



CODEYLABS

DRTE - ADD ON

**MASS MERGE FROM
LISTVIEW**

User Guide



DRTE

Overview

Mass Merge feature is an add-on that enables users to generate documents for multiple selected records simultaneously from a Salesforce List View. This process, often referred to as "Mass Merge" or "Bulk Document Generation," significantly improves efficiency by queueing the document creation as a background process..

Mass Merge / Bulk Document Generation

1. Configuration Steps
2. End-User Workflow
3. Troubleshooting and Support

Understanding the Bulk Generation URL

The custom button uses a specific URL structure to invoke the bulk generation flow. The parameters in the URL define which template to use and how to name the output files.

URL Parameter Key	Description	Example Value
SFDCDocumentTemplateId	The 18-digit SFDC Record ID of the DRTE Document Template to be used for generation.	a01XXXXXXXXXXXXXX
SFDCObjectAPIName	The API Name of the Salesforce Object (e.g., standard or custom) where the button is placed.	Invoice__c or Account
SFDCDocumentFileNamePrefix	A prefix used to name the generated document files.	Bulk_Invoice_

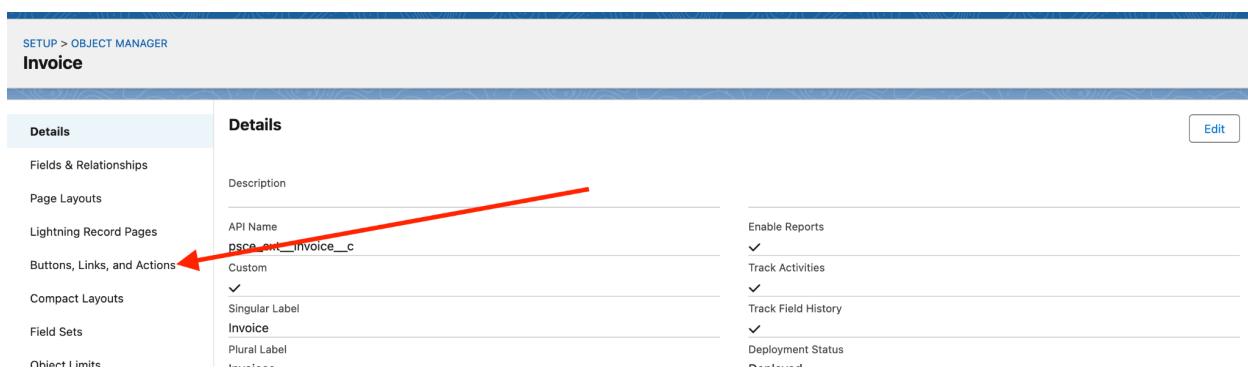
Generic URL Structure:

/flow/drte_ext/GenerateMassDocument?SFDCDocumentTemplateId=[DocumentTemplateId]&SFDCObjectAPIName=[SFDCObjectAPIName]&SFDCDocumentFileNamePrefix=[NameOfFileToSave]

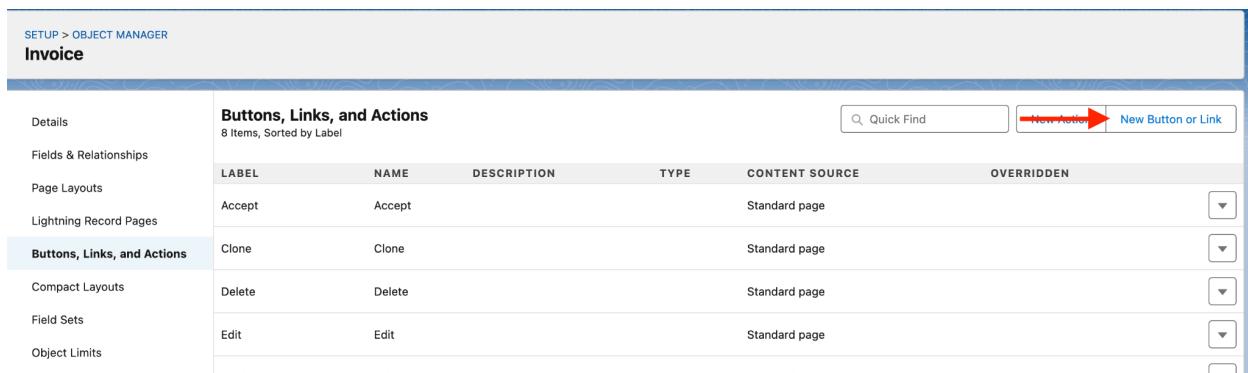
Important Note: The URL key names (e.g., `SFDCDocumentTemplateId`) must be used exactly as shown for the feature to function correctly.

Step 1: Create the Custom List View Button

1. Navigate to **Setup** -> **Object Manager**.
2. Search for and select the **Target Object** (e.g., a custom `Invoice__c` object) on which you want to enable bulk generation.



3. Go to **Buttons, Links, and Actions** and click **New Button or Link**.



4. Configure the button details:

- a. **Label:** Provide a user-friendly label (e.g., [Generate Documents](#) or [Bulk Invoice Generation](#)).
- b. **Name:** Enter the API name (e.g., [Generate_Documents](#)).
- c. **Display Type:** Select **List Button**.
- d. Ensure "**Display Checkboxes (for Multi-Record Selection)**" is checked.
- e. **Content Source:** Select **URL**.
- f. **Content:** Paste the generic URL structure and replace the bracketed values with your specific configuration details (e.g., inserting your template ID).

Invoice Custom Button or Link
New Button or Link

Custom Button or Link Edit

Save Quick Save Preview Cancel

Label:

Name: [i](#)

Description:

Display Type: Detail Page Link [View example](#)
 Detail Page Button [View example](#)
 List Button [View example](#)
 Display Checkboxes (for Multi-Record Selection)

Behavior: [View Behavior Options](#)

Content Source:

Select Field Type: [v](#)

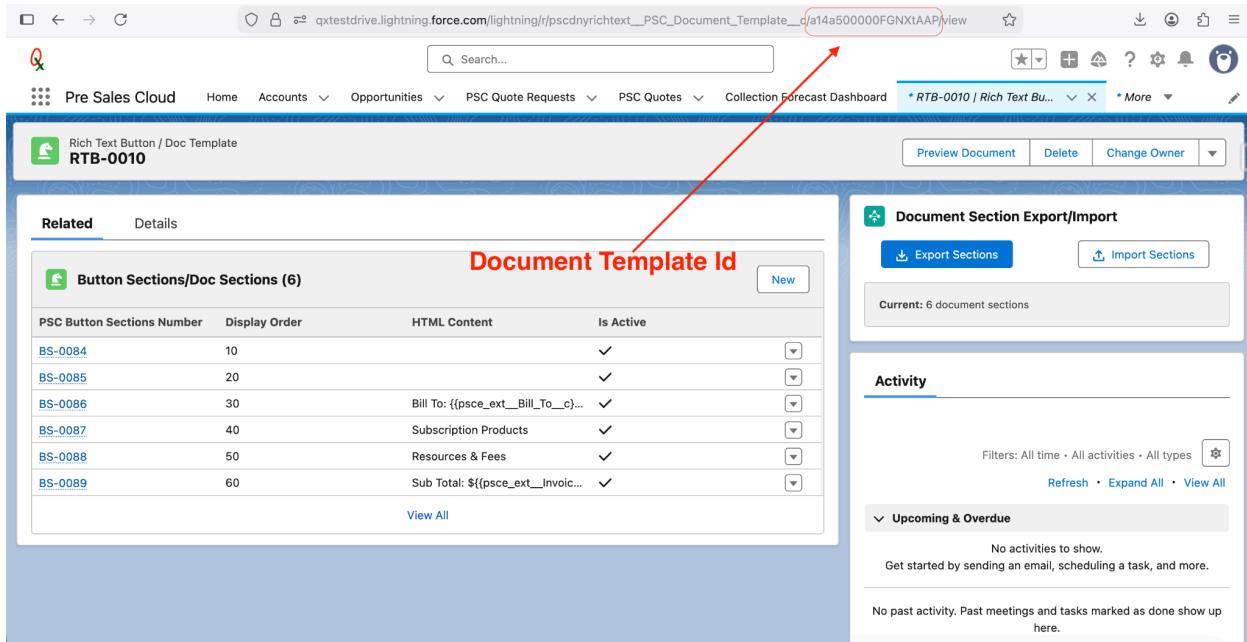
Insert Field: [-- Insert Merge Field --](#) [v](#) [Insert Operator](#) [v](#)

Functions: [-- All Function Categories](#) [v](#)

`/flow/drte_ext/GenerateMassDocument?
SFDCDocumentTemplateId=a14a500000FGNxtAAP&SFDCObjectName=psce_ext__Invoice__c&SFDCDocument
FileNamePrefix=INV-2005-SIMPLE-`

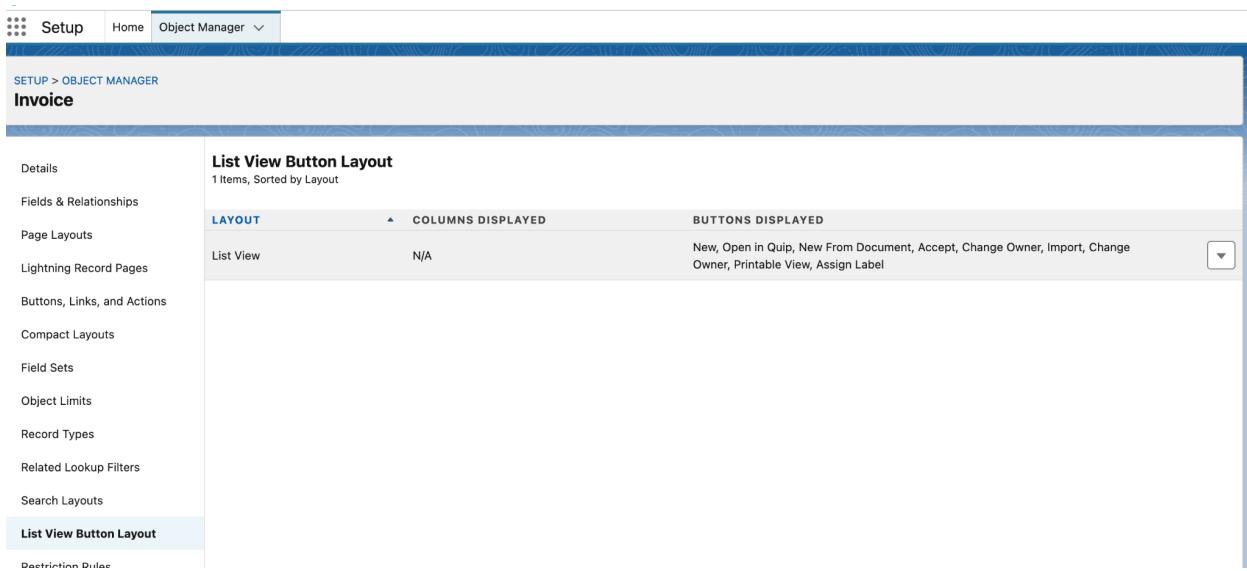
[Insert Selected Function](#)

Document Template id is the SFDC record id of your rich text button/document template related to the object you selected, in this example we are using document template id of 'Invoice Document' doc template.



Step 2: Add the Button to the List View Layout

1. While still in the Object Manager for the Target Object, navigate to **List View Button Layout**.



2. Click **Edit** next to the List View layout you wish to modify.
3. Move the newly created custom button (e.g., **Generate Documents**) from the **Available Buttons** list to the **Selected Buttons** list.

SETUP > OBJECT MANAGER

Invoice

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Custom Buttons

Available Buttons	Selected Buttons
--None--	Generate Invoice Document
Add	
Remove	
	Up
	Down

4. Click **Save**.

The Mass Merge feature is now configured and ready for end-user deployment.

Pre Sales Cloud Home Accounts Opportunities PSC Quote Requests PSC Quotes Collection Forecast Dashboard Invoices My Time More

Invoices All Opens (New View) Ready to Generate Document in Bulk

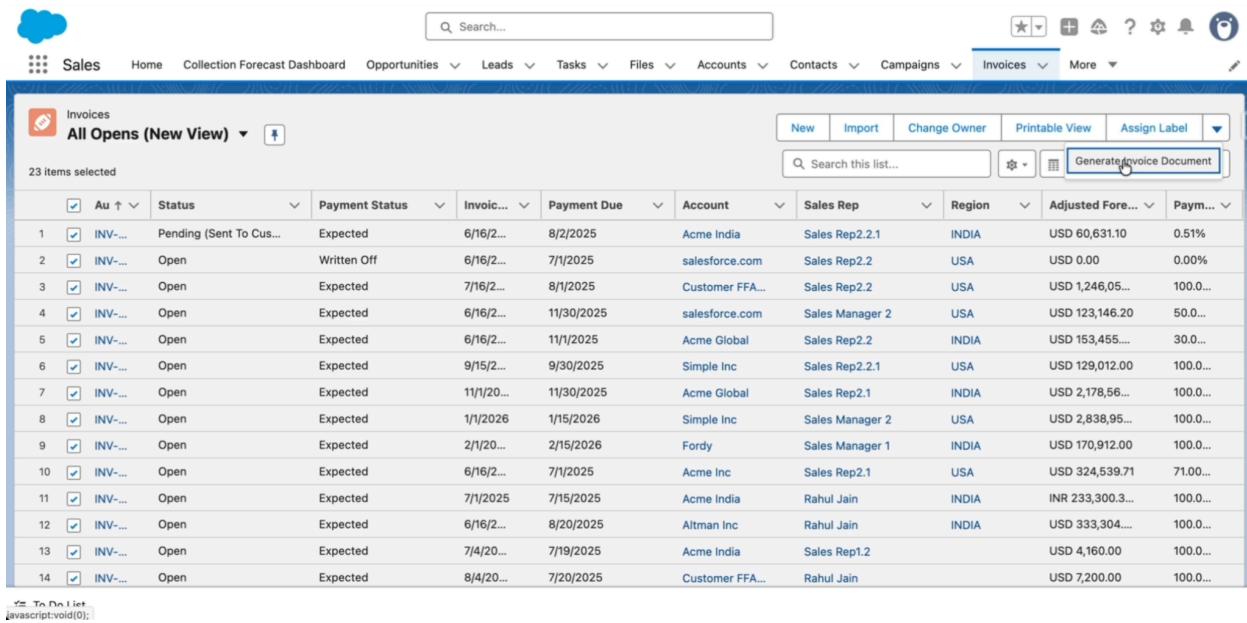
Items • Sorted by Auto Invoice No. • Filtered by Status • Updated a few seconds ago

Au ↑	Status	Payment Status	Invoice No.	Payment Due	Account	Sales Rep	Region	Adjusted Forecast	Paym...	
1	INV-...	Pending (Sent To Cus...	Expected	6/16/2...	8/2/2025	Acme India	Sales Rep2.1	INDIA	USD 60,631.10	0.51%
2	INV-...	Open	Written Off	6/16/2...	7/1/2025	salesforce.com	Sales Rep2.2	USA	USD 0.00	0.00%
3	INV-...	Open	Expected	7/16/2...	8/1/2025	Customer FFA...	Sales Rep2.2	USA	USD 1,246,05...	100.0...
4	INV-...	Open	Expected	6/16/2...	11/30/2025	salesforce.com	Sales Manager 2	USA	USD 123,146.20	50.0...
5	INV-...	Open	Expected	6/16/2...	11/1/2025	Acme Global	Sales Rep2.2	INDIA	USD 153,455...	30.0...
6	INV-...	Open	Expected	9/15/2...	9/30/2025	Simple Inc	Sales Rep2.2.1	USA	USD 129,012.00	100.0...
7	INV-...	Open	Expected	11/1/20...	11/30/2025	Acme Global	Sales Rep2.1	INDIA	USD 2,178,56...	100.0...
8	INV-...	Open	Expected	1/1/2026	1/15/2026	Simple Inc	Sales Manager 2	USA	USD 2,838,95...	100.0...
9	INV-...	Open	Expected	2/1/20...	2/15/2026	Fordy	Sales Manager 1	INDIA	USD 170,912.00	100.0...
10	INV-...	Open	Expected	6/16/2...	7/1/2025	Acme Inc	Sales Rep2.1	USA	USD 324,539.71	71.00...
11	INV-...	Open	Expected	7/1/2025	7/15/2025	Acme India	Rahul Jain	INDIA	INR 233,300.3...	100.0...
12	INV-...	Open	Expected	6/16/2...	8/20/2025	Altman Inc	Rahul Jain	INDIA	USD 333,304...	100.0...

End-User Workflow - Mass Merge / Bulk Document Generation

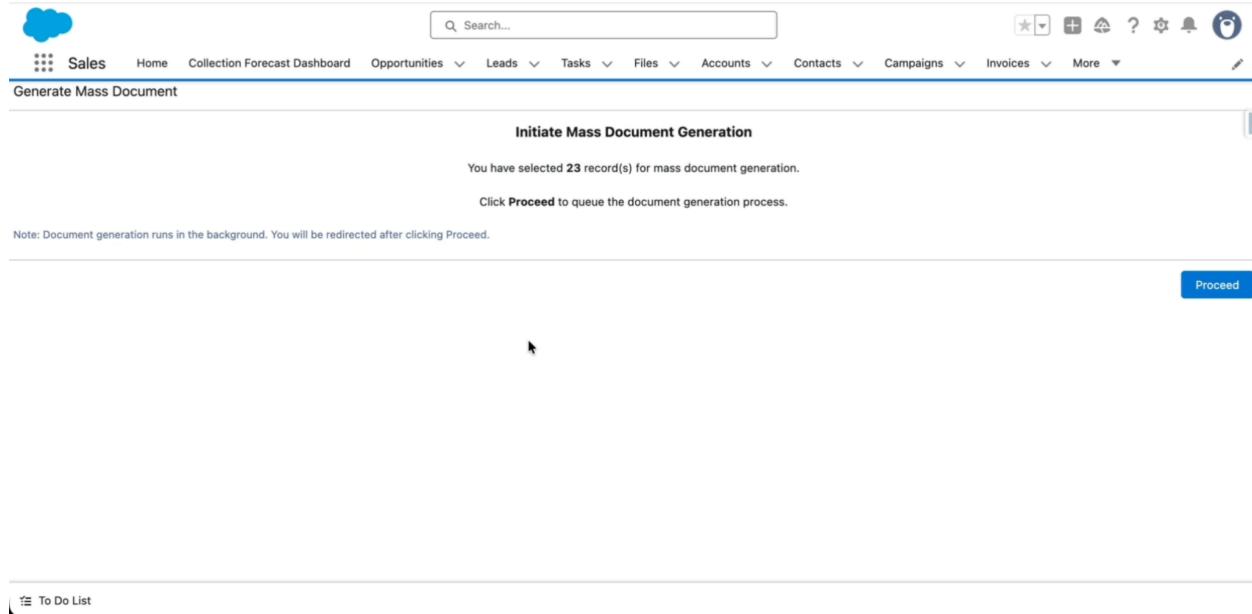
The bulk generation process is initiated by the end-user directly from a standard or custom List View.

- 1. Prepare the List View:** The user navigates to the List View of the target object (e.g., Invoices). They should apply appropriate filters to ensure the view displays **only** the records for which documents need to be generated.
- 2. Select Records:** The user selects the checkboxes next to the desired records.

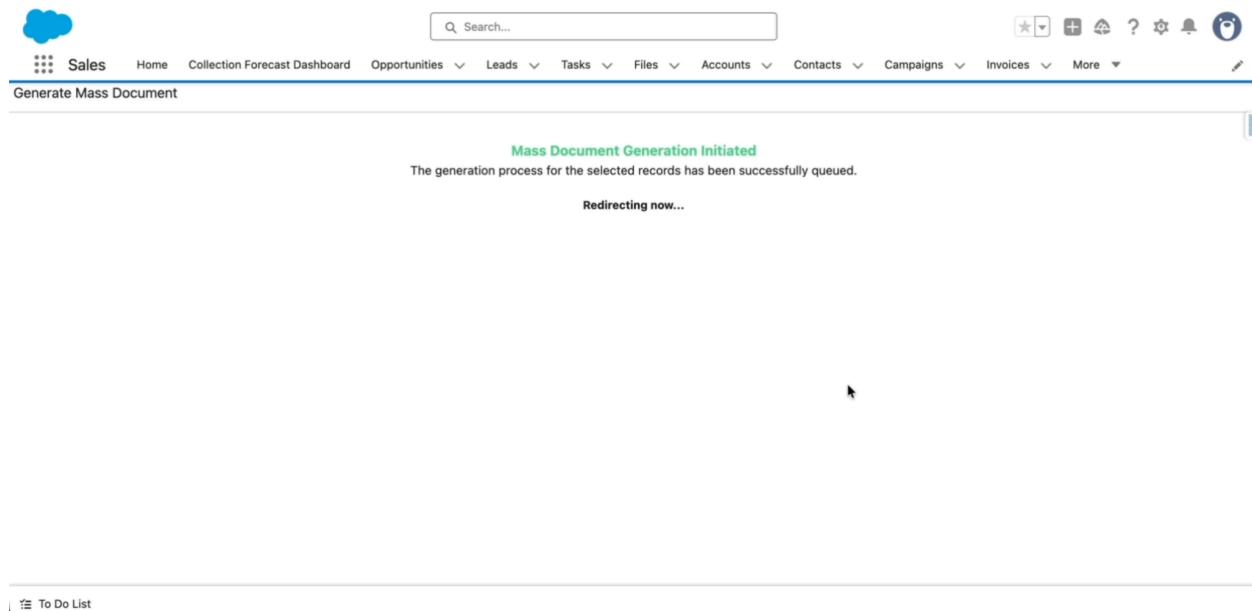


The screenshot shows a Salesforce List View for the 'Invoices' object. The view is titled 'All Opens (New View)'. The toolbar at the top includes standard buttons like New, Import, Change Owner, and Print View, along with a custom button labeled 'Generated Invoice Document' which is highlighted with a blue box. The main table displays 23 items selected, with columns for ID, Status, Payment Status, Invoice Date, Payment Due, Account, Sales Rep, Region, Adjusted Forecast, and Payment Method. The data includes various invoice details such as 'Pending (Sent To Cus...)', 'Written Off', and 'Expected' statuses, and payment due dates ranging from 6/16/2025 to 8/4/2025.

- 3. Initiate Merge:** The user clicks the custom button (e.g., "Generate Documents" or "Bulk Invoice Generation") located above the list view.



4. **Confirm and Proceed:** A confirmation screen will appear, showing the number of selected records and prompting the user to confirm the action. The user clicks **Proceed**.



5. **Monitor Processing:** The user is immediately redirected to a **Batch Record** screen. This record serves as the central log for the background process.

Object API Name	Total Records To Process	In-Progress	Success	Fail
psce_ext_Invoice_c	23	23	0	0

- The batch status will typically update quickly (e.g., from **Queued** to **Processing**).
- The screen will show the status of individual records as the Document Content is built and PDF generation is initiated.

DRTE Batch Item Name	Status	Completion Status	SFDC Record Id
BATCHITEM-000037	Document Built	In-Progress	a1ea5000006RIafAAK
BATCHITEM-000038	Document Built	In-Progress	a1ea5000006RIFVAA0
BATCHITEM-000039	Document Built	In-Progress	a1ea5000006RIH7AAK
BATCHITEM-000040	Document Built	In-Progress	a1ea5000006RIKLAA0
BATCHITEM-000041	Document Built	In-Progress	a1ea5000006RIlxAAK
BATCHITEM-000042	Document Built	In-Progress	a1ea5000006RIc5AAC
BATCHITEM-000043	Document Built	In-Progress	a1ea5000006RIJJAAS
BATCHITEM-000044	Document Built	In-Progress	a1ea5000006RinNAAS
BATCHITEM-000045	Document Built	In-Progress	a1ea5000006RlozAAC
BATCHITEM-000046	Document Built	In-Progress	a1ea5000006RisDAAS
BATCHITEM-000047	Document Built	In-Progress	a1ea5000006RltpAAC
BATCHITEM-000048	Document Built	In-Progress	a1ea5000006RnCTAA0
BATCHITEM-000049	Document Built	In-Progress	a1ea5000006hmifAAA
BATCHITEM-000050	Document Built	In-Progress	a1ea5000006hoXZAAY

DRTE Batch Master
DRTEBATCH-00000002

Object API Name: psce_ext_invoice_c Total Records To Process: 23 In-Progress: 1 Success: 22 Fail: 0

Related Details

Information

DRTE Batch Master Name: DRTEBATCH-00000002 Owner: Rahul Jain Object API Name: psce_ext_invoice_c Document Template Id: a14a500000FGNxtAAP

System Information

Currency: Last Modified By:

DRTE Batch Items (10+)

- BATCHITEM-000037: Status: PDF Generated, Completion Stat.: Success, SFDC Record Id: a1ea5000006RIAAK
- BATCHITEM-000038: Status: PDF Generated, Completion Stat.: Success, SFDC Record Id: a1ea5000006RIFVAA0
- BATCHITEM-000039: Status: PDF Generated, Completion Stat.: Success, SFDC Record Id: a1ea5000006RIH7AAK
- BATCHITEM-000040: Status: PDF Generated, Completion Stat.: Success, SFDC Record Id: a1ea5000006RIH7AAK

6. Completion: Once the batch status shows **Completed**, the documents have been generated.

Invoice
INV-000

Account: Acme India Status: Pending (Sent To Customer) Sub Total: USD 60,631.10 Additional Discount: USD 0.00 Total Fees: USD 60,631.10 Total: USD 60,631.10

Related Details Invoice Document

Information

Invoice Number: Sales Rep: Sales Rep 2.2.1 Region: INDIA Total Applied Credit Amount: USD 0.00 Total Applied Debit Amount: USD 0.00

Files (1)

INV-2005-SIMPLE_-2025-12-11.pdf
Dec 11, 2025 - 3KB - pdf

Activity Chatter

Filters: All time • All activities • All types Refresh • Expand All • View All

7. Access Documents: All generated PDF documents are automatically saved to the **Files** related list of their respective records (e.g., the generated Invoice PDF will be saved to the related Invoice record).