



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. | a01XXXXXXXXXXXXXXXXXX |
| 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.

SETUP > OBJECT MANAGER
Invoice

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Details

Description

API Name
PSCC__c__Invoice__c

Custom
✓

Singular Label
Invoice

Plural Label
Invoices

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Activated

Edit

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

SETUP > OBJECT MANAGER
Invoice

Buttons, Links, and Actions

8 Items, Sorted by Label

Q Quick Find

New Action

New Button or Link

| LABEL | NAME | DESCRIPTION | TYPE | CONTENT SOURCE | OVERRIDDEN |
|-------------|--------|-------------|------|----------------|------------|
| Accept | Accept | | | Standard page | |
| Clone | Clone | | | Standard page | |
| Delete | Delete | | | Standard page | |
| Edit | Edit | | | Standard page | |
| Invoice Tab | Tab | | | Standard page | |

4. Configure the button details:

- Label:** Provide a user-friendly label (e.g., [Generate Documents](#) or [Bulk Invoice Generation](#)).
- Name:** Enter the API name (e.g., [Generate_Documents](#)).
- Display Type:** Select **List Button**.
- Ensure **"Display Checkboxes (for Multi-Record Selection)"** is checked.
- Content Source:** Select **URL**.
- 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 ⓘ

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

Insert Field

Insert Operator

Functions

ABS
ACOS
ADDMONTHS
AGE
AGEON
AND
[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.

Document Template Id

| PSC Button Sections Number | Display Order | HTML Content | Is Active |
|----------------------------|---------------|--------------------------------------|-----------|
| BS-0084 | 10 | | ✓ |
| BS-0085 | 20 | | ✓ |
| BS-0086 | 30 | Bill To: {{psce_ext__Bill_To__c}}... | ✓ |
| BS-0087 | 40 | Subscription Products | ✓ |
| BS-0088 | 50 | Resources & Fees | ✓ |
| BS-0089 | 60 | Sub Total: \${{psce_ext__Invoic...}} | ✓ |

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**.

SETUP > OBJECT MANAGER
Invoice

List View Button Layout
1 Items, Sorted by Layout

| LAYOUT | COLUMNS DISPLAYED | BUTTONS DISPLAYED |
|-----------|-------------------|--|
| List View | N/A | New, Open in Quip, New From Document, Accept, Change Owner, Import, Change Owner, Printable View, Assign Label |

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

☒ Accept [Accept]
☒ Change Owner [ChangeOwner]
☒ Import [Import]
☒ Change Owner [MassChangeOwner]
☒ Printable View [PrintableListView]
☒ Assign Label [MassAssignRecordLabel]

Custom Buttons

Available Buttons

--None--

Add
Remove

Selected Buttons

Generate Invoice Document

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**

New Import Change Owner Printable View Assign Label **Generate Invoice Document**

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

| | Au ↑ | Status | Payment Status | Invoice... | Payment Due | Account | Sales Rep | Region | Adjusted Fore... | Paym... | |
|----|--------------------------|---------|-------------------------|-------------|-------------|------------|-----------------|-----------------|------------------|------------------|----------|
| 1 | <input type="checkbox"/> | INV-... | Pending (Sent To Cus... | Expected | 6/16/2... | 8/2/2025 | Acme India | Sales Rep2.2.1 | INDIA | USD 60,631.10 | 0.51% |
| 2 | <input type="checkbox"/> | INV-... | Open | Written Off | 6/16/2... | 7/1/2025 | salesforce.com | Sales Rep2.2 | USA | USD 0.00 | 0.00% |
| 3 | <input type="checkbox"/> | INV-... | Open | Expected | 7/16/2... | 8/1/2025 | Customer FFA... | Sales Rep2.2 | USA | USD 1,246,05... | 100.0... |
| 4 | <input type="checkbox"/> | INV-... | Open | Expected | 6/16/2... | 11/30/2025 | salesforce.com | Sales Manager 2 | USA | USD 123,146.20 | 50.0... |
| 5 | <input type="checkbox"/> | INV-... | Open | Expected | 6/16/2... | 11/1/2025 | Acme Global | Sales Rep2.2 | INDIA | USD 153,455... | 30.0... |
| 6 | <input type="checkbox"/> | INV-... | Open | Expected | 9/15/2... | 9/30/2025 | Simple Inc | Sales Rep2.2.1 | USA | USD 129,012.00 | 100.0... |
| 7 | <input type="checkbox"/> | INV-... | Open | Expected | 11/1/20... | 11/30/2025 | Acme Global | Sales Rep2.1 | INDIA | USD 2,178,56... | 100.0... |
| 8 | <input type="checkbox"/> | INV-... | Open | Expected | 1/1/2026 | 1/15/2026 | Simple Inc | Sales Manager 2 | USA | USD 2,838,95... | 100.0... |
| 9 | <input type="checkbox"/> | INV-... | Open | Expected | 2/1/20... | 2/15/2026 | Fordy | Sales Manager 1 | INDIA | USD 170,912.00 | 100.0... |
| 10 | <input type="checkbox"/> | INV-... | Open | Expected | 6/16/2... | 7/1/2025 | Acme Inc | Sales Rep2.1 | USA | USD 324,539.71 | 71.00... |
| 11 | <input type="checkbox"/> | INV-... | Open | Expected | 7/1/2025 | 7/15/2025 | Acme India | Rahul Jain | INDIA | INR 233,300.3... | 100.0... |
| 12 | <input type="checkbox"/> | 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

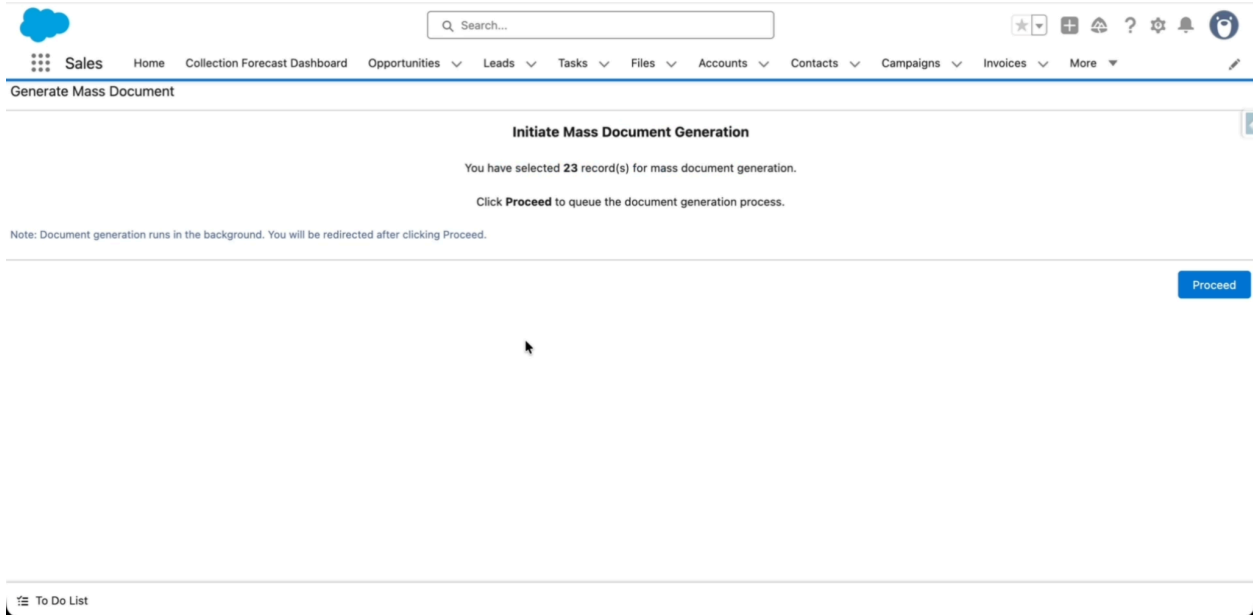
The bulk generation process is initiated by the end-user directly from a standard or custom List View.

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.

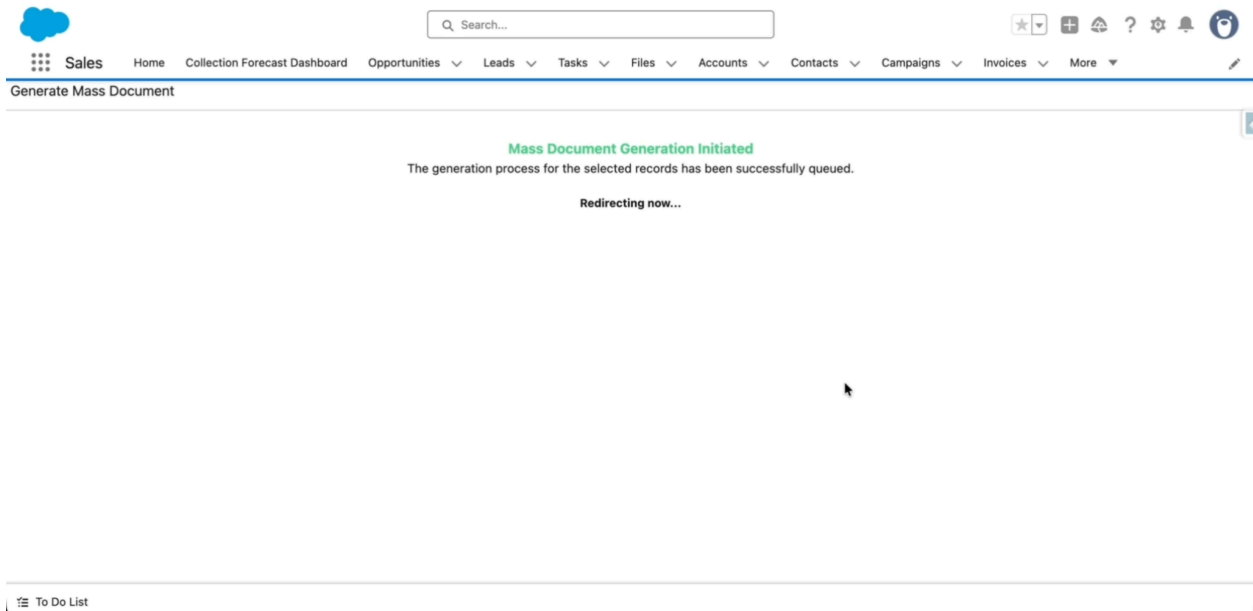
The screenshot displays the Salesforce Invoices List View. The top navigation bar includes a search bar and various utility icons. The main header shows 'Invoices' and 'All Opens (New View)'. Below the header, there are buttons for 'New', 'Import', 'Change Owner', 'Printable View', and 'Assign Label'. A 'Generate Invoice Document' button is highlighted with a red circle. The table below lists 23 items, all of which are selected (checkboxes are checked). The table columns include: ☒, Au ↑, Status, Payment Status, Invoic..., Payment Due, Account, Sales Rep, Region, Adjusted Fore..., and Paym....

| <input checked="" type="checkbox"/> | Au ↑ | Status | Payment Status | Invoic... | Payment Due | Account | Sales Rep | Region | Adjusted Fore... | Paym... | |
|-------------------------------------|-------------------------------------|---------|-------------------------|-------------|-------------|------------|-----------------|-----------------|------------------|------------------|----------|
| 1 | <input checked="" type="checkbox"/> | INV-... | Pending (Sent To Cus... | Expected | 6/16/2... | 8/2/2025 | Acme India | Sales Rep2.2.1 | INDIA | USD 60,631.10 | 0.51% |
| 2 | <input checked="" type="checkbox"/> | INV-... | Open | Written Off | 6/16/2... | 7/1/2025 | salesforce.com | Sales Rep2.2 | USA | USD 0.00 | 0.00% |
| 3 | <input checked="" type="checkbox"/> | INV-... | Open | Expected | 7/16/2... | 8/1/2025 | Customer FFA... | Sales Rep2.2 | USA | USD 1,246,05... | 100.0... |
| 4 | <input checked="" type="checkbox"/> | INV-... | Open | Expected | 6/16/2... | 11/30/2025 | salesforce.com | Sales Manager 2 | USA | USD 123,146.20 | 50.0... |
| 5 | <input checked="" type="checkbox"/> | INV-... | Open | Expected | 6/16/2... | 11/1/2025 | Acme Global | Sales Rep2.2 | INDIA | USD 153,455... | 30.0... |
| 6 | <input checked="" type="checkbox"/> | INV-... | Open | Expected | 9/15/2... | 9/30/2025 | Simple Inc | Sales Rep2.2.1 | USA | USD 129,012.00 | 100.0... |
| 7 | <input checked="" type="checkbox"/> | INV-... | Open | Expected | 11/1/20... | 11/30/2025 | Acme Global | Sales Rep2.1 | INDIA | USD 2,178,56... | 100.0... |
| 8 | <input checked="" type="checkbox"/> | INV-... | Open | Expected | 1/1/2026 | 1/15/2026 | Simple Inc | Sales Manager 2 | USA | USD 2,838,95... | 100.0... |
| 9 | <input checked="" type="checkbox"/> | INV-... | Open | Expected | 2/1/20... | 2/15/2026 | Fordy | Sales Manager 1 | INDIA | USD 170,912.00 | 100.0... |
| 10 | <input checked="" type="checkbox"/> | INV-... | Open | Expected | 6/16/2... | 7/1/2025 | Acme Inc | Sales Rep2.1 | USA | USD 324,539.71 | 71.00... |
| 11 | <input checked="" type="checkbox"/> | INV-... | Open | Expected | 7/1/2025 | 7/15/2025 | Acme India | Rahul Jain | INDIA | INR 233,300.3... | 100.0... |
| 12 | <input checked="" type="checkbox"/> | INV-... | Open | Expected | 6/16/2... | 8/20/2025 | Altman Inc | Rahul Jain | INDIA | USD 333,304... | 100.0... |
| 13 | <input checked="" type="checkbox"/> | INV-... | Open | Expected | 7/4/20... | 7/19/2025 | Acme India | Sales Rep1.2 | | USD 4,160.00 | 100.0... |
| 14 | <input checked="" type="checkbox"/> | INV-... | Open | Expected | 8/4/20... | 7/20/2025 | Customer FFA... | Rahul Jain | | USD 7,200.00 | 100.0... |

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.

DRTE Batch Master

DRTEBATCH-00000002

Edit Delete Clone

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

Related Details

Information

DRTE Batch Master Name
DRTEBATCH-00000002

Owner
Rahul Jain

Document Name Prefix
INV-2005-SIMPLE-

Object API Name
psce_ext__Invoice__c

Document Template Id
a14a500000FGNxtAAP

System Information

Currency

Last Modified By

DRTE Batch Items (10+)

BATCHITEM-000037
Status: Document Built
Completion Stat... In-Progress
SFDC Record Id: a1ea5000006RIaFAAK

BATCHITEM-000038
Status: Document Built
Completion Stat... In-Progress
SFDC Record Id: a1ea5000006RIFVAA0

BATCHITEM-000039
Status: Document Built
Completion Stat... In-Progress
SFDC Record Id: a1ea5000006RIH7AAK

BATCHITEM-000040
Status: Document Built
Completion Stat... In-Progress

To Do List

- 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 Batches Master > DRTEBATCH-00000002

DRTE Batch Items

23 Items • Sorted by Record ID • Updated a few seconds ago

New

Settings Copy Filter

| <input type="checkbox"/> | DRTE Batch Item Name | Status | Completion Status | SFDC Record Id |
|--------------------------|---|----------------|-------------------|--------------------|
| 1 | <input type="checkbox"/> BATCHITEM-000037 | Document Built | In-Progress | a1ea5000006RIaFAAK |
| 2 | <input type="checkbox"/> BATCHITEM-000038 | Document Built | In-Progress | a1ea5000006RIFVAA0 |
| 3 | <input type="checkbox"/> BATCHITEM-000039 | Document Built | In-Progress | a1ea5000006RIH7AAK |
| 4 | <input type="checkbox"/> BATCHITEM-000040 | Document Built | In-Progress | a1ea5000006RIKLAA0 |
| 5 | <input type="checkbox"/> BATCHITEM-000041 | Document Built | In-Progress | a1ea5000006RILxAAK |
| 6 | <input type="checkbox"/> BATCHITEM-000042 | Document Built | In-Progress | a1ea5000006Ric5AAC |
| 7 | <input type="checkbox"/> BATCHITEM-000043 | Document Built | In-Progress | a1ea5000006RIfJAAS |
| 8 | <input type="checkbox"/> BATCHITEM-000044 | Document Built | In-Progress | a1ea5000006RinNAAS |
| 9 | <input type="checkbox"/> BATCHITEM-000045 | Document Built | In-Progress | a1ea5000006RlozAAC |
| 10 | <input type="checkbox"/> BATCHITEM-000046 | Document Built | In-Progress | a1ea5000006RisDAAS |
| 11 | <input type="checkbox"/> BATCHITEM-000047 | Document Built | In-Progress | a1ea5000006RitpAAC |
| 12 | <input type="checkbox"/> BATCHITEM-000048 | Document Built | In-Progress | a1ea5000006RnCTAA0 |
| 13 | <input type="checkbox"/> BATCHITEM-000049 | Document Built | In-Progress | a1ea5000006hmIfAAA |
| 14 | <input type="checkbox"/> BATCHITEM-000050 | Document Built | In-Progress | a1ea5000006hoXZAAy |

To Do List

The screenshot shows the 'DRTE Batch Master' interface for batch **DRTEBATCH-00000002**. The top navigation bar includes 'Sales', 'Home', 'Collection Forecast Dashboard', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', and a search bar. The batch summary shows: Object API Name: **psce_ext__Invoice__c**, Total Records To Process: 23, In-Progress: 1, Success: 22, Fail: 0. The 'Details' tab is active, showing 'Information' and 'System Information' sections. The 'Information' section includes fields for DRTE Batch Master Name, Document Name Prefix, Owner (Rahul Jain), Object API Name, and Document Template Id. The 'System Information' section includes Currency and Last Modified By. On the right, a list of 'DRTE Batch Items (10+)' is shown, each with a status of 'PDF Generated' and 'Success'.

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

The screenshot shows the 'Invoice' interface for invoice **INV-000**. The top navigation bar includes 'Sales', 'Home', 'Collection Forecast Dashboard', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Invoices', and a search bar. The invoice summary shows: 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. The 'Details' tab is active, showing 'Information' and 'Invoice Document' sections. The 'Information' section includes fields for Invoice Number, Sales Rep, Region, Total Applied Credit Amount, Total Applied Debit Amount, Account, Invoice Date, Payment Term, Status, and Payment Status. The 'Invoice Document' section shows a list of files, including 'INV-2005-SIMPLE-_2025-12-11.pdf'. The 'Activity' section shows a list of activities, including 'View All'.

- 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).