

Generating Documents

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Using the template documents, documents can be generated from the following:

- Reports
- Forms
- Workflows ([Generate Document](#))

Template documents have a target object starting context. Begin with the target object the template document is based on and choose where the action button will appear either on the form or report.

Generating a document from a form

To generate a document from a form:

1. Select the form where the action button to generate documents will be placed and open in Form Builder.
2. On the top right hand corner of the screen, select **+ Actions**. The Actions dialog appears.
3. Find the report template name and select the checkbox for **Enable**. This provides an action button on the form.
4. Select **OK**.
5. Select **SAVE** to save the form.
6. Open any record in the target object.
7. Select the newly created Action button from on top of the form.
8. The document downloads to your browser. Select to open.

Generating a document from a report

To generate a document from a report:

1. Select the report of where the action button to generate documents will be placed and open it in Report Builder.
2. Select **Actions**.
3. Find the report template name and tick **Enable** and **Show Button** from the actions menu. This will provide an action button on the report.
4. Select **OK**.

5. Select **SAVE** to save the report.
 6. Open the report and then single click to highlight a record to generate the document against. The action button is enabled.
 7. Select the generated Action button from the top of the form.
 8. The document downloads to your browser. Select to open.
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