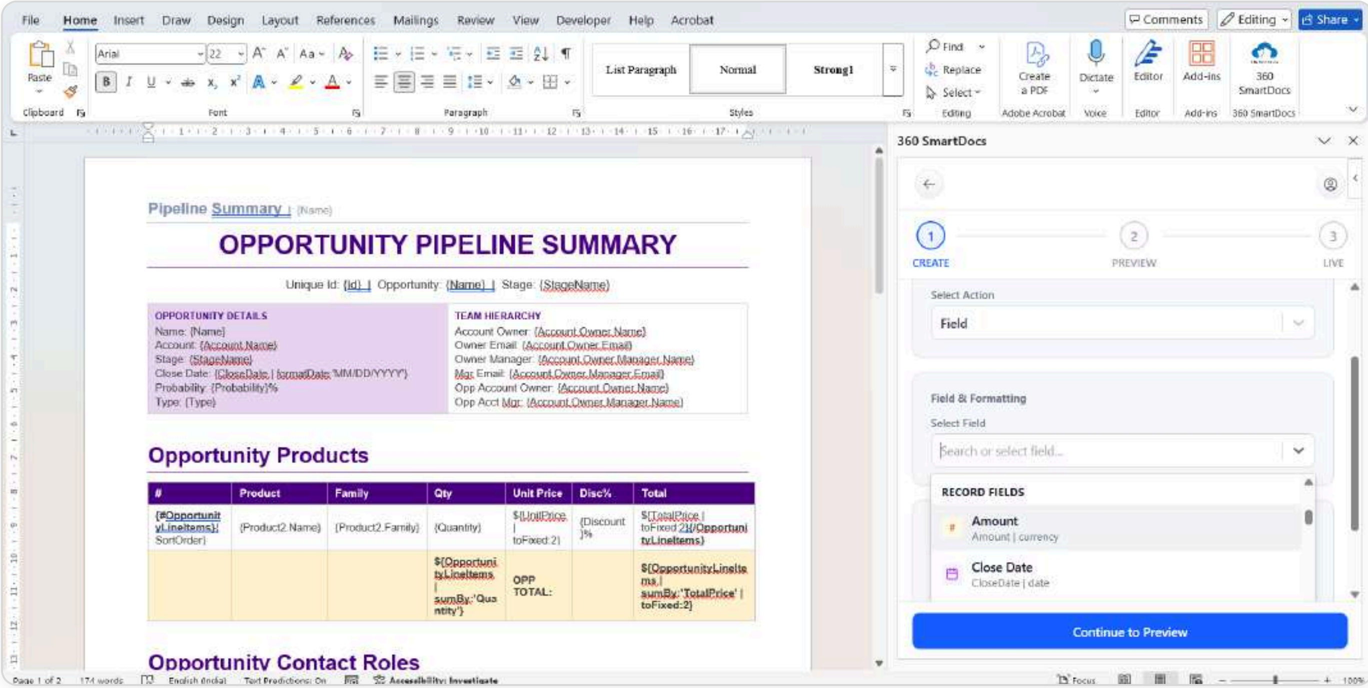
*Word Add-In sidebar showing the login screen with the Sign in to Production and Sign in to Sandbox button.*

> **Note:** The Add-In requires the External Client App / OAuth configuration to be completed by your administrator. If you see a connection error, contact your Salesforce admin to verify the OAuth setup.

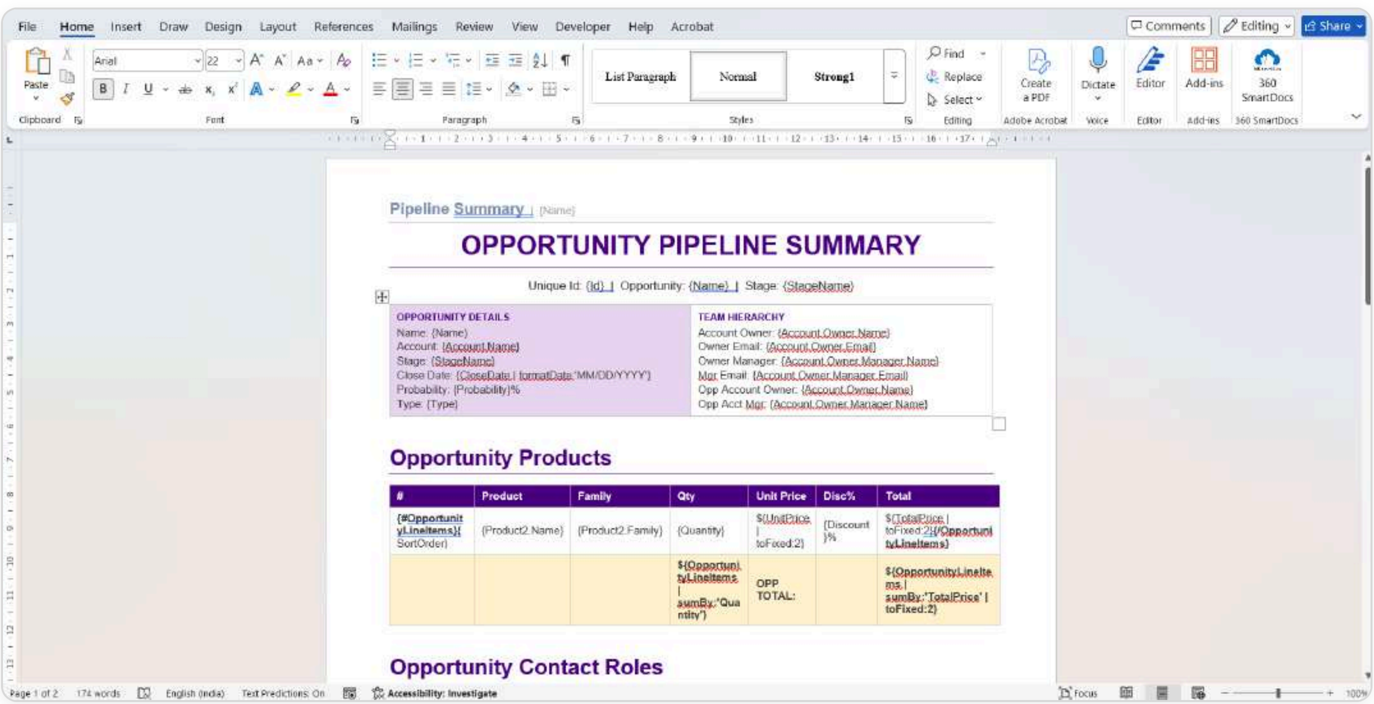
## 4.3 Inserting Merge Fields / Tokens

Merge fields (tokens) are placeholders in your Word template that get replaced with actual Salesforce data during document generation.

1. With the Add-In sidebar open and connected to Salesforce, you will see a **field browser** panel.
2. Select the **Salesforce object** your template is associated with (e.g., Opportunity).
3. Browse or search through the object's **fields** and **related objects** in the tree view.
4. Click on a field to select it. The merge token syntax will be shown (e.g., `{Name}`, `{Account.Name}`).
5. Click **"Insert"** to insert the token at the current cursor position in your Word document.
6. The token appears in the document as a placeholder text that will be replaced with real data during generation.
7. Repeat for all fields you want to include in the template.



*Word Add-In field browser showing the Opportunity object tree with fields and related objects.*



*Word document with merge field tokens inserted. Tokens will be replaced with Salesforce data.*

> **Tip:** You can also type merge tokens manually using the `{FieldName}` or `{RelationshipName.ParentFieldName}` syntax. However, using the Add-In's field browser helps prevent typos and ensures you use valid field API names.

## 4.4 Previewing the Document

Before saving your template to Salesforce, you can **preview** the document to see how it will look with actual Salesforce data merged in. This helps you verify formatting, layout, and token placement before going live.

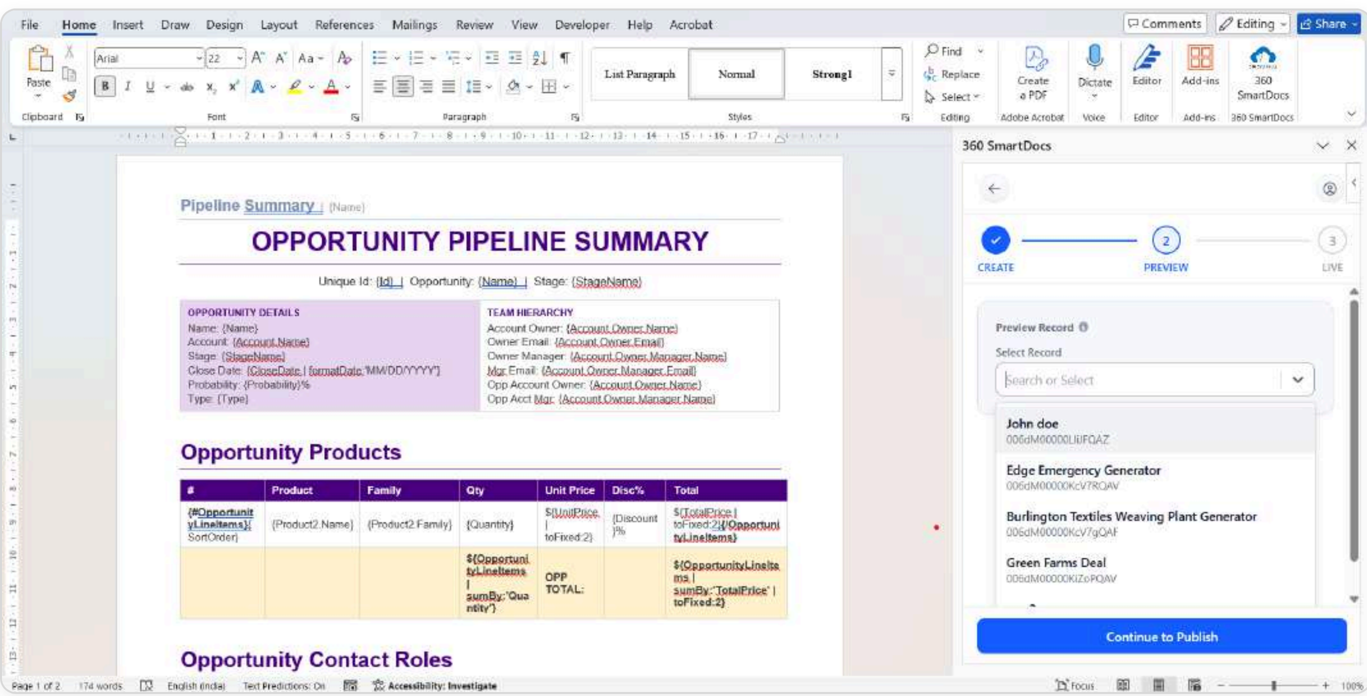
1. After inserting your merge fields, click the **"Continue to Preview"** button in the Add-In sidebar.

2. The Add-In fetches sample data from Salesforce and generates a preview of the document with the merge tokens replaced by real field values.

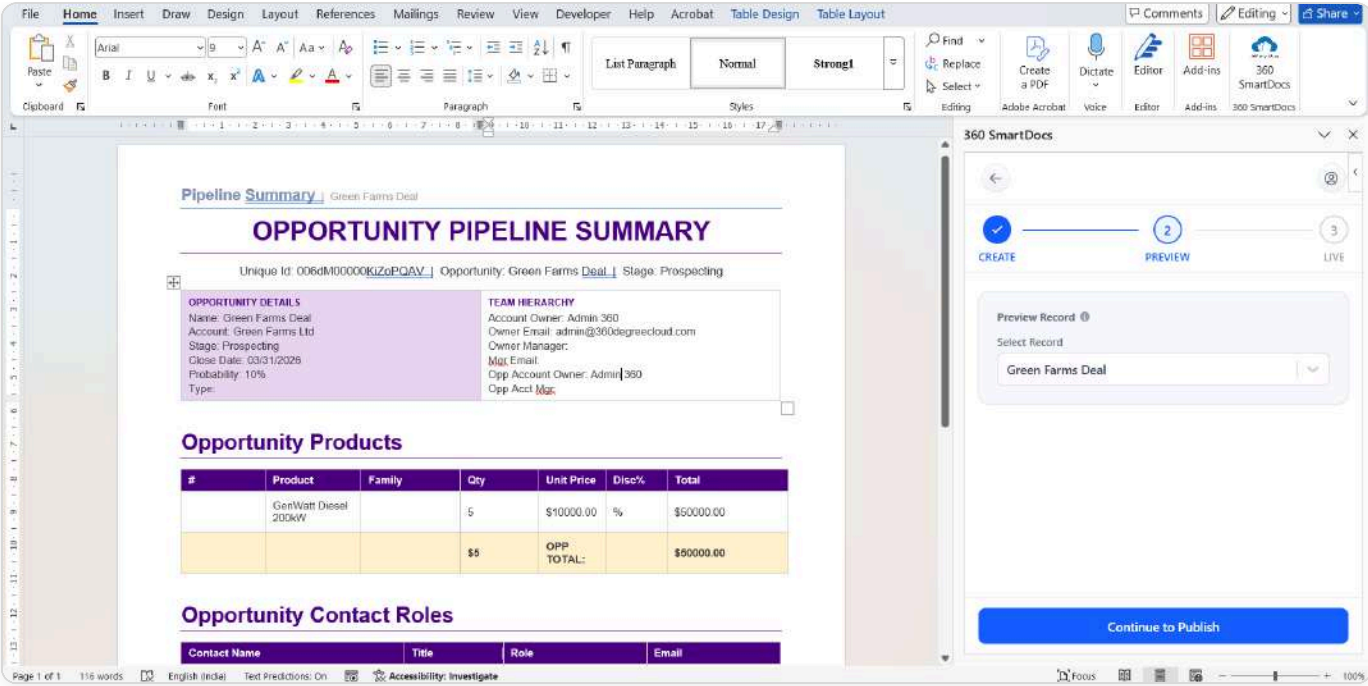
3. Review the previewed document to check formatting, spacing, and data placement.

4. If adjustments are needed, go back to the **CREATE tab** in the Add-In sidebar, make your changes in the template, and preview again.

5. Once satisfied, click the **"Continue to Publish"** to save the template in Salesforce.




*Word Add-In preview step showing the document being prepared for preview with Salesforce data.*

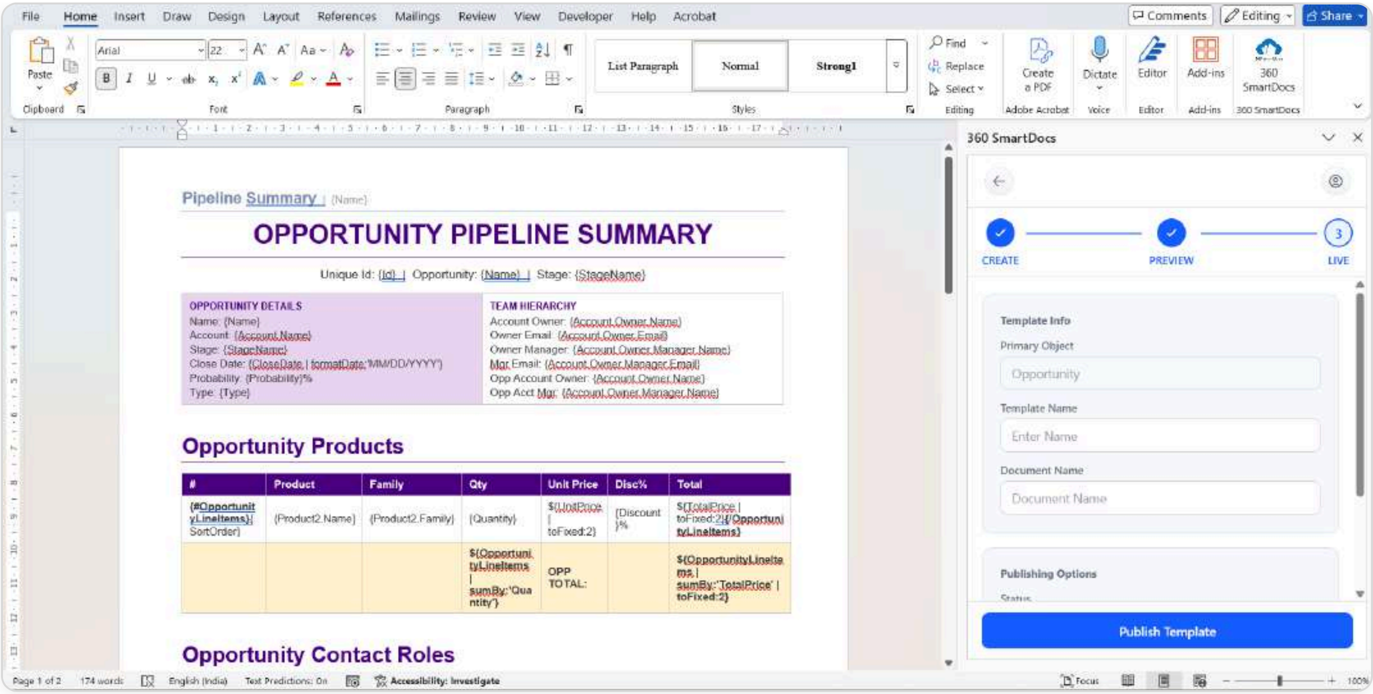



*Document preview result showing the template rendered with actual Salesforce data, with merge tokens replaced by field values.*

> **Tip:** Always preview your template before saving to Salesforce. This ensures that merge fields resolve correctly and the final document layout matches your expectations.

## 4.5 Saving Templates Back to Salesforce

1. After designing your template in Word, click the **"Continue to Publish"** button in the Add-In sidebar.
2. Fill out all the details related to the template.
3. Once ready, click **"Publish Template"** button.
4. The file is uploaded to Salesforce as a new **ContentVersion** linked to the template record.
5. Return to Salesforce and open the template record to verify the new version appears in the Preview Attached Files component.
6. If needed, click **"Activate Template"** to make this new version the active one.




*Word Add-In "Save to Salesforce" panel with template selector, version information, and Save button.*

# 5. Single Document Generation

Single document generation creates a document from **one Salesforce record** using a selected template. There are two ways to trigger it: via a **Quick Action** or via a **URL Button**.

**When to Use Single Document Generation:**

- Generating a proposal or SOW for a specific Opportunity during a sales meeting
- Creating a contract or agreement for a single Account that is ready for signing
- Producing an invoice or quote for one customer order
- Generating a personalized welcome letter for a new Contact

Use a **Quick Action** when users need flexibility to choose templates and options each time. Use a **URL Button** when you want a one-click experience with pre-configured settings (e.g., always generating a PDF SOW with a specific template).

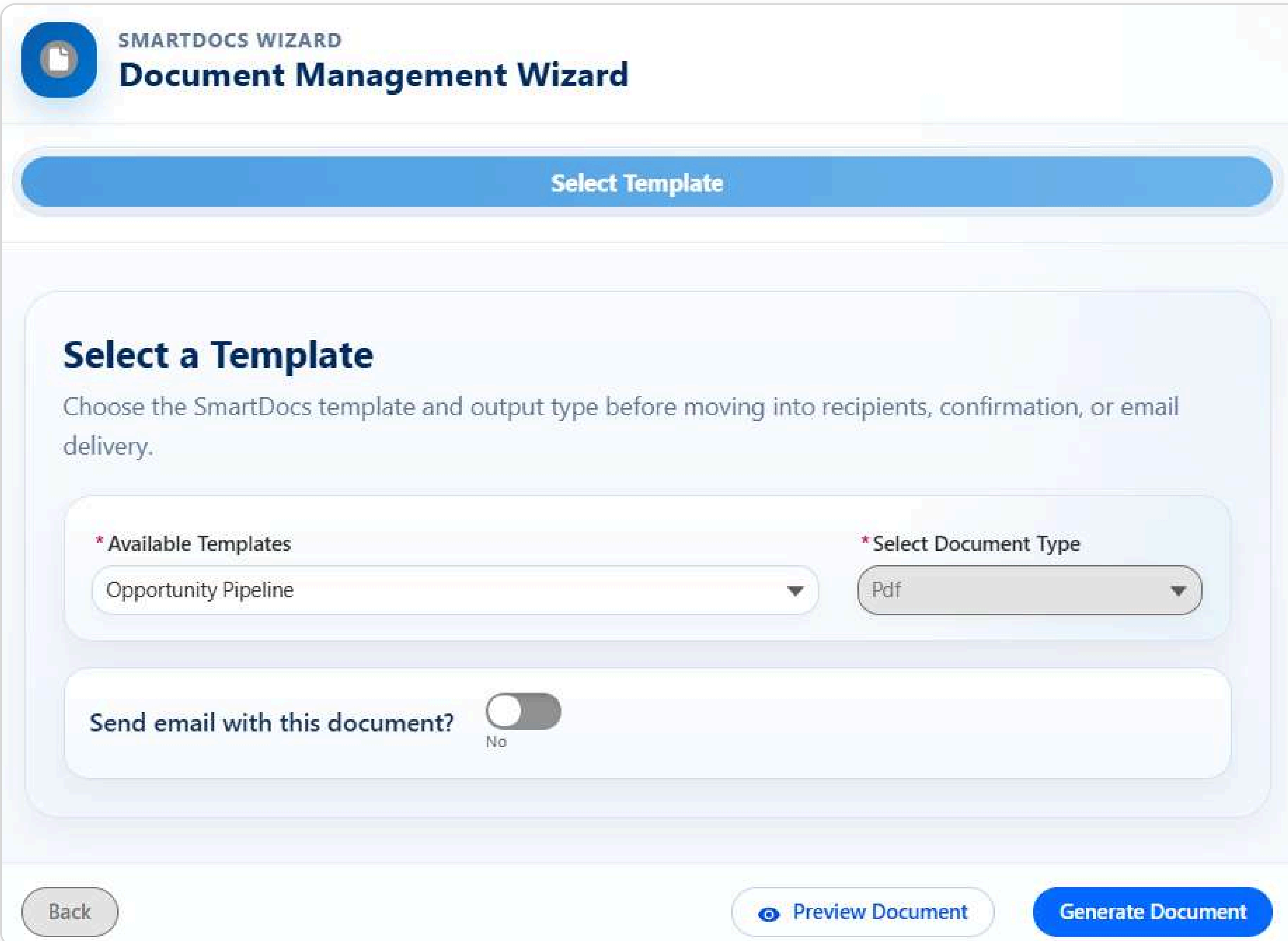
## 5.1 Generating via Quick Action

1. Navigate to a Salesforce **record page** (e.g., an Opportunity record) that has the SmartDocs Quick Action configured.

2 In the record's **highlight panel** (the actions area at the top of the record), look for the **"Create Document"** (or equivalent) action button.

3 Click the action button. The **Document Generation Wizard** opens as a modal dialog.

4 Follow the wizard steps (described in Section 5.3 below).




*Salesforce record page showing the "Create Document" Quick Action button in the record's actions area.*

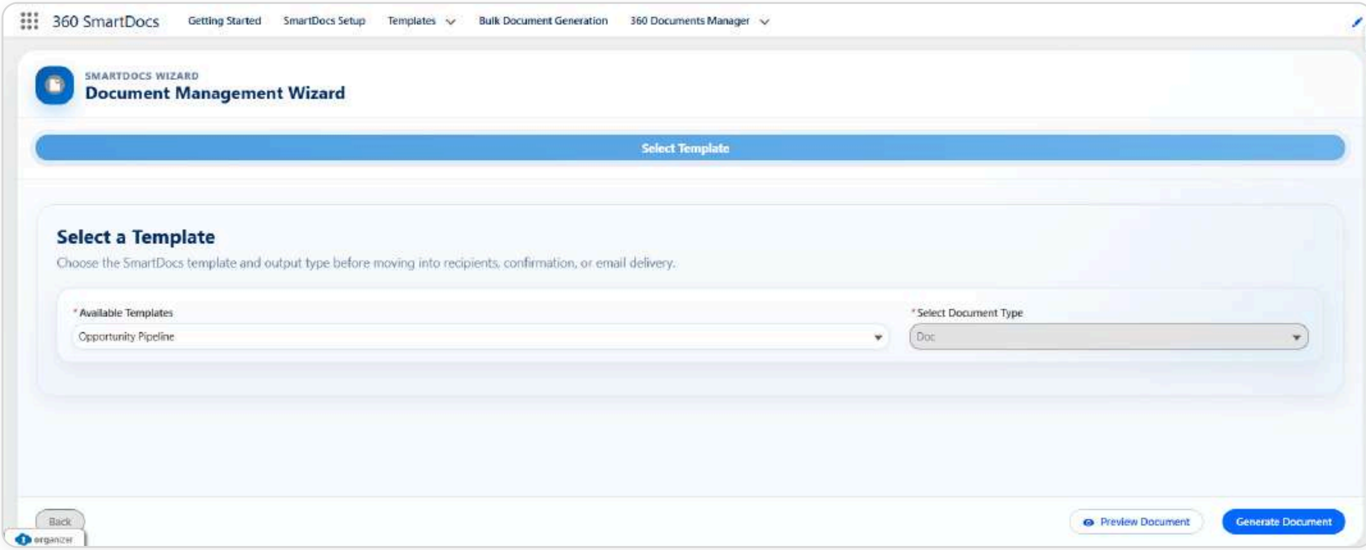
## 5.2 Generating via URL Button

1 Navigate to a Salesforce **record page** that has a SmartDocs URL Button configured (e.g., "Generate SOW (PDF)").

2 Click the **URL button** on the record detail page.

**3** The browser navigates to the SmartDocs component page. Depending on the button configuration:

- If `c__mode=auto` : Document generation starts immediately with the pre-configured template and settings.
- If `c__mode=view` : The Document Generation Wizard opens, allowing you to review or change settings before generating.




*Salesforce record page showing a SmartDocs URL button on the record detail page.*

## 5.3 The Document Generation Wizard

The Document Generation Wizard guides you through the document creation process with a visual **progress path** showing each step. The number of steps varies based on the template configuration and button settings.


*Document Generation Wizard progress indicator showing two steps: Select Template, and Send Email.*

### 5.3.1 Step 1: Select Template

**1** The **"Available Templates"** dropdown shows all active templates mapped to the current object. Select a template from the dropdown.

**2** Once a template is selected, its **description** appears below the dropdown for reference.

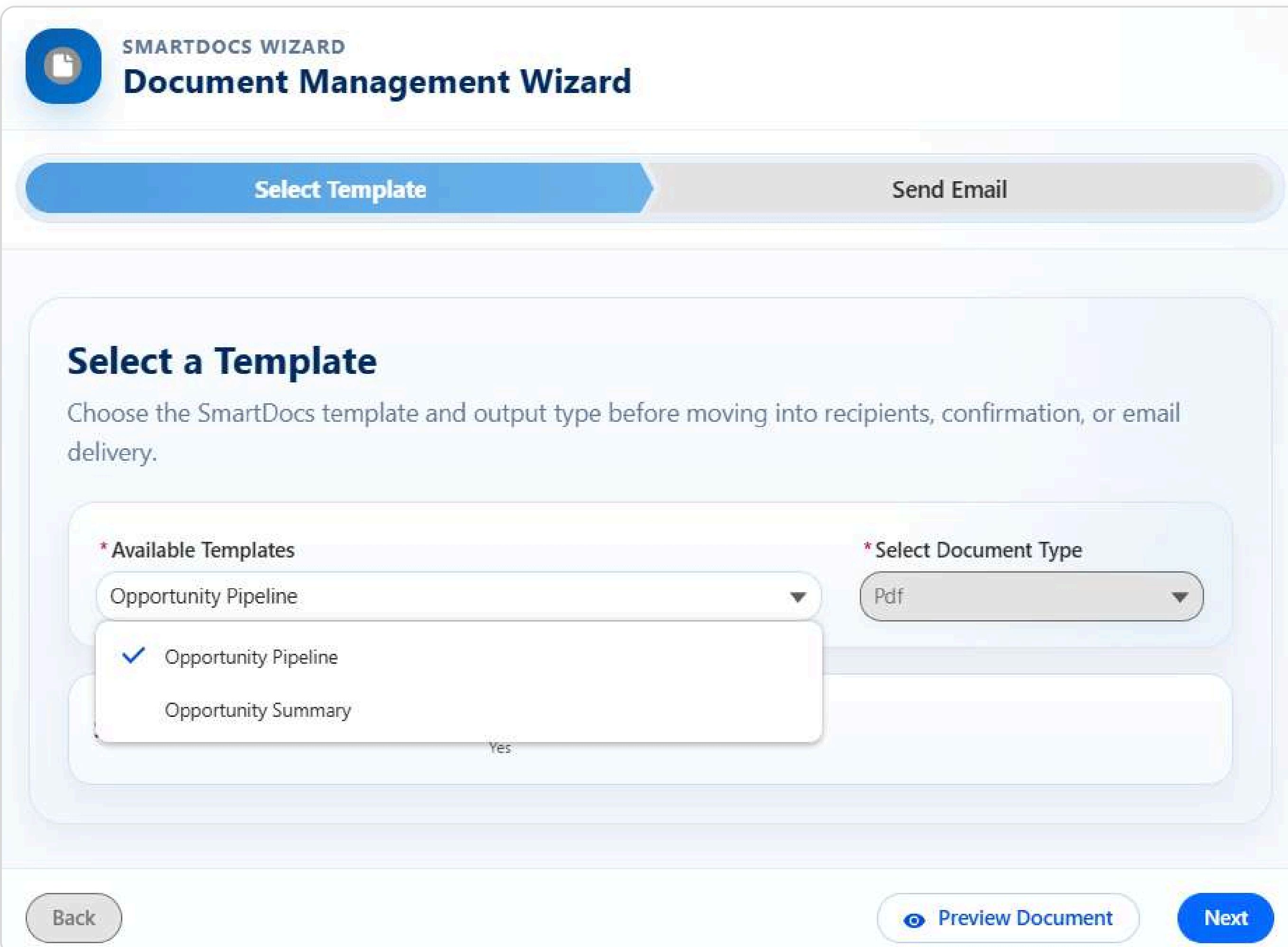
3 Choose the **"Document Type"** from the dropdown:

- **Doc** — Generates a Microsoft Word (.docx) file
- **Pdf** — Generates a PDF file

(If the template's Document Type is set to a specific format, this dropdown may be pre-set and locked.)

4 If triggered via **Quick Action**, you will see a toggle: **"Send email with generated document"**. Enable this if you want to email the document after generation.

5 Click **"Next"** to proceed to the next step.

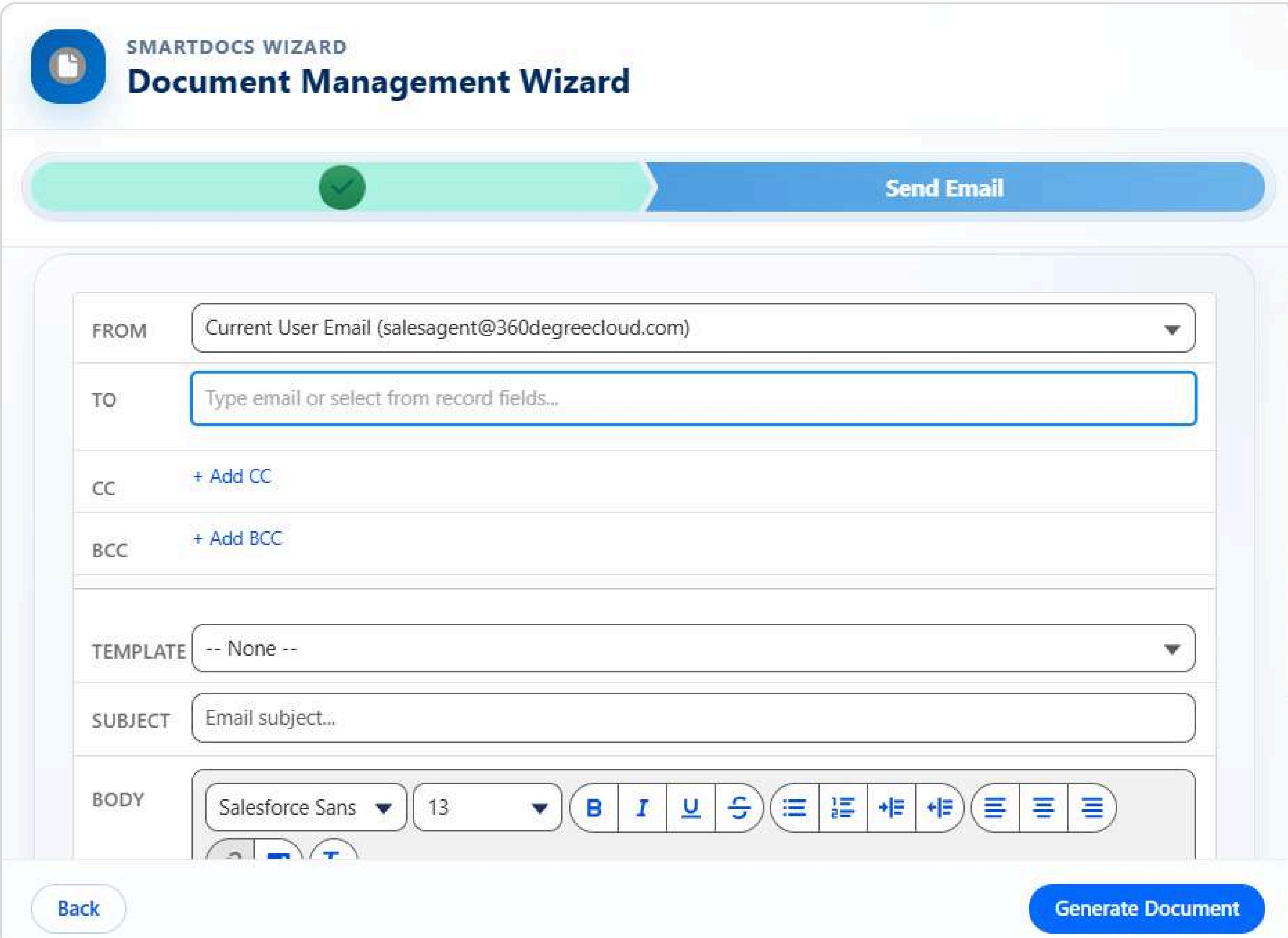



*Wizard Step 1: "SOW - Standard Implementation" selected, Document Type set to "Pdf", and email toggle enabled.*

**Note — Field Access Validation:** After template selection, the system checks whether you have read access to all fields used in the template. If any fields are inaccessible, a **Field Access Warning** screen is displayed. See [Section 6.8 — Field Access Validation](#) for full details.

### 5.3.2 Step 2: Send Email (Optional)

If email sending was enabled (either via the toggle in Step 1 or via the button's config key settings), the Email Composer appears after document creation. The Email Composer allows you to configure From, To, CC, BCC, Subject, Body, and email templates before sending the generated document as an attachment.

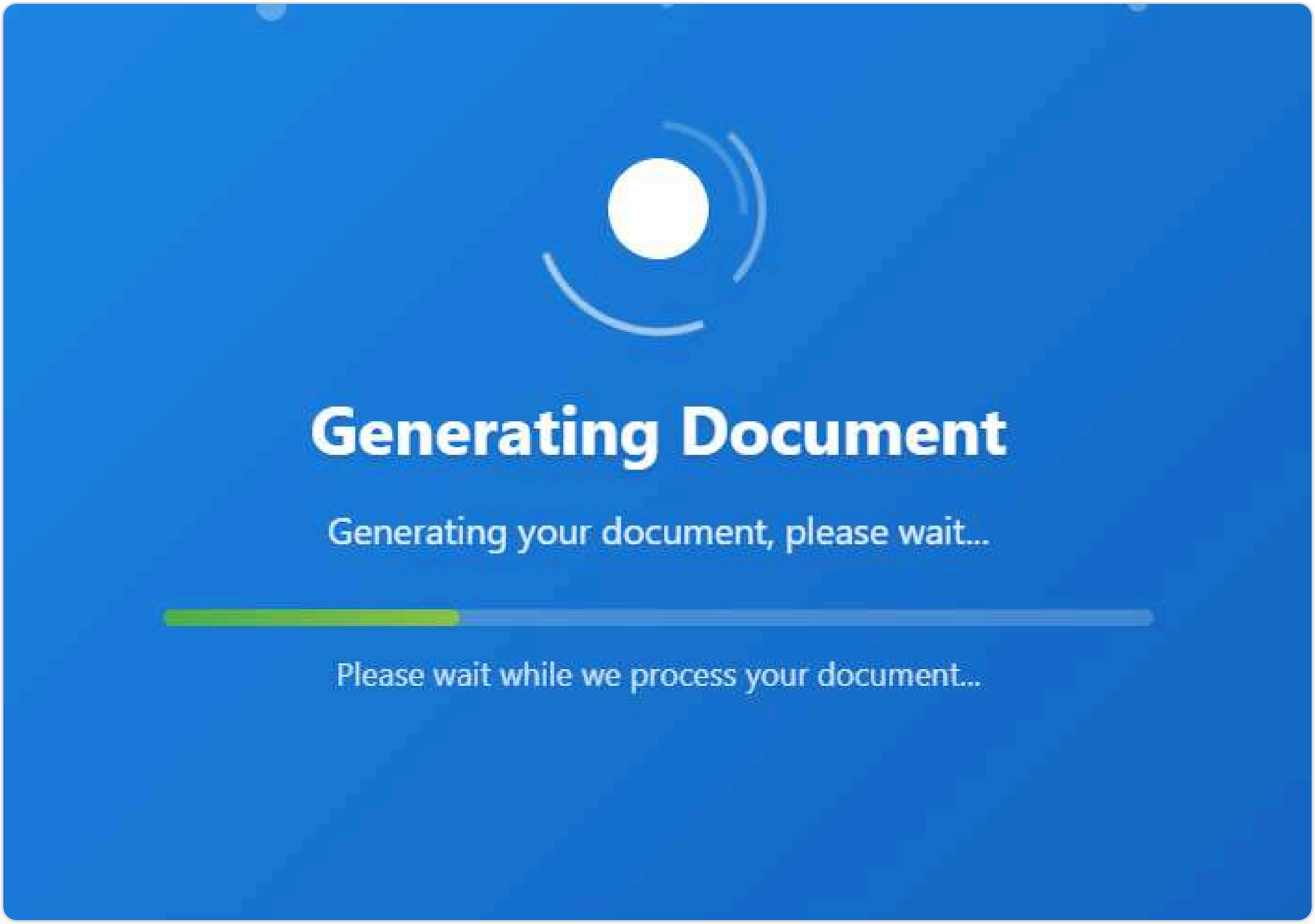



*Wizard Email step with the Email Composer showing From, To, Subject, Body, and the generated document automatically attached.*

## 5.4 Processing and Status Tracking

After clicking "Generate Document", the wizard transitions to a **processing screen**:

- An **animated progress indicator** shows that document generation is in progress
- A **status message** updates as the process moves through stages (e.g., "Generating document...", "Finalizing...")
- Once complete, it will redirect you to the record detail page with a success message.
- The generated document will be attached to the record under the related files section.
- If the generation fails, an **error message** is displayed with details about what went wrong




*Document processing screen showing a spinner and progress bar with the "Generating document..." status message.*

# 6. Bulk Document Generation

Bulk Document Generation allows you to create documents for **multiple records at once**, using data from a Salesforce Report or a List View. This is ideal for generating invoices, letters, contracts, or any documents for a batch of records.

**When to Use Bulk Document Generation:**

- **Monthly invoicing** — Generate invoices for all customers with outstanding balances at month-end
- **Batch contract generation** — Create renewal contracts for all Opportunities closing this quarter
- **Mail merge campaigns** — Produce personalized letters or proposals for a targeted list of Accounts or Contacts
- **Compliance documents** — Generate standardized compliance or audit documents for all records matching specific criteria

Use the **Bulk Document Generation tab** when working from a Salesforce Report. Use a **List View Button** when you want to select specific records directly from an object's list view.

## 6.1 Accessing Bulk Document Generation

1. In the 360 SmartDocs app, click the **"Bulk Document Generation"** tab in the navigation bar.

2. The Bulk Document Generation wizard opens with a **progress path** showing the steps you will follow.

## 6.2 Step 1: Select Data Source

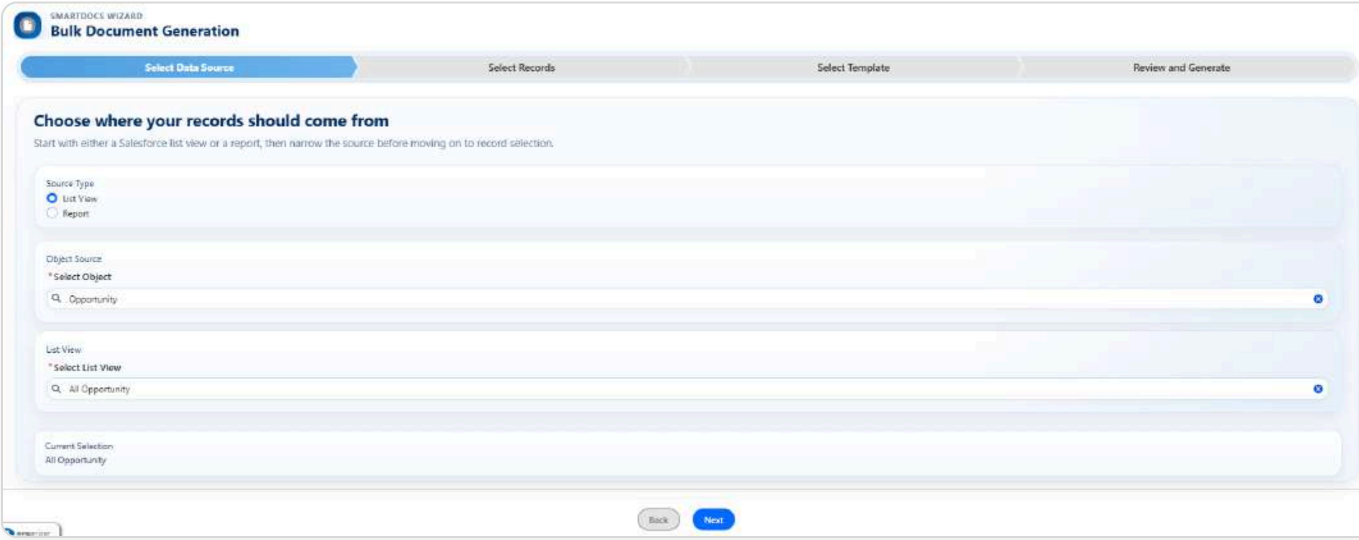
Choose where the records for bulk generation will come from:

1. Select the **Source Type**:
   - **Report** — Use records from a Salesforce report
   - **List View** — Use records from a specific object's list view

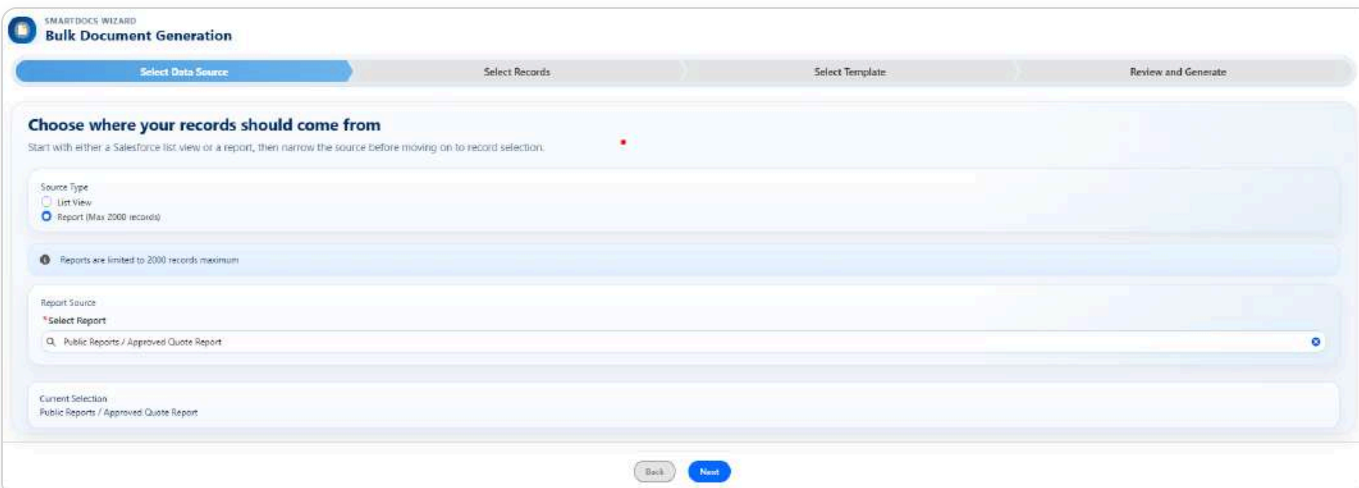
2. **If you selected "Report":**
   - A **Search Reports** field appears. Type to search for a report by name.
   - Select a report from the dropdown results.
   - The system loads the report data.

3. **If you selected "List View":**
   - First, select the **Object** from the object dropdown (e.g., Opportunity, Account).
   - Then, select a **List View** from the list view dropdown for that object.
   - The system loads all records matching the selected list view.

4. Click **"Next"** to proceed to record selection.




*Bulk wizard Step 1 with "List View" source type selected, Object set to "Opportunity", and List View dropdown showing available views.*




*Bulk wizard Step 1 with "Report" source type selected and autocomplete search results for reports.*

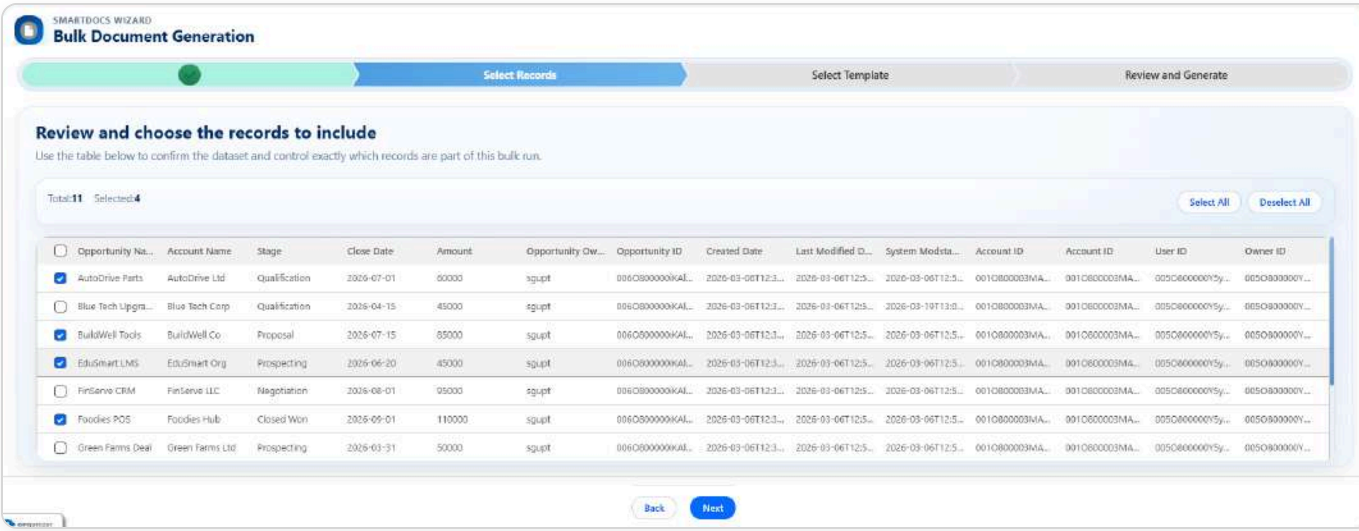
## 6.3 Step 2: Select Records

Review the loaded records and select which ones should have documents generated:

1. A **data table** displays all records from your selected data source, with checkboxes on each row.
2. Use the **Select All / Deselect All** buttons above the table to quickly select or deselect all records.
3. Individually check or uncheck records as needed.
4. The **record count summary** above the table shows "Total: X | Selected: Y".

5 If there are many records, scroll down and use **"Load More"** to load additional pages.

6 Click **"Next"** when your selection is ready.




*Bulk wizard Step 2 showing a data table with checkboxes for record selection. The count summary shows 45 of 150 records selected.*

## 6.4 Step 3: Select Template

Choose the template and document type for bulk generation:

1 The screen uses a **split-panel layout**:

- **Left panel (Template Settings):** Template dropdown and document type selector
- **Right panel (Template Preview):** Live preview of the selected template in an iframe

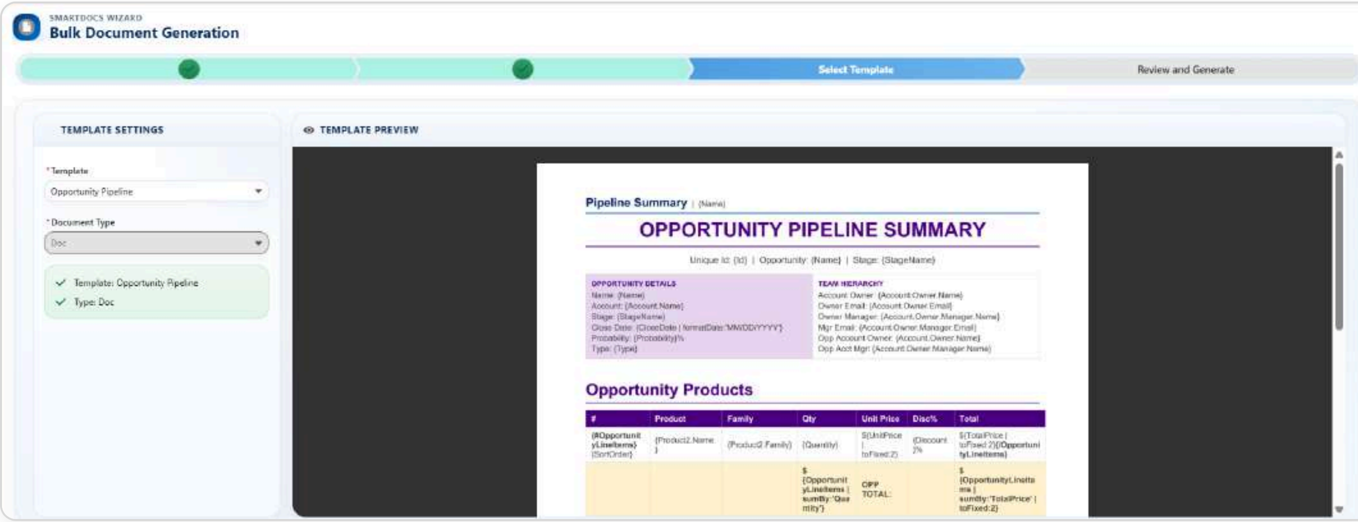
2 Select a **template** from the "Available Templates" dropdown. Only templates mapped to the selected object and marked as active will appear.

3 Select the **Document Type**: Doc (DOCX) or Pdf (PDF).

4 The right panel updates to show a **preview** of the selected template.

5 Review the template preview to confirm it is the correct one.

6 Click **"Next"** to proceed to review.




*Bulk wizard Step 3 with split layout: "Invoice - Monthly" template selected on the left, template preview on the right.*

> **Note — Field Access Validation:** After template selection, the system checks whether you have read access to all fields used in the template. If any fields are inaccessible, a **Field Access Warning** screen is displayed. See Section 6.8 — Field Access Validation for full details.

## 6.5 Step 4: Review & Generate

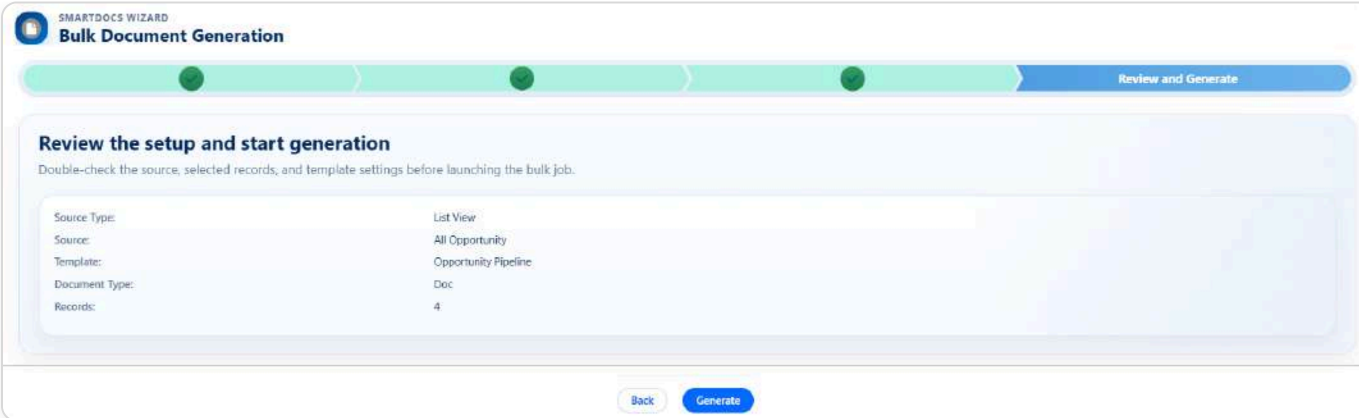
Confirm your selections before starting bulk generation:

1 Review the **summary** displayed on screen:

- **Source Type:** Report or List View
- **Source:** The name of the report or list view selected
- **Template:** The template name
- **Document Type:** Doc or Pdf
- **Records:** Total number of records selected for generation

2 If everything looks correct, click the **"Generate"** button to start bulk document generation.

3 If you need to make changes, use the **"Back"** button to return to previous steps.

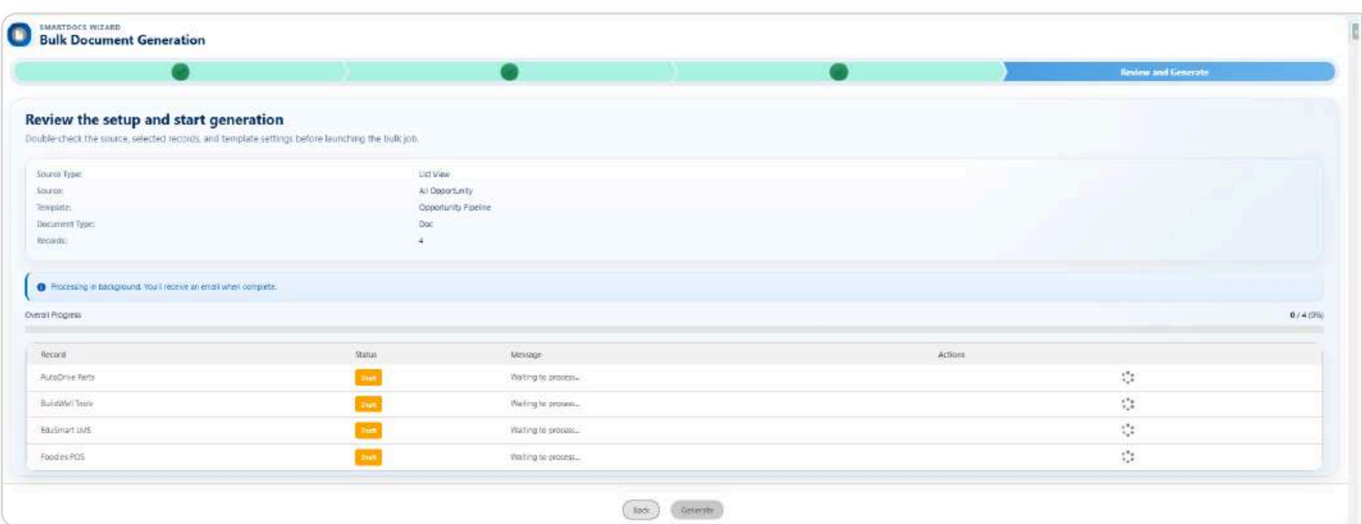



*Bulk wizard Step 4 showing the generation summary: List View source, SOW template, Pdf type, 45 records selected.*

## 6.6 Status Tracking and Progress

After clicking "Generate", the wizard transitions to a **status tracking view**:

- A **progress bar** shows the overall completion percentage (e.g., "Processing: 23 of 45 records")
- A **status table** below the progress bar shows each record's individual status:
  - **Record Name** — The name of the Salesforce record
  - **Status** — Color-coded badge:
    - Completed — Document generated successfully
    - Processing — Currently being generated
    - Pending — Waiting in queue
    - Failed — Generation failed (check error message)
  - **Message** — Success confirmation or error details
  - **Actions** — Links to view the parent record or the Document Manager record
- An **info box** may indicate: "Processing is running in the background."




*Bulk generation status tracking with progress bar and per-record status table showing Completed, Processing, and Pending statuses.*

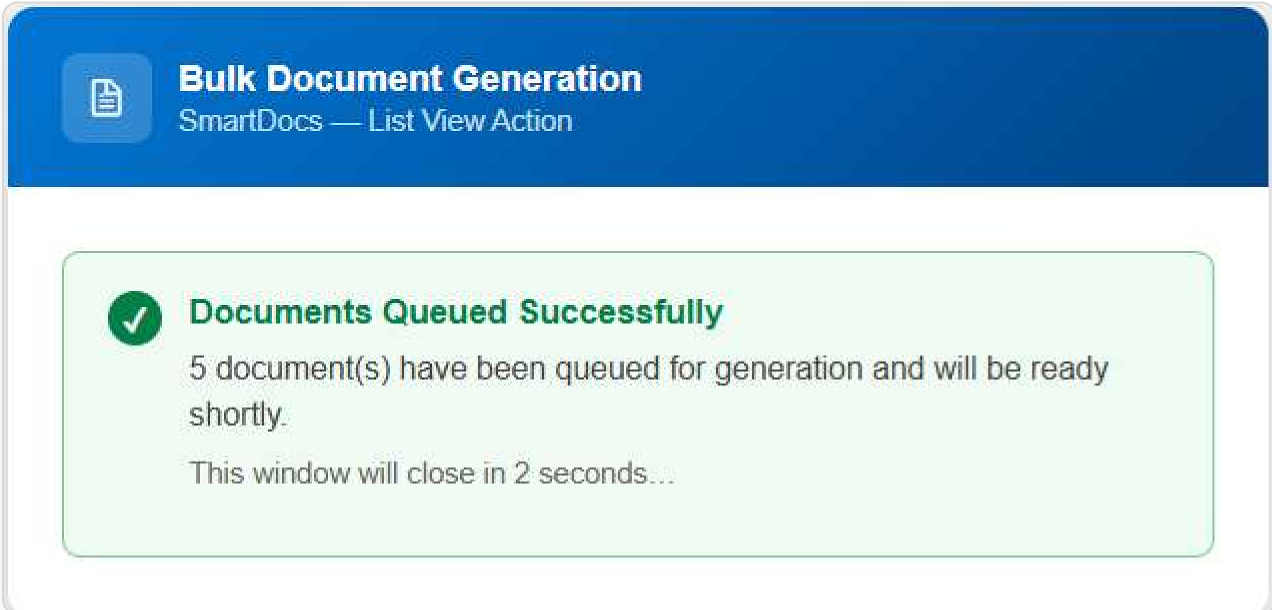
> **Note:** For large batches (100+ records), generation runs as a **background batch job** in Salesforce. You can safely navigate away from the page — the generation will continue in the background and you will receive an email when it completes.

## 6.7 Using List View Buttons

If your administrator has set up a **List View Button** for an object, you can also trigger bulk generation directly from the object's list view:

1. Navigate to the object's list view (e.g., Opportunities → All Opportunities).
2. **Select records** using the checkboxes in the leftmost column of the list view.
3. Click the **Bulk Generate Documents** button (or equivalent name) in the list view toolbar.
4. The system processes the selected records:
   - **1-199 records:** Generation starts immediately
   - **200 records:** You are given a choice: "Process selected 200 records only" or "Process all records in this list view"

> **Note — Field Access Validation:** When generating documents via a List View Button, the system also checks whether you have read access to all fields used in the template. If any fields are inaccessible, a **Field Access Warning** screen is displayed before generation proceeds. See [Section 6.8 — Field Access Validation] for full details.




*Salesforce Opportunities list view with records selected and the "Bulk Generate Documents" button in the toolbar.*

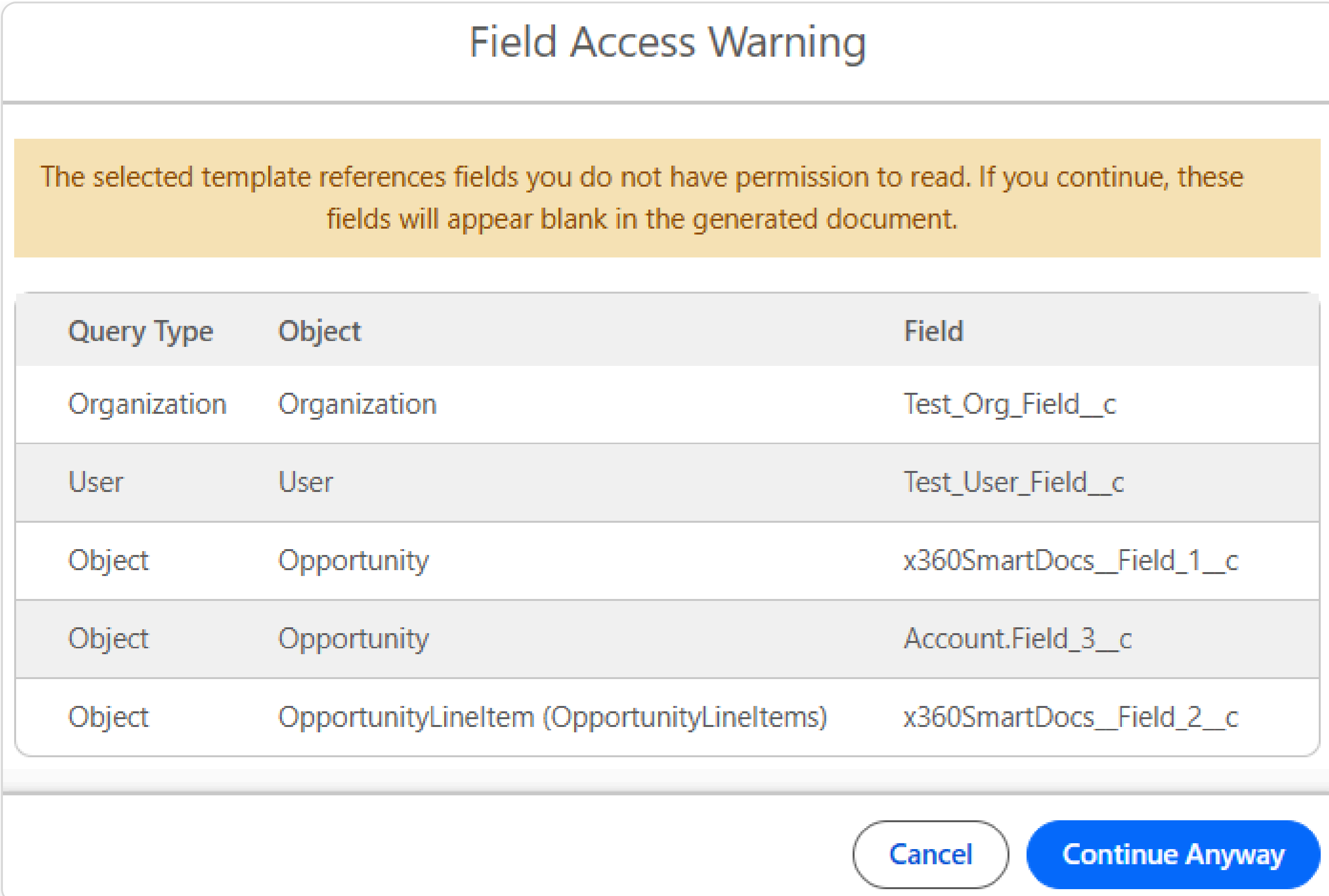
## 6.8 Field Access Validation

Whenever a template is selected for document generation — whether through **Single Document Generation** (Section 5), **Bulk Document Generation** (Section 6), or a **List View Button** (Section 6.7) — the system automatically performs a **Field-Level Security (FLS) check**. It inspects all fields referenced in the template's queries (Organization Query, User Query, and Object Query) and verifies that the current user has **read permission** on each field.

If all fields are accessible, the generation process proceeds normally. However, if one or more fields are **not accessible** to the current user, a **Field Access Warning** screen is displayed before any documents are generated.

The warning screen includes:

- A **warning banner** explaining that the selected template references fields the user does not have permission to read.
- A **table** listing every inaccessible field with the following columns:
  - **Query Type** — Which query the field belongs to ( `Organization` , `User` , or `Object` )
  - **Object** — The Salesforce object the field belongs to (e.g., `Account` , `User` )
  - **Field** — The API name of the inaccessible field (e.g., `Phone` , `Account.Name` )
- Two action buttons:
  - **"Cancel"** — Stops the generation process and returns the user to the previous step.
  - **"Continue Anyway"** — Proceeds with document generation. Fields the user cannot access will appear **blank** in the generated documents.




*Field Access Warning screen displaying inaccessible fields detected in the selected template, with options to Cancel or Continue Anyway.*

> **Warning:** If you choose **"Continue Anyway"**, any inaccessible fields will render as **blank values** in the generated documents. To ensure all fields populate correctly, ask your Salesforce administrator to grant read access to the required fields via Permission Sets or Profiles.

# 7. Custom Related List Component

The **Custom Related List** component displays document generation history (or any related records) directly on a Salesforce record page. It provides a rich data table with sorting, infinite scrolling, and navigation capabilities.

## 7.1 Adding to Record Pages

1. Navigate to the record page where you want to add the related list (e.g., an Opportunity record page).

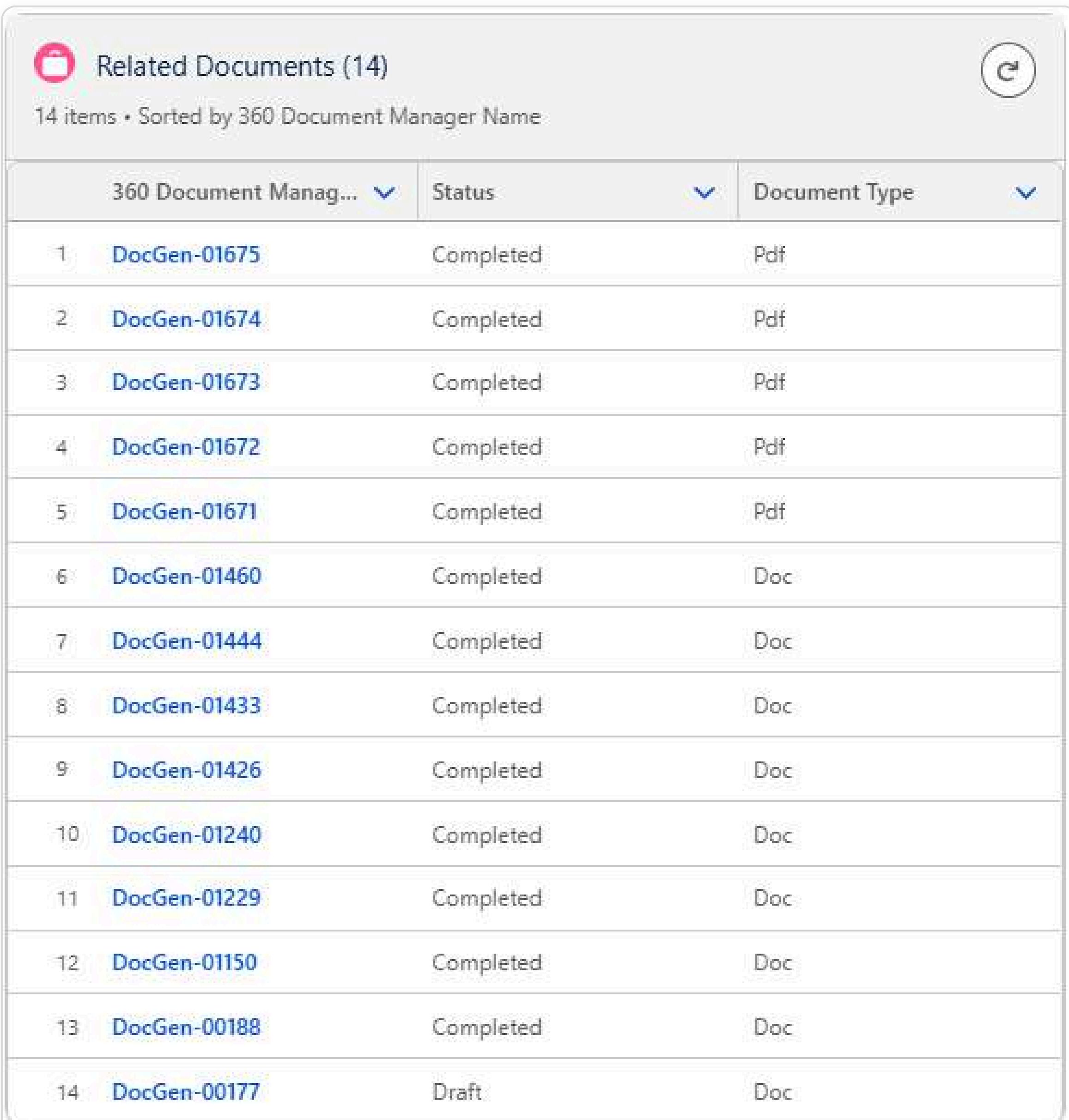
2. Click the **gear icon** → **"Edit Page"** to open the Lightning App Builder.

3. In the **Components panel** on the left, search for **"customRelatedListComponent"** (it appears under Custom components).

4. Drag the component into the desired position on the page layout (typically in the Related section or a sidebar).

5. Configure the component properties in the right-side panel (see Section 7.2).

6. Click **"Save"** and then **"Activate"** the page.



Related Documents (14)

14 items • Sorted by 360 Document Manager Name

| | 360 Document Manag... | Status | Document Type |
|---|---|---|---|
| 1 | DocGen-01675 | Completed | Pdf |
| 2 | DocGen-01674 | Completed | Pdf |
| 3 | DocGen-01673 | Completed | Pdf |
| 4 | DocGen-01672 | Completed | Pdf |
| 5 | DocGen-01671 | Completed | Pdf |
| 6 | DocGen-01460 | Completed | Doc |
| 7 | DocGen-01444 | Completed | Doc |
| 8 | DocGen-01433 | Completed | Doc |
| 9 | DocGen-01426 | Completed | Doc |
| 10 | DocGen-01240 | Completed | Doc |
| 11 | DocGen-01229 | Completed | Doc |
| 12 | DocGen-01150 | Completed | Doc |
| 13 | DocGen-00188 | Completed | Doc |
| 14 | DocGen-00177 | Draft | Doc |

*Lightning App Builder showing the customRelatedListComponent being placed on an Opportunity record page. Properties panel on the right shows configuration fields.*

## 7.2 Configuration Properties

After placing the component on the page, configure the following properties:

| Property | Description | Example Value |
| --- | --- | --- |
| `iconName` | SLDS icon for the component header | `standard:document` |
| `pNoteObjectApiName` | API name of the child object to display | `x360dc__X360_Document_Manager__c` |
| `pRelatedListTitle` | Display title for the related list header | `Generated Documents` |
| `pLookupField` | The lookup/reference field on the child object that points to the parent record | `x360dc__Parent_Record_Id__c` |
| `pLinkField` | The field to make clickable for navigation | `Name` |
| `pNotesFields` | Comma-separated list of field API names to display as columns | `Name,x360dc__Document_Type__c,x360dc__Status__c,` |
| `showNewButton` | Whether to show a "New" button | `false` |
| `pDefaultSortedBy` | Default sort field | `CreatedDate` |
| `pDefaultSortDirection` | Default sort direction | `desc` |
| `pPageSize` | Records per page (1-200) | `50` |

# 8. End-to-End Example: Generating a Document from an Opportunity

This section walks through the complete workflow from start to finish, using an Opportunity record as an example. Follow these steps to understand how all the pieces fit together.

> **Prerequisites:** Before starting, ensure that 360 SmartDocs is installed and configured (see the **Installation Guide**), and that your user account has the appropriate permission set assigned.

## Step 1: Design the Template in Microsoft Word

1. Open **Microsoft Word** and launch the **360 SmartDocs Add-In** from the ribbon.
2. Log in to your Salesforce org and click the **New** button.
3. Design your document layout — add headers, company logo, tables, and formatting as needed.
4. Use the Add-In's **field browser** to insert merge fields (e.g., `{Name}` , `{Account.Name}` , `{Amount}` , `{CloseDate}` ).
5. Switch to the **Preview** tab in the Add-In to verify the document renders correctly with real Salesforce data.
6. When satisfied, go to the **Live** tab, fill all the required fields and click **"Publish Template"** to upload the template in Salesforce.

> **Note:** While publishing the template, you can set the **Status** to **"Active"** to make it immediately available for document generation. If you choose **"Draft"** instead, the template will be saved to Salesforce but will **not** appear in the template selection dropdown. To activate a draft template later, open the template record in Salesforce and activate it using the **Preview Attached Files** component (see Section 3.4: Activating and Deactivating Templates).

## Step 2: Generate a Document from an Opportunity Record

1. Navigate to an **Opportunity record** in Salesforce.

2. Click the **"Create Document"** Quick Action button (or the URL button your admin configured).

3. In the Document Generation Wizard:
    - Select the template you created in Step 1 from the **"Available Templates"** dropdown.
    - Confirm the **Document Type** (e.g., Pdf).
    - Optionally enable **"Send email with generated document"** if you want to email it immediately.

4. Click **"Next"** and follow through to generate the document.

## Step 3: Review the Generated Document

1. After generation completes, you will be redirected back to the Opportunity record.

2. The generated document will appear in the **Files** related list on the record.

3. You can also find the document in the **360 Document Manager** tab, where it will show a **"Completed"** status with details like template used, document type, and generation timestamp.

> **Tip:** Use this same workflow for any object (Account, Quote, Case, custom objects, etc.). The only differences are the template's **SObject Name** and the merge fields you insert in the Word template.

# 9. 360 Document Manager Records

## 9.1 Understanding Document Manager Records

Every document generation — whether single, bulk, or automated — creates an **x360dc__X360_Document_Manager__c** record. This record tracks the generation process, stores references to the template and generated file, and provides a complete audit trail.

The record name follows an auto-number pattern: **DocGen-00001**, **DocGen-00002**, etc.

## 9.2 Key Fields Reference

| Field | Description |
|---|---|
| **Name** | Auto-generated record name (e.g., DocGen-00042) |
| **Template** | Lookup reference to the Template record used for generation |
| **Template Version Id** | The specific template file version used at the time of generation |
| **Document Type** | The output format: Doc (DOCX) or Pdf (PDF) |
| **Status** | Current status of the generation:<br>• **Draft** — Record created, generation not yet started<br>• **In Progress** — Document is being generated<br>• **Merging** — Merge fields are being replaced with data<br>• **Finalizing** — Document is being finalized<br>• **Completed** — Document generated successfully<br>• **Failed** — Generation encountered an error |
| **Parent Record Id** | The Salesforce record ID of the parent record (e.g., the Opportunity this document was generated from) |
| **Parent Object Name** | The API name of the parent object (e.g., Opportunity, Account) |
| **Document Version Id** | The ContentVersion ID of the generated output file |
| **Created From** | How the document was generated: "Detail Page Button", "List View", "Report", "Flow/Apex" |
| **Batch Job Id** | For bulk generations, the Salesforce batch job ID (useful for tracking and troubleshooting) |
| **Transaction Id** | Unique request identifier for tracing through logs |

# 9.3 Viewing Generated Documents

1. Open a **Document Manager record** (from the 360 Document Manager tab, a related list, or a notification link).

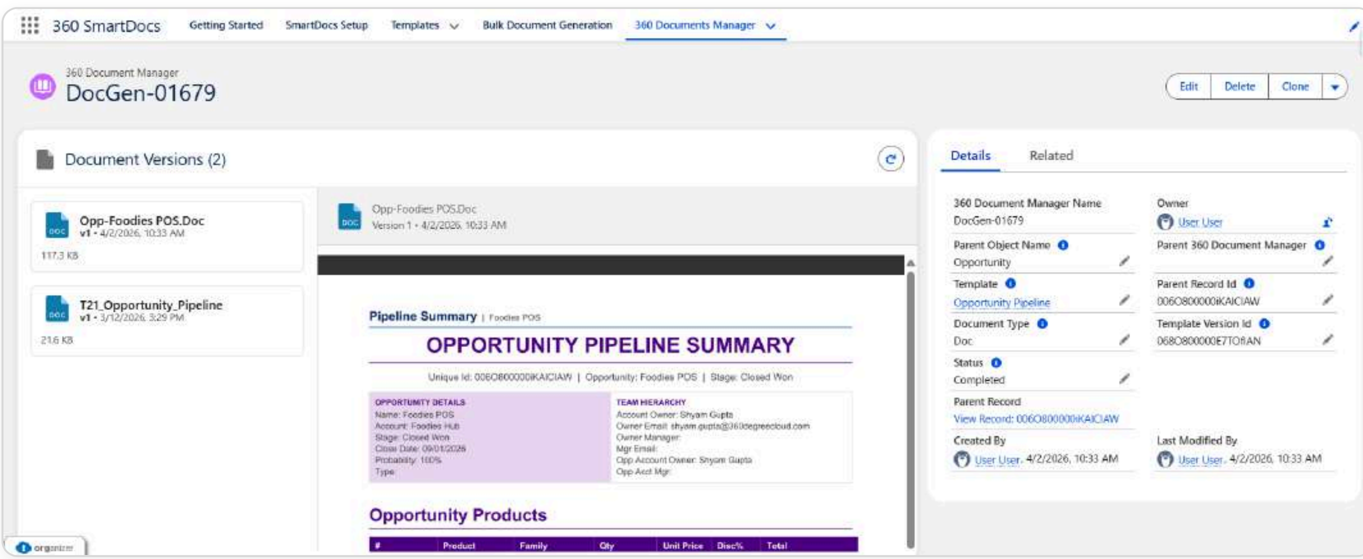
2. The record detail page shows all fields described above.

3. The generated document file is attached to the record via **Files**. Look for the file in the **Files** related list or Notes & Attachments section.

4. Click on the file name to **preview** it in Salesforce's built-in file viewer.

5. Click **"Download"** to save the file to your computer.

6. The file is also linked to the **parent record** (e.g., the Opportunity), so you can find it in the parent record's Files related list as well.




*Document Manager record detail showing DocGen-00042 with Completed status, template reference, parent record link, and the generated PDF file.*

# 10. Error Logs

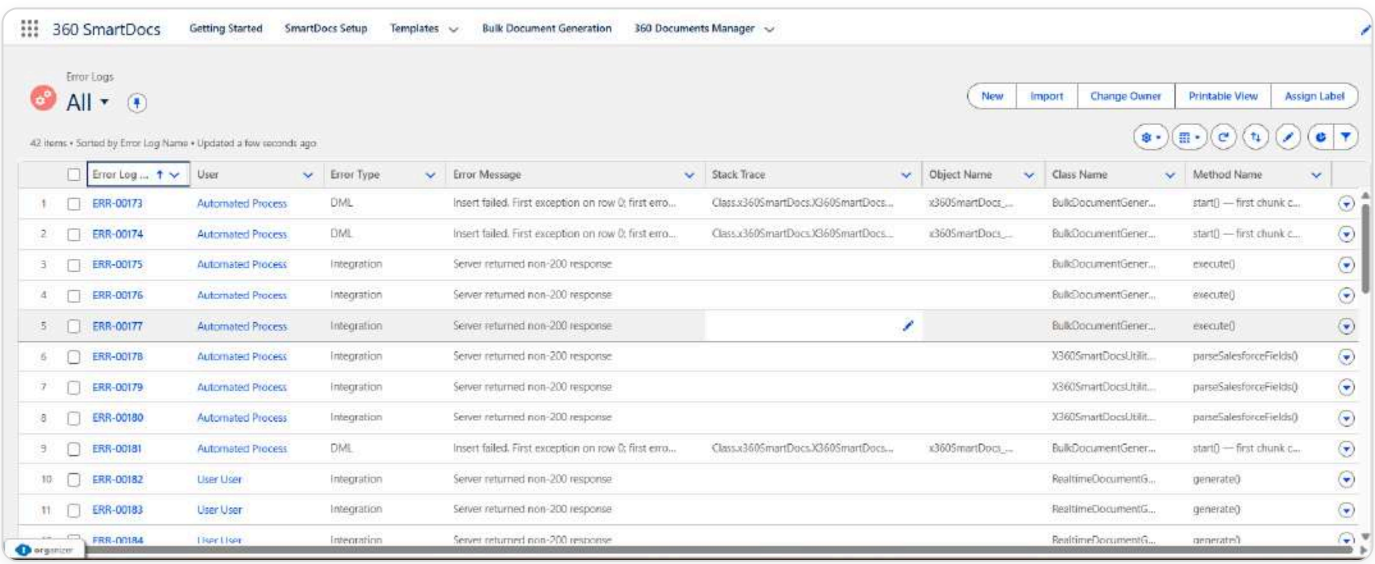
## 10.1 Accessing Error Logs

Error logs provide detailed information about any failures that occur during document generation, template processing, or system operations.

1. In the 360 SmartDocs app, you may find an **Error Logs** tab (if configured by your admin) or navigate to the Error Log object via the App Launcher.

2. The list view shows all error records, sorted by most recent first.

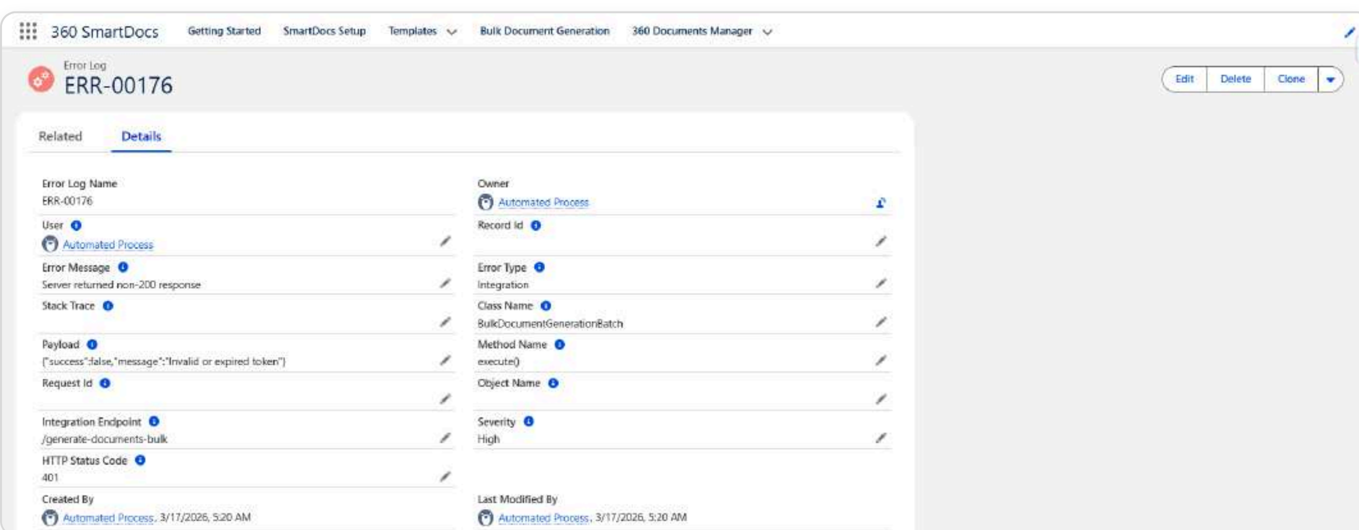
3. Click on an error record to see full details.




*Error Log list view showing error records with Type, Severity badges (Critical, Medium, Low, High), Class Name, and Created Date.*

## 10.2 Understanding Error Log Fields

| Field | Description |
|---|---|
| **Error Type** | The category of error (e.g., DmlException, HttpException, ValidationException) |
| **Error Message** | A human-readable description of what went wrong |
| **Severity** | How critical the error is: Low, Medium, High, or Critical |
| **Class Name** | The Apex class where the error originated |
| **Method Name** | The specific method that encountered the error |
| **Stack Trace** | The full technical stack trace (useful for developer troubleshooting) |
| **Record Id** | The Salesforce record associated with the error (if applicable) |
| **Object Name** | The Salesforce object involved |
| **User** | The user whose action triggered the error |
| **Transaction Id** | Unique identifier for correlating errors across batch operations |
| **Batch Job Id** | The batch job ID if the error occurred during bulk generation |




*Error Log record detail showing error message, stack trace, associated record, and user information.*

## 10.3 Common Errors and Resolutions

| Error | Likely Cause | Resolution |
|---|---|---|
| "Insufficient privileges" or CRUD/FLS error | User lacks required permissions on an object or field | Verify the user has the correct permission set ( `X360_SmartDocs_Admin` or `X360_SmartDocs_User` ) assigned. Check field-level security for any custom fields referenced in the template. |
| "Package is not active" error | The SmartDocs license is inactive or expired | Navigate to SmartDocs Setup → License Details and click "Sync" to refresh the license status. Contact your account manager if the license has expired. |
| HTTP callout error / Server unreachable | The document generation server cannot be reached | Check the Remote Site Setting for x360SmartDocs in Salesforce Setup. Verify your network allows outbound connections to the SmartDocs server. |
| "Template not found" or "No active version" | The template record is missing, inactive, or has no active file version | Open the template record and ensure: (1) IsActive is checked, (2) A file version is uploaded, (3) The file version is activated via the Preview component. |
| No templates visible in the document generation wizard (empty template list) | End user does not have visibility to x360dc__Template__c records — **Sharing Rules not configured** | Sharing Rules on `x360dc__Template__c` must be configured to grant read access to end users. See the **Installation Guide, Step 4: Template Sharing Rules** for detailed setup instructions. |
| Batch job failure with partial completion | A batch chunk encountered an error, causing some records to fail | Check the Document Manager records for the batch — look for records with "Failed" status. Review the Error Log for the batch job ID. Re-generate only the failed records. |

| Error | Likely Cause | Resolution |
|---|---|---|
| Merge field not resolved (shows raw token in output) | The merge field references a field that doesn't exist or the user lacks access to it | Verify the merge field syntax matches the object and field API names. Ensure the user has read access to the referenced fields. |

# 11. Creating Buttons on Any Object

> **For Administrators:** This section is a reference for Salesforce administrators who need to add document generation buttons to additional objects beyond the initial setup. For initial button configuration, see the **360 SmartDocs Installation & Setup Guide, Step 6: Creating Buttons on Objects**.

This section provides complete instructions for creating SmartDocs buttons on any Salesforce object. Three types of buttons are supported, each suited for different use cases.

## 11.1 URL Parameter Reference

When creating URL Buttons, you pass parameters to the `createDocumentManagerComponent` Lightning Web Component via URL. The base URL is:

```
/lightning/cmp/x360dc__createDocumentManagerComponent
```

| Parameter | Required | Type | Description | Values |
|---|---|---|---|---|
| `c__recordId` | **Yes** | Record ID | The 18-character Salesforce record ID. Use merge fields in button formulas to dynamically insert the current record's ID. | `{!Account` `{!Opportu` `{!Custom_` |
| `c__mode` | **Yes** | String | **`auto`** — Immediately generates the document without user interaction. Requires `c__templateId` or `c__configKey` . **`view`** — Opens the full Document Generation Wizard for user interaction. | `auto` `view` |
| `c__templateId` | Conditional | Record ID(s) | One or more x360dc__Template__c record IDs. **Required when `c__mode=auto`** and `c__configKey` is not provided. Multiple IDs can be comma-separated; however, **auto mode only supports a single template ID** — use `c__mode=view` when passing multiple IDs. | Single: `a01Hn0000` Multiple (vi `a01000…, a` |
| `c__documentType` | No | String | Output format. When set, the document type selector is locked. | `Doc` (DOC `Pdf` (PDF) |
| `c__configKey` | No | String | Loads all settings from a `x360dc__SmartDocs_Button_Config__c` record. **Overrides** templateId, mode, documentType, and adds email config. | e.g., `opp_s` |

**Tip:** Using `c__configKey` is the recommended approach for email configuration. It centralizes settings in a configuration record that can be updated without modifying the button URL. The config record stores email settings (To, CC, BCC, From, Template, Subject, Body). Alternatively, you can pass email settings directly via URL using the parameters in Section 11.1.1 below.

## 11.1.1 Email URL Parameters (Alternative to c__configKey)

When a `c__configKey` is **not** used, you can configure the email step directly via URL parameters. Set `c__emailEnabled=true` to activate the email step; the remaining parameters are optional.

| Parameter | Required | Type | Description | Values |
|---|---|---|---|---|
| `c__emailEnabled` | No | Boolean string | Enables the email step in the wizard. Must be set to `true` to activate any of the email parameters below. Has no effect when `c__configKey` is also present. | `true` |
| `c__emailTo` | No | String | Field API name(s) or static email address(es) for the To field. Comma-separated for multiple values. | `Email` `Contact.Email` |
| `c__emailCc` | No | String | Field API name(s) or static email address(es) for the CC field. | `Email` |
| `c__emailBcc` | No | String | Field API name(s) or static email address(es) for the BCC field. | `Email` |
| `c__emailFromType` | No | String | Sender type. Defaults to `current_user` when not specified. | `current_user` `org_wide` |
| `c__emailFromOrgWideId` | No | Record ID | The 18-character Org-Wide Email Address record ID. Only used when `c__emailFromType=org_wide`. | 18-character ID |
| `c__emailTemplateId` | No | Record ID | The 18-character Email Template record ID to pre-populate the email composer. | 18-character ID |

## 11.2 Quick Action Setup

A Quick Action adds a document generation button to the record page's actions menu. No URL parameters are needed — the component automatically detects the record context.

1. Go to **Setup** → **Object Manager** → select your object (e.g., Account, Opportunity, or any custom object).
2. Click **"Buttons, Links, and Actions"** in the left sidebar.
3. Click **"New Action"**.
4. Set **Action Type** to **"Lightning Web Component"**.
5. Set **Lightning Web Component** to `x360dc__createDocumentManagerComponent`.
6. Enter a **Label** (e.g., "Create Document") and optional **Description**.
7. Click **"Save"**.
8. Edit the object's **Page Layout**:
    - Open the page layout editor
    - Click **"Mobile & Lightning Actions"** in the palette
    - Drag your new action into the **"Salesforce Mobile and Lightning Experience Actions"** section
    - Click **"Save"**

## 11.3 URL Button Setup

1. Go to **Setup** → **Object Manager** → select your object.
2. Click **"Buttons, Links, and Actions"** → **"New Button or Link"**.
3. Enter a **Label** (e.g., "Generate SOW (PDF)").

4 Set **Display Type** to **"Detail Page Button"**.

5 Set **Behavior** to **"Display in existing window without sidebar or header"**.

6 Set **Content Source** to **"URL"**.

7 In the URL formula field, enter:

```
/lightning/cmp/x360dc__createDocumentManagerComponent?c__recordId={!Object.Id}&c__
```

Replace `Object` with your object name (e.g., `Account`, `Opportunity`) and `YOUR_TEMPLATE_ID` with the actual x360dc__Template__c record ID.

8 Click **"Save"**.

9 Edit the object's **Page Layout** and add the button to the **"Custom Buttons"** section.

## Example URLs

**Auto-generate a PDF with a specific template:**

```
/lightning/cmp/x360dc__createDocumentManagerComponent?c__recordId={!Opportunity.Id}&c__mode=a
```

**Open wizard in view mode (user selects template):**

```
/lightning/cmp/x360dc__createDocumentManagerComponent?c__recordId={!Account.Id}&c__mode=view
```

**Use a config key for all settings:**

```
/lightning/cmp/x360dc__createDocumentManagerComponent?c__recordId={!Quote.Id}&c__configKey=qu
```

**Open wizard with multiple templates pre-loaded (user selects one):**

```
/lightning/cmp/x360dc__createDocumentManagerComponent?c__recordId={!Opportunity.Id}&c__mode=v
```

**Open wizard with email enabled (no config record):**

```
/lightning/cmp/x360dc__createDocumentManagerComponent?c__recordId={!Opportunity.Id}&c__mode=v
```

## 11.4 List View Button Setup

List View buttons require a Visualforce page intermediary. Follow these three sub-steps:

### Sub-step A: Create a Visualforce Page

1. Go to **Setup** → search for **"Visualforce Pages"** → click **"New"**.

2. Enter a Label and Name (e.g., `AccountBulkDocGeneration`).

3. Paste the following code, replacing `Account` with your object's API name:

```
<apex:page standardController="Account"
           extensions="x360dc.BulkDocumentGenerationVFController"
           recordSetVar="records"
           showHeader="false" sidebar="false" standardStylesheets="false">

    <x360dc:BulkDocumentGenerationComponent
        configKey=""
        templateId=""
        documentType=""
        mode=""
        selectedRecords="{!selectedRecords}"
        listViewId="{!listViewId}"
    />

</apex:page>
```

4 Check **"Available for Lightning Experience..."** and click **"Save"**.

## Component Attribute Reference

The `x360dc:BulkDocumentGenerationComponent` accepts the following attributes:

| Attribute | Type | Required | Description |
|---|---|---|---|
| `configKey` | String | No | Key to query a `SmartDocs_Button_Config__c` record for centralized template, object, mode, and document type settings. When provided, the component loads settings from the matching configuration record. |
| `templateId` | String | No | A single Template ID or comma-separated Template IDs. When a single ID is provided with `mode="auto"`, the component uses that template directly. When multiple IDs are provided, the template selection UI is filtered to show only the specified templates. |
| `documentType` | String | No | The output document format: `Doc`, `Docx`, or `Pdf`. When set, this overrides any document type from the configuration record. |
| `mode` | String | No | Execution mode: `auto` (processes immediately without showing the wizard UI — requires `templateId` or `configKey`) or `view` (shows the full selection wizard). Defaults to `view` if not specified. |
| `selectedRecords` | String | Auto-bound | Comma-separated list of selected record IDs. Automatically bound to `{!selectedRecords}` from the VF controller — do not hard-code a value. |
| `listViewId` | String | Auto-bound | ID of the current list view. Automatically bound to `{!listViewId}` from the VF controller — do not hard-code a value. |

**Tip:** The `templateId`, `documentType`, and `mode` attributes are optional. Leave them empty ( `""` ) to use the default wizard behavior where users select these options interactively. Use `configKey` to centralize settings in a configuration record, or set these attributes directly for fine-grained control over the component's behavior.

### Sub-step B: Create the List View Button

1. Go to **Object Manager** → select your object → **"Buttons, Links, and Actions"**.
2. Click **"New Button or Link"**.
3. Set **Label** (e.g., "Bulk Generate Documents"), **Display Type** to **"List Button"**.
4. Check **"Display Checkboxes (for Multi-Record Selection)"**.
5. Set **Content Source** to **"Visualforce Page"** and select the page from Sub-step A.
6. Click **"Save"**.

### Sub-step C: Add to Search Layouts

1. In the same object's Object Manager page, click **"Search Layouts for Salesforce Classic"** or **"List View Button Layout"**.
2. Edit the List View layout and add your button to the **"Selected Buttons"** list.
3. Click **"Save"**.

> **Note:** Replace `Account` in `standardController="Account"` with your target object's API name (e.g., `Opportunity`, `Case`, `Custom_Object__c`). The `configKey` attribute can be left empty or set to a specific configuration key. The optional `templateId`, `documentType`, and `mode` attributes can be left empty for default wizard behavior, or set to control template selection, output format, and execution mode respectively. See the **Component Attribute Reference** table above for details. The `x360dc:BulkDocumentGenerationComponent` is a Visualforce component included in the package — it handles the bulk generation UI automatically.

# 12. Flow and Apex Integration

360 SmartDocs provides an **Invocable Action** that can be called from Salesforce Flows, Process Builder, or Apex code. This enables automated document generation as part of your business processes.

> **When to Use Flow/Apex Integration:**
> - **Auto-generate welcome letters** when new Accounts or Contacts are created
> - **Trigger contract generation** automatically when an Opportunity stage changes to "Closed Won"
> - **Generate approval documents** as part of an approval process flow
> - **Schedule recurring document generation** via scheduled flows (e.g., weekly status reports)

## 12.1 Using the Invocable Action in Flow

1. Open **Salesforce Flow Builder** (Setup → Flows → New Flow).
2. Add an **Action** element to your flow.
3. Search for **"Create Document Manager"** (or **"createDocumentManagers"**) in the action search.
4. Select the **360 SmartDocs - Create Document Managers** invocable action.
5. Configure the **input parameters** (see Section 12.2 below).

6 Optionally, capture the **output parameters** to track the result.

7 Connect the action element to the rest of your flow logic.

8 Save and activate the flow.

## 12.2 Input / Output Parameters

### Input Parameters

| Parameter | Required | Type | Description |
|---|---|---|---|
| `templateId` | **Yes** | Id (Text) | The record ID of the x360dc__Template__c record to use for document generation |
| `parentRecordId` | **Yes** | Id (Text) | The record ID of the parent Salesforce record (the record the document is being generated for) |
| `parentObjectName` | **Yes** | Text | The API name of the parent object (e.g., "Opportunity", "Account", "Custom_Object__c") |
| `documentType` | **Yes** | Text | The output format: "Doc" (DOCX) or "Pdf" (PDF). Defaults to the template's configured type if not specified. |

### Output Parameters

| Parameter | Type | Description |
|---|---|---|
| `documentManagerId` | Id (Text) | The record ID of the created x360dc__X360_Document_Manager__c record |
| `isSuccess` | Boolean | `true` if the document generation was initiated successfully, `false` otherwise |
| `errorMessage` | Text | Error details if `isSuccess` is `false`. Empty string if successful. |

**Tip:** The invocable action supports bulk input — you can pass multiple records in a single flow loop. Each input creates a separate Document Manager record and triggers generation independently.

**Note:** When triggered from Flow, the `Created_From` field on the Document Manager record is set to **"Flow/Apex"**, making it easy to distinguish automated generations from user-initiated ones in reports and list views.

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