



iDialogue Batch Document Generation Guide

June 2021

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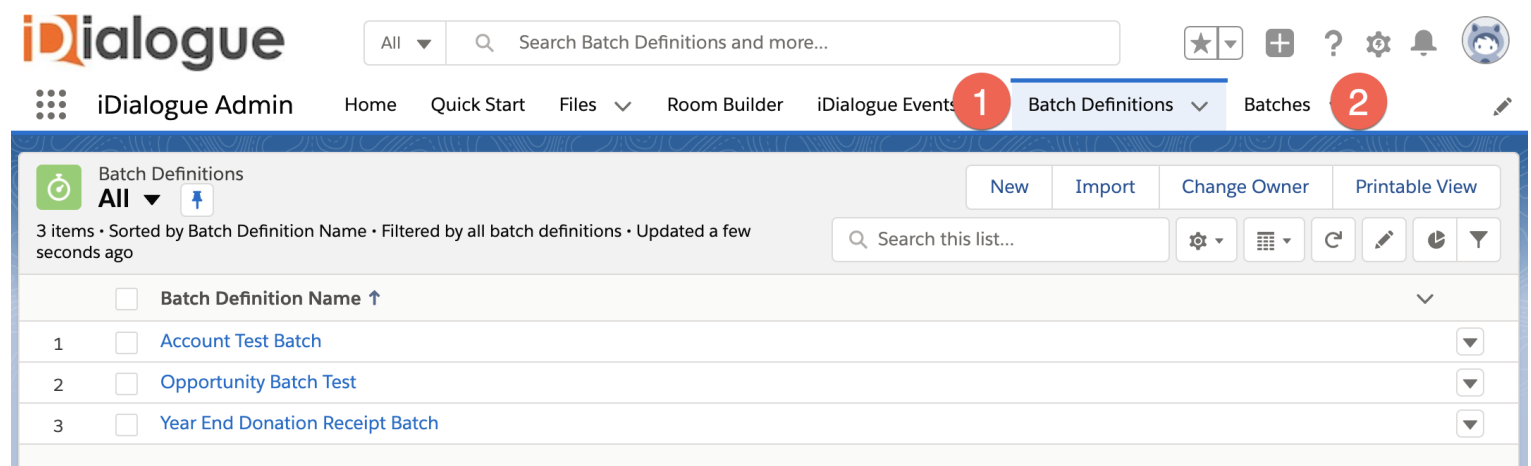
Overview

iDialogue supports the batch generation of documents using MS Word templates. Examples of batch document generation include:

- Monthly eStatements
- Invoices
- Donation receipts
- Year-end letters

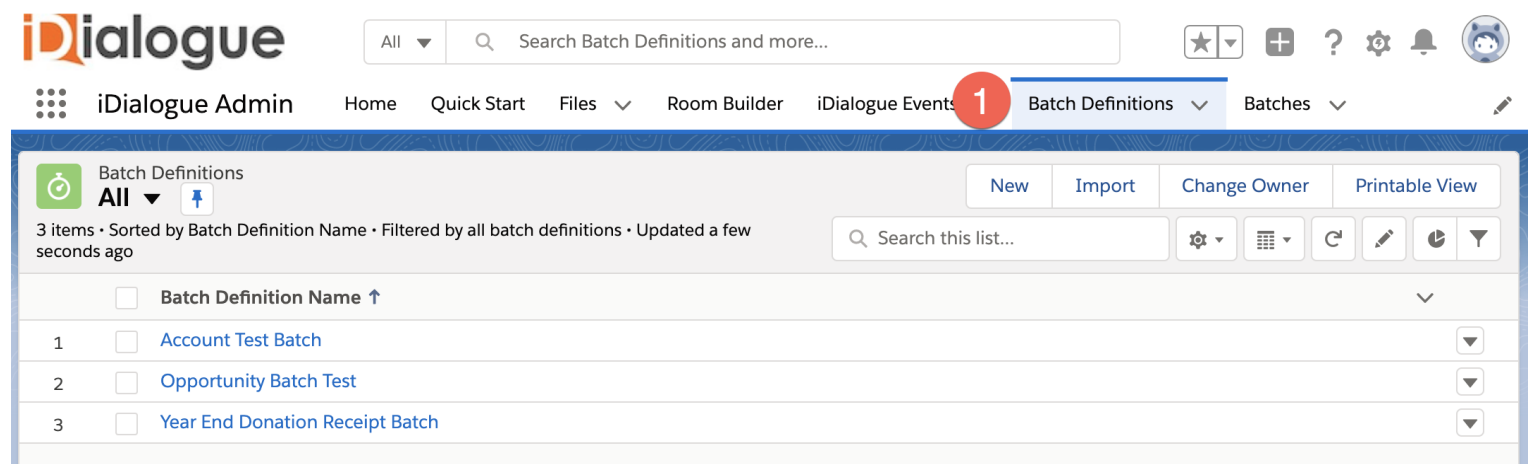
Batches are managed from the iDialogue Admin app using 2 tabs and 2 custom buttons on batch record details.

1. Batch Definition Tab: Batch templates
2. Batch Tab: Instances of batch runs generated from batch definition templates.



Batch Definition

A batch definition is a template from which many batches may be run. Upon selecting the iDialogue Admin application, go to the “Batch Definitions” tab.



Create a new “Batch Definition” record.

iDialogue Admin

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Batch Definitions

Batches

Batch Definition

Year End Donation Receipt Batch

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Run Batch

Related

Details

1

Batch Definition Name

Year End Donation Receipt Batch

Owner

Mike Leach

2

Notify On Finish User

Custom Schedule

15

Cron Expression

Document

3

Attach Document to Record

4

Attach Document to Batch Record

5

Document Format

PDF

6

Content Document Template ID

0691U000002XVGIIQA4

7

File Name Format

2020_Donation_Receipt_{{Name}}_{{DateTime}}.pdf

8

Notify On Finish Message

Query

9

Salesforce Object Source API Name

Opportunity

10

Query

SELECT {{AllFields}} FROM Opportunity WHERE FieldName=Criteria

Email

11

Email From Address

donations@nonprofit.org

12

Email From Name

NPO Donations

13

Email To Field

Email

14

Email Template Name

	Batch Definition Setting	Description
1	Name	The name of the batch definition.
2	Notify on Finish User	Reference to a user to receive notification when the batch has completed. By default, this is the user who started the batch.
3	Attach Documents to Record	When enabled, documents generated during the batch are attached to their source record.
4	Attach Documents to Batch Record	When enabled, documents generated during the batch are attached to the batch instance record. For email delivery, this checkbox must be enabled.
5	Document Format	Options are “PDF” or “Word”
6	Content Document Template ID	ID of the Salesforce File to use as the template. Open a Salesforce File that has been mapped using the tag builder, and cut-n-paste the ID from browser URL.
7	File Name Format	The name of the file to be generated. Tags surrounded by double curly

		braces are field names on the object to be replaced during the batch generation. In addition to fieldnames, the tags {{Date}} and {{DateTime}} are supported.
8	Notify on Finish Message	The email message sent to the Admin user upon completion.
9	Object API Name	Name of the Salesforce object in scope for the batch run.
10	Query	The Salesforce Object Query Language (SOQL) to extract the records for use in batch run. The tag {{AllFields}} is replaced at runtime using all fields on the SObject.
11	Email From Address	Used in the next stage and copied to the batch instance.
12	Email From Name	Used in the next stage and copied to the batch instance.
13	Email To Field	Reference to a standard or formula field on the batch records that returns an email recipient.
14	Email Template Name	Used in the next stage and copied to the batch instance. A reference to a classic email template name.
15	Schedule Cron Expression	Advanced setting for scheduling the batch to run on a recurring timer.
16	“Run Batch” custom button	Launches a preview of the batch to be confirmed for execution.

Running Batches

To manually run a batch on-demand, select the “Run Batch” action button from the Batch Definition page layout.

The screenshot shows the iDialogue Admin interface for a 'Scheduled Batch' named 'Year End Donation Receipt Batch'. The page layout includes a top navigation bar with 'iDialogue Admin' and various menu items like 'Home', 'Quick Start', 'Files', 'Portal Builder', 'Document Rooms', 'Portal Events', and 'Scheduled Batches'. A search bar is also present. The main content area is divided into sections: 'Details', 'Document', 'Query', 'Email', and 'Document Rooms'. The 'Details' section shows the batch name, frequency ('On Demand'), batch size (5), owner (Mike Le), and custom schedule cron expression. The 'Document' section includes options for attaching documents, overwriting existing attachments, content document template ID, and file name format. The 'Query' section shows the Salesforce object source API name ('Opportunity') and the query itself. The 'Email' section includes options for generating emails, email from address, email from name, email to field, email subject, and email body template. The 'Document Rooms' section includes options for publishing to document rooms and portal room templates. A red circle highlights the 'Run Batch' button in the top right corner, with a red arrow pointing to it from the bottom left.

iDialogue Admin | All | Search Salesforce

Batches | Edit | Delete | Clone | **Run Batch**

Scheduled Batch
Year End Donation Receipt Batch

Related | **Details**

Scheduled Batch Name: Year End Donation Receipt Batch
Frequency: On Demand
Batch Size: 5
Owner: Mike Le
Custom Schedule Cron Expression

Document

Attach Document to Record: ☒
Overwrite Existing Attachments: ☐
Content Document Template ID: 0691U000002XVGIA4
File Name Format: 2019_Donation_Receipt_{{Name}}_{{DateTime}}.pdf

Query

Salesforce Object Source API Name: Opportunity
Query: SELECT {{AllFields}} FROM Opportunity

Email

Email On Generate: ☒
Email From Address: donations@nonprofit.org
Email From Name: NPO Donations
Email To Field: Email
Email Subject: Your 2019 Donations Receipt
Email Body Template: Hello {{FirstName}},
Please find your donation receipt attached.
-OrgName

Document Rooms

Publish To Document Room on Generate: ☐
Portal Room Template: Test Portal

A preview of the batch is displayed. Click the “Looks good. Start the batch” button to initiate the batch.
Note: If error messages are displayed during batch preview, check the query to make sure all fields are valid.



All ▾





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Document Rooms ▾

Portal Events ▾

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Batches ▾

Preview Batch Document Process

Looks good. Start the batch

Batch Property	Value
Errors	(None)
Batch ID	a0A1U00000DTvUsUAL
Batch Name	Year End Donation Receipt Batch
Document Template Title	OpportunityTemplate
SObject	Opportunity
Query	SELECT {{AllFields}} FROM Opportunity
Query Expanded	SELECT Id,IsDeleted,AccountId,IsPrivate,Name,Description,StageName,Amount,Probability,ExpectedRevenue,TotalOpportunityQuantity,CloseDate,Typ
Batch Size	5
Records to Process	46

Reviewing Batch Results

Batch runs can take anywhere from a few seconds to several minutes to complete, depending on the number of records and pages per document.

Each instance of a batch run creates a “Batch” record. Click on the “Batches” tab to view the batch instances.



All

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Batch Definitions

Batches



Batches

All



New

Import

Change Owner

Printable View

⚙

📄

↺

✎

🔄

🔍

6 items

Sorted by Batch Name

Filtered by all batches

Updated a few seconds ago

	☐	Batch Name ↑	Created By	Created Date	Batch Definition	Status	Email Run Date	
1	☐	a071U00000f4UTI	Mike Leach	5/17/2020, 4:03 PM	Account Test Batch	Sent	5/18/2020, 11:29 AM	▼
2	☐	a071U00000f4Xxs	Mike Leach	5/18/2020, 10:56 AM	Opportunity Batch Test	Sent	5/18/2020, 11:36 AM	▼
3	☐	a071U00000f55EI	Mike Leach	5/25/2020, 7:15 PM	Account Test Batch			▼
4	☐	a071U00000f55Eq	Mike Leach	5/25/2020, 7:26 PM	Opportunity Batch Test			▼
5	☐	a071U00000f55F0	Mike Leach	5/25/2020, 7:35 PM	Opportunity Batch Test			▼
6	☐	a071U00000f55FK	Mike Leach	5/25/2020, 7:44 PM	Account Test Batch			▼

The major components of a batch instance are:

1. Batch scope. Primarily copied from the batch definition.
2. Document Attachments
3. Batch utilities to zip or combine files
4. Email manifest of contacts/leads to be emailed
5. "Batch Emitter" custom button.

The screenshot displays the iDialogue Admin interface for a batch instance. The top navigation bar includes links to Home, Quick Start, Files, Room Builder, iDialogue Events, Site Definition Data, Enablement Rules, Batch Definitions, Batches, and Checklists. The main header shows the batch name "a071U00000iDTfV" with buttons for Edit, Delete, and Batch Emitter (labeled 5). The left sidebar has tabs for Related and Details. The Details tab is active, showing a table of batch properties. The right sidebar contains the "Batch Document Utilities" section with a "Utility Action" dropdown (labeled 3) and a "Notes & Attachments (3+)" section (labeled 2) listing attachments like "AllBatchFiles.zip" and "CombinedFiles.docx". The main content area shows the "Document Results" section with a list of documents (labeled 4) and their details.

Batch a071U00000iDTfV Edit Delete Batch Emitter

Related Details

Batch Name	a071U00000iDTfV	Owner	Mike Leach
Scheduled Batch	☐		
Manual Batch	☒		
Batch Definition	Account Test Batch DOCX		
Label	Batch Run 2021-06-23 00:00:00		
Status			
Email Run Date			
Email To Type	User		
Email Template Name	Batch_Email_Delivery_With_Attachment		
Email From Address	distro_list@idialogue.app		
EmailFromName	Mike Leach (Batch Email Test)		
Email To Field	Ownerid		

Batch Document Utilities

Utility Action

☒ Zip all files

☐ Combine all files into one

Next

Notes & Attachments (3+)

- AllBatchFiles.zip Jun 23, 2021 • Attachment
- CombinedFiles.docx Jun 23, 2021 • Attachment
- Account_Template_Edge Communications_2021-06-23 20:41:... Jun 23, 2021 • Attachment

View All

Document Results

Documents

```
[{"uid":"0051U000004Ag5mQAC","ts":"2021-06-24T03:40:20.288Z","sent":null,"name":"Mike Leach","id":"0011U000001k89xrQAC","email":"mike@getpacificapps.com","aid":"00P1U00000GmWSPUA3"}, {"uid":"0051U000004Ayn2QAC","ts":"2021-06-24T03:40:22.266Z","sent":null,"name":"Daniel Ramirez","id":"0011U000001NDEmeQAH","email":"dc@rmrz.ph","aid":"00P1U00000GmWSUUA3"}, {"uid":"0051U000004Ag5mQAC","ts":"2021-06-24T03:40:24.351Z","sent":null,"name":"Mike Leach","id":"0011U000001JfzFAQZ","email":"mike@getpacificapps.com","aid":"00P1U00000GmWSZUA3"}, {"uid":"0051U000004Az1yQAC","ts":"2021-06-24T03:40:26.518Z","sent":null,"name":"Christine Rose de Castro","id":"0011U000000hcDaQAI","email":"christine@getpacificapps.com","aid":"00P1U00000GmWSeUAN"}, {"uid":"0051U000004Az1yQAC","ts":"2021-06-24T03:40:28.645Z","sent":null,"name":"Christine Rose de Castro","id":"0011U00000n70W8QAI","email":"christine@getpacificapps.com","aid":"00P1U00000GmWSJUAN"}, {"uid":"0051U000004Az1yQAC","ts":"2021-06-24T03:40:31.321Z","sent":null,"name":"Christine Rose de Castro","id":"0011U00000Q4azqQAB","email":"christine@getpacificapps.com","aid":"00P1U00000GmWSFUAN"}, {"uid":"0051U000004Az1yQAC","ts":"2021-06-24T03:40:33.173Z","sent":null,"name":"Christine Rose de"}]
```

Use the batch utilities to zip up or combine all of the batch files into a single file, then export for printing or offline storage.

Emailing Batch Documents

Click on the “Batch Emailer” custom button from batch record details (see previous page).

A preview of the batch email is displayed. Update any related email fields or email templates, if needed.

If everything looks good, click on the “Start the batch” button to intimate the batch emailer



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Preview Batch Document Emailer

Looks good. Start the batch

Batch Property	Value
Errors	(None)
Batch ID	a071U00000f55EIQAI
Batch Name	Account Test Batch
Batch Generated	Tue May 26 02:15:02 GMT 2020
Batch Status	Generated
TotalDocuments	20
TotalUniqueEmails	4
Email Template	Batch Email Delivery With Attachment
Email Template Body	iDialogue Attachment Your document is attached. Hi {!Contact.Name}, Your document is attached. Download Document Thank you! F

References

Contact support@getpacificapps.com with any questions or assistance setting up batches.

Visit www.GetPacificApps.com