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Flow / Process Builder

PDF Butler Invocable:

This packaged component allows to call PDF Butler from Visual Flow (Flow Builder) or Process Builder. In both the Apex Action has to be used with the Apex Class: "Call PDF Butler"

The call has following variables:

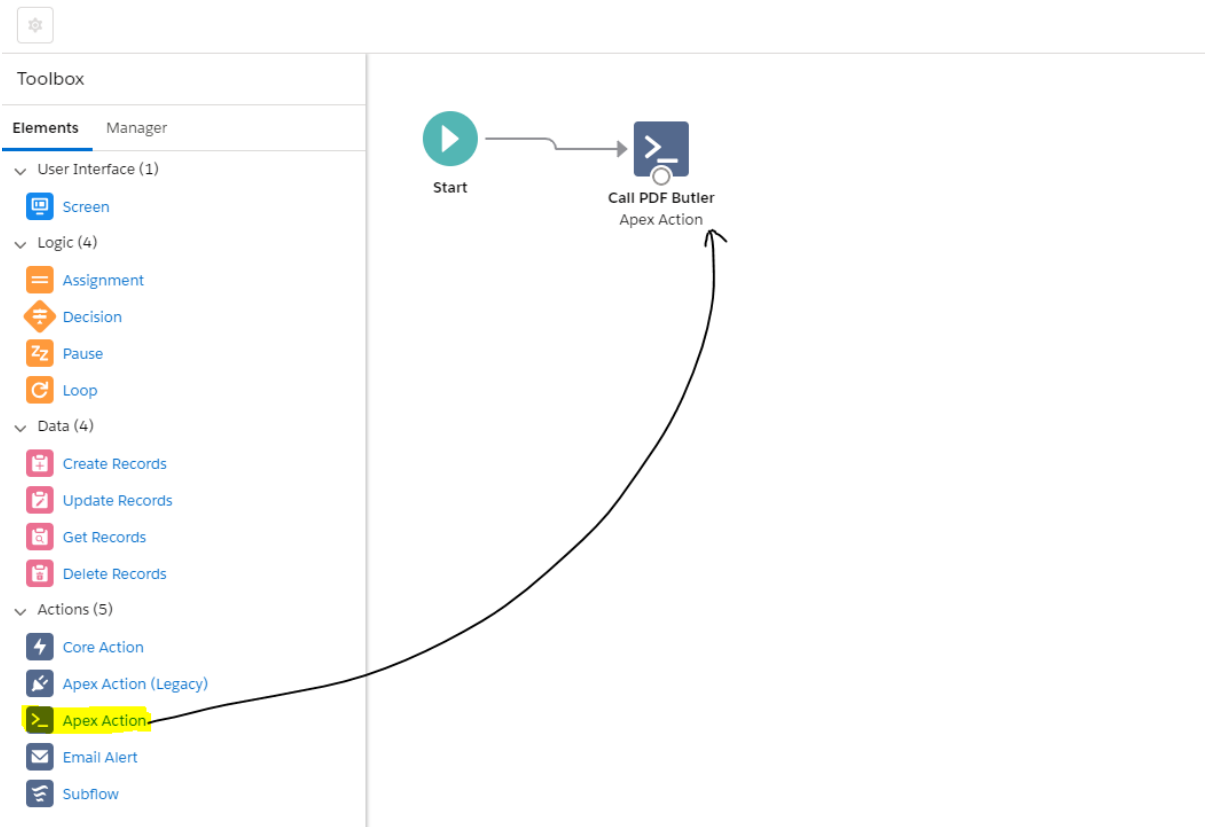
- 1) docConfigId (required if "docConfigIdAsString" is not supplied): Id of the DocConfig to generate
- 2) docConfigIdAsString (required if "docConfigId" is not supplied): Id of the DocConfig to generate. The type of the field can be String, so it can be a text field or a constant or coming from a Custom Setting
- 3) docConfigIds: Multiple Doc Config Ids
- 4) docConfigIdsAsString: Multiple Doc Config Ids As String (comma seperated)
- 5) objectId (required if "objectIdAsString" is not supplied): Record Id
- 6) objectIdAsString (required if "objectId" is not supplied): Record Id As String
- 7) targetType: Target Type (PDF or DOCX), default is PDF
- 8) alternativeName: Alternative Name
- 9) locale: Locale eg nl_BE
- 10) language: Language eg nl
- 11) country: Country eg BE
- 12) timeZone: time zone
- 13) pdfActionType: MERGE or NONE, default is NONE. Merge the PDF's generated
- 14) packId: Pack Id
- 15) packIdAsString: Pack Id As String
- 16) runAsync: true or false, default false. Do the callout Async

Flow Builder (Visual Flow)

Flows can be operated with or without a user interface:

- 1) Autolaunched flow: this is run in the backend, eg from a process builder. The callout to PDF Butler has to happen Async
- 2) Other flows with UI: the steps are run in real time so the callout can also be done in realtime

Add the Apex Action to the flow process and configure it:



New Action

Action Type: Apex Action (dropdown) | Apex Action: Call PDF Butler (text input)

Use values from earlier in the flow to set the inputs for the "Call PDF Butler" Apex action. To use its outputs later in the flow, store them in variables.

*Label: [text input] | *API Name: [text input]

Description: [text area]

Set Input Values | Store Output Values

A _a Alternative Name	<input type="checkbox"/>	Don't Include
A _a Country	<input type="checkbox"/>	Don't Include
A _a Doc Config Id	<input type="checkbox"/>	Don't Include
A _a Doc Config Id As String	<input type="checkbox"/>	<input checked="" type="checkbox"/> Include

YOUR DOCCONFIG ID [text input]

Cancel Done

Process Builder (Visual Flow)

The callout has to be done asynchronously!

Add the Apex Action to the process and configure it:

The screenshot displays the Salesforce Process Builder interface for a process named "PDF Butler Quote Sent Mail". The flowchart on the left starts with a "START" node, followed by a "Quote" object. A decision diamond labeled "Mail required" branches into two paths: a "TRUE" path leading to an "IMMEDIATE ACTIONS" box containing a "Send Mail Async" action, and a "FALSE" path leading to another decision diamond labeled "+ Add Criteria". This second decision diamond branches into a "TRUE" path leading to another "IMMEDIATE ACTIONS" box with "+ Add Action", and a "FALSE" path leading to a "STOP" node.

The "Call Apex" configuration panel on the right is titled "Call Apex" and contains the following fields:

- Action Name*: Send Mail Async
- Apex Class*: Call PDF Butler
- Set Apex Variables table:

Field*	Type*	Value*
Run Async	Boolean	True
Locale	String	nl_BE
Record Id	Field Reference*	[SBQQ__Quote__c...Q]
Pack Id As String	Field Reference*	[SBQQ__Quote__c...Q]
Multiple Doc Config Ids As String (c	Formula	[SBQQ__Quote__c]...

At the bottom of the panel are "Save", "Cancel", and "Delete" buttons.