



CODEYLABS

Configuring Alternative Template Buttons in DRTE

User Guide



DRTE

In many business scenarios, a single default template covers the majority of your needs (e.g., T&M Quotes). However, for the remaining edge cases (e.g., Fixed Fee Quotes), the **DRTE Editor** allows you to surface alternative templates as clickable SLDS icon buttons directly within the editor interface.

Phase 1: Configuring the Rich Text Button Template

Before a template can appear as a button, it must be properly configured in the **Rich Text Button / Doc Template** object.

Step 1: Understanding Deactivation Logic

- **Active Templates:** If a template record is **not** deactivated, it is eligible to appear as an additional shortcut button on the DRTE Editor toolbar.
- **Deactivated Templates:** When the **Deactivated** checkbox is selected, the template will not appear as an optional button. However, it can still be used as a "Default Template" for the editor if its SFDC ID is hardcoded in the component settings.

The screenshot shows the 'Rich Text Button / Doc Template' object's details page in Salesforce. The record ID is RTB-0008. The 'Details' tab is selected. Under the 'Information' section, there is a note: 'This template is deactivated, which means can only be used as default template for editors, and not available as optional/additional button on editor'. A red arrow points to the 'Deactivated' checkbox, which is checked. Other fields shown include Rich Text Button Number (RTB-0008), Template Name (SOW (USD) ON Quote Request), SLDS icon-name (utility:contract_doc), Owner (Rahul Jain), Category, Display Order (1), and Test SFDC Record Id (a0La500000Z5lszEAF).

Field	Value
Rich Text Button Number	RTB-0008
Template Name	SOW (USD) ON Quote Request
SLDS icon-name	utility:contract_doc
Owner	Rahul Jain
Category	
Deactivated	<input checked="" type="checkbox"/>
Display Order	1
Test SFDC Record Id	a0La500000Z5lszEAF

Step 2: Assigning Categories and Icons

- Category: Assign a specific name (e.g., QuoteRequestSOW) to the Category field. This value is used to filter which buttons appear on specific Editor instances.
- SLDS Icon Name: Define the visual identity of your button by entering a standard SLDS icon string (e.g., utility:contract_doc).

Rich Text Button / Doc Template
RTB-0009

Related Details

Information

Rich Text Button Number	RTB-0009	Owner	Rahul Jain
Template Name	Fixed Fee SOW (USD) ON Quote Request	Category	QuoteRequestSOW
SLDS icon-name	utility:contr	Deactivated	<input type="checkbox"/>
This isn't deactivated so available to be shown as additional button on DRTE Editor			
Note this Category Name, it will be used to filter buttons on DRTE Editor			
Display Order	1	Test SFDC Record Id	a15GB00000SOGYsYAP

System Information

Phase 2: Editor Component Setup

Once your template records are ready, you must configure the **Dynamic Rich Text Editor** component on the Lightning Page.

Step 3: Filtering Buttons by Category

- Default Behavior:** If the **Filter Category** field in the component properties is left empty, the editor will display **all** active template buttons.

The screenshot shows a Lightning page for a 'PSC Quote Request' record. On the right, the 'Dynamic Rich Text Editor' configuration pane is open. The 'Filter Category' field is empty, indicated by a red arrow pointing from the text 'Without category filter, showing all active template buttons' to the input field. The DRTE component on the page displays a full set of rich text editing buttons (bold, italic, underline, etc.) in its toolbar.

- Targeted Visibility:** To show only specific buttons (like the "Fixed Fee SOW"), enter the exact Category Name defined in Step 2 into the **Filter Category** attribute.

The screenshot shows the same Lightning page and configuration pane, but now the 'Filter Category' field contains the value 'QuoteRequestSOW', highlighted by a red arrow. This causes the DRTE component on the page to only display a subset of buttons, specifically those assigned to the 'QuoteRequestSOW' category.

Phase 3: End-User Workflow

Once configured, the user experience is streamlined for handling exceptions.

Step 4: Default Template Loading

- Upon opening the DRTE tab, the system automatically loads the **Default Template** (e.g., the standard Statement of Work). This ensures 98% of users can proceed immediately without extra clicks.

The screenshot shows the Pre Sales Cloud interface with the PSC Quote Requests tab selected. A red arrow points from the text "Default Template Loaded" in the DRTE tab header to the "STATEMENT OF WORK" section below. The "STATEMENT OF WORK" section contains the text: "This Statement of Work ("Statement of Work" or "SOW") is governed by the terms of the Technology-Enabled Services Agreement ("Agreement") located at <https://www.simpleinc.com/technology-enabled-services-Agreement.html> and hereby entered into between Simple Inc".

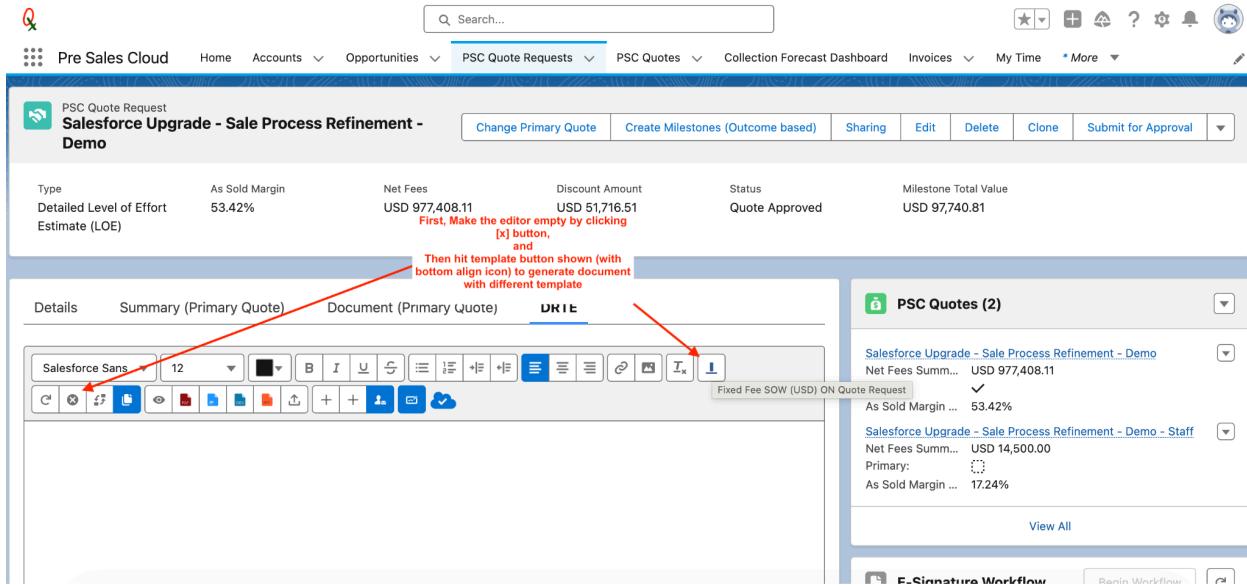
Type	As Sold Margin	Net Fees	Discount Amount	Status	Milestone Total Value
Detailed Level of Effort Estimate (LOE)	53.42%	USD 977,408.11	USD 51,716.51	Quote Approved	USD 97,740.81

PSC Quotes (2) sidebar:

- Salesforce Upgrade - Sale Process Refinement - Demo (Primary): Net Fees Summ... USD 977,408.11, Primary: ✓, As Sold Margin ... 53.42%
- Salesforce Upgrade - Sale Process Refinement - Demo - Staff: Net Fees Summ... USD 14,500.00, Primary: ○, As Sold Margin ... 17.24%

Step 5: Clearing the Editor and Switching Templates If the user needs to generate the "2% exception" document (e.g., a Fixed Fee quote):

1. **Clear Content:** Click the [X] (Clear) button on the toolbar to empty the editor.
2. **Select Alternative:** Click the specific **Template Button** (identified by the SLDS icon, such as the bottom-align icon shown in the toolbar).
3. **Hover Verification:** Users can hover over the icon to see a tooltip (e.g., *"Fixed Fee SOW (USD) ON Quote Request"*) to ensure they are selecting the correct version.



Step 6: Success - Document Re-Generation

- The editor will immediately refresh and generate the document using the alternative template logic. The user can now proceed with the specialized content without ever leaving the DRTE interface.

The screenshot shows the Pre Sales Cloud interface with the following details:

- PSC Quote Request**: Salesforce Upgrade - Sale Process Refinement - Demo
- Toolbar Buttons**: Change Primary Quote, Create Milestones (Outcome based), Sharing, Edit, Delete, Clone, Submit for Approval
- Table Data**:

Type	As Sold Margin	Net Fees	Discount Amount	Status	Milestone Total Value
Detailed Level of Effort Estimate (LOE)	53.42%	USD 977,408.11	USD 51,716.51	Quote Approved	USD 97,740.81
- DRTE Editor**:
 - Document Generated with Different Template Than Default**
 - Toolbar Buttons**: Font, Size, Bold, Italic, Underline, etc.
 - SCOPE OF WORK**
 - Deliverables**
 - Sales Process Refinement: {{psce__Description__c}}
 - Opportunity Creation & Qualification Framework Logic: Implementation of the one-click creation logic from the Sales Cloud Lead module and the technical setup of the Qualification Framework (BANT/MEDDIC). The developer will build the logic to engage collaborators and ensure validations are enforced during creation.
 - Opportunity Context Capture & Categorization Automation: Development of auto-capture scripts for Industry, Problem
- PSC Quotes (2)**:
 - Salesforce Upgrade - Sale Process Refinement - Demo
 - Net Fees Summ... USD 977,408.11
 - Primary: ✓
 - As Sold Margin ... 53.42%
 - Salesforce Upgrade - Sale Process Refinement - Demo - Staff
 - Net Fees Summ... USD 14,500.00
 - Primary: ○
 - As Sold Margin ... 17.24%
- E-Signature Workflow**: Beam Workflow