

Nutrient Document Merge - Functionality Guide

Overview

Nutrient Document Merge is a Salesforce Lightning application that enables users to preview, edit, and merge PDF files directly within the Opportunity record page.

The solution is implemented as a Lightning Web Component (LWC) that can be added to the Opportunity Lightning Record Page and configured by administrators.

The application operates entirely within Salesforce and does not rely on external systems.

Functional Objectives

The application is designed to:

- Display files associated with an Opportunity
- Allow users to preview PDF files within the component
- Enable editing of PDF documents
- Allow selection of multiple PDF files
- Merge selected files into a single PDF document
- Save merged files back to Salesforce

Functional Components

Lightning Web Component

Component Name: nutrientDocumentBundlingLWC

The component is deployed on the Opportunity Record Page.

Configurable Property

Available Sources:

Supported values:

- All
- Current Object
- Current Object and Related

This property controls which files are displayed in the component.

Functional Features

File Retrieval:

The component retrieves files based on the configured Available Sources setting.

Behavior:

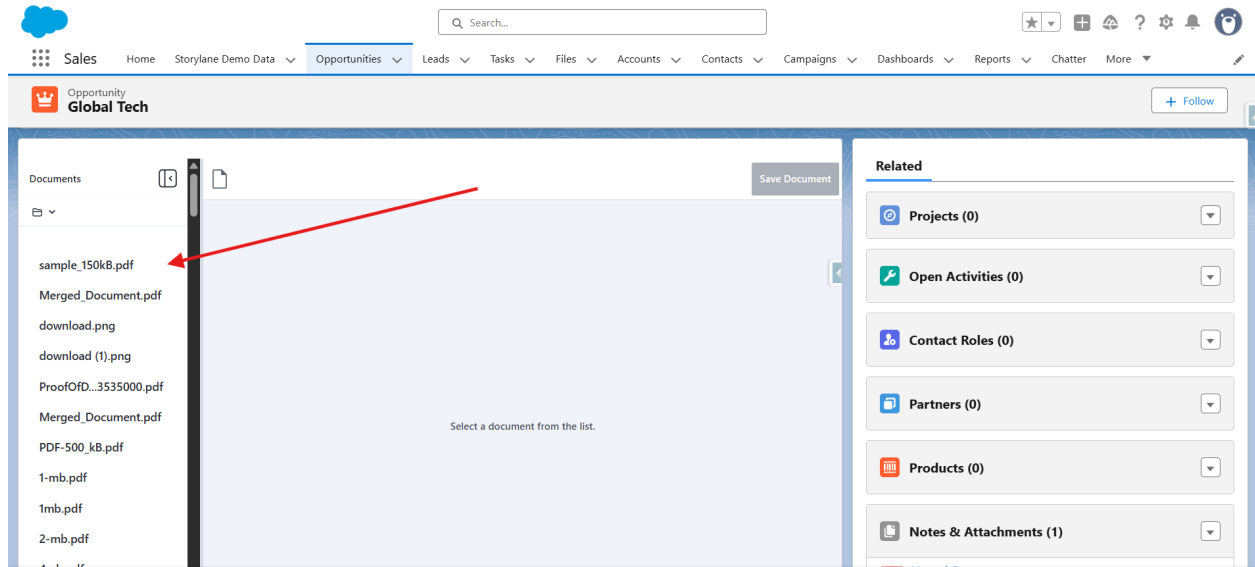
- If set to **All** → Displays all files in the org.
- If set to **Current Object** → Displays only files linked to the current Opportunity.
- If set to **Current Object and Related** → Displays files linked to the Opportunity and its related records.

File Preview

Users can preview PDF files directly inside the component.

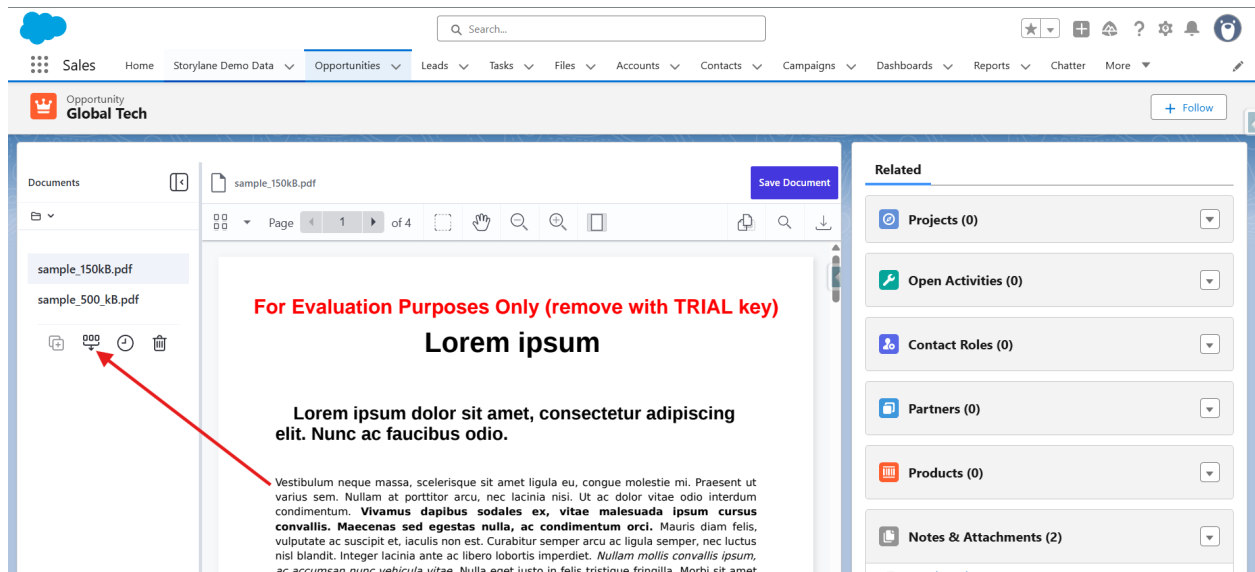
Behavior:

- Clicking a file opens it in the preview panel.
- Users can scroll through pages.
- No download is required for preview.



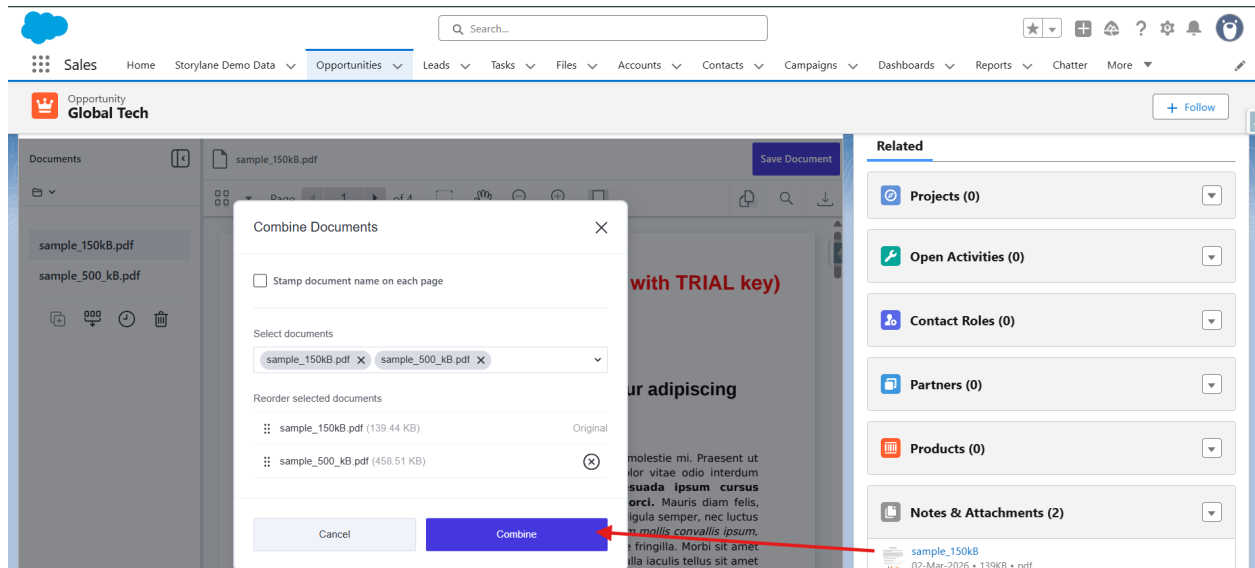
File Selection

Users can select multiple PDF files for merging.



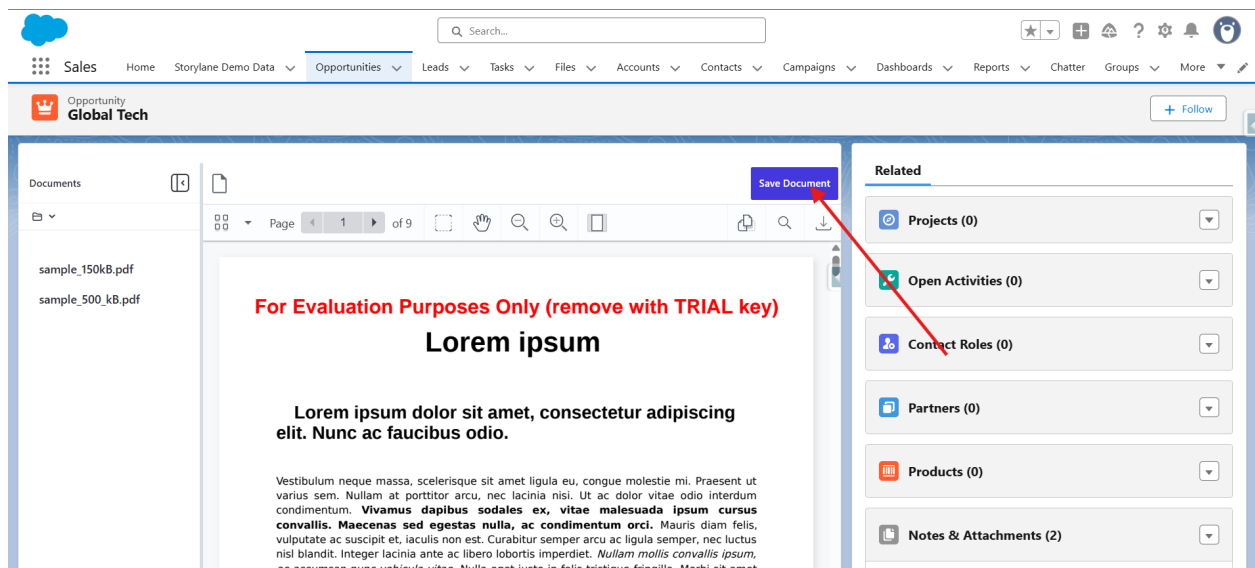
Behavior:

- Files are selectable using checkboxes.
- At least two files must be selected to enable the merge action.



PDF Merge Functionality

The application merges selected PDF files into a single consolidated document.



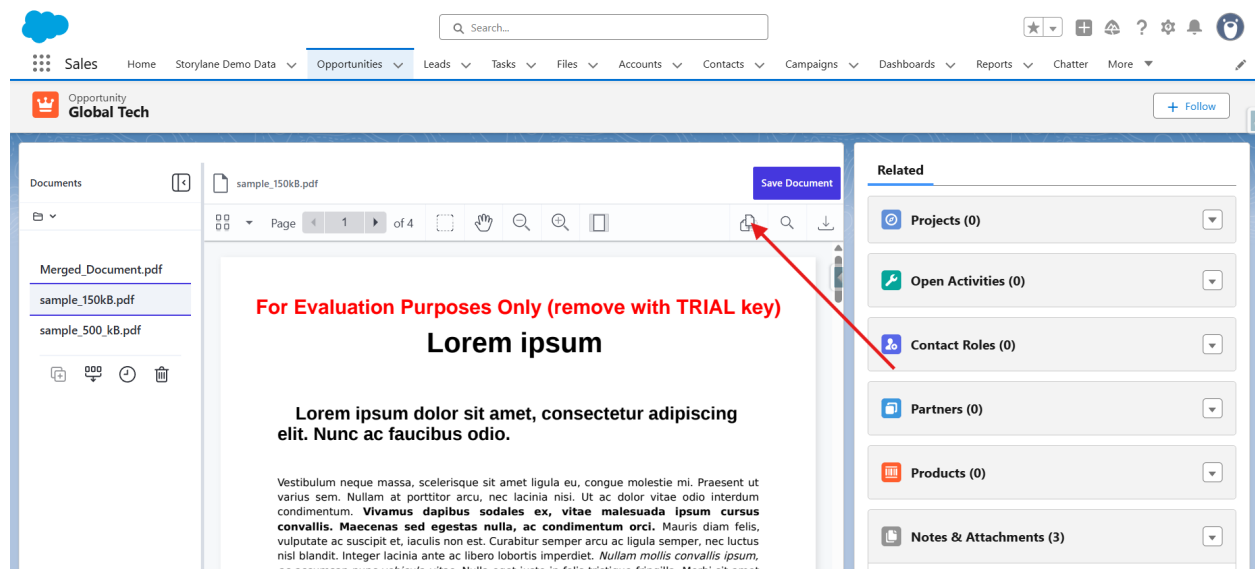
Functional Flow:

1. The user selects one or more PDF files and Click **“Combine”**.
2. User clicks **Save Document**.
3. System processes selected files.

4. A new merged PDF file is generated and Save it under the same Opportunity record.
5. The merged file is saved to the same Opportunity record.

PDF Editing

Users can edit individual PDF files within the component.



Functional Flow:

1. The user selects a file.
2. Click the Edit (Pen) icon.
3. File opens in edit mode.
4. Users make changes.
5. Clicks Save.
6. A new version of the file is created.

Data Handling & Processing

- All file processing occurs within Salesforce.
- No external API calls are made.
- No third-party storage is used.
- Files remain in Salesforce ContentDocument / ContentVersion.
- No data leaves the Salesforce environment.

Security & Access Control

Functionality depends on:

- Opportunity object access
- File access permissions
- Lightning page access

Users can only access files they have permission to view within Salesforce.

Non-Functional Considerations

- UI operates within Lightning Record Page.
- No impact on Opportunity data model.
- No custom objects required.

Conclusion

Nutrient Document Merge delivers a streamlined and secure solution for managing PDF documents directly within the Opportunity record in Salesforce. By enabling in-platform file preview, editing, and merging capabilities, the application eliminates the need for external tools while maintaining full compliance with Salesforce data governance standards.