



CODEYLABS

Managing E-Signature Placeholders in DRTE

User Guide



DRTE

The E-Signature feature streamlines the contract finalization process by allowing users to insert "Signature Blocks" with a single click. These blocks act as placeholders that the system recognizes to collect electronic signatures once the document is sent to a client.

1. Key Benefits

- **Accuracy:** Eliminates manual typing errors in signature tags.
- **Efficiency:** Standard templates for "Name" and "Date" are automatically included.
- **Consistency:** Ensures every Quote or SOW has the same professional signature layout.

2. Enabling the Feature

The signature buttons are context-aware. They will only appear in your DRTE toolbar if the following property is set in the component configuration:

- **Requirement:** The '**Enable to Request E-Signature**' property must be checked in the editor settings.
- Once enabled, you will see two "**Double Plus**" (+, +) icon buttons added to your toolbar.

The screenshot shows the 'PSC Quote Request' page. In the top right corner, there is a 'Dynamic Rich Text Editor' configuration panel. Under the 'Component Configuration' section, the 'Enable to Request E-Signature' checkbox is checked. A red arrow points from this checkbox to the 'Enable to Request E-Signature' button on the DRTE toolbar. The DRTE toolbar also features a 'Double Plus' icon (+, +) which is highlighted with a red circle. A tooltip above the toolbar states: 'Double Plus Icon Buttons renders only when 'Enable to Request E-Signature' property is set. Double Plus Icon Buttons are included to apply a default Signature1 and Signature 2 Placeholders in the Document at the cursor position.' Another tooltip below the toolbar says: 'A user need not to remember/edit the document by typing when default signatures placeholder need to apply'.

3. How to Insert Signature Blocks

Follow these steps to place signature templates for both the Client and the Vendor:

Step 1: Insert Signature 1 (e.g., Client)

1. Navigate to the **DRTE** Editor on your record.
2. Place your cursor in the document where you want the first signature to appear.
3. Click the **first "plus"** (+) icon (labeled "insert signature1 template" on hover).

Detailed Level of Effort 55.42% USD 977,408.11 USD 51,710.51 Quote Approved

Estimate (LOE)

Place your cursor in the editor document, and hit first plus icon button to generate signature1 default template

Details Summary (Primary Quote) Document (Primary Quote) DRTE

Salesforce Sans 18 B I U +

C X

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Altman Inc

Vendor

PROJECT DESCRIPTION

- The system will automatically generate the [Signature1] block, including placeholders for the signer's Name and Date.

Details Summary (Primary Quote) Document (Primary Quote) DRTE

Salesforce Sans 12 B I U +

C X

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Altman Inc

[Signature1]

Name: [text[Name]:[Signature1]]
Signed On: [date[Signed On]:[Signature1]]

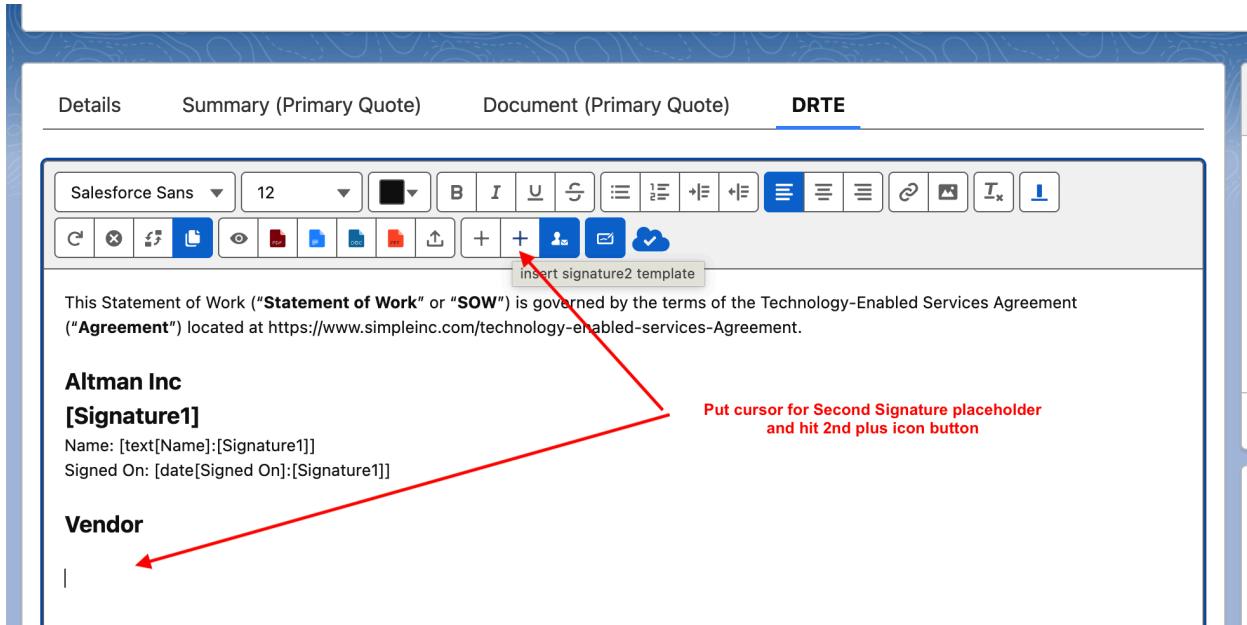
Vendor

PROJECT DESCRIPTION

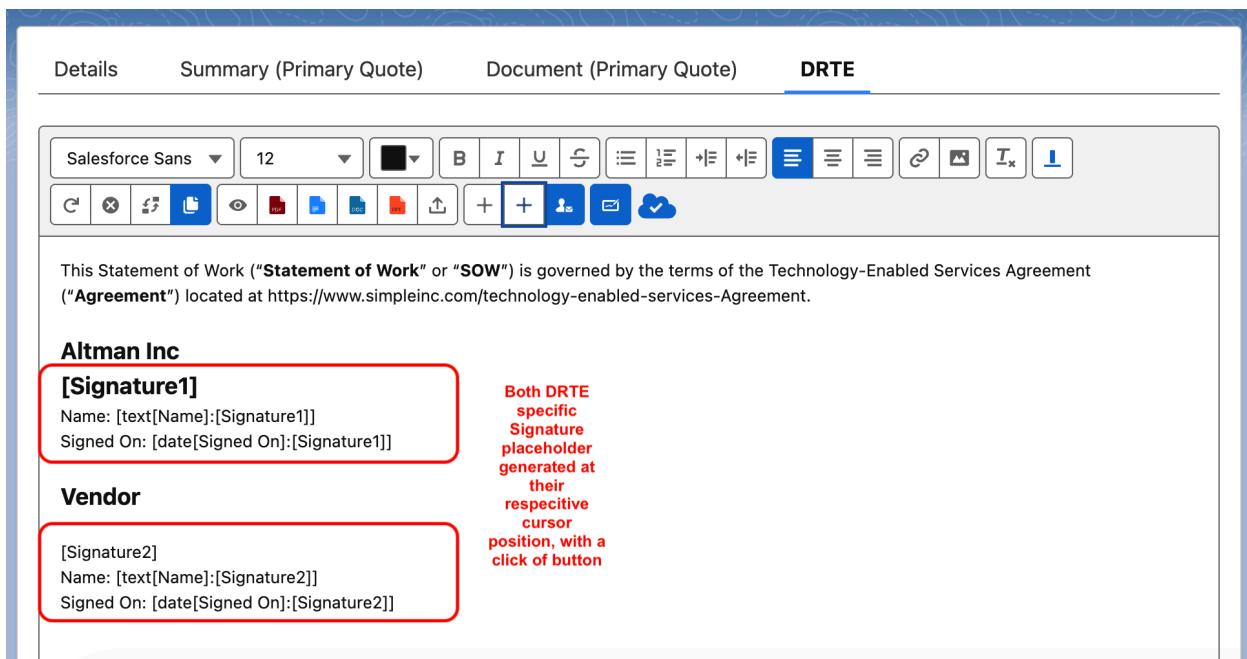
System Automatically places the Signature1 default placeholder at cursor position

Step 2: Insert Signature 2 (e.g., Vendor)

1. Move your cursor to the next desired signature location (e.g., under the "Vendor" section).
2. Click the **second "plus" (+) icon** (labeled "insert signature2 template").



3. A second independent block, [Signature2], will be generated at the cursor position.



4. Understanding the Rendered Content

When a button is clicked, the DRTE automatically places the following template at your cursor:

[SignatureX]

Name: [text[Name]:[SignatureX]]

Signed On: [date[Signed On]:[SignatureX]]

- **[SignatureX]:** The primary anchor for the e-signature software.
- **Name/Date Tags:** Dynamic fields that the signer will fill out digitally.

5. Pro-Tips for Sales Teams

- **Cursor Placement:** Always ensure your cursor is on a new line before clicking the signature buttons to prevent the block from merging with existing paragraph text.
- **Manual Edits:** While these are generated automatically, they remain editable. You can adjust the bolding or spacing around the placeholders to match the document's aesthetic. But make sure the text is all together in a single html tag.
- **Verification:** Before submitting for approval, scroll to the bottom of your DRTE document to verify that both [Signature1] and [Signature2] are present and correctly placed.