



CODEYLABS

DRTE

User Guide



DRTE

Overview

Welcome to the CodeyLabs **DRTE** for Salesforce. This comprehensive guide will help you create, configure, and manage dynamic documents with integrated e-signature capabilities directly within your Salesforce environment.

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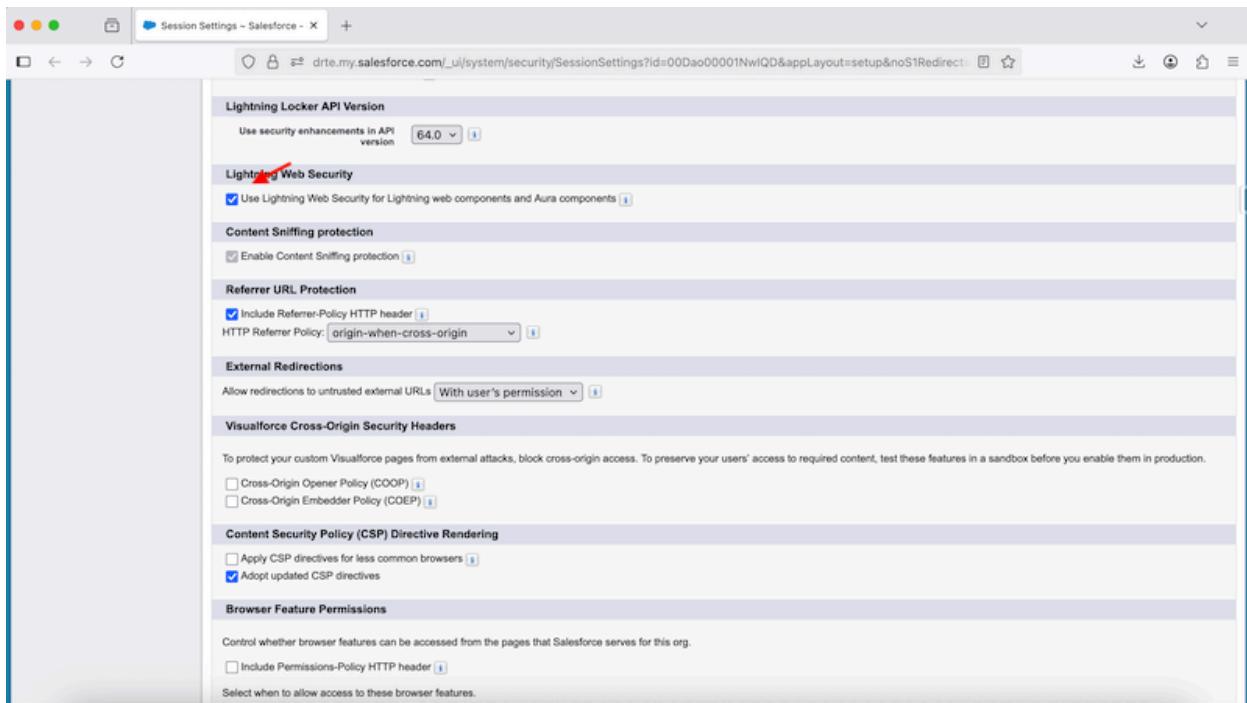
1. Prerequisites
2. Administrator Setup
3. UI Integration and Workflow
4. End-User Workflow
5. Additional Features
6. Troubleshooting

Prerequisites

Before beginning the installation, ensure that **Lightning Web Security** is enabled in your Salesforce instance.

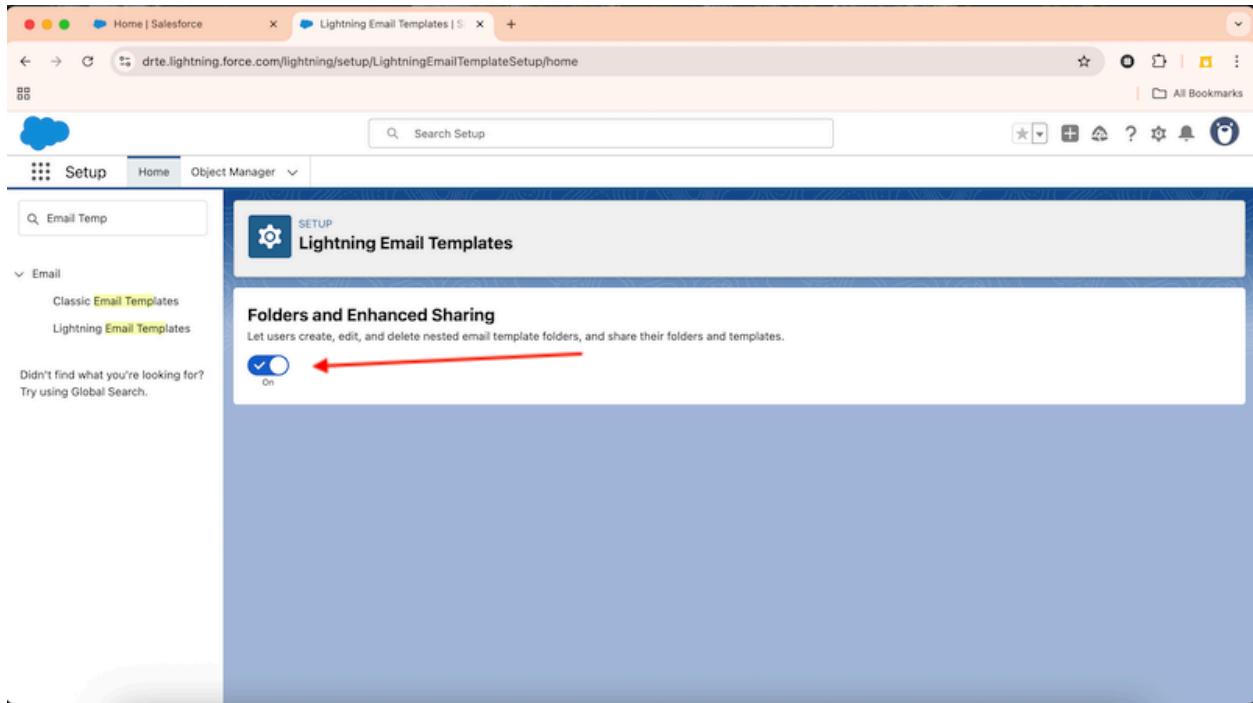
To enable Lightning Web Security:

1. Navigate to **Setup** → **Session Settings** → **Lightning Web Security**
2. Enable the setting if not already active



Enable Folders and Enhanced Sharing:

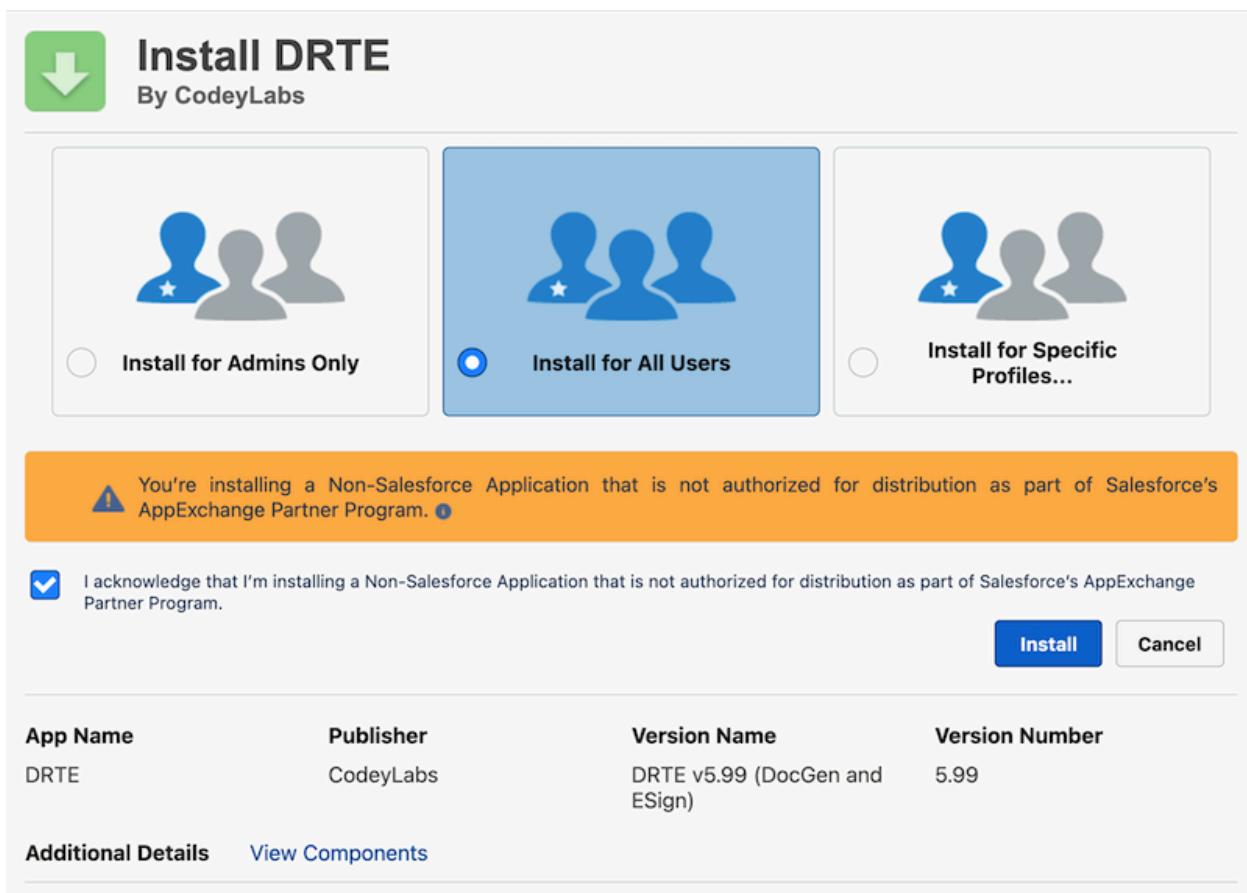
Enhanced sharing must be enabled for proper document management functionality.



Administrator Setup

Step 1: Install the Managed Package

1. Obtain the DRTE installation URL from your provider
2. Paste the URL into your browser while logged into Salesforce
3. On the installation screen:
 - o Select "**Install for All Users**" (recommended)
 - o Check the acknowledgement box for installing a non-AppExchange application
 - o Click **Install**



4. You will receive a confirmation email upon successful completion
5. Verify installation by checking **Installed Packages**

The screenshot shows the 'Installed Packages' section of the Salesforce Setup. At the top, there's a header with the 'SETUP' icon and the title 'Installed Packages'. Below the header, a sub-header says 'Installed Packages' with a 'Help for this Page' link. A note states: 'On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)'. Another note says: 'Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.' A 'Depending on the links next to an installed package, you can take different actions from this page.' note follows. A 'To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.' note is also present. On the right, there's a 'Visit AppExchange »' button with the AppExchange logo. The main table lists one package: 'DRTE' by 'CodeyLabs' (version 5.66). The package has an 'Uninstall | Manage Licenses' link, a 'Description' section (streamlining document processes), and columns for Action, Package Name, Publisher, Version Number, Namespace Prefix, Status, Allowed Licenses, Used Licenses, Enabled for Platform Integrations, Expiration Date, Install Date, Limits, Apps, and Tx.

Step 2: Configure Permission Sets

Permission sets control user access to DRTE features. Proper configuration ensures security and appropriate access levels.

To assign permission sets:

1. Navigate to **Setup → Permission Sets**

The screenshot shows the 'Permission Sets' page for the 'Dynamic RichText Editor Admin User'. The header includes the 'SETUP' icon, 'Permission Sets', and 'Video Tutorial | Help for this Page'. The main area starts with a 'Permission Set Overview' section for 'Dynamic RichText Editor Admin User'. It shows details like API Name (DynRichText_User), Namespace Prefix (pscdnyrichtext), Created By (Rahul Jain, 9/16/2025, 10:55 PM), and Last Modified By (Rahul Jain, 9/16/2025, 10:55 PM). Below this is an 'Apps' section with sections for 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', and 'Visualforce Page Access'. Each section contains a brief description of its purpose.

2. For Administrators:

- Locate "**Dynamic RichText Editor Admin User**"
- Click **Manage Assignments → Add Assignments**
- Select all system administrators
- Click **Assign**

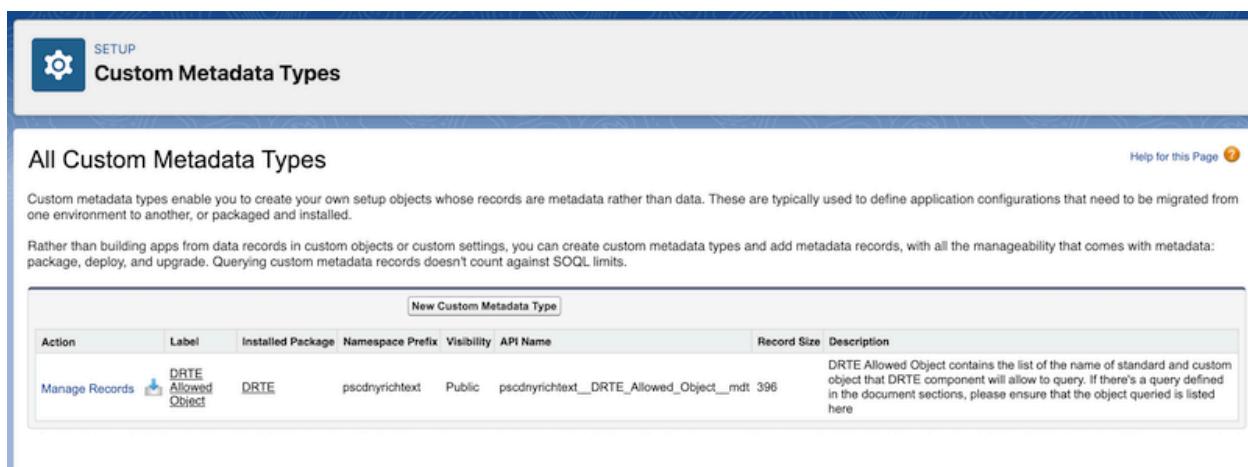
3. For Standard Users:

- Clone the "**Dynamic RichText Editor Standard User**" permission set
- Remove administrative permissions not required for standard users
- Assign the cloned permission set to appropriate users

Important Note: The DRTE namespace is **pscdnyrichtext**. Use the prefix **pscdynrichtext__** when configuring custom objects and fields.

Step 3: Configure Allowed Objects

DRTE requires explicit permission to query Salesforce objects for dynamic content.



Action	Label	Installed Package	Namespace Prefix	Visibility	API Name	Record Size	Description
Manage Records	DRTE Allowed Object	DRTE	pscdnyrichtext	Public	pscdnyrichtext__DRTE_Allowed_Object__mdt	396	DRTE Allowed Object contains the list of the name of standard and custom object that DRTE component will allow to query. If there's a query defined in the document sections, please ensure that the object queried is listed here

To add allowed objects:

1. Navigate to **Setup → Custom Metadata Types**
2. Find "**DRTE Allowed Object**" and click **Manage Records**

DRTE Allowed Object

DRTE Allowed Object Edit

Information	Label	Contract	Protected Component
DRTE Allowed Object Name	Contract	<input type="checkbox"/>	
Object API Name	Contract		

Save Save & New Cancel

3. Click **New** to create a new record
4. Enter the **Object API Name** (e.g., **Contract** for standard objects)

Example for managed package objects:

DRTE Allowed Object (Managed)

This DRTE Allowed Object is managed, meaning that you may only edit certain attributes. [Display More Information](#)

DRTE Allowed Object Detail

Label	Document Section	Protected Component
DRTE Allowed Object Name	Document_Section	<input type="checkbox"/>
Object API Name	pscdnyrichtext__PSC_Document_Section__c	Namespace Prefix pscdnyrichtext
Created By	Rahul Jain, 10/4/2025, 1:11 AM	Last Modified By Rahul Jain, 10/4/2025, 1:11 AM

Edit Clone

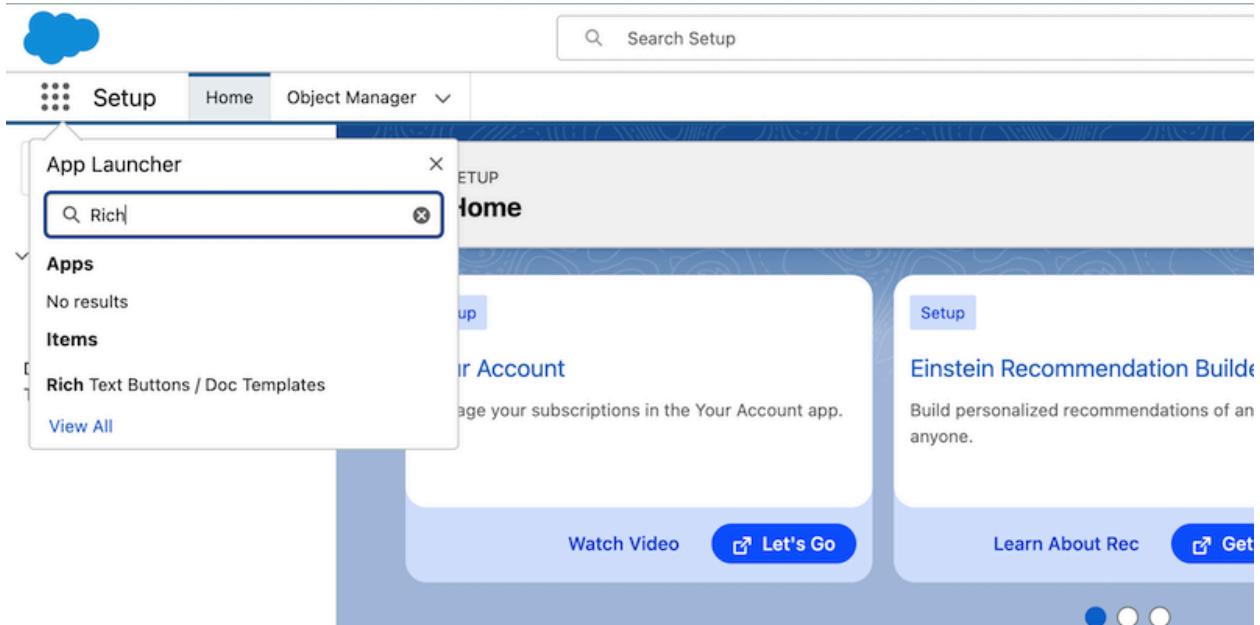
Note: Without adding an object to this list, DRTE components cannot query that object for dynamic data.

Step 4: Create Document Templates

Document templates define the structure and content of your generated documents.

To create a template:

1. Open the App Launcher and search for "Rich"
2. Select "**Rich Text Buttons/Doc Templates**"



3. Click **New** to create a template record

New Rich Text Button / Doc Template

* = Required Information

Information

Rich Text Button Number	Owner
* Template Name Contract Template	Rahul Jain
SLDS icon-name ⓘ utility:contract_doc	Category ⓘ
Generate Content Using Gen AI <input type="checkbox"/>	Deactivated ⓘ <input checked="" type="checkbox"/>
Instructions To Gen AI	* Display Order 1,000
	Test SFDC Record Id ⓘ 800al00000fVNckAAG

Cancel Save & New Save

There's nothing in your list yet. Try adding a new record.

4. Configure the following fields:

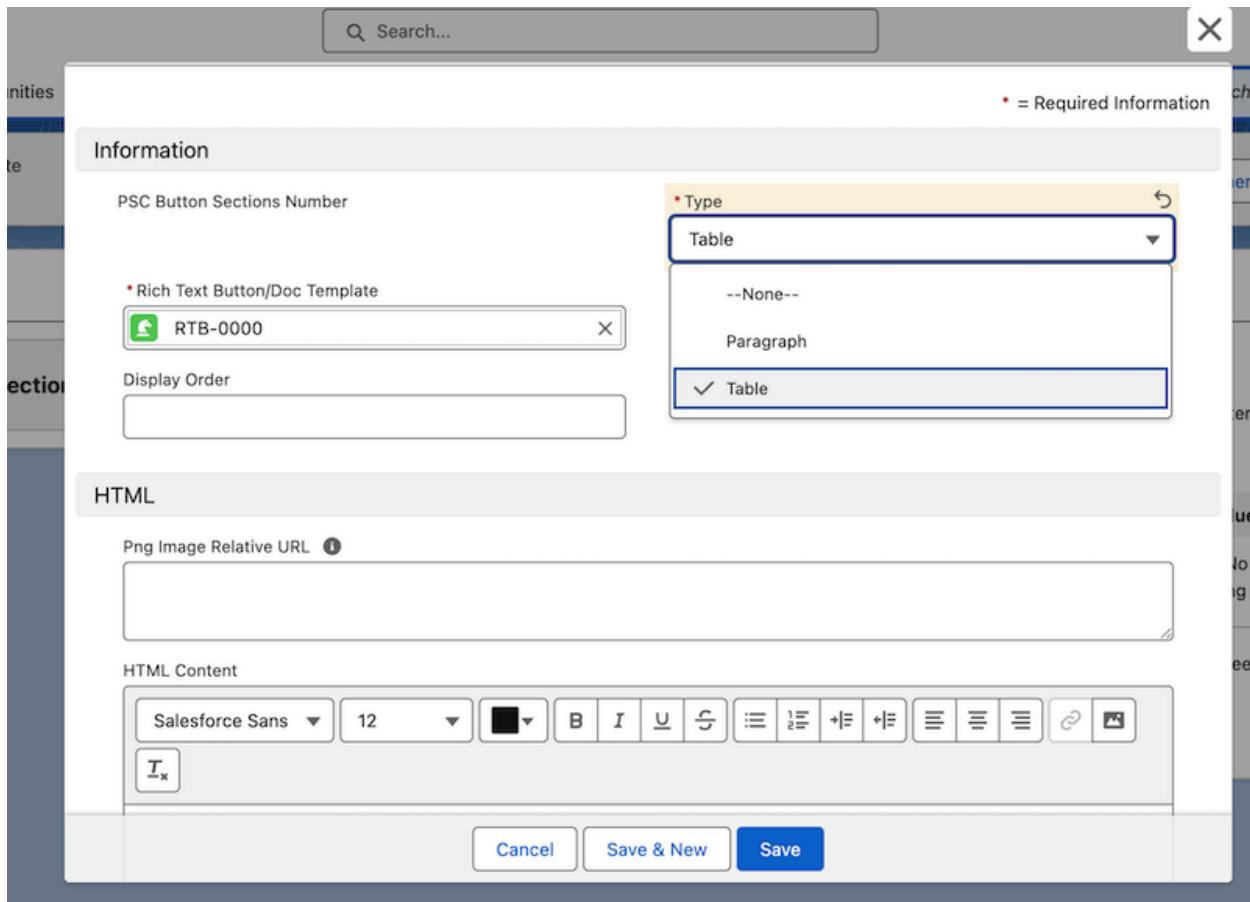
- **Template Name:** Enter a descriptive name (e.g., "Contract Template")
- **Deactivated:** Check this box during initial setup
- **SLDS Icon Name:** Enter an icon name (e.g., `utility:contract_doc`)
- **Test SFDC Record ID:** Enter an existing record ID for testing

Step 5: Add Document Sections and SOQL Queries

Document sections define the dynamic content and data sources for your templates.

To create a document section:

1. From your template record, scroll to the related list
2. Click **New Doc Section**



3. Configure section details:

- **Type:** Select **Table** for dynamic content or **Paragraph** for static content
- **Display Order:** Set to **10** (allows for future insertions)
- **HTML Content:** Paste your template HTML
- **Iterate HTML for Records:** Check this box for dynamic content to show multiple records only. For single record merge context, there's no need to check this box.

Button Section/Doc Section
BS-0000

Related Details

PSC Button Sections Number BS-0000	Type Table
Rich Text Button/Doc Template RTB-0000	Is Active <input checked="" type="checkbox"/>
Display Order 10	

▼ HTML

Png Image Relative URL

HTML Content

Non-Disclosure Agreement (NDA)

This Non-Disclosure Agreement (the "Agreement"), effective as of the last date of signature below (the "Effective Date"), is made and entered into by and between:

4. Add SOQL Query:

Enter a SOQL query to retrieve data. Example:

Example sql

```
SELECT Id, ContractNumber, AccountId, Account.Name,  
Account.BillingState, Status, StartDate, EndDate,  
SpecialTerms, Description  
FROM Contract  
WHERE ID = '{pv0}'
```

Button Section/Doc Section
BS-0000

Table

Show Table Header

SOQL Query [?](#)

```
SELECT
    Id,
    ContractNumber,
    Name,
    AccountId,
    Account.Name,
    Status,
    StartDate,
    EndDate,
    SpecialTerms,
    Description
FROM
    Contract
WHERE
    ID = '{pv0}'
```

Table Config JSON [?](#)

Cancel Save

Important: The `{pv0}` placeholder automatically captures the current record ID from the page context.

To show **Tables** in the document, After you define the SOQL query, use the **Table Config & Style Builder** action (instead manually defining them) to build the table columns and style them.

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Search... ★ + ? ! ! ! !

Button Section/Doc Section
BS-0002

Rich Text Button/Doc Template	Type	Display Order	Is Active
RTB-0001	Table	20	<input checked="" type="checkbox"/>

Preview Document Table Config & Style Builder Update HTML Content Source Clone

Related Details

PSC Button Sections Number BS-0002	Type Table
Rich Text Button/Doc Template RTB-0001	Is Active <input checked="" type="checkbox"/>
Display Order 20	

Activity

Filters: All time • All activities • All types
Refresh • Expand All • View All

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

To Do List

For applying html styles (not supported directly by the editor of HTML Content field), use **Update HTML Content Source action**.

For example, you can use page break class to apply page break in the downloaded pdf document automatically.

DRTE supports css classes for applying page break after or before any element in the final rendered server side pdf.

- page-break-before-always
- page-break-after-always

The screenshot shows the Salesforce 'Update HTML Content Source' dialog. On the left, there's a sidebar with a document icon and the text 'Button Section/Doc Section BS-0849'. Below it are sections for 'Rich Text Button/Doc Template' (RTB-0051) and 'Type Table'. The main area has tabs for 'Related' and 'Details', with 'Details' selected. Under 'HTML', there's a 'HTML Content' field containing the following code:

```
<p class="page-break-before-always"><br><strong style="font-size: 16px;">Final Notes</strong></p><p><br></p><p>We appreciate the collaboration from the <strong>{{psce__Account__r.Name}}</strong> team and remain committed to delivering a high-quality solution.</p><p><br></p><p style="text-align: center;">For any urgent concerns, please reach out to: <strong>Rahul Jain (rahul@codeyleabs.com)</strong></p><p><br></p><p><br></p><p><br></p><p><br></p></p>
```

At the bottom right of the dialog is a 'Next' button. To the right of the dialog, the main Salesforce interface shows a 'Content' tab with a 'Rich Text Content Source' section, a 'Related' list, and a 'Activities' section.

5. Click Preview Document to validate your configuration

The screenshot shows the Salesforce 'Preview Document' view for a document titled 'Non-Disclosure Agreement (NDA)'. The document content includes:

This Non-Disclosure Agreement (the "Agreement"), effective as of the start date mentioned below (the "Effective Date"), is made and entered into by and between:

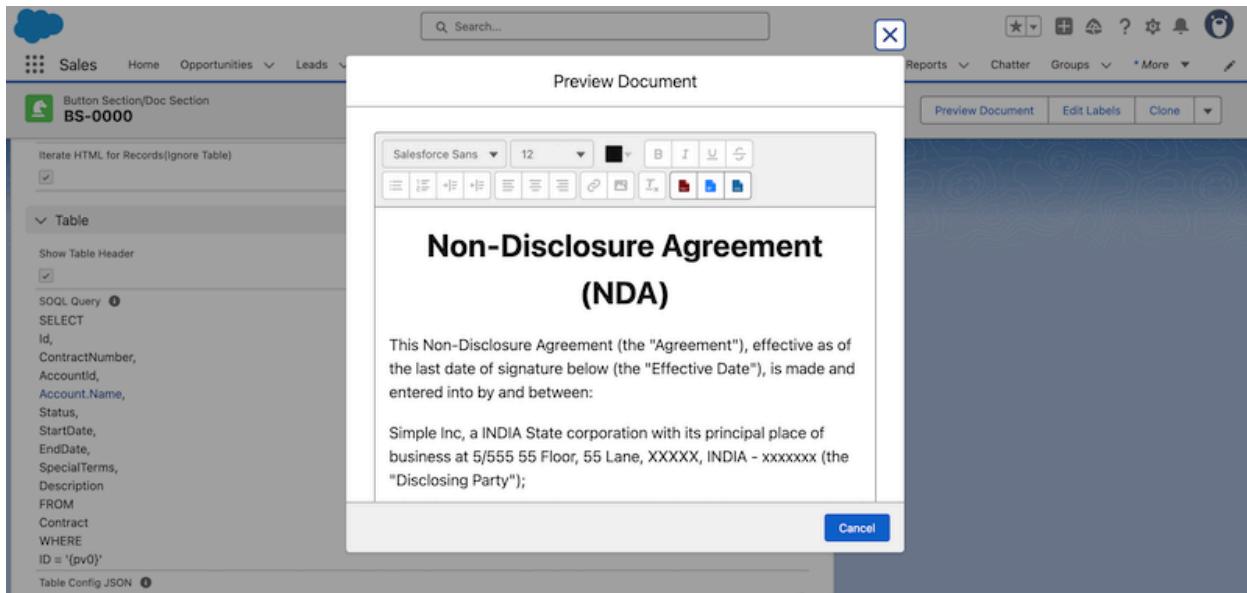
Simple Inc, a INDIA State corporation with its principal place of business at 5/555 55 Floor, 55 Lane, XXXXX, INDIA - xxxxxxx (the "Disclosing Party");

AND

{{Account.Name}}, a {{Account.BillingState}} corporation with its principal place of business at {{Account.BillingStreet}} {{Account.BillingCity}} {{Account.BillingState}} {{Account.BillingCountry}} (the "Receiving Party").

Start Date: {{StartDate}}

Valid For: {{ContractTerm}} months



Step 6: Add E-Signature Placeholders

E-signature placeholders define where signers will input information and sign the document.

General Placeholders

Format: [type[label]]

Examples:

- [text[First Name]] - Text input field
- [date[Service Date]] - Date field

Signature-Specific Placeholders

Format: [type[label] : [signature]]

Examples:

- [text[First Name] : [Signature1]] - Assigned to first signer
- [Signature1] - Signature field for client

Single Signer Example:

Search... ★ + ? ⚙ 🔍

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Button Section/Doc Section
BS-0000

11. Special Terms
{{SpecialTerms}}

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date(s) written below.

DISCLOSING PARTY:

Simple Inc

[Signature1]

By: _____

Name: [text[Authorized Signatory Name]:[Signature1]]

Title: [text[Authorized Signatory Title]:[Signature1]]

[date[Signed Date]:[Signature1]]

Date: _____

Multiple Signers Example:

Search... ★ + ? ⚙ 🔍

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Button Section/Doc Section
BS-0000

RECEIVING PARTY:

{{Account.Name}}

[Signature2]

By: _____

Name: [text[Authorized Signatory Name]:[Signature2]]

Title: [text[Authorized Signatory Title]:[Signature2]]

[date[Signed Date]:[Signature2]]

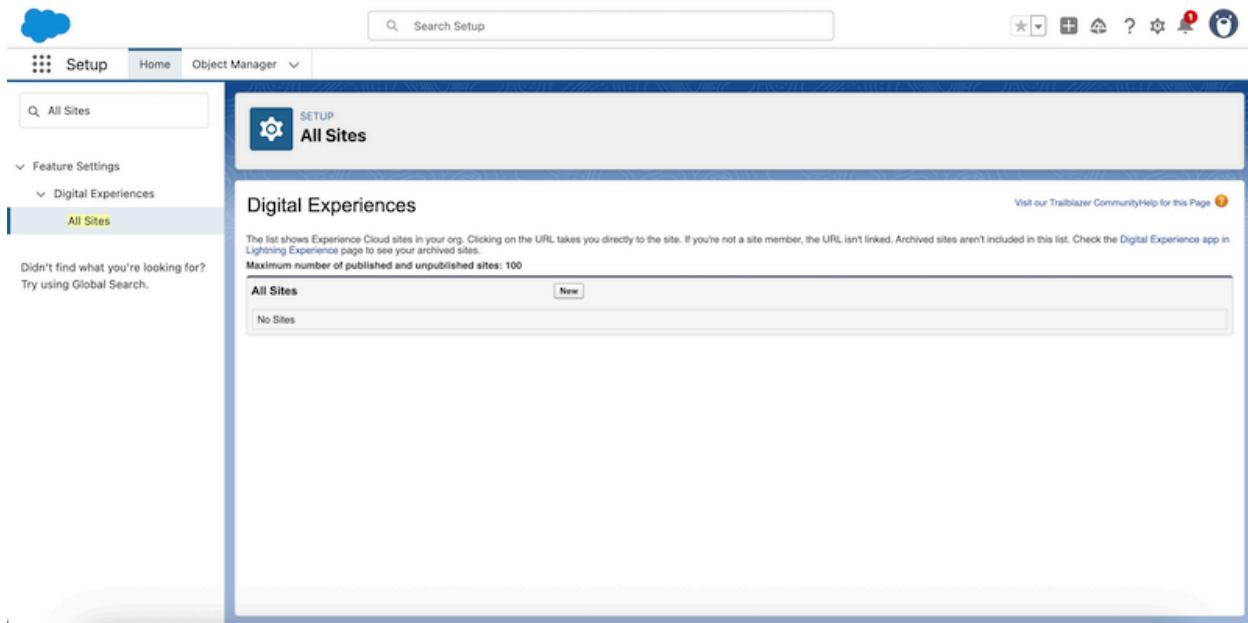
Date: _____

Iterate HTML for Records(ignore Table)

UI Integration and Workflow

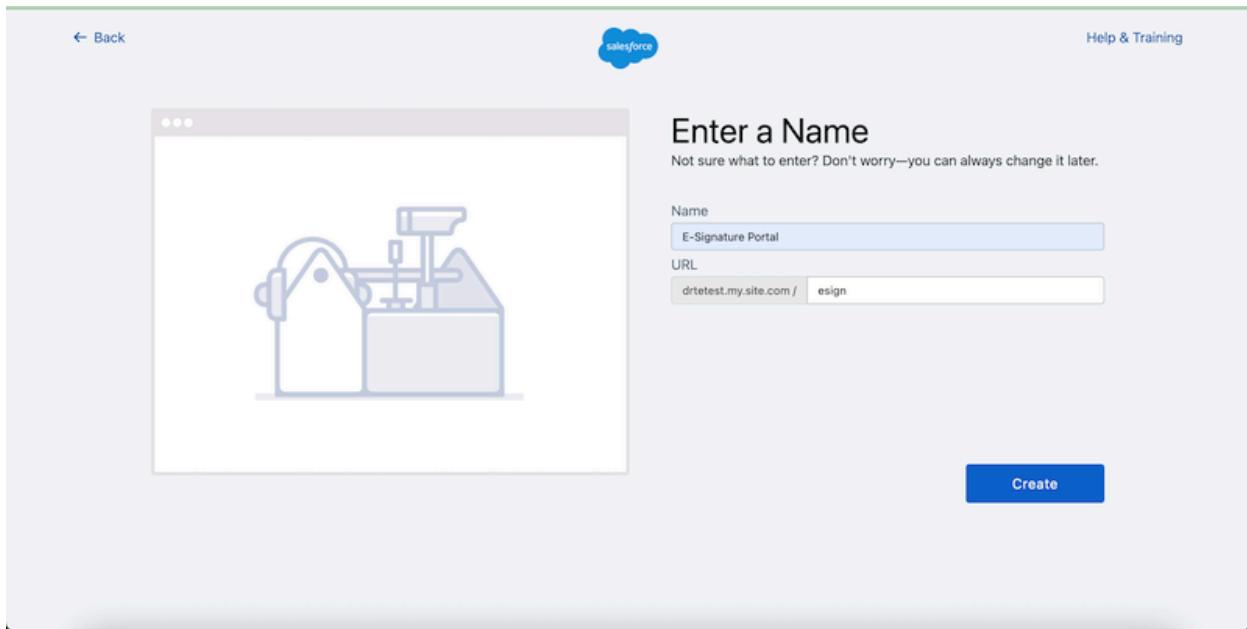
Step 7: Create E-Signature Site

Create a public-facing site where external signers can view and sign documents.

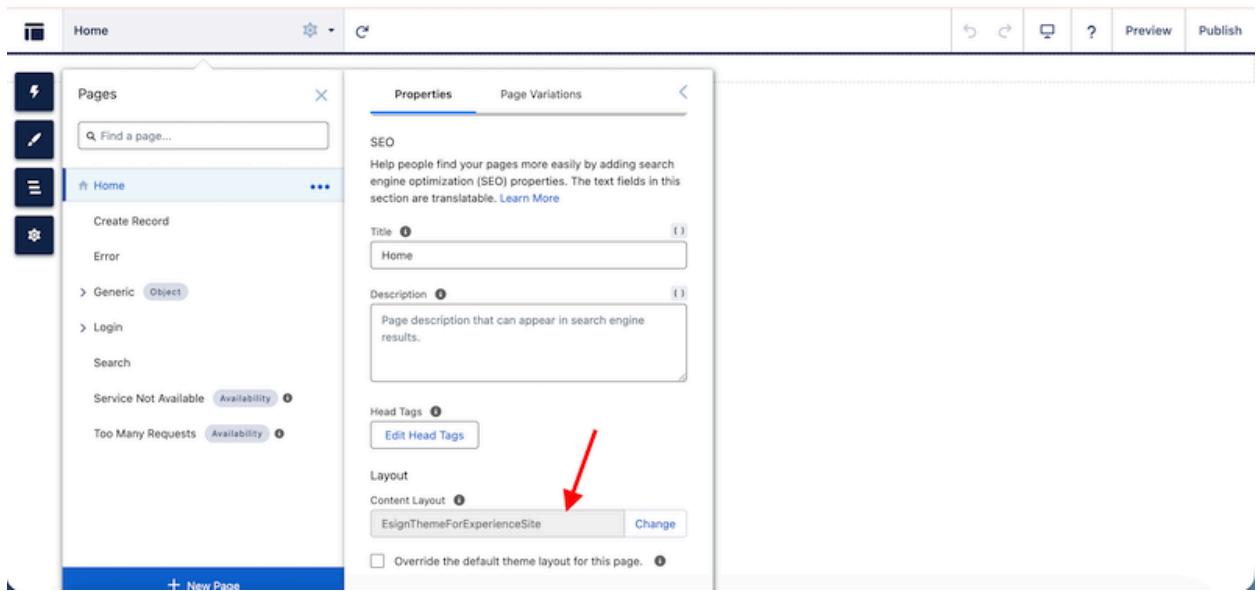


To create the site:

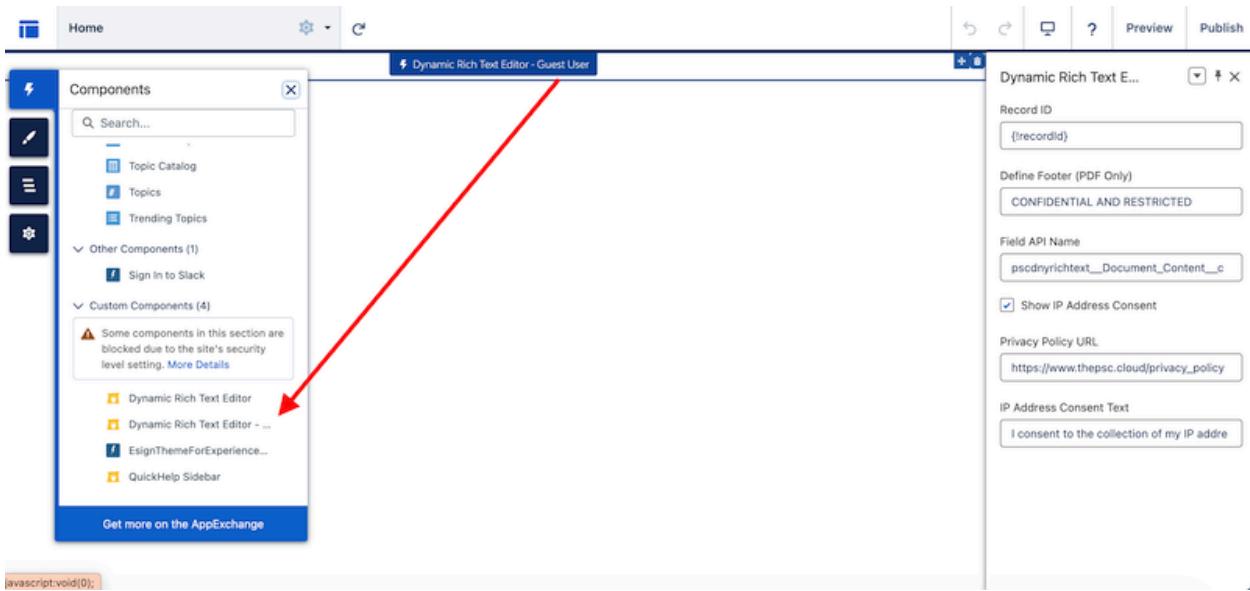
1. Navigate to **Setup** → **Digital Experiences** → **All Sites**
2. Click **New Site**
3. Select "**Build Your Own (Aura)**" template
4. Name your site (e.g., "DRTE_Sign_Site")



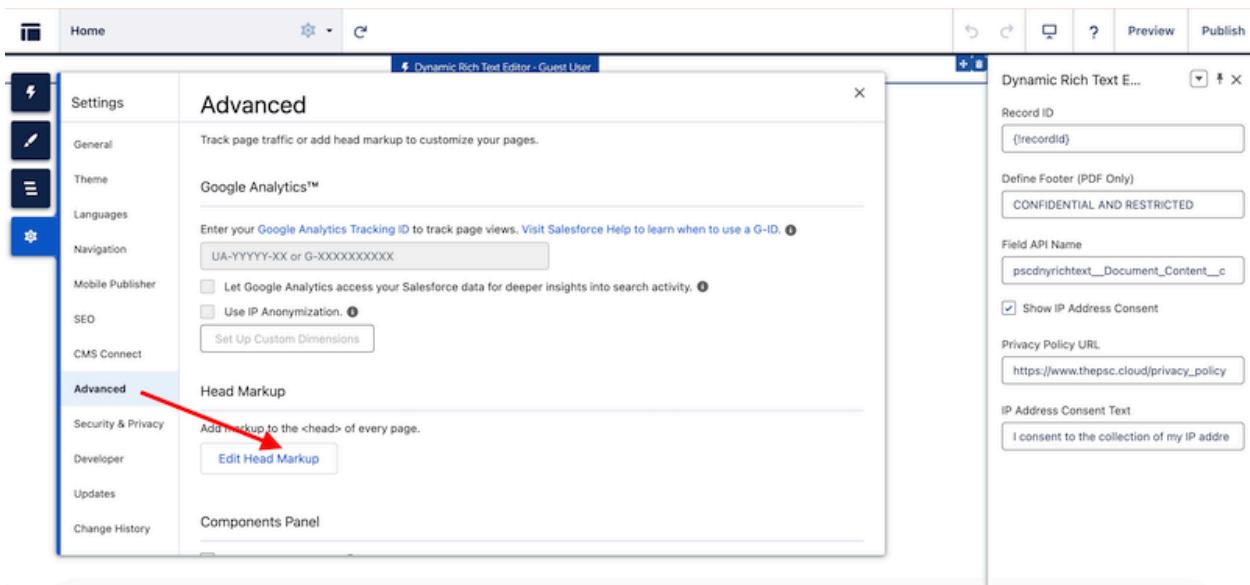
5. Open the site in **Builder**
6. Change the home page theme to DRTE
EsignThemeForExperienceSite with only one content region on the page.

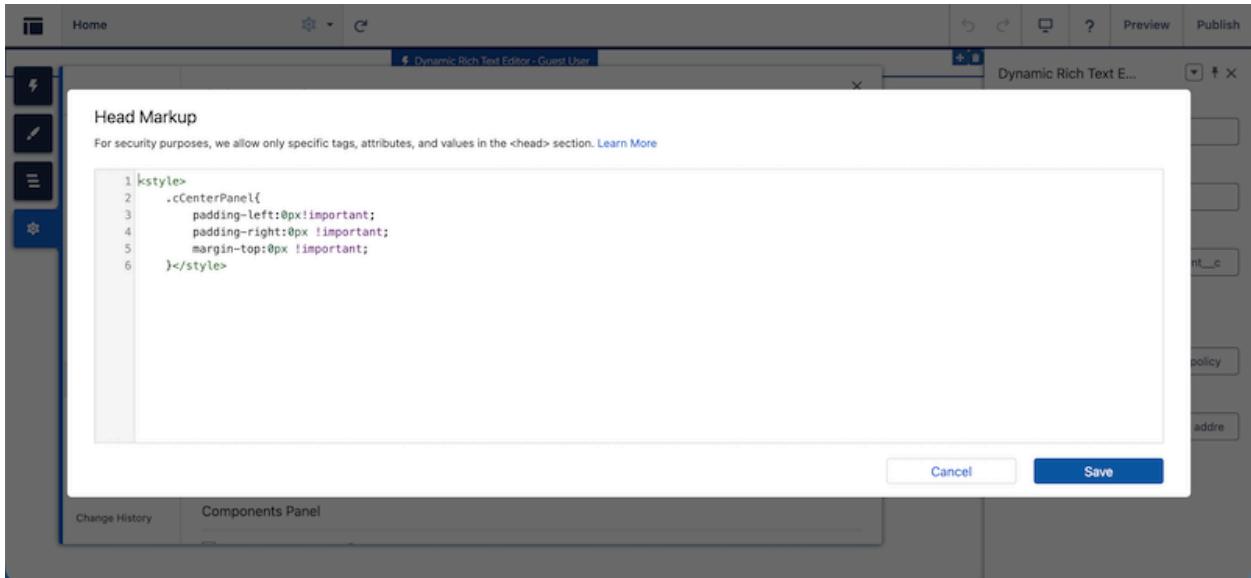


7. Drag the "**Dynamic Rich Text Editor for Guest User**" component onto the home page.



8. In Advance, Edit Head Markup, and add below style tag to remove extra spaces around the DRTE component to give a full page view.



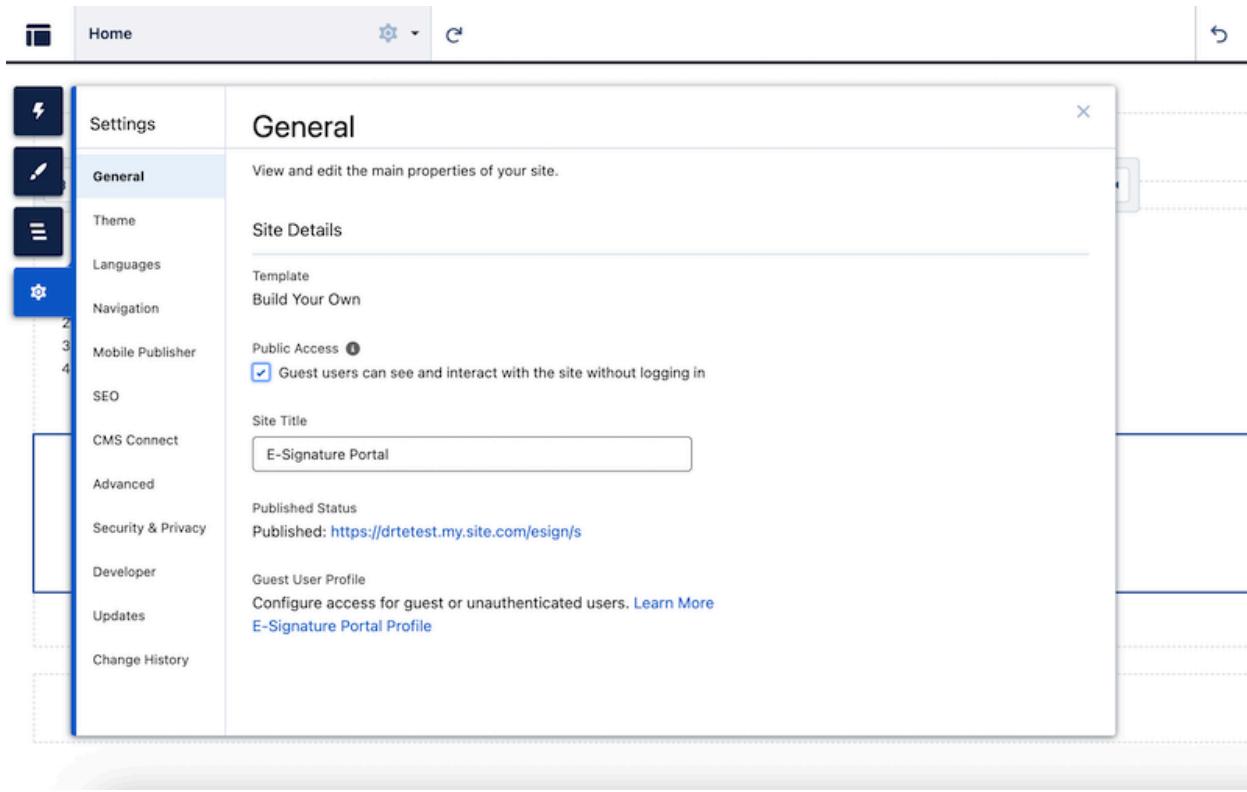


<style>

```
.cCenterPanel{
  padding-left:0px!important;
  padding-right:0px !important;
  margin-top:0px !important;
}
```

</style>

9. In settings, enable "**Guest users can see and interact with the site without logging in**"



Step 8: Configure Guest User Permissions

To set guest user permissions:

1. Access the **Guest User Profile** from Builder settings

E-Signature Portal Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[16\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

Profile Detail	
Name	E-Signature Portal Profile
User License	Guest User License
Description	
Created By	Rahul Jain, 9/17/2025, 12:59 AM
Modified By	Rahul Jain, 9/17/2025, 12:59 AM

Page Layouts

Standard Object Layouts	
Global	Global Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Home Page Layout	Home Page Default [View Assignment]
Access	Access Layout [View Assignment]
Document Type	Document Type Layout [View Assignment]
Email Message	Email Message Layout [View Assignment]
Employee	Employee Layout [View Assignment]
Employee Crisis Assessment	Employee Crisis Assessment Layout [View Assignment]

2. Assign the "DRTE guest user" permission set

E-Signature Portal Site Guest User

[Save](#) [Cancel](#)

Available Permission Sets	Enabled Permission Sets
Context Service Runtime Customer Experience Analytics Admin Customer Experience Analytics User Data Cloud Home Org Integration User Data Pipelines Base User DecimalQuantityDesigntime DecimalQuantityRuntime DeliveryEstimationServicePermSet Document Checklist Dynamic RichText Editor Admin User	DRTE Esign Guest User Permission Set

[Save](#) [Cancel](#)

3. Activate the site

The screenshot shows the 'Administration E-Signature Portal' interface. On the left, a sidebar lists various settings categories: Settings, Preferences, Members, Contributors, Login & Registration, Emails, Pages, Rich Publisher Apps, and URL Redirects. The 'Settings' category is currently selected. The main content area is titled 'Settings' and contains a section for the 'E-Signature Portal'. It shows the URL <https://drftest.my.site.com/esign>. Below the URL, there are two status buttons: 'Status' (Active) and 'Deactivate'. Underneath these are two template buttons: 'Template' (Build Your Own) and 'Change Template'.

Step 9: Configure Sharing Rules

Sharing rules ensure guest users can only access documents intended for them.

To create sharing rules:

1. Navigate to **Setup → Sharing Settings**

Sharing Settings

No sharing rules specified.

Work Plan Template Sharing Rules New Recalculate Work Plan Template Sharing Rules Help ?

No sharing rules specified.

Work Step Template Sharing Rules New Recalculate Work Step Template Sharing Rules Help ?

No sharing rules specified.

E Signature Log/Signed Document Sharing Rules New Recalculate E Signature Log/Signed Document Sharing Rules Help ?

No sharing rules specified.

E Signature Request Sharing Rules New Recalculate E Signature Request Sharing Rules Help ?

No sharing rules specified.

Rich Text Button / Doc Template Sharing Rules New Recalculate Rich Text Button / Doc Template Sharing Rules Help ?

No sharing rules specified.

Rich Text Preview Sharing Rules New Recalculate Rich Text Preview Sharing Rules Help ?

No sharing rules specified.

2. Create sharing rules for both:
 - **E Signature Log/Signed Document**
 - **E Signature Request**
3. For each object:
 - Click **New**
 - Set Rule Type to "**Guest User Access**"
 - Define criteria (e.g., token not null and status is sent) **exactly shown in the screen shot below**.

Sharing Settings

No sharing rules specified.

E Signature Log/Signed Document Sharing Rules New Recalculate E Signature Log/Signed Document Sharing Rules Help ?

Action	Criteria	Shared With	Access Level
Edit Del	(E Signature Log/Signed Document: Token NOT EQUAL TO) AND (E Signature Log/Signed Document: Do Not Share The Record EQUALS False)	E-Signature Portal Site Guest User	Read Only

E Signature Request Sharing Rules New Recalculate E Signature Request Sharing Rules Help ?

Action	Criteria	Shared With	Access Level
Edit Del	(E Signature Request: Token NOT EQUAL TO) AND (E Signature Request: Status EQUALS Sent For Signature)	E-Signature Portal Site Guest User	Read Only

Rich Text Button / Doc Template Sharing Rules New Recalculate Rich Text Button / Doc Template Sharing Rules Help ?

No sharing rules specified.

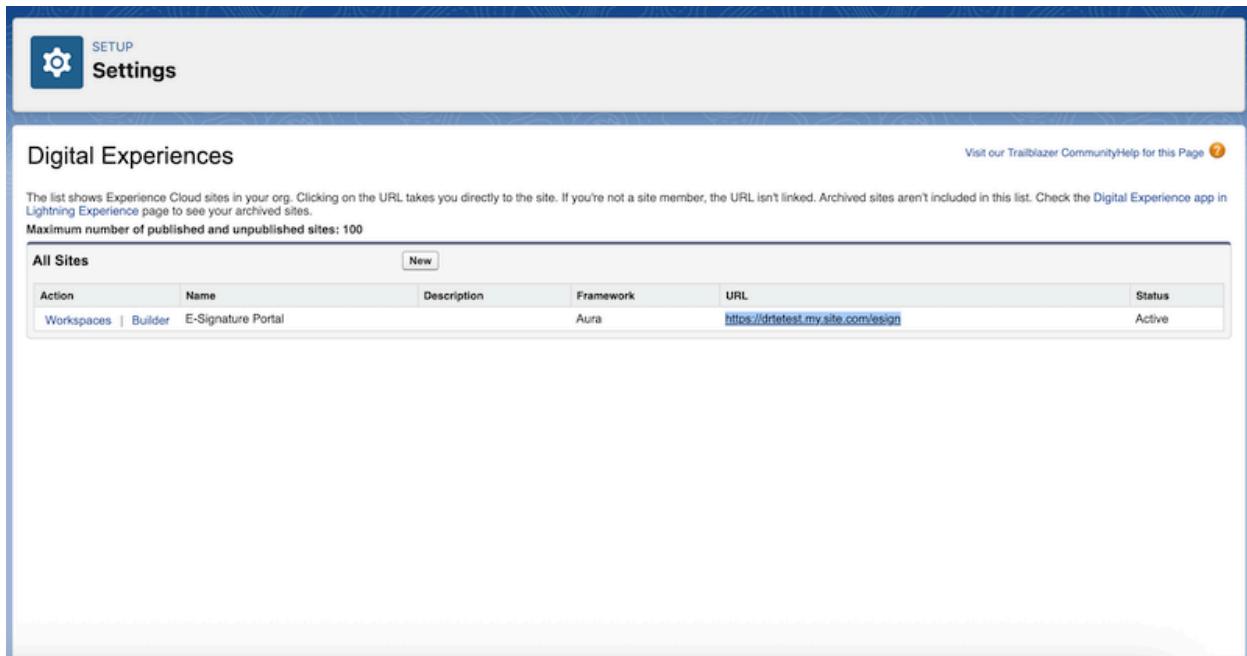
Rich Text Preview Sharing Rules New Recalculate Rich Text Preview Sharing Rules Help ?

No sharing rules specified.

Step 10: Link DRTE to E-Signature Site

To configure the site URL:

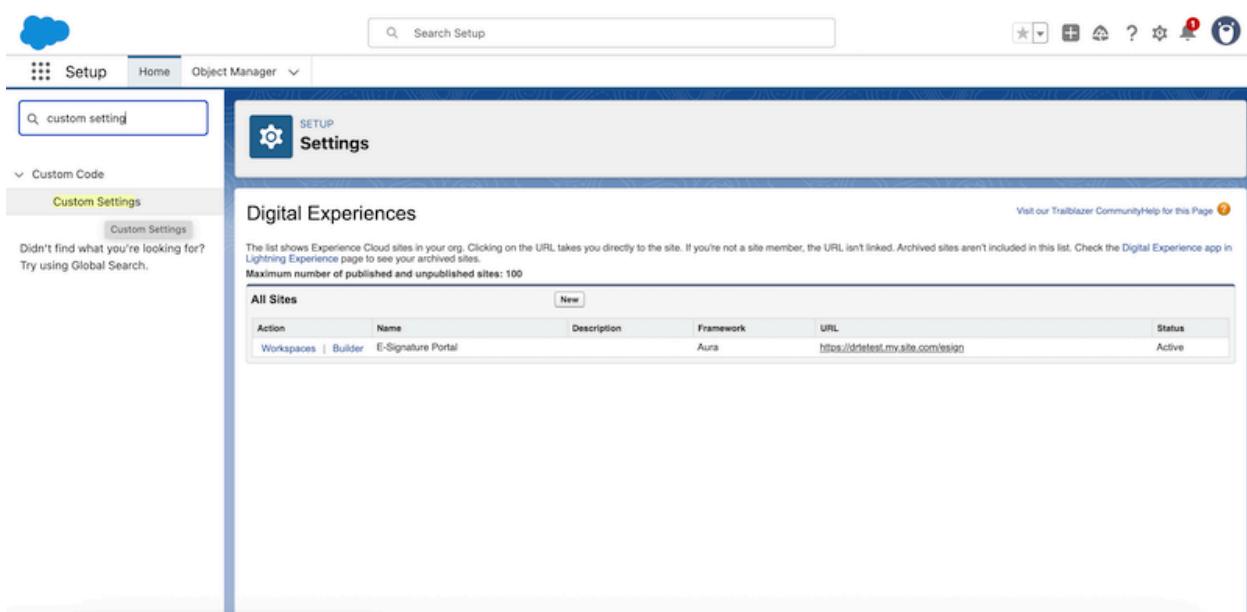
1. Copy your site URL from All Sites



The screenshot shows the 'Digital Experiences' page in the Salesforce Setup. At the top, there's a message about Experience Cloud sites and a note about the maximum number of sites. Below is a table titled 'All Sites' with columns for Action, Name, Description, Framework, URL, and Status. One row is visible: 'E-Signature Portal' (Name), 'Aura' (Framework), 'https://drtest.my.site.com/esign' (URL), and 'Active' (Status). A 'New' button is at the top right of the table.

Action	Name	Description	Framework	URL	Status
Workspaces Builder	E-Signature Portal		Aura	https://drtest.my.site.com/esign	Active

2. Navigate to **Setup → Custom Settings**



The screenshot shows the 'Custom Settings' page in the Salesforce Setup. On the left, there's a sidebar with 'Custom Code' and 'Custom Settings'. A search bar at the top says 'Q: custom setting'. The main area is identical to the one above, showing the 'Digital Experiences' page with the 'All Sites' table. The table has one row: 'E-Signature Portal' (Name), 'Aura' (Framework), 'https://drtest.my.site.com/esign' (URL), and 'Active' (Status).

Action	Name	Description	Framework	URL	Status
Workspaces Builder	E-Signature Portal		Aura	https://drtest.my.site.com/esign	Active

3. Click **Manage** next to "**DRTE Settings**"
4. Paste the site URL in the default org-wide value field

The screenshot shows the Salesforce Setup interface under the 'Custom Settings' tab. The title is 'DRTE Settings Edit'. A note says 'Provide values for the fields you created. This data is cached with the application.' Below is a form titled 'Edit DRTE Settings' with two buttons: 'Save' and 'Cancel'. A legend indicates a red vertical bar means 'Required Information'. The 'DRTE Settings Information' section contains four fields under the 'Location' heading:

Field	Value
Esign Guest Site URL	est.my.site.com/esign/s/
endpoint (Deprecated) - No Use	[Empty]
gptversion (Deprecated) - No Use	[Empty]
key (Deprecated) - No Use	[Empty]

Step 11: Add DRTE to Record Pages

Configure the DRTE component on your object record pages (e.g., Contract or any SFDC object).

To add DRTE components:

1. Open the **Lightning App Builder** for your record page

2. Add a new tab named "Contract Document"

3. Add the following components:

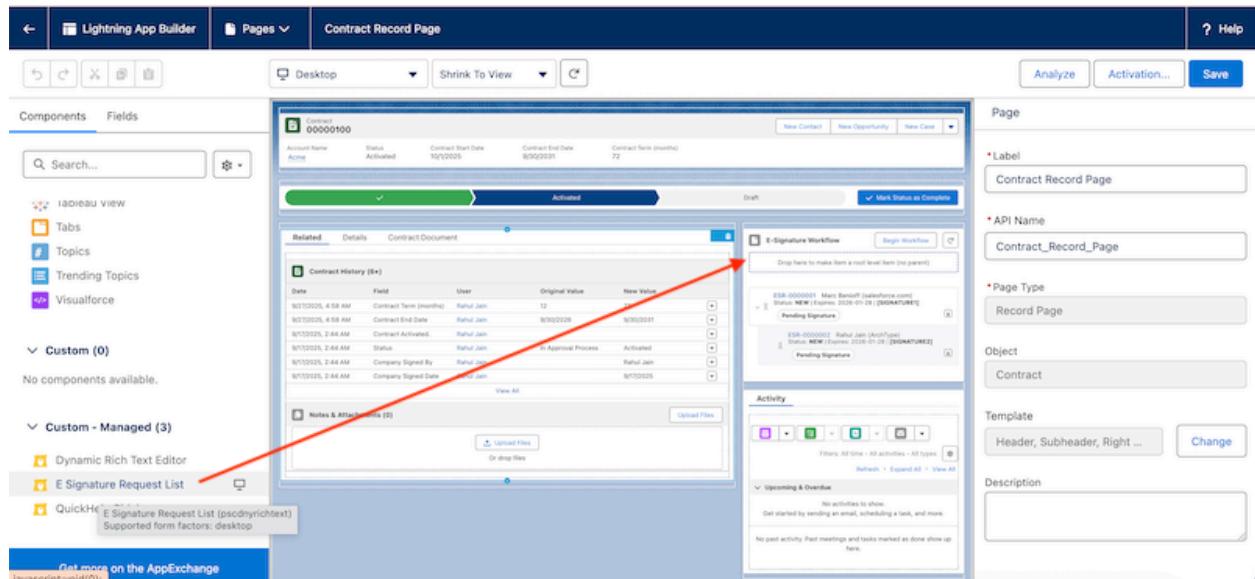
- **Dynamic Rich Text Editor** (main area)
- **E-Signature Request List** (right panel)

4. Configure component properties:

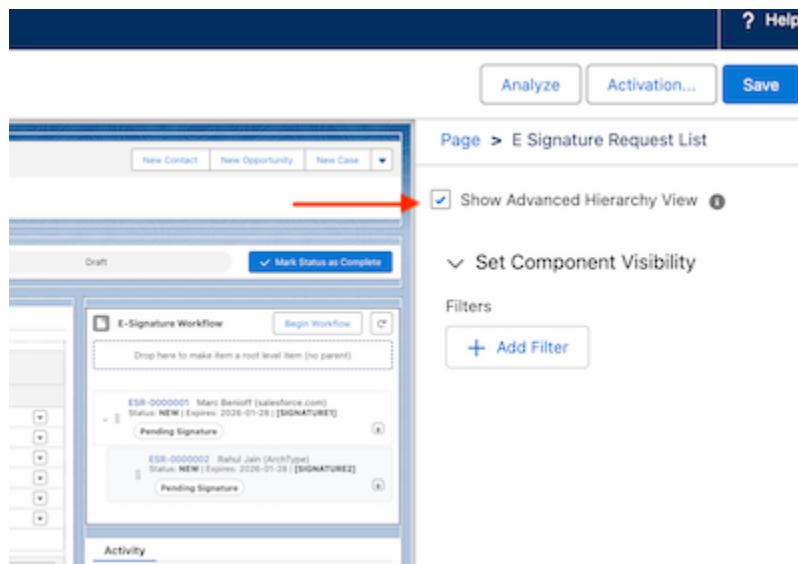
- **Default Template SFDC Id:** Enter your template record ID
- **Footer:** Optional footer text

- **Show Page Number:** Enable/disable page numbers
- **Read Only:** Restrict manual editing (only keep it unchecked when needed to make it editable on the fly)
- **Enable to request E-Signature:** Enable signature functionality

5. Add the E Signature Workflow component



For the latest upgraded version of E Signature Request List, select **Show Advanced Hierarchy View** in the component property.



Step 12: Configure Email Templates

To set up PIN email notifications (this is a mandatory step, as the packaged email template is referencing wrong entity type):

1. Clone the package-included email template
2. Change Entity Type to "E Signature Request Pin"

The screenshot shows the 'Email Template' page with a blue header bar. The title is 'DRTE (Cloned) Your PIN to Sign Document'. On the right, there are buttons for 'Edit', 'Clone', 'Delete', and a dropdown. Below the header, there are two tabs: 'Details' (selected) and 'Related'. Under 'Information', there is a table with fields: 'Email Template Name' (DRTE (Cloned) Your PIN to Sign Document), 'Related Entity Type' (E Signature Request Pin), 'Description' (DRTE Your PIN to Sign Document), and 'Folder' (DRTE Email Template). A red arrow points to the 'Folder' field. The 'Message Content' section contains the subject 'Your PIN to Sign Document', the message body 'Hello {{Recipient.Name}}', and the access PIN template code. At the bottom, there are 'Edit' and 'Delete' buttons.

3. Update the Share PIN Email Template Id in DRTE Settings

The screenshot shows the 'Custom Settings' page under 'SETUP'. The title is 'Custom Settings'. Below it, there is a section titled 'DRTE Settings'. A red arrow points to the 'Share PIN Email template Id' field, which contains the value '00Xa50000093ljBEAU'. There are 'Edit' and 'Delete' buttons above the table. The table has columns for 'Location' and 'Value'. Other rows include 'gptversion (Deprecated) - No Use' (Value: https://qxttestdrive.my.site.com/esign/s/), 'Company Footer Text For Email Template' (Value: CodeyLabs.com, All Rights Reserved.), 'Company Support Email for Email Template' (Value: support@codeylabs.com), 'Send Signature Request Email Template Id' (Value: 00Xa50000092fbOEAQ), and 'Org Wide Email To Send Signature Request' (Value: info@codeylabs.com). The table also includes columns for 'endpoint (Deprecated) - No Use' (Value: 00Xa50000092fbPEAQ), 'key (Deprecated) - No Use' (Value: 00Xa50000092fbNEAQ), and 'Company Header Image For Email Template' (Value: https://www.codeylabs.com/assets/img/codeylabs_logo.svg). At the bottom, there are 'View: All' and 'Create New View' buttons.

To enable PIN authentication:

Check the **Require PIN** field on the E Signature Request record, manually or programmatically as per your organisation requirements. When this is

checked, it will always asks end user to verify PIN before watching the document.

E Signature Request
Howard Jones (Acme Inc)

Howard Jones	Is Expired
Contact Name	<input type="checkbox"/>
Howard Jones (Acme Inc)	Only After Signing
Request Name	ESR-0000003
ESR-0000004	Expiration Date
Signature URL	11/15/2025
https://qxtestdrive.my.site.com/esign/s/? token=fabbe519-9462-47cd-a112-c5678e693115	Signature Placeholder
Request Sent On	[Signature2]
10/16/2025, 12:44 AM	Document Name
Request Signed On	quotextestdrive_CustomerAgreement
10/16/2025, 12:46 AM	
Require PIN	<input checked="" type="checkbox"/>
Auto Send To Next Signer (If Available)	<input type="checkbox"/>
Acknowledged and Viewed?	
0	
First View Date and Time	
Last View Date and Time	

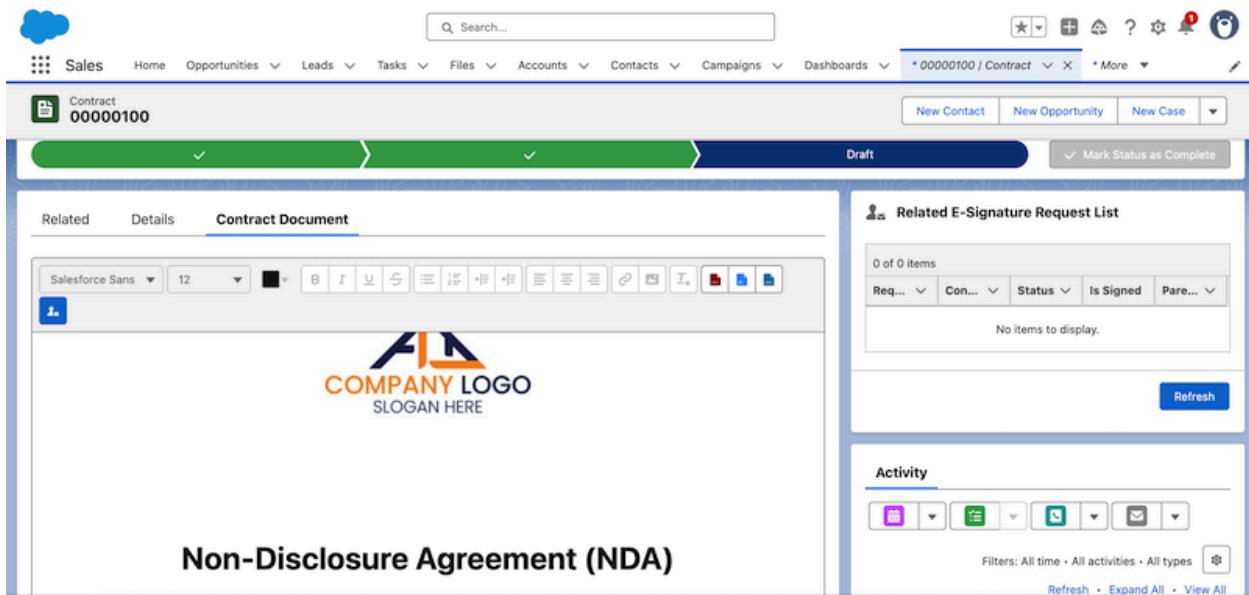
A red arrow points to the "Require PIN" checkbox, which is checked.

End-User Workflow

Step 13: Generate and Review Documents

To generate a document:

1. Open the relevant record (e.g., Contract)
2. Click the "Contract Document" tab



3. Review the automatically generated document
4. Update the record status as needed (e.g., "In Approval Progress")

Contract
00000100

In Approval Process Activated

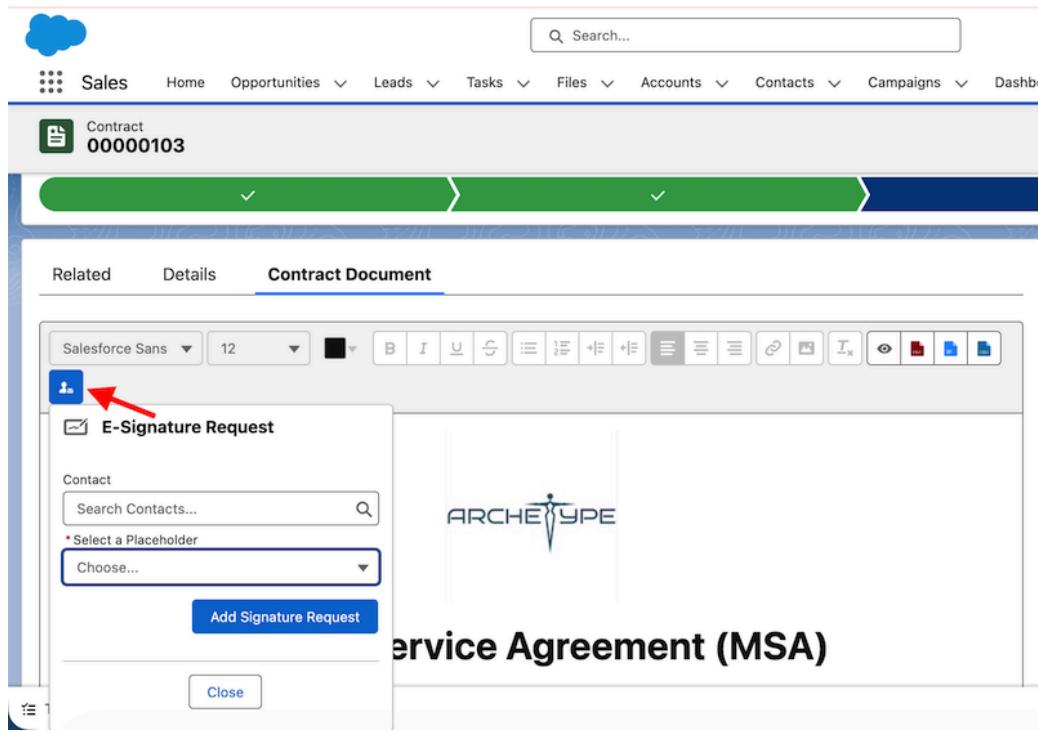
Related Details Contract Document

Contract Owner  Rahul Jain	Contract Start Date 10/1/2025
Contract Number 00000100	Contract End Date 9/30/2026
Account Name Acme	Contract Term (months) 12
Status In Approval Process	Owner Expiration Notice
Address Information	
Billing Address	Shipping Address
Description Information	

Step 14: Send for E-Signature (First Signer)

To request a signature:

1. Click the "Request E-Signature" button



2. Enter the first signer's information (a Signature placeholder in document is **mandatory** to be able to generate a **E-Signature Request**, the DRTE system automatically parses the document to find the unique signature placeholders in the document and generates a list in 'Select a Placeholder' picklist.

The screenshot shows the Salesforce interface for a Contract record (ID: 00000103). The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, and Dashboards. A search bar is at the top right. The main content area displays the Contract Document tab. On the left, there's a rich text editor toolbar. A modal window titled "E-Signature Request" is open, showing a contact selection dropdown with "Fake Butler" selected, a placeholder dropdown with "[Signature1]", and a "Add Signature Request" button. The background document features the Archetype logo and the title "Service Agreement (MSA)".

The screenshot shows the Salesforce interface for the same Contract record (ID: 00000100). The top navigation bar and search bar are visible. The main content area displays the Contract Details tab. On the left, there's a rich text editor toolbar. A sidebar titled "E-Signature Workflow" is open, showing two pending signature items: one for Marc Benioff (status: NEW) and one for Rahul Jain (status: NEW). Both items have a "Pending Signature" status indicator.

3. Verify signature placeholder matches signer details
4. Refresh the **E-Signature Request List** to confirm (when it doesn't automatically refresh)

5. Drag and Drop the second signer box in the workflow over first signer to create a link between them.
6. Click on Begin Workflow, to kick off signature process automatically while on the same screen (or you can always manually start it from first E Signature Request record)

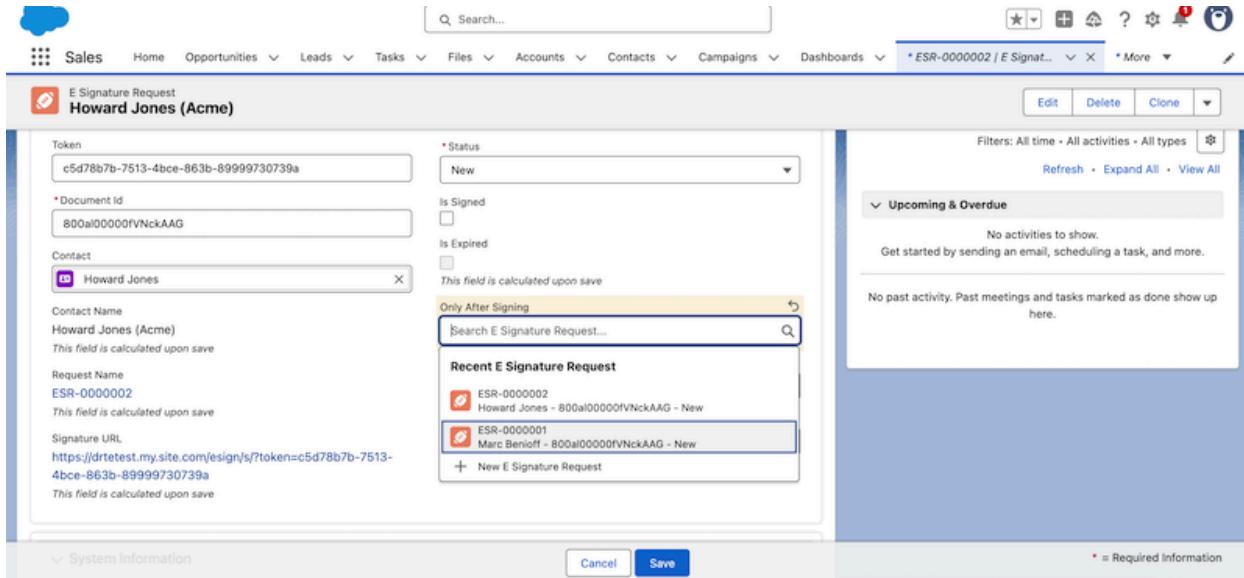
The screenshot shows the Pre Sales Cloud interface with the following details:

- Top Navigation:** Home, Accounts, Opportunities, PSC Quote Requests, PSC Quotes, Collection Forecast Dashboard, ESR-0000004 / E Signat..., More.
- Left Panel:** Document (Primary Quote) tab selected. It contains a rich text editor toolbar, a section titled "STATEMENT OF WORK", and a "PROJECT DESCRIPTION" section with repeating QR codes.
- Right Panel:** PSC Quotes (1) list view. One quote is listed: QR - Commodity Trading & Risk Management (CTRM) with Net Fees Summ... USD 175,352.63, Primary checked, and As Sold Margin ... 49.29%.
- Bottom Right Overlay:** A modal window titled "E-Signature Workflow" with a red arrow pointing to the "Begin Workflow" button. The modal message says: "We have locked this document hierarchy as the e-signature workflow has begun." It lists two e-signature requests:
 - ESR-0000003 Rahul Jain (Simple Inc) Status: COMPLETED | Sent on: 2025-10-16 13:13 | Signed on: 2025-10-16 13:14 | [SIGNATURE1] Signed
 - ESR-0000004 Howard Jones (Acme Inc) Status: COMPLETED | Sent on: 2025-10-16 13:14 | Signed on: 2025-10-16 13:16 | [SIGNATURE2] Signed

Step 15: Configure Signing Order

To set up sequential signing (Manually):

1. Create a second e-signature request for the next signer



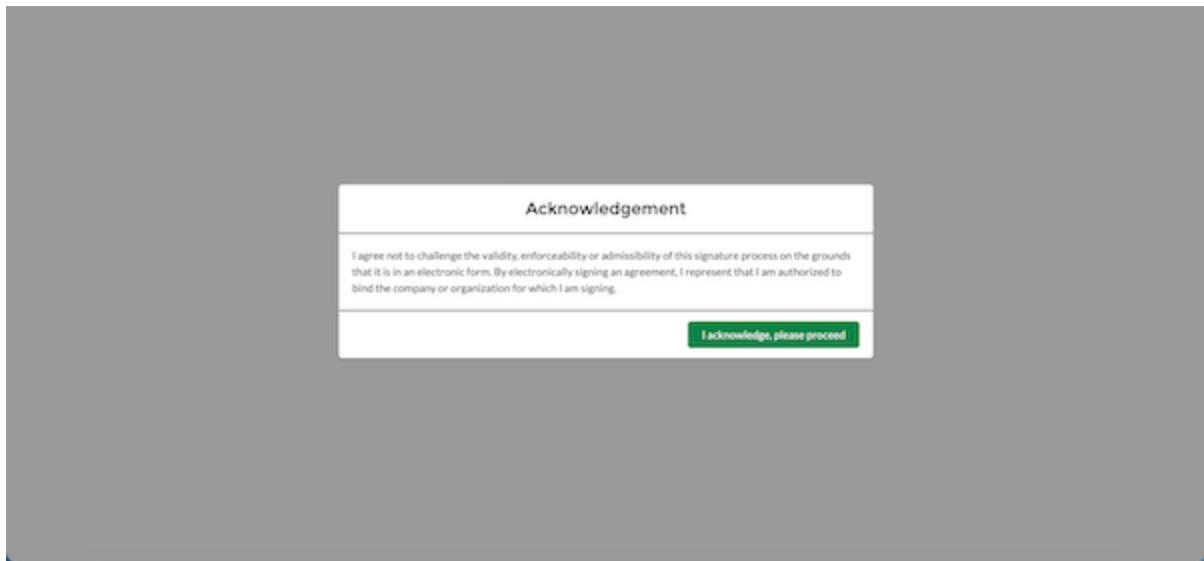
2. Open the second request record
3. In the "**Only After Signing**" field, select the first request

This ensures the second signer receives notification only after the first signer completes their signature.

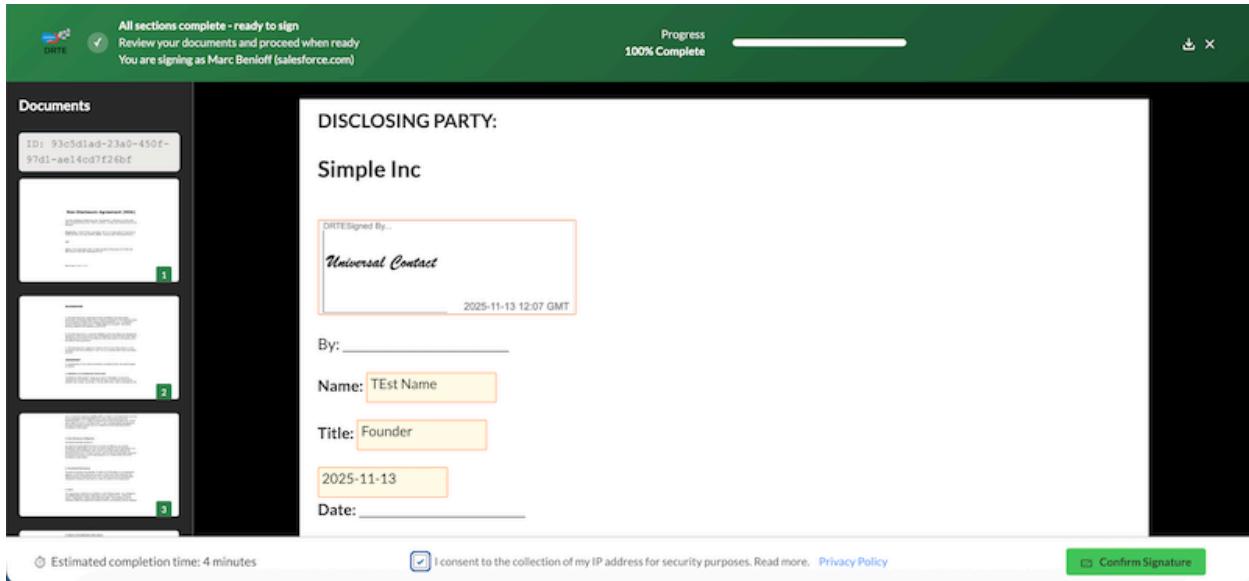
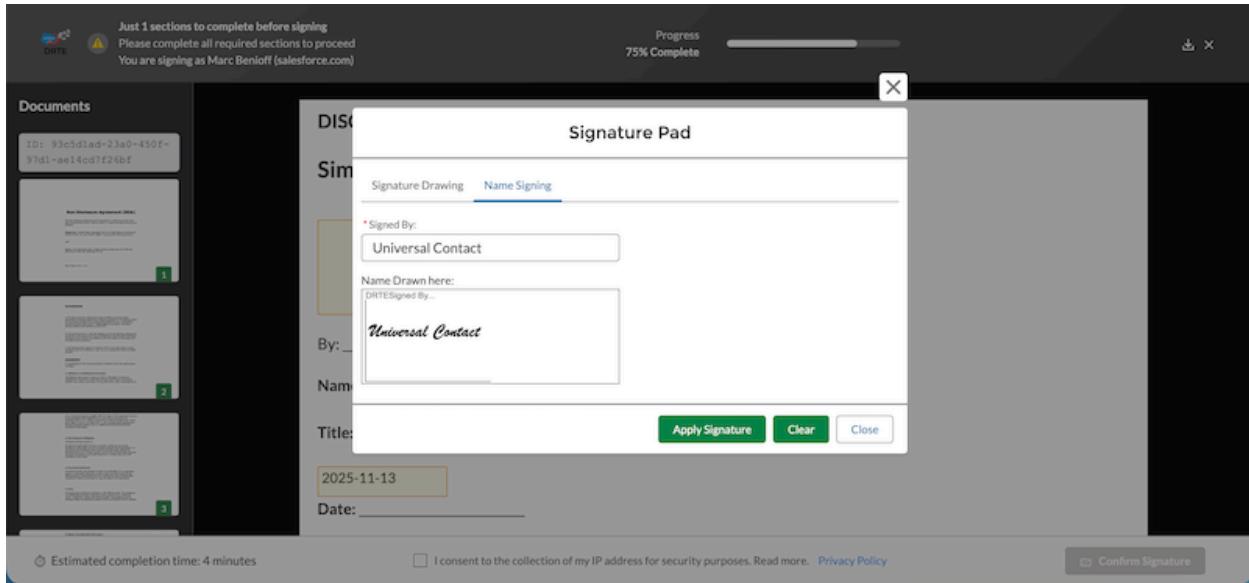
Step 16: Send Signature Requests

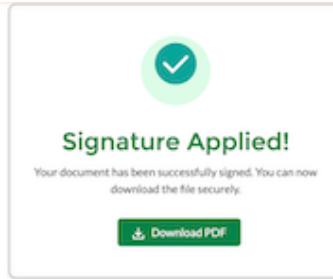
To trigger the signing process (Manually):

1. Open the first e-signature request
2. Change **Status** to "**Sent for Signature**"
3. The first signer receives an email notification and starts signing from there.



A screenshot of a digital document signing interface. At the top, it displays "Just 4 sections to complete before signing", "Please complete all required sections to proceed", and "You are signing as Marc Benioff (salesforce.com)". The progress bar shows "0% Complete". On the left, there's a sidebar titled "Documents" showing three document thumbnails. In the center, there's a placeholder for a company logo with the text "COMPANY LOGO" and "SLOGAN HERE". Below that is the title "Non-Disclosure Agreement (NDA)". A note below the title states: "This Non-Disclosure Agreement (the "Agreement"), effective as of the start date mentioned below (the "Effective Date"),". At the bottom, there are three buttons: "Estimated completion time: 4 minutes", "I consent to the collection of my IP address for security purposes. Read more. Privacy Policy", and "Confirm Signature".





4. Monitor status updates in the E-Signature Request List

The screenshot shows the Salesforce interface for managing e-signature requests. At the top, there's a navigation bar with tabs like Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and a specific record for "Contract *00000100". Below the navigation is a search bar and some quick action buttons: "New Contact", "New Opportunity", and "New Case".

The main content area displays two e-signature requests:

- Contract Document (Acme):** Status is "Activated". The "Mark Status as Complete" button is visible. The document preview shows the "ARCHETYPE" logo.- E-Signature Workflow (Rahul Jain):** Status is "Pending Signature". The "Begin Workflow" button is visible. The document preview shows the "ARCHETYPE" logo.

The interface includes standard Salesforce UI elements like tabs (Related, Details), a rich text editor toolbar, and a header with account name, status, and contract details.

The screenshot shows the Salesforce interface for a 'Contract' object. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', and a search bar. The current page is 'Contract' with ID '00000100'. The main content area displays basic contract details: Account Name 'Acme', Status 'In Approval Process', Contract Start Date '10/1/2025', Contract End Date '9/30/2026', and Contract Term (months) '12'. Below this, a progress bar indicates the status is 'In Approval Process'. To the right of the progress bar are buttons for 'Activated', 'Draft', and 'Mark Status as Complete'. A 'Related' section contains tabs for 'Details' and 'Contract Document'. Under 'Details', there is a 'Contract History' table with four rows showing changes made by 'Rahul Jain' on 9/17/2025 at 1:53 AM. The table columns are Date, Field, User, Original Value, and New Value. To the right, a 'Related E-Signature Request List' sidebar shows two items: 'Marc Benioff (salesforce.com)' with status 'Completed' and 'Howard Jones (Acme)' with status 'Ready To Send'. A 'Refresh' button is located at the bottom right of the sidebar.

5. Repeat for subsequent signers (manually)

The screenshot shows the Salesforce interface for an 'E Signature Request' object. The top navigation bar is identical to the previous screenshot. The current page is 'E Signature Request' with ID 'ESR-00000002'. The main content area shows the request details: E Signature Request Name 'ESR-00000002', Token 'c5d78b7b-7513-4bce-863b-89999730739a', Document Id '800a00000fVNckAAG', Contact 'Howard Jones (Acme)', and Request Name 'ESR-00000002'. The 'Status' dropdown menu is open, showing options: 'Ready To Send' (selected), 'None', 'New', 'Sent For Signature', 'Completed', and 'Cancelled'. To the right, a 'Signed Document/Logs (0)' sidebar shows activity logs, with a note that no activities are shown. A 'To Do List' button is visible at the bottom left.

Step 17: Mobile Signing Experience

Mobile signing workflow:

Step 1: Signer opens the email on mobile device

You are signing as Rahul Jain (ArchType)

Progress 0% Complete

A COMPANY LOGO SLOGAN HERE

Non-Disclosure Agreement (NDA)

This Non-Disclosure Agreement (the "Agreement"), effective as of the start date mentioned below (the "Effective Date"), is made and entered into by and between:

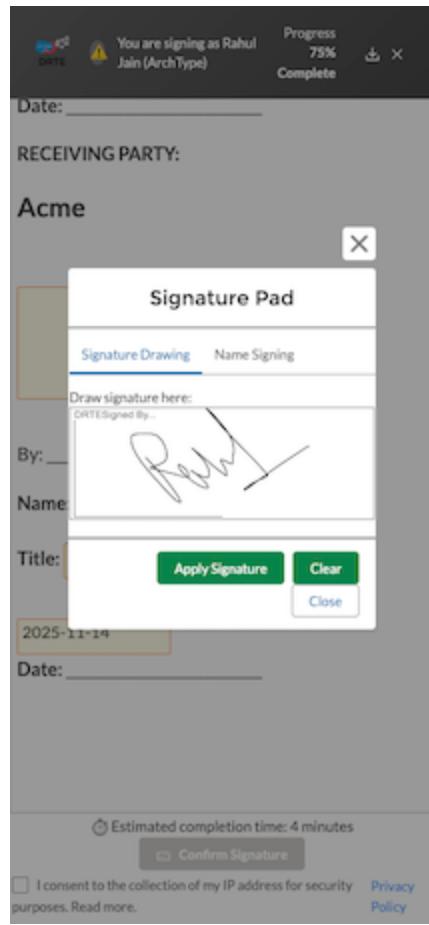
Simple Inc, a INDIA State corporation with its principal place of business at 5/555 55 Floor, 55

Estimated completion time: 4 minutes

Confirm Signature

I consent to the collection of my IP address for security purposes. Read more. [Privacy Policy](#)

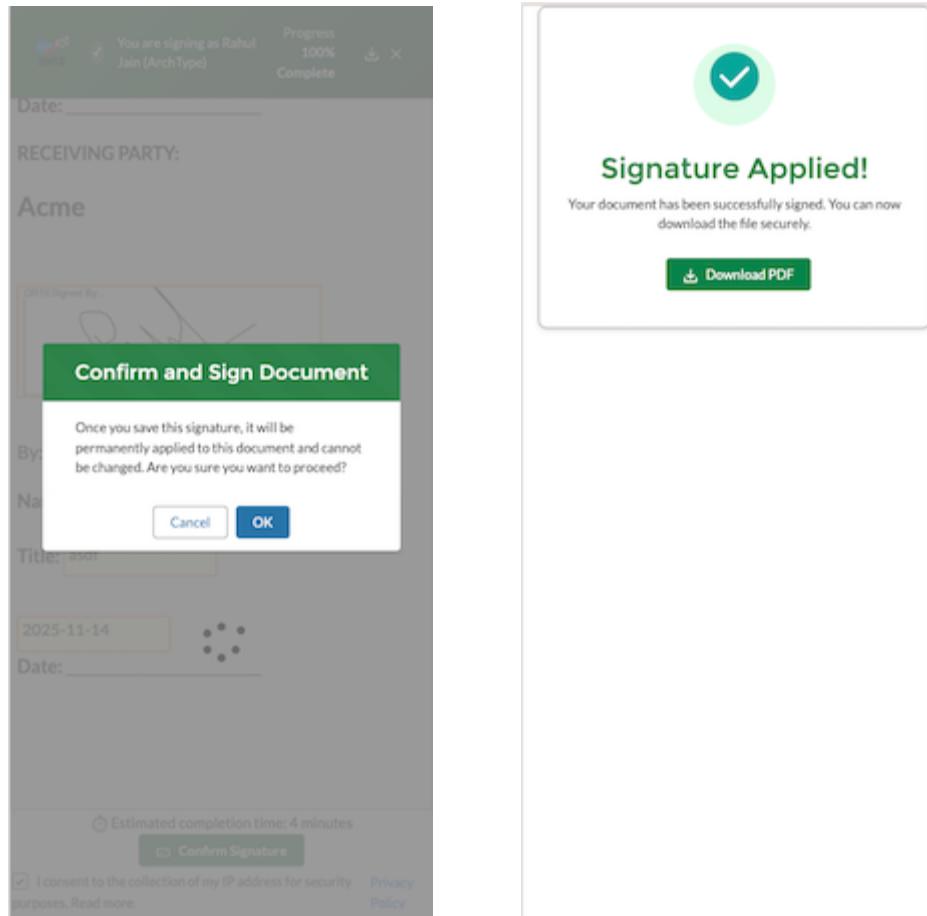
Step 2: Signer reviews the document



Step 3: Signer fills in details and signs



Step 4: Signature is applied with timestamp



Step 18: Finalize and Store Documents

To complete the process:

1. After all signatures are collected, open the **E-Signature Log** record

The screenshot shows a Salesforce interface for a 'Contract' record with ID 00000100. The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and more. The main content area displays basic contract details: Account Name (Acme), Status (In Approval Process), Contract Start Date (10/1/2025), Contract End Date (9/30/2026), and Contract Term (months) (12). Below these details is a status bar with three stages: 'In Approval Process' (highlighted in blue), 'Activated', and 'Draft'. A button labeled 'Mark Status as Complete' is visible. On the right, a sidebar titled 'Related E-Signature Request List' shows two items: one for Marc Benioff (Completed) and another for Howard Jones (Completed). The central area contains a rich text editor and a placeholder for a document thumbnail.

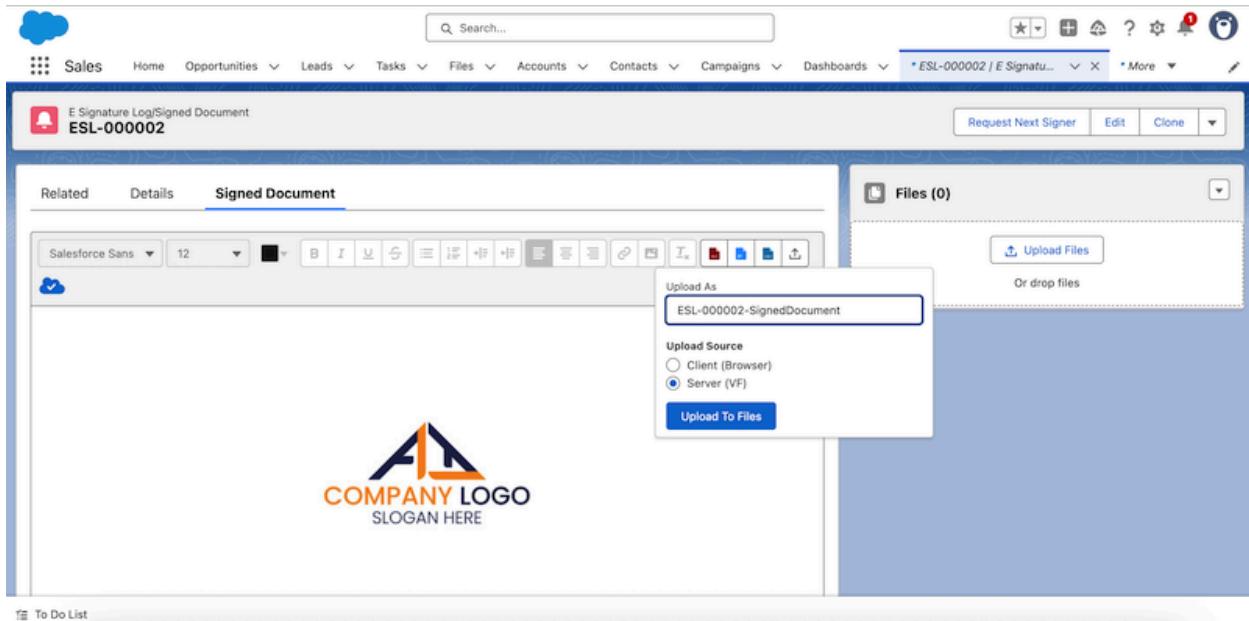
2. Verify all signature details:

- Date and time
- IP address
- Full name

The screenshot shows a Salesforce interface for an 'E-Signature Log/Signed Document' record with ID ESL-000002. The top navigation bar is identical to the previous screenshot. The main content area has tabs for Related, Details, and Signed Document, with Details selected. The 'Information' section contains fields for E-Signature Log Name (ESL-000002), E-Signature Request (ESR-0000002), Date/Time (2025-09-17 09:35 GMT), FullName (Howard Jones), and SignerIPAddress (157.48.90.127). The 'System Information' section includes fields for Related Record Link, Owner (Rahul Jain), Last Modified By (E-Signature Portal Site Guest User), and Created By. To the right, a sidebar titled 'Files (1)' shows a single PDF file named ESL-000002.pdf from Sep 17, 2025. A 'View All' link is also present.

3. Click the button to upload the signed document to **Files**

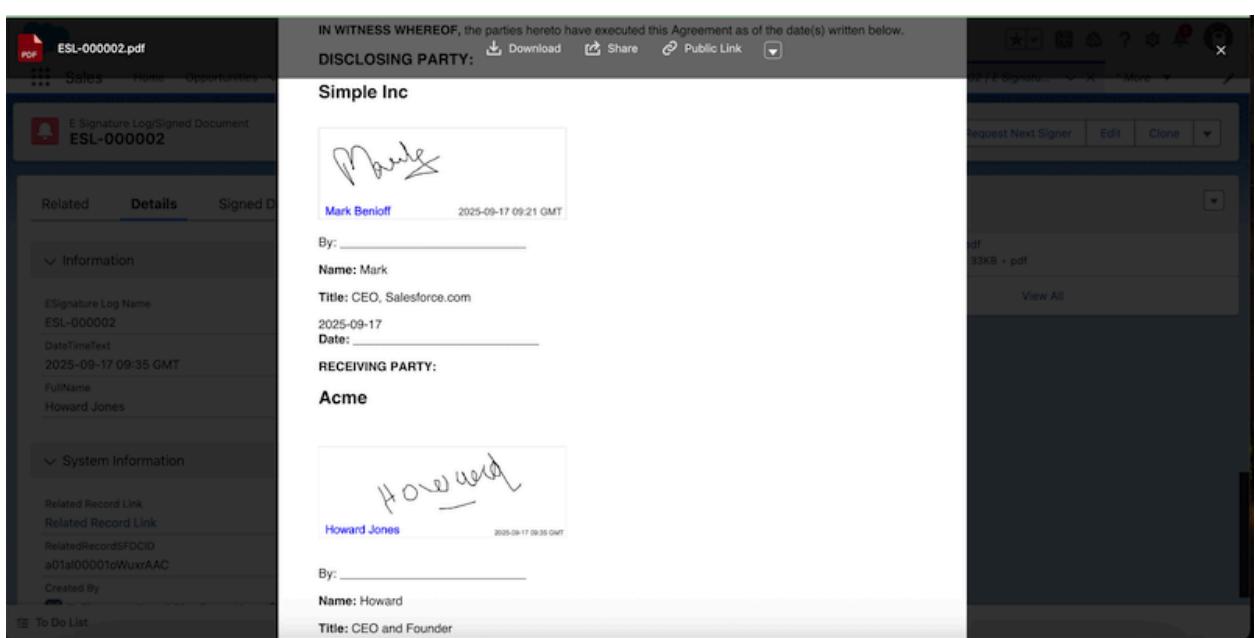
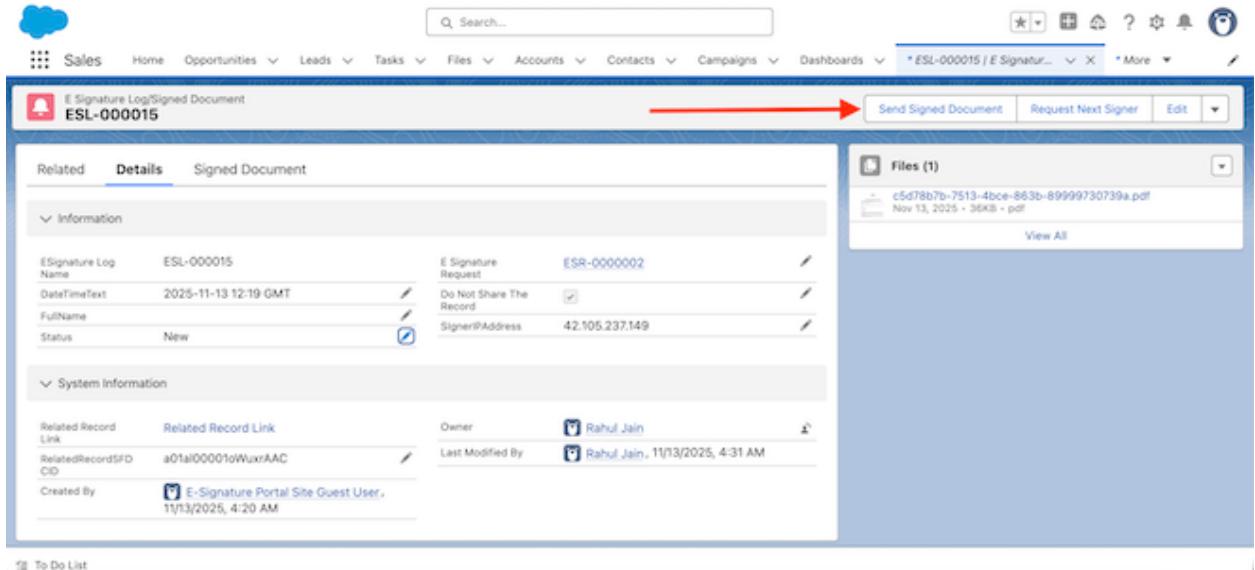
Important: Always use **Server Side Upload Source**



Step 19: Share and Activate

To finalize the contract:

1. Share the signed document with all parties

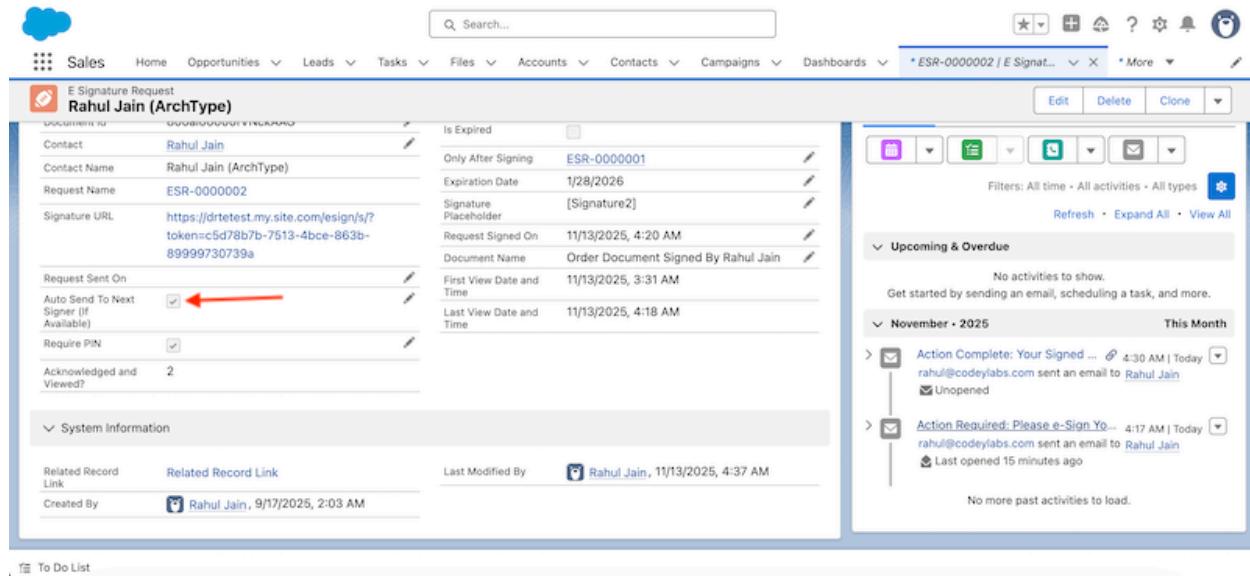


2. Next steps, for example, update the contract status to "**Activated**" (**manually**)

Additional Features

1. Automatic Sequential Signing

Configure automatic sending to the next signer upon completion, define this on the first signer E Signature Request record:



The screenshot shows the Salesforce interface with the following details:

E Signature Request
Rahul Jain (ArchType)

Contact: Rahul Jain
Contact Name: Rahul Jain (ArchType)
Request Name: ESR-0000002
Signature URL: https://drtetest.my.site.com/esign/s/?token=c5d78b7b-7513-4bce-863b-89999730739a

Request Sent On: 11/13/2025, 4:20 AM
Auto Send To Next Signer (If Available) (highlighted with a red arrow)
Require PIN
Acknowledged and Viewed?: 2

System Information:
Related Record Link: Related Record Link
Created By: Rahul Jain, 9/17/2025, 2:03 AM
Last Modified By: Rahul Jain, 11/13/2025, 4:37 AM

Upcoming & Overdue: No activities to show. Get started by sending an email, scheduling a task, and more.

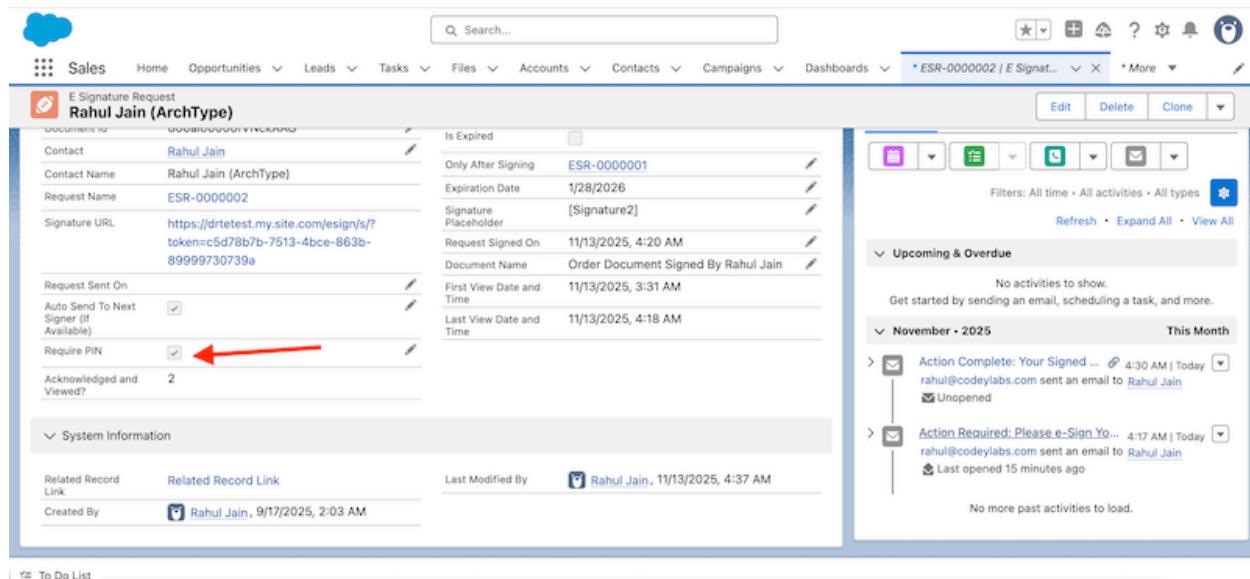
November - 2025 This Month

- Action Complete: Your Signed ... 4:30 AM | Today rahul@codeylabs.com sent an email to Rahul Jain Unopened
- Action Required: Please e-Sign Yo... 4:17 AM | Today rahul@codeylabs.com sent an email to Rahul Jain Last opened 15 minutes ago

No more past activities to load.

2. Enhanced Security with PIN

Add PIN-based authentication for additional security:



The screenshot shows the Salesforce interface with the following details:

E Signature Request
Rahul Jain (ArchType)

Contact: Rahul Jain
Contact Name: Rahul Jain (ArchType)
Request Name: ESR-0000002
Signature URL: https://drtetest.my.site.com/esign/s/?token=c5d78b7b-7513-4bce-863b-89999730739a

Request Sent On: 11/13/2025, 4:20 AM
Auto Send To Next Signer (If Available)
Require PIN (highlighted with a red arrow)
Acknowledged and Viewed?: 2

System Information:
Related Record Link: Related Record Link
Created By: Rahul Jain, 9/17/2025, 2:03 AM
Last Modified By: Rahul Jain, 11/13/2025, 4:37 AM

Upcoming & Overdue: No activities to show. Get started by sending an email, scheduling a task, and more.

November - 2025 This Month

- Action Complete: Your Signed ... 4:30 AM | Today rahul@codeylabs.com sent an email to Rahul Jain Unopened
- Action Required: Please e-Sign Yo... 4:17 AM | Today rahul@codeylabs.com sent an email to Rahul Jain Last opened 15 minutes ago

No more past activities to load.

3. Document View Tracking

Track when signers view the document:

The screenshot shows the Salesforce E-Signature Request page for a record named "Rahul Jain (ArchType)". The "Document Name" field is set to "Order Document Signed By Rahul Jain". A red box highlights the "First View Date and Time" and "Last View Date and Time" fields, both of which show "11/13/2025, 3:31 AM". Below these fields, the "Acknowledged and Viewed?" field has a value of "2", indicated by a red arrow. On the right side of the page, there is a sidebar titled "Upcoming & Overdue" showing recent activity items.

4. Custom File Names

Apply custom file names to signed documents:

The screenshot shows the Salesforce E-Signature Request page for a record named "Rahul Jain (ArchType)". The "Document Name" field is explicitly set to "Order Document Signed By Rahul Jain", highlighted by a red box. The rest of the page content is standard, including the "Is Signed" checkbox and other request details.

Troubleshooting

Images Not Displaying in Guest Portal

Issue: Document images are not visible in the e-signature guest user portal.

Solution: Add a trusted URL entry for

[https://\[domain\].lightning.force.com](https://[domain].lightning.force.com) where [domain] is your Salesforce org's My Domain.

Document Section Not Displaying

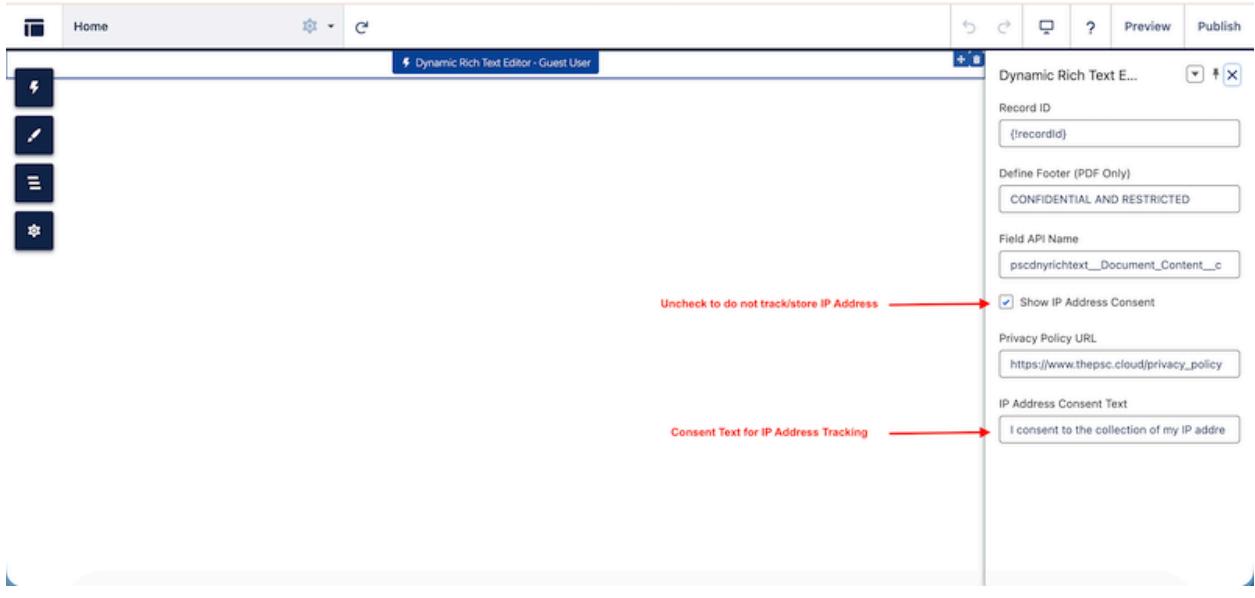
Issue: Document section is not displaying despite correct SOQL query.

Solution: Verify that the object API name is listed in **DRTE Allowed Objects** records. Only objects in this list can be queried.

IP Address Tracking

Question: We do not want to track/store signer IP Address ? Can we stop that ?

Answer: Yes. You can stop tracking and storing external signer IP addresses.



Custom Email Templates

Question: Can I use my own branded email templates?

Answer: Yes. Clone the existing packaged email templates or create new ones. Update the template IDs in **DRTE Settings** custom settings to reflect your new templates.

Button-Triggered Document Generation

Question: Can I generate documents via button click instead of a tab?

Answer: Yes. The DRTE managed package exposes several flow actions:

1. Build Document and Return Preview Id

- Apex: `pscdnyrichtext__DocumentGeneratorService`
- Uses Document Template Id and Related Record Id ('pv0')
- Builds document on server and updates preview record

2. Generate Document Directly on Server

- Apex: `pscdnyrichtext__GenerateDocumentAction`
- Generates PDF and saves to Files without editor

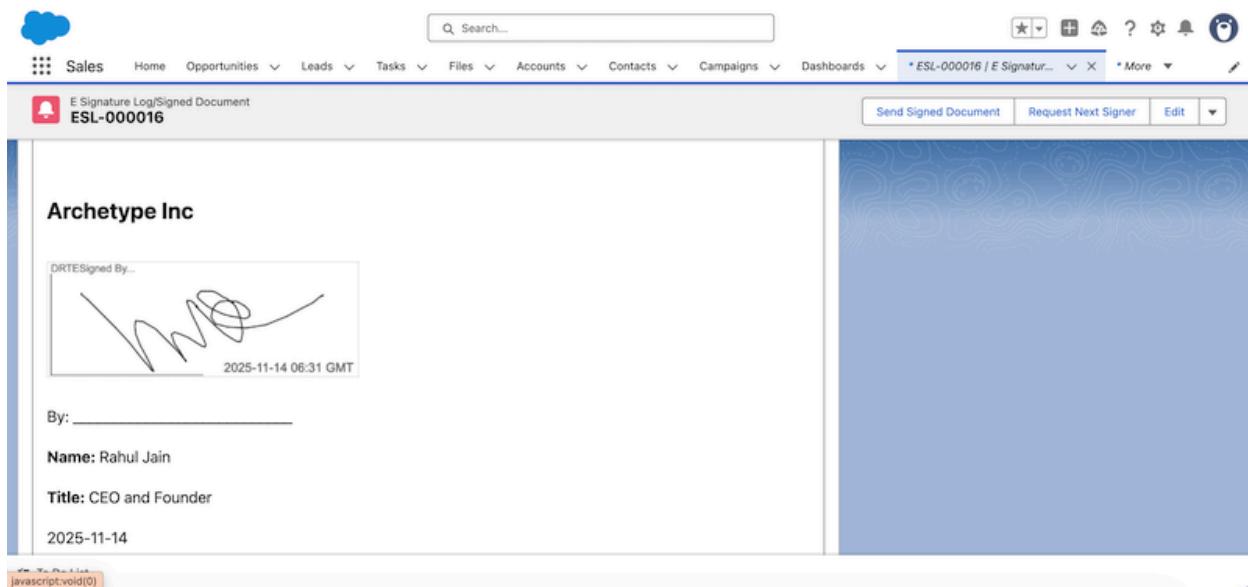
3. Upload Signed Document from E-Signature Log

- Apex: `pscchnyrichtext__UploadSignedDocument`
 - Generates PDF and saves to Files on related E-Signature Log record
-

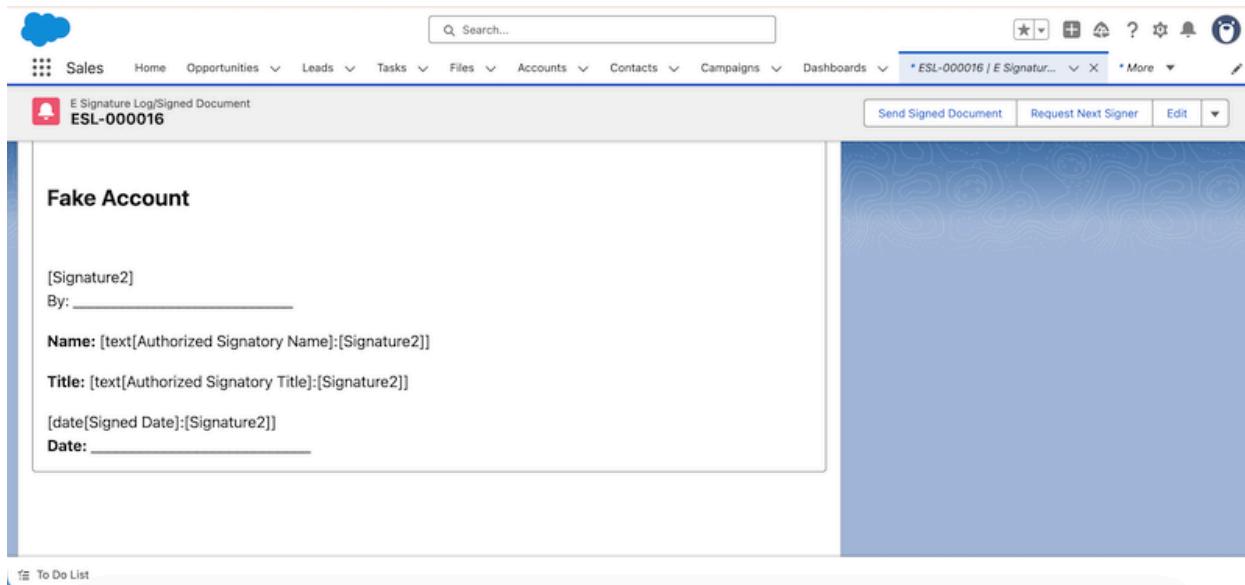
Question: I was supposed to create 2 E Signature requests on a document but accidentally/overlooked to create just Signature1 and begin the workflow. Apparently the first signer has also signed the document. Add Signature2 later from the DRTE editor is not bringing already signed content in the request document. What to do ?

Solution: Don't worry. DRTE has an answer to this problem.

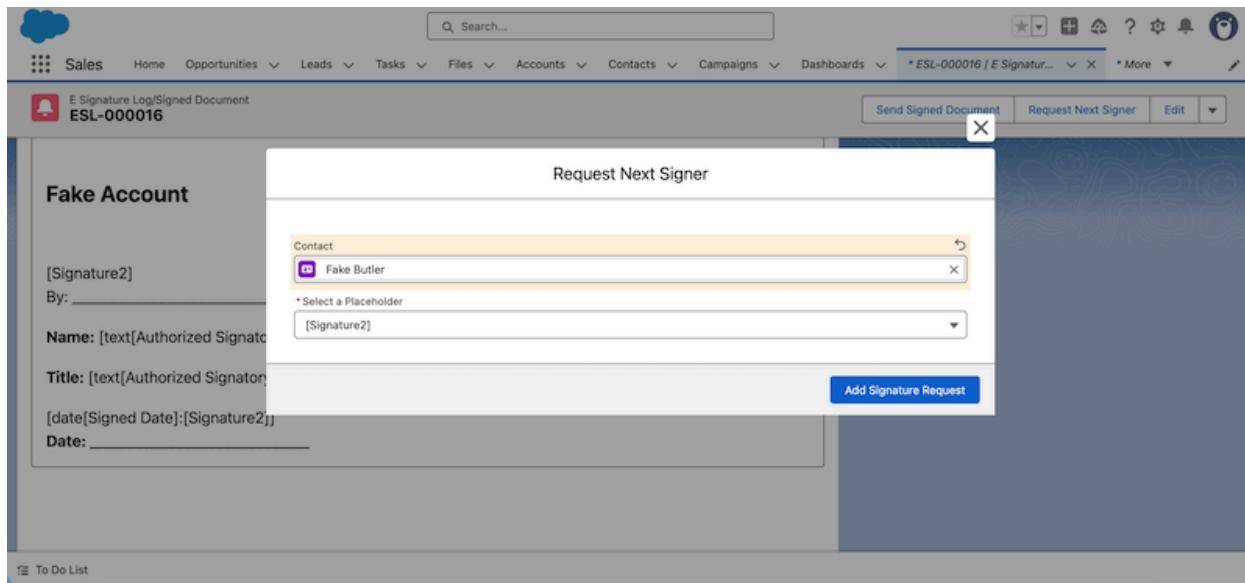
Simply navigate to the E Signature Log/Singed Document record created under Signature1 E Signature Request record. Notice that the Signee 1 has signed.



Also validate, the placeholders for Signee 2 (Signature 2) exists on the response document.

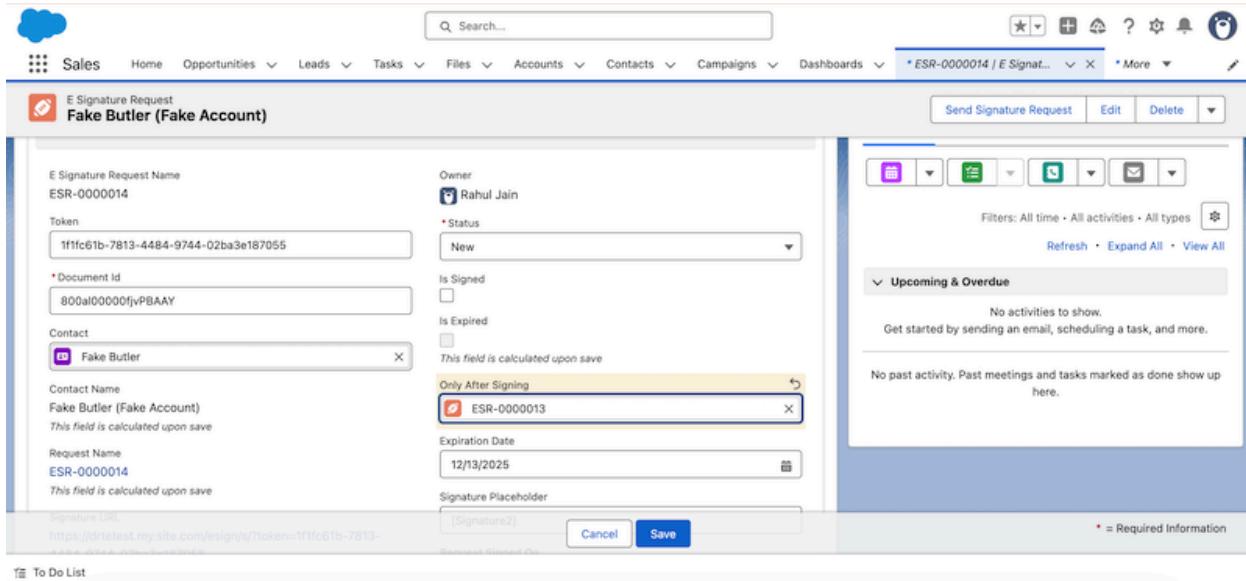


After all validations are complete, simply ‘Request Next Signer’ and associate Signature 2 - contact and placeholder to add a new signature request for the document.



Create a link on a newly created signature 2 request record with the Signature 1 request record through **Only After Signing** field.

And hit the **Send Signature Request** Button. Done. You have signature request to your second signee with the document including the signature from 1st Signee



Notice the correct linking now on the document record page.



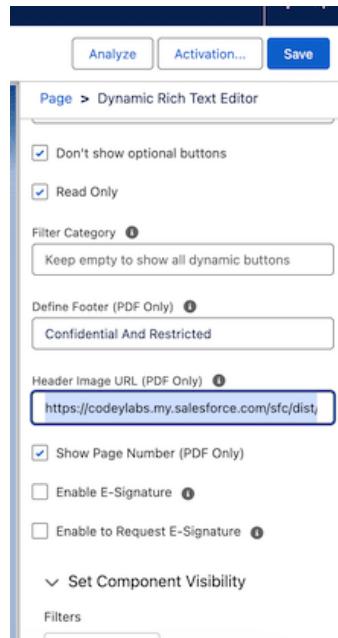
Question: For Invoices or any other financial transactional objects, can we use a custom company header template on the generated PDF within DRTE (Dynamic Rich Text Engine)?

Solution:

Yes, this can be achieved using a custom image file as the header.

To implement this, follow these three steps:

1. **Prepare the Image:** Create your header image with the specific dimensions of **1340 px (width) x 200 px (height), preferred.**
2. **Generate Public Link:** Upload this image to **Salesforce Files** and generate a **non-expirable public link (URL)** for the file.
3. **Configure DRTE:** Copy the image URL and paste it into the '**Header Image URL (PDF only)**' property within your DRTE template configuration.



Support

For additional assistance or questions not covered in this guide, please contact your Salesforce administrator or DRTE support team at [**support@codeylabs.com**](mailto:support@codeylabs.com).

DRTE Version v5.134 | Last Updated: November 2025