



CODEYLABS

**Manual E-Signature Workflow & Custom Email
Delivery**

User Guide



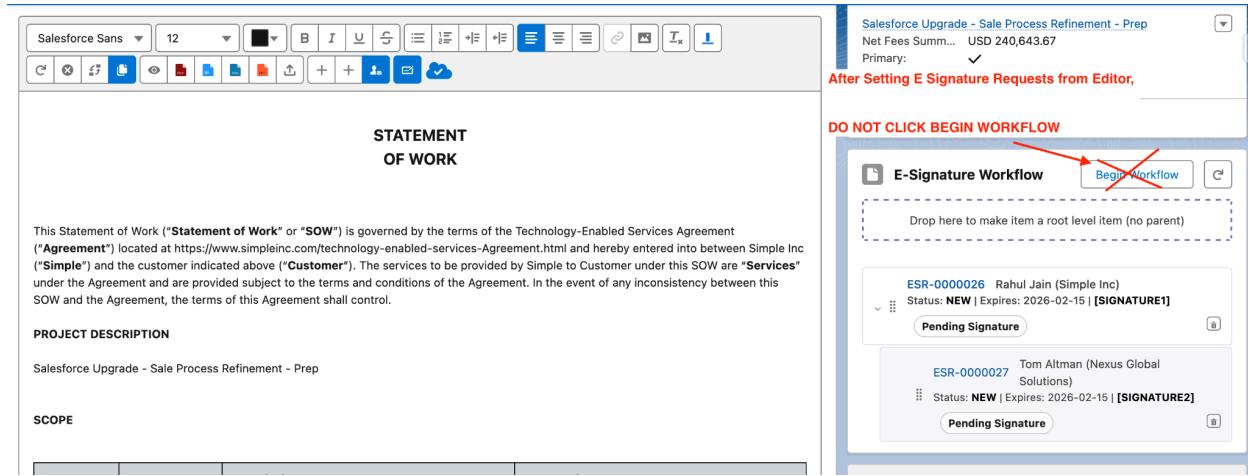
DRTE

This guide provides step-by-step instructions on how to manually execute an e-signature workflow in **DRTE**. By following this process, you can bypass the automated "Begin Workflow" button, allowing you to **modify email content** and maintain specific **sharing rules** for guest users.

Phase 1: Initiating the Manual Process

Important: Do not use the automated "Begin Workflow" button if you intend to customize the experience for the signers.

- Prepare the Document:** Open the Document Editor. After setting up your E-Signature Requests (ESRs) in the editor, navigate to the **E-Signature Workflow** component.
- Bypass Automation: DO NOT CLICK "BEGIN WORKFLOW."** Instead, you will manage each signature request (e.g., ESR-0000026) individually from the record level.



Phase 2: Sending the First Signature Request

- 1. Navigate to the Record:** Click on the E-Signature Request Name (e.g., **ESR-0000026**) to open that specific record.
- 2. Open Email Activity:** In the **Activity** panel on the right, click the **Email (Envelope)** icon.

The screenshot shows the 'E Signature Request' record for 'Rahul Jain (Simple Inc)'. The 'Details' tab is selected. On the right, the 'Activity' panel is open, showing a list of activities. A red arrow points from the text 'Hit email in activity on first signature on E Signature Request record.' to the 'Email (Envelope)' icon in the toolbar of the activity panel.

- 3. Configure Recipient & Template:** * **To:** Ensure the field is populated with the E-Signature request contact.
 - Insert Template:** Click the **Insert Template** button in the email toolbar.

The screenshot shows the same 'E Signature Request' record for 'Rahul Jain (Simple Inc)'. The 'Details' tab is selected. The 'Email' toolbar is open on the right, showing the 'From' field set to 'Codeylabs <info@codeylabs.com>' and the 'To' field set to 'Rahul Jain'. A red arrow points from the text 'Populate the e signature request contact' to the 'To' field. Another red arrow points from the text 'Insert Email Template for requesting e signature,' to the 'Insert a template...' button in the toolbar.

- 4. Select the DRTE Template:** Choose the relevant template, such as **DRTE: Action Required: Please e-Sign Your Document.**

Insert Email Template

Select a template for: Contacts Leads E Signature Request

Templates

Name Description Template Folders

Welcome to the Team! Your Appointment Letter & Onboarding Guide	Welcome to the Team! Your Appointment Letter & Onboar...	Public Email Templates
DRTE Action Complete: Your Signed Document is Ready	Action Complete: Your Select a relevant email template to insert	DRTE Email Template
DRTE: Action Required: Please e-Sign Your Document	Action Required: Please e-Sign Your Document	DRTE Email Template
DRTE: Action Required: Please e-Sign Your Document (Second Signer)		DRTE Email Template
DRTE Your PIN to Sign Document	DRTE Your PIN to Sign Document	DRTE Email Template

Related To ESR-0000026

Cancel

5. Modify & Send: You can now edit the email body to include custom notes, remove existing ones. Once finalized, click **Send**.

E Signature Request
Rahul Jain (Simple Inc)

Related Details Requested Document

Information

E Signature Request Name: ESR-0000026
Owner: Rahul Jain
Status: New
Is Signed:
Is Expired:
Only After Signing:
Expiration Date: 2/15/2026
Signature Placeholder: [Signature1]

You can now modify the email content before sending it to the contact.

Action Required: Please e-Sign Your Document

Company Logo

Hello {{Recipient.Name}},
Modify the content here... Thank you for your business.
We're excited to have you as a customer.

Sign the Document

Please note, this link will expire in **2 hours**

Related To ESR-0000026

Send

6. Verify Activity: Confirm the email log appears in the **Activity** timeline to ensure the request was dispatched.

The screenshot shows a digital signature request interface. On the left, the 'Information' tab is active, displaying details such as E Signature Request Name (ESR-0000026), Token (8b27ecf0-88af-45dd-93a3-0d78f9e70353), Document Id (a0La500000aikiLEAQ), Contact (Rahul Jain), and Request Name (ESR-0000026). The 'Activity' tab is also visible, showing a log entry: 'Action Required: Please e-Sign' sent at 2:51 AM | Today to info@codeylabs.com, with a status of 'Unopened'. A red arrow points from the text 'Email is Sent and Email Log created in Activity' in the Information tab to this log entry.

The screenshot shows an email message from 'From: Codeylabs' to 'To: Rahul Jain' at 2:51 AM | Today. The email content is as follows:

Hello Rahul Jain,

Modify the content here... Thank you for your business. We're excited to have you as a customer.

Sign the Document

Please note, this link will expire in **30** days. If you have any questions, please contact our support team at support@codeylabs.com.

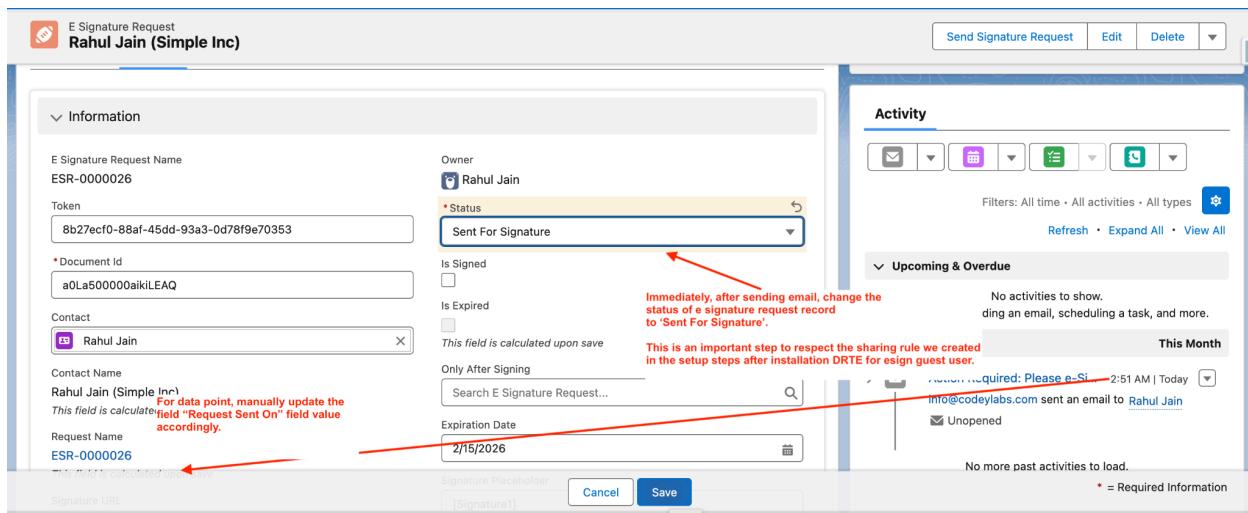
Thank you,

A red box highlights the entire body of the email message. Inside this box, the text 'Email sent out with modified email content' is displayed in red.

Phase 3: Synchronizing System Data

To ensure the signer can access the document via the guest user portal, you must manually update the record status.

1. **Update Status:** Immediately after sending the email, click **Edit** on the record and change the **Status** to "**Sent For Signature**." * Note: This is a critical step to respect the sharing rules created for the esign guest user.



2. **Timestamp the Request:** Manually update the "Request Sent On" field to reflect the current date and time.
3. **Save:** Click **Save** to apply the changes.

Phase 4: Handling Subsequent Signers

1. **Monitor Progress:** Once the first signer completes their task, the E-Signature Workflow component will show the first record as **COMPLETED** and the next record (e.g., ESR-0000027) as **READY TO SEND**.

The screenshot shows two main sections: a detailed view of a document record and a list of E-Signature Workflow records.

Document Record View:

- Name: Salesforce Upgrade - Sale Process Refinement - Prep
- Owner: Rahul Jain
- Status: Quote Approved
- Triggers the Sync To Opportunity

E-Signature Workflow View:

- Primary: As Sold Margin ... 50.41%
- View All
- E-Signature Workflow** (button)
- We have locked this document hierarchy as the e-signature workflow has begun.
- ESR-0000026 Rahul Jain (Simple Inc)
Status: COMPLETED | Sent on: 2026-01-16 16:20 | Signed on: 2026-01-16 16:23 | [SIGNATURE1]
Signed
- ESR-0000027 Tom Altman (Nexus Global Solutions)
Status: READY TO SEND | Expires: 2026-02-15 | [SIGNATURE2]
Pending Signature

A red arrow points from the "Signed" status of the first record to the "READY TO SEND" status of the second record, indicating the transition between signers.

2. **Repeat the Process:** For the second signer, repeat the steps in **Phase 2 and Phase 3**. Open the new ESR record, manually send the email with any needed modifications, and update the status to "Sent For Signature."

Pro-Tip: Always verify that the "Status" is updated immediately after sending the email. If the status remains "New," the signer may encounter access errors when clicking the "Sign the Document" link.