

Nutrient Document Merge - User Guide

Introduction:

This guide provides a comprehensive, user-friendly walkthrough for installing and configuring the **Nutrient Document Merge** application in Salesforce.

Install the Nutrient Document Merge App

1. Access AppExchange

- Log in to your Salesforce instance.
- Navigate to the [AppExchange](#) from the Setup Page.
- In the AppExchange, use the search bar to search for “**Nutrient Document Merge**”.

2. Install the App

- Click on the app named “**Nutrient Document Merge**”. Click on the button Get It Now
- Choose the appropriate Salesforce environment (either **Production** or **Sandbox**), depending on where you want to install the app.
- Follow the installation prompts, which may include:
 - Agreeing to the terms and conditions.
 - Selecting who should have access to the app (**Admin Only, All Users, or Specific Profiles**). Verifying the security review of the app.
- Click **Install** to complete the process.

3. Verify Installation:

- After the installation completes, navigate to **Setup > Installed Packages** to confirm that **Nutrient Document Merge** is listed as an installed package.

What is Nutrient Document Merge?

Nutrient Document Merge is a Salesforce application designed to simplify document management and PDF merging directly within the Opportunity record page. The application provides a Lightning Web Component (LWC) that can be added to the **Opportunity Record Detail Page**. It enables users to:

- View files related to an Opportunity and its related objects
- Preview files directly inside the component
- Edit files directly inside the component
- Select multiple files, merge selected files into a single PDF
- Save the merged document back to the Opportunity

This guide provides step-by-step instructions for installation, configuration, and usage.

Key Benefits

- No external integrations required
- Secure document handling within Salesforce
- Simple drag-and-drop configuration
- User-controlled file merging
- Real-time file preview

Who Should Use This Guide?

1. Salesforce Administrators

Responsible for:

- Installing the package
- Adding the component to the Opportunity record page
- Configuring component properties

2. Sales Users / End Users

Responsible for:

- Viewing Opportunity-related files
- Previewing documents
- Selecting files to merge
- Saving merged documents

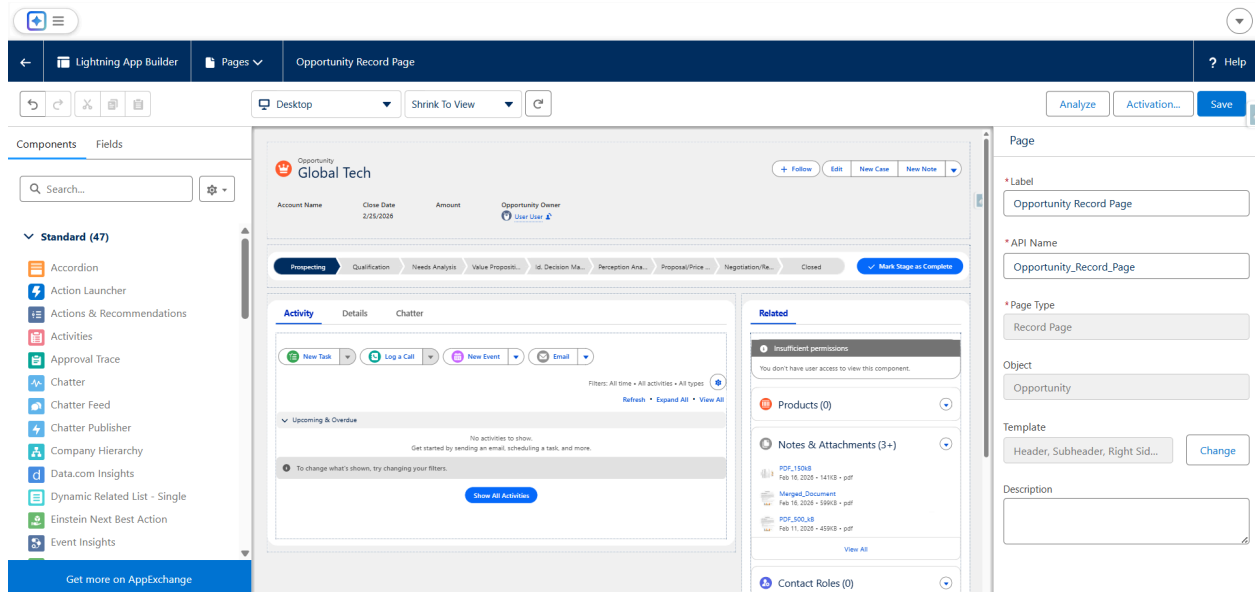
Add the Component to Opportunity Record Page

Step 1: Assign Permission Set

- Go to **Permission Sets** and find the permission set named **“NutrientDocumentBundlingUser”**.
- Assign this permission set to the users who need access to the functionality of our app to make the process smoother.

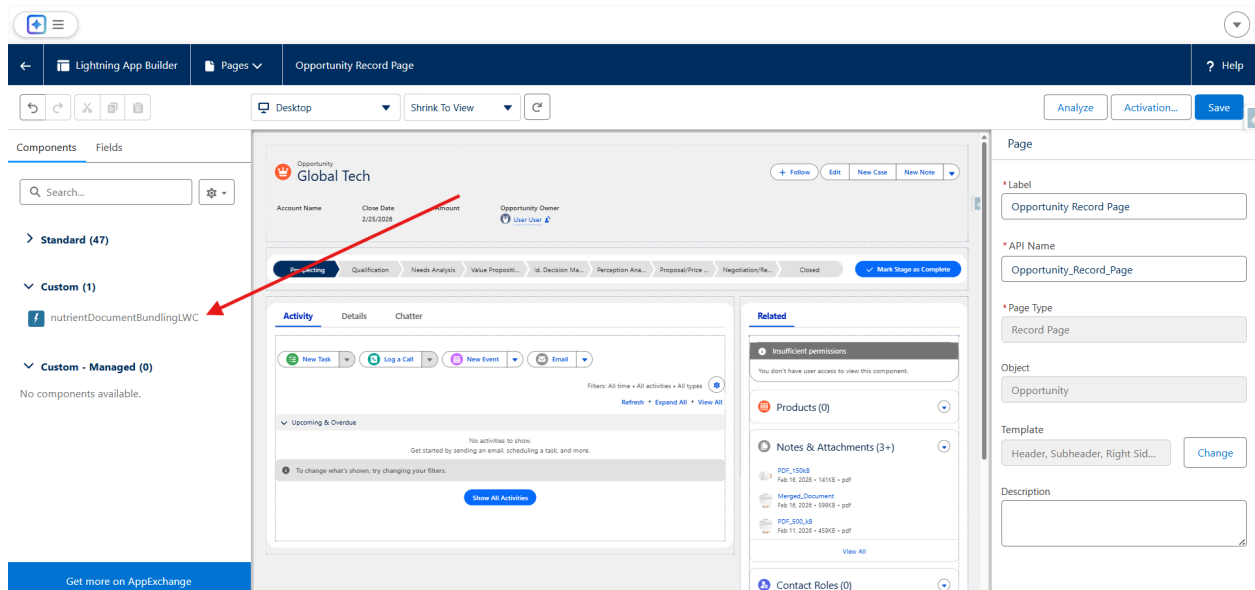
Step 3: Open Lightning App Builder

1. Go to **Setup**.
2. Search for an Object Manager.
3. Open **Opportunity**.
4. Click **Lightning Record Pages**.
5. Open the active Record Page OR click **Edit**.



Step 3: Add the LWC Component

1. From the Components panel, locate: **nutrientDocumentBundlingLWC**
2. Drag and drop the component onto the page.
3. Place it in a suitable region (e.g., right sidebar or main tab).



Component Configuration (Important)

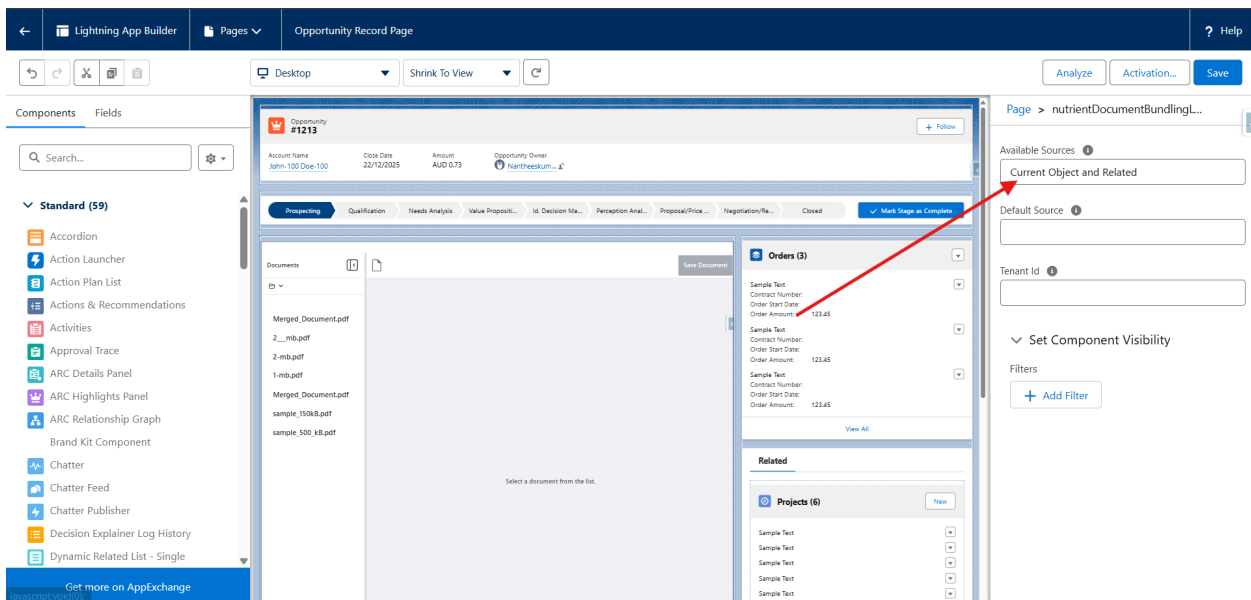
The component has a configurable property that controls which files are displayed.

- Property Name: **Available Sources**

Supported Values:

- All
- Current Object
- Current Object and Related

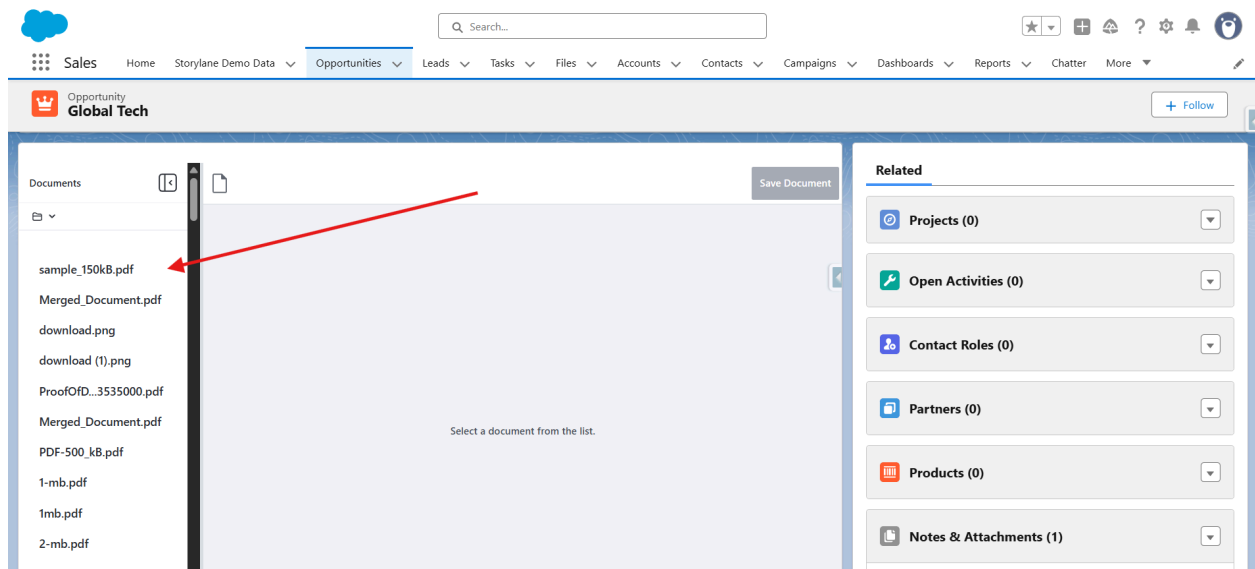
Value	Description
All	Displays all files uploaded in the Salesforce org.
Current Object	Displays only files directly uploaded to the current Opportunity record.
Current Object and Related	Displays files uploaded to the Opportunity and all its related records.



How the Component Works

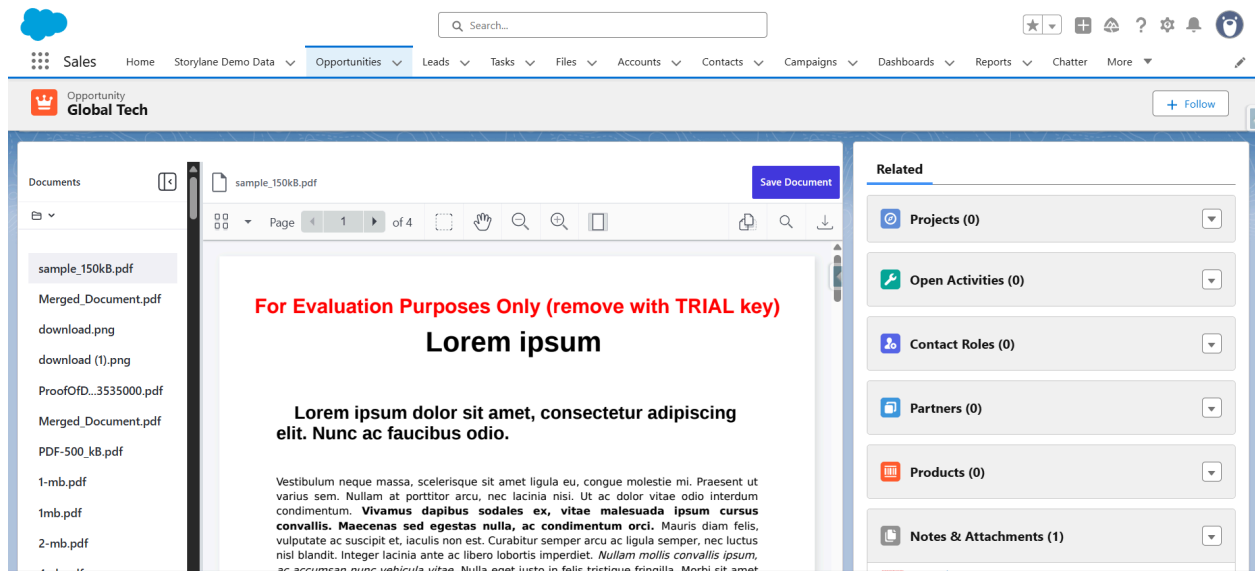
- File Preview Functionality
- Merging Files
- Edit a File

File Preview Functionality

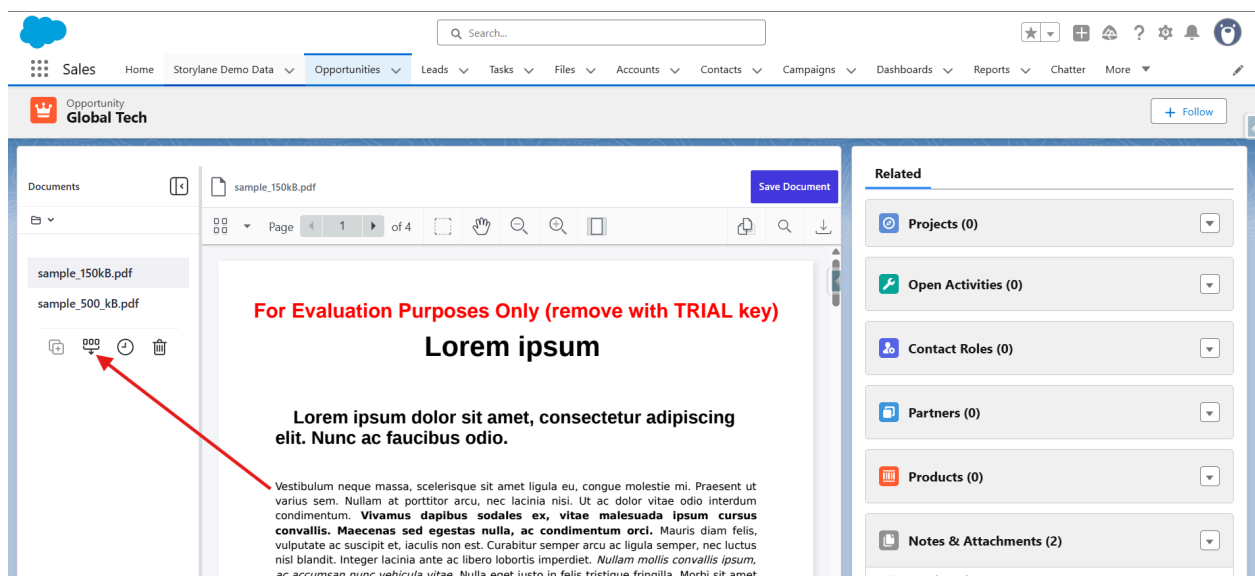


When a user clicks on a file:

- The file is previewed directly inside the LWC component.
- Users can:
 - Scroll through the document
 - Review content before merging

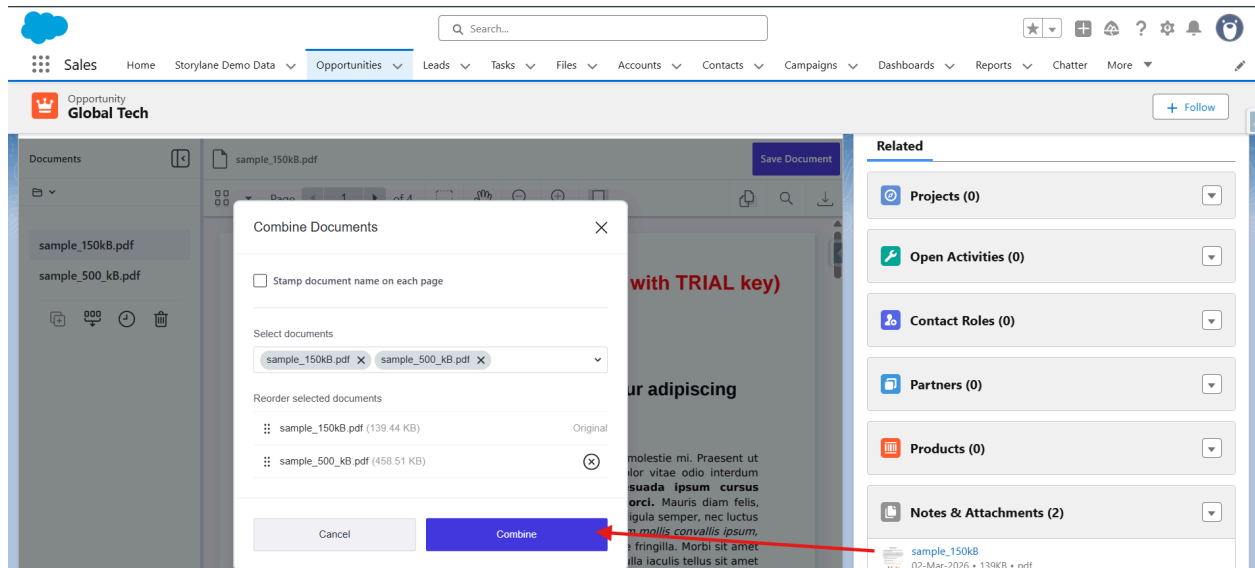


Merging Files



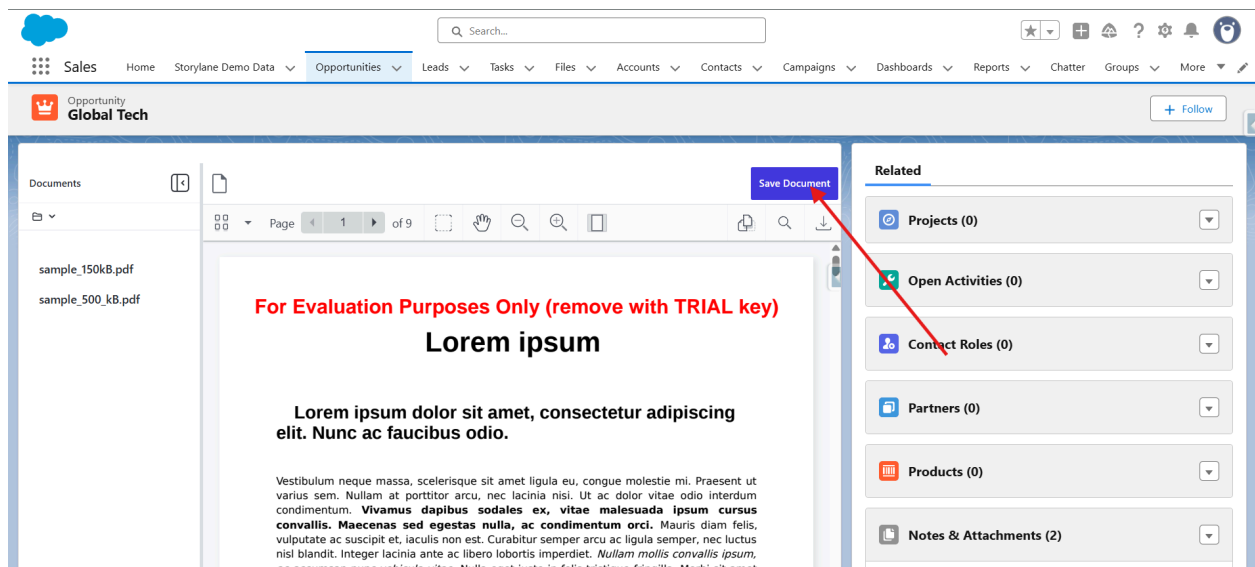
Step 1: Select Files

- Users select the checkboxes next to the files they want to merge, click “Combine”



Step 2: Click “Save Document” Button

- After selecting files, Click **Save Document**.

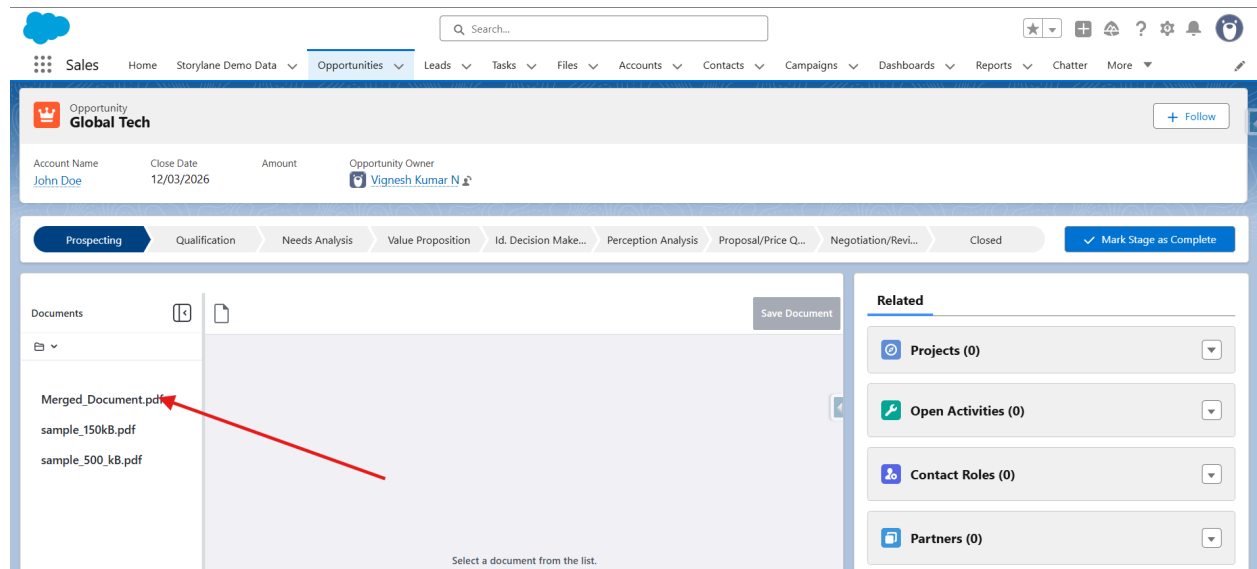


Step 3: System Processing

The system:

- Merges selected PDF files in the selected order.
- Creates a new merged PDF file.

- Save it under the same Opportunity record.



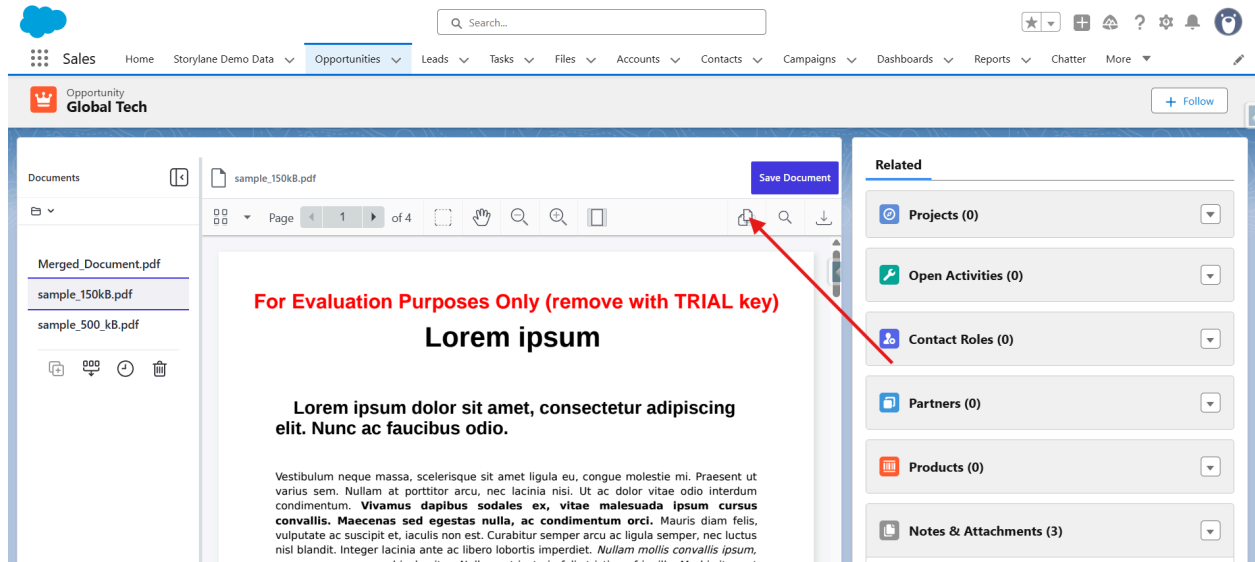
Edit a File

Step 1: Select the File

- From the file list displayed in the component, select the file you want to edit.

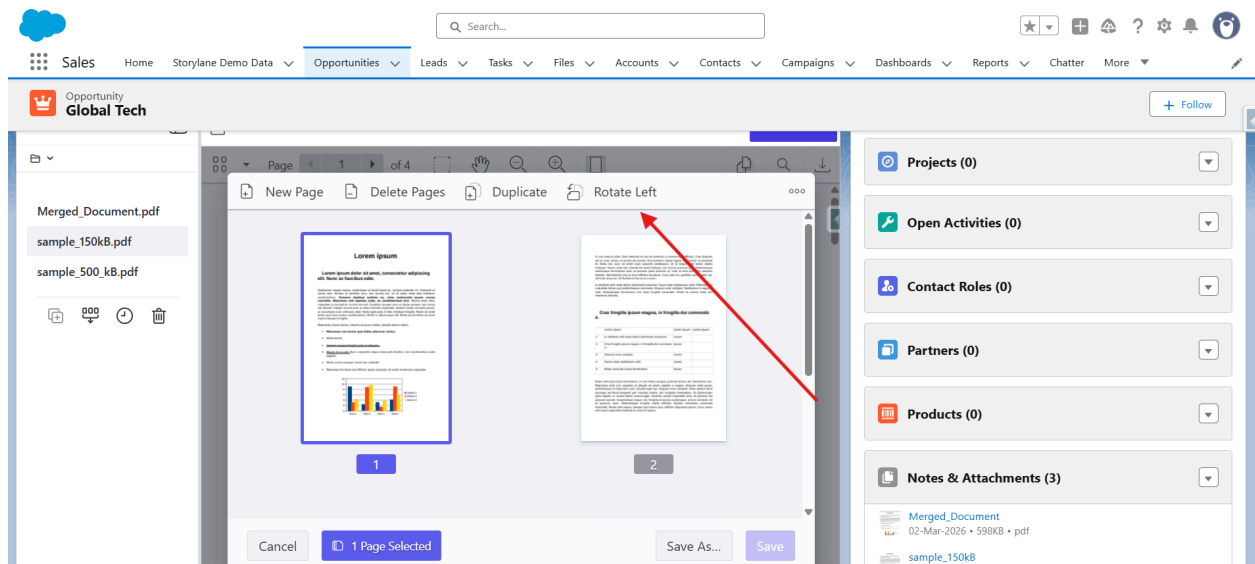
Step 2: Click the Edit (Pen) Icon

- Click the **pen icon** next to the selected file.
- The file will open in edit mode within the preview panel.



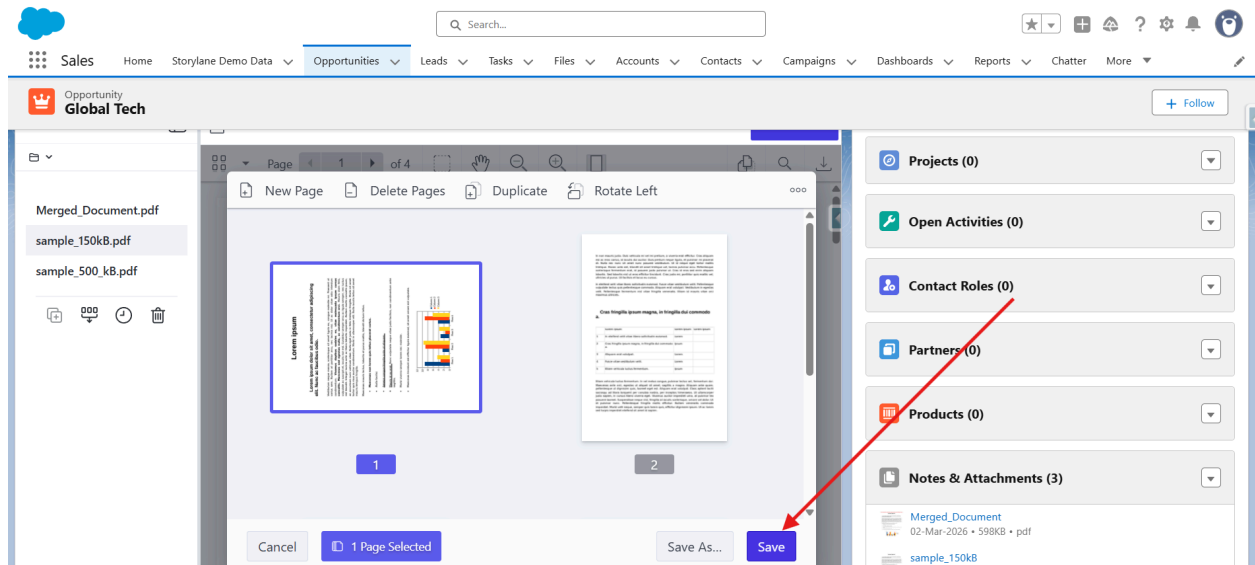
Step 3: Make Changes

- Perform the required modifications.
- For example:
 - Rotate the first page to the right.
 - Reorder pages.
 - Apply other supported PDF edits.

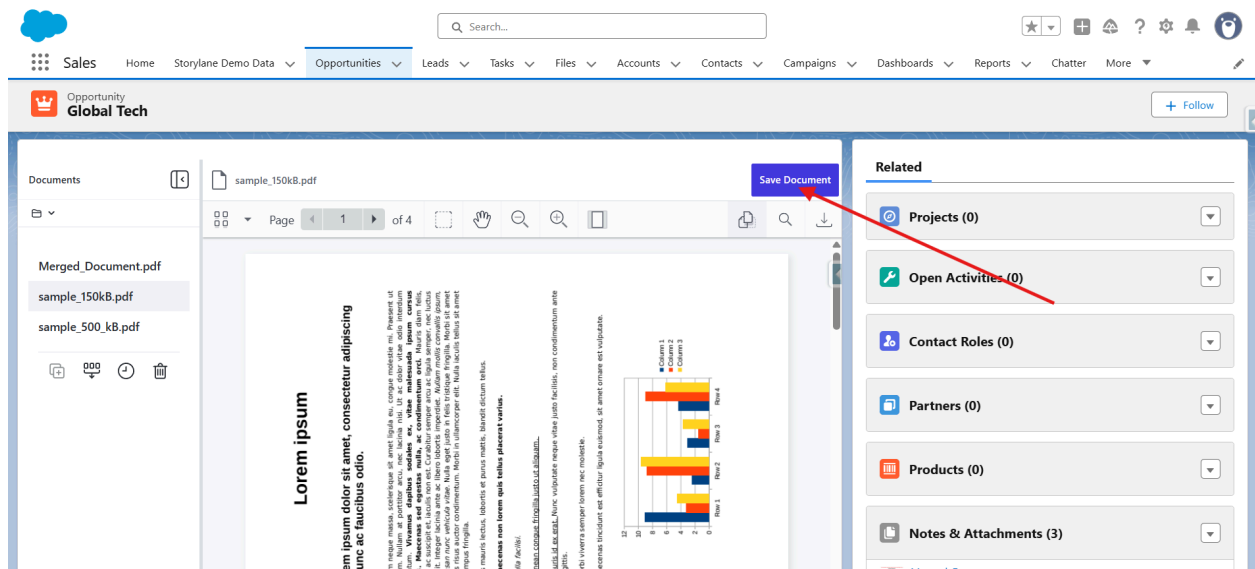


Step 4: Save the Changes

- After completing the edits, click **Save** inside the preview panel.



- Then click **Save Document**.



What Happens After Saving?

- The system saves the edited document as a **new version** of the same file.
- The original file remains in Salesforce with version history maintained.

- The updated version becomes the latest active version of the file under the Opportunity.

Troubleshooting

Issue	Possible Cause	Solution
Files not visible	Incorrect File Scope setting	Check component configuration
Merge button disabled	No files selected	Select at least one PDF file
Save fails	Insufficient permissions	Contact Salesforce Admin

Post-Installation Configuration Checklist

- ✓ Installed package
- ✓ Added LWC to Opportunity Record Page
- ✓ Configured Available Sources property
- ✓ Activated Lightning Record Page

Uninstallation Steps

- Remove component from Lightning Page
- Deactivate page
- Uninstall from Installed Packages

Conclusion

Nutrient Document Merge provides a secure and efficient way to manage, edit, and merge PDF documents directly within the Opportunity record in Salesforce. By eliminating the need for external tools and ensuring all document processing remains within the Salesforce platform, the application enhances productivity while maintaining data integrity and compliance. With simple configuration and intuitive functionality, administrators and end users can quickly adopt the solution to streamline document handling processes.