



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_

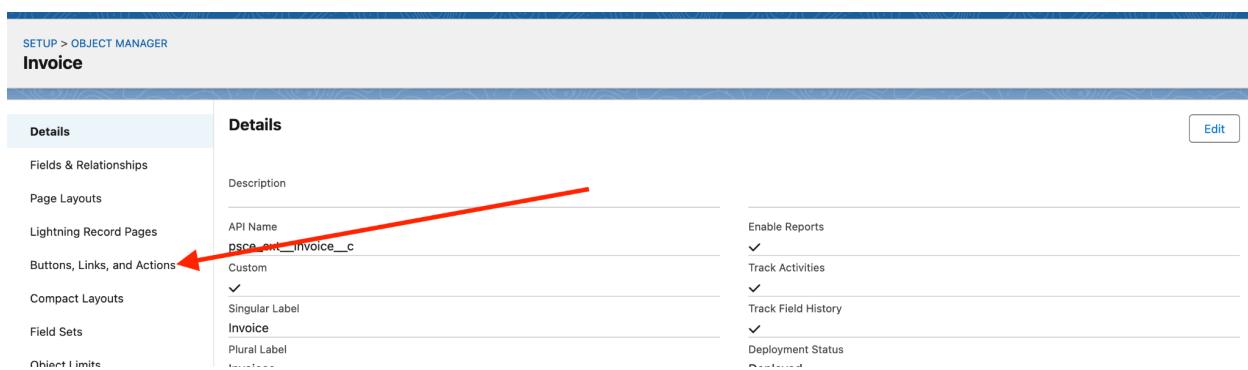
Generic URL Structure:

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

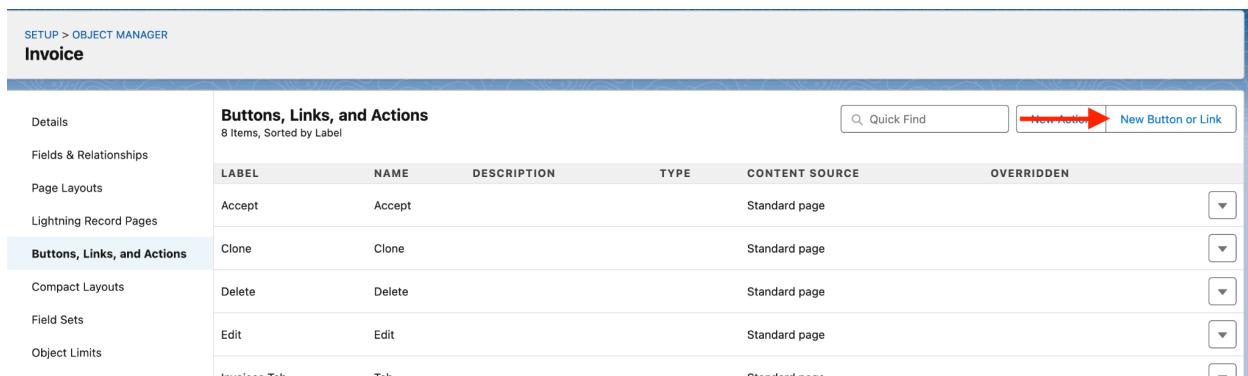
Important Note: The URL key names (e.g., `SFDCDocumentTemplateId`) must be used exactly as shown for the feature to function correctly.

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

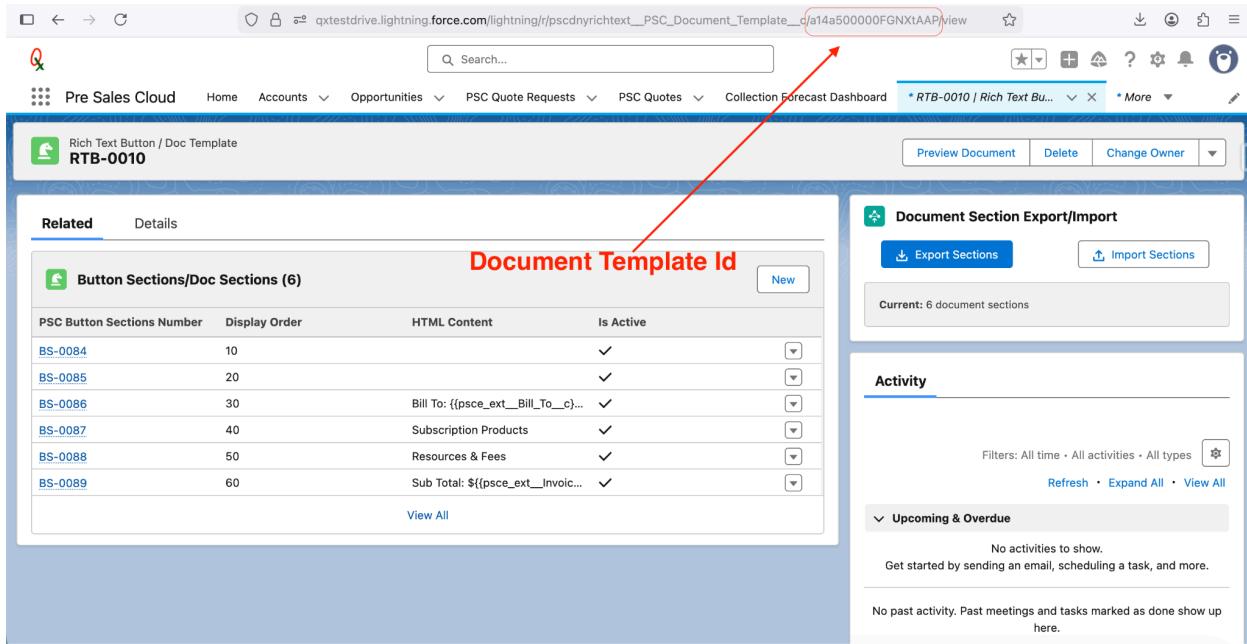
Label	<input type="text" value="Generate Invoice Document"/>
Name	<input type="text" value="Generate_Invoice_Document"/> i
Description	<input type="text"/>
Display Type	<input type="radio"/> Detail Page Link View example <input type="radio"/> Detail Page Button View example <input checked="" type="radio"/> List Button View example <input checked="" type="checkbox"/> Display Checkboxes (for Multi-Record Selection)
Behavior	<input type="text" value="Display in existing window with sidebar"/> View Behavior Options
Content Source	<input type="text" value="URL"/>

Select Field Type: **Invoice** Insert Field: -- Insert Merge Field -- Insert Operator Functions: -- All Function Categories

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

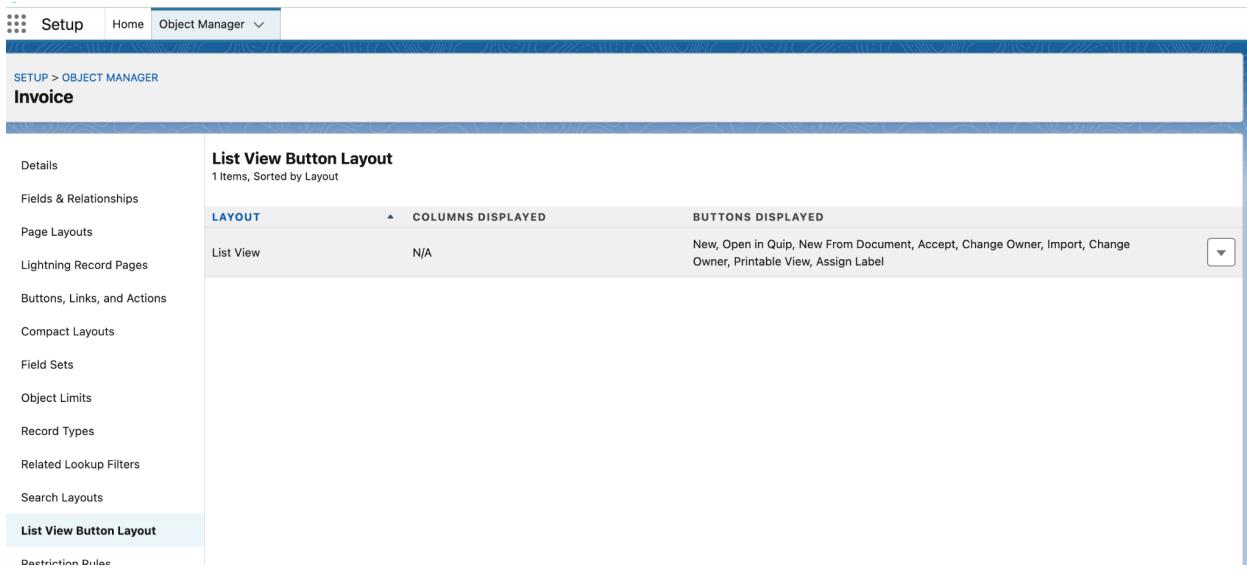
ABS
ACOS
ADDMONTHS
AGE
AGEON
AND
[Insert Selected Function](#)

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.



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

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

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 Up Down Remove

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

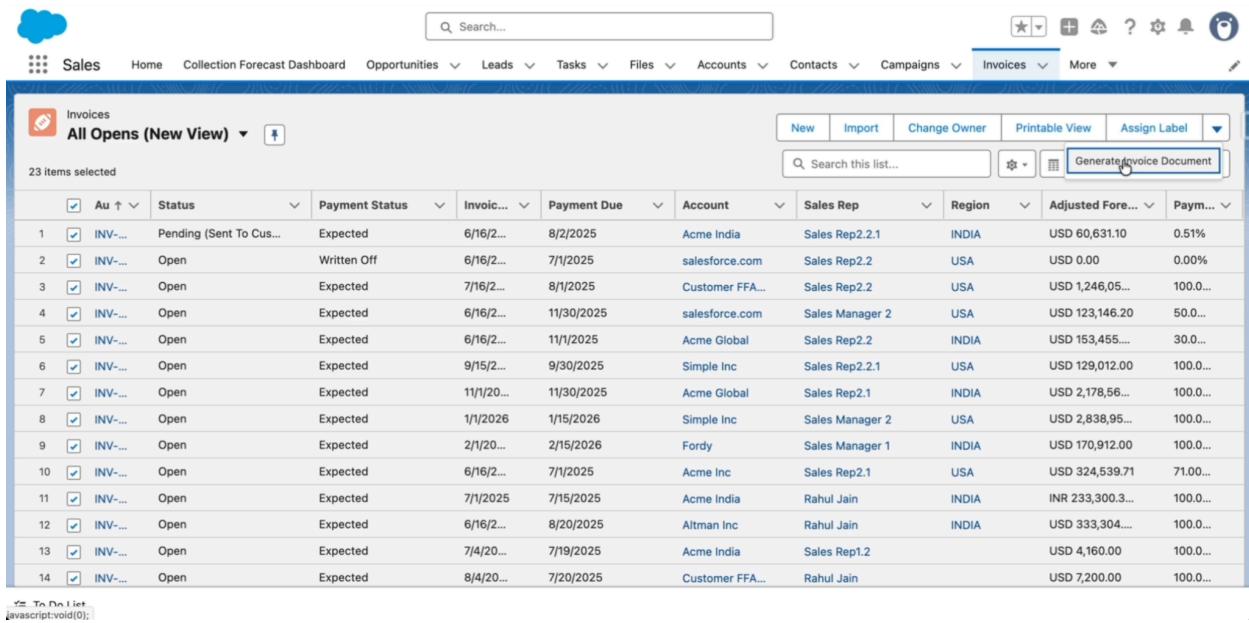
Items • Sorted by Auto Invoice No. • Filtered by Status • Updated a few seconds ago

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

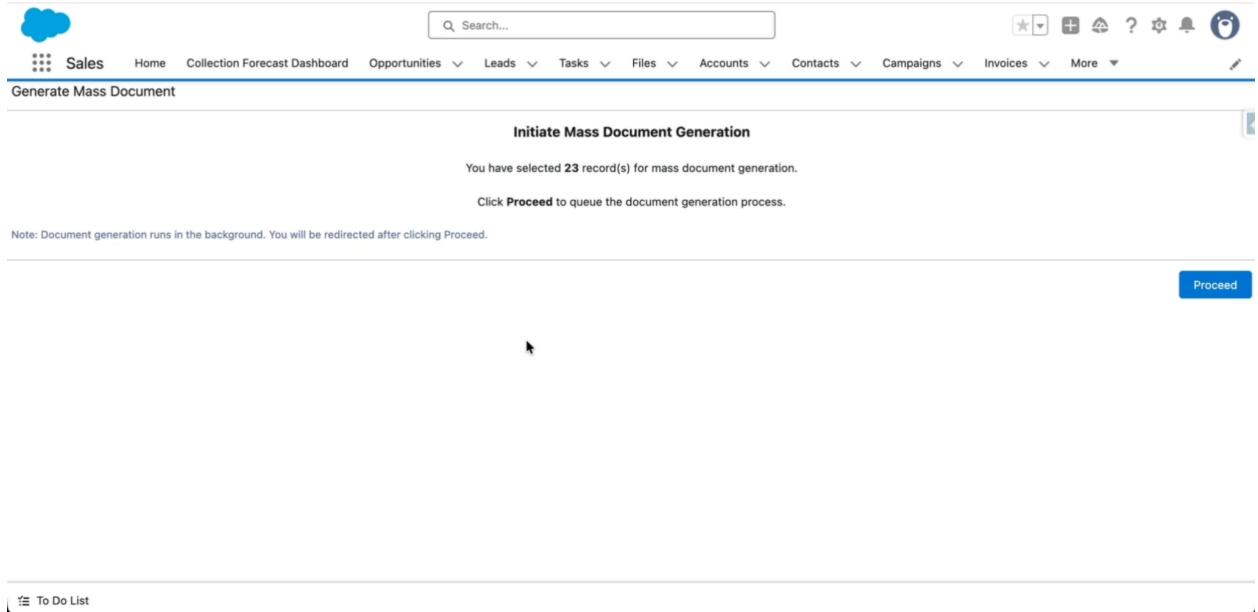
- Prepare the List View:** The user navigates to the List View of the target object (e.g., Invoices). They should apply appropriate filters to ensure the view displays **only** the records for which documents need to be generated.
- Select Records:** The user selects the checkboxes next to the desired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



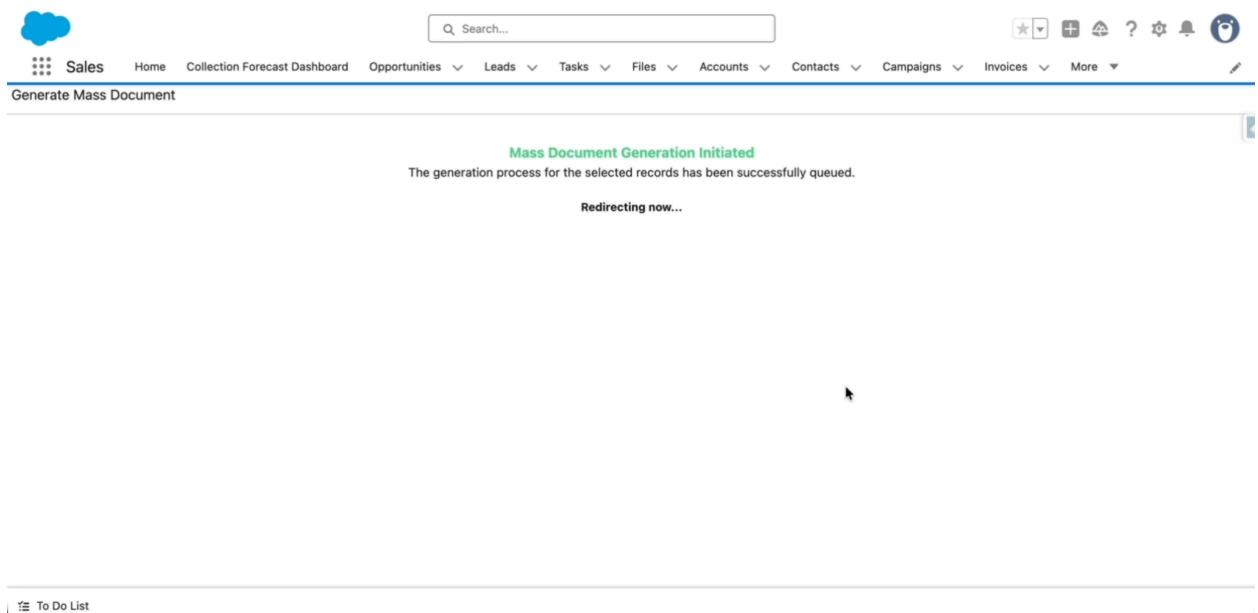
A screenshot of a Salesforce application interface. The top navigation bar includes a cloud icon, Sales, Home, Collection Forecast Dashboard, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Invoices (which is currently selected), and More. Below the navigation is a search bar with placeholder 'Search...'. The main content area shows a list of invoices under the heading 'Invoices All Opens (New View)'. There are 23 items selected, indicated by checked checkboxes in the first column. The columns represent various fields: Au (sorted ascending), Status, Payment Status, Invoice Number (sorted descending), Payment Due, Account, Sales Rep, Region, Adjusted Forecast, and Payment Method. A toolbar above the list includes New, Import, Change Owner, Printable View, Assign Label, and a search bar for the list itself. A custom button labeled 'Generated Invoice Document' is visible in the toolbar, with a mouse cursor hovering over it. The bottom of the page shows a 'To Do List' section with the code 'Javascript:void(0);'.

	Au ↑	Status	Payment Status	Invoice #	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...

- 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

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
- Object API Name: psce_ext_Invoice_c
- Document Template Id: a14a500000FGNxtAAP

System Information

- Currency
- Last Modified By

DRTE Batch Items (10+)

ID	Status	Completion Stat.	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	a1ea5000006RILxAA0
BATCHITEM-000041	Document Built	In-Progress	a1ea5000006Ric5AAC
BATCHITEM-000042	Document Built	In-Progress	a1ea5000006RifJAA5
BATCHITEM-000043	Document Built	In-Progress	a1ea5000006RinNAAS
BATCHITEM-000044	Document Built	In-Progress	a1ea5000006RlozAAC
BATCHITEM-000045	Document Built	In-Progress	a1ea5000006RisDAAS
BATCHITEM-000046	Document Built	In-Progress	a1ea5000006RltpAAC
BATCHITEM-000047	Document Built	In-Progress	a1ea5000006RnCTAA0
BATCHITEM-000048	Document Built	In-Progress	a1ea5000006hmifAAA
BATCHITEM-000049	Document Built	In-Progress	a1ea5000006hoXZAY
BATCHITEM-000050	Document Built	In-Progress	a1ea5000006RiLxAA0

- 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

#	DRTE Batch Item Name	Status	Completion Status	SFDC Record Id
1	BATCHITEM-000037	Document Built	In-Progress	a1ea5000006RIAfAAK
2	BATCHITEM-000038	Document Built	In-Progress	a1ea5000006RIFVAA0
3	BATCHITEM-000039	Document Built	In-Progress	a1ea5000006RIH7AAK
4	BATCHITEM-000040	Document Built	In-Progress	a1ea5000006RILxAA0
5	BATCHITEM-000041	Document Built	In-Progress	a1ea5000006Ric5AAC
6	BATCHITEM-000042	Document Built	In-Progress	a1ea5000006RifJAA5
7	BATCHITEM-000043	Document Built	In-Progress	a1ea5000006RinNAAS
8	BATCHITEM-000044	Document Built	In-Progress	a1ea5000006RlozAAC
9	BATCHITEM-000045	Document Built	In-Progress	a1ea5000006RisDAAS
10	BATCHITEM-000046	Document Built	In-Progress	a1ea5000006RltpAAC
11	BATCHITEM-000047	Document Built	In-Progress	a1ea5000006RnCTAA0
12	BATCHITEM-000048	Document Built	In-Progress	a1ea5000006hmifAAA
13	BATCHITEM-000049	Document Built	In-Progress	a1ea5000006hoXZAY
14	BATCHITEM-000050	Document Built	In-Progress	a1ea5000006RiLxAA0

The screenshot shows the Salesforce interface for a DRTE Batch Master record named "DRTEBATCH-00000002". The top navigation bar includes Sales, Home, Collection Forecast Dashboard, Opportunities, Leads, Tasks, Files, Accounts, Contacts, and More. The main content area displays the following information:

- 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
 - Document Name Prefix: INV-2005-SIMPLE-
 - Owner: Rahul Jain
 - Object API Name: psce_ext_invoice_c
 - Document Template Id: a14a500000FGNxtAAP
- System Information:**
 - Currency
 - Last Modified By

DRTE Batch Items (10+):

ID	Status	Completion Stat...	SFDC Record Id
BATCHITEM-000037	PDF Generated	Success	a1ea5000006RIAAFK
BATCHITEM-000038	PDF Generated	Success	a1ea5000006RIFVAA0
BATCHITEM-000039	PDF Generated	Success	a1ea5000006RIH7AAK
BATCHITEM-000040	PDF Generated	Success	a1ea5000006RIH7AAK

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

The screenshot shows the Salesforce interface for an Invoice record named "INV-000". The top navigation bar includes Sales, Home, Collection Forecast Dashboard, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Invoices, and More. The main content area displays the following information:

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

Related Details:

- Information:**
 - Invoice Number: INV-000
 - Sales Rep: Sales Rep2.2.1
 - 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).