



CODEYLABS

Configuring Alternative Template Buttons in DRTE

User Guide



DRTE

The File Import feature allows users to seamlessly bring externally drafted documents (.docx and .pdf) directly into the DRTE. Instead of manually re-typing or copy-pasting, which often breaks complex layouts, this tool converts your local files into editable content within the record.

Key Use Case

A Sales Rep drafts a detailed **10-page Statement of Work (SOW) or Quote** in Microsoft Word using a corporate template. By using the Import tool, they can bring that entire document into the system record in seconds, preserving tables, images, and brand formatting.

How to Import a Document

Follow these steps to import your local file:

1. Open the DRTE Editor

PSC Quote Request
Salesforce Upgrade - Sale Process Refinement - Demo

Type As Sold Margin Net Fees Discount Amount Status
Detailed Level of Effort 53.42% USD 977,408.11 USD 51,716.51 Quote Approved

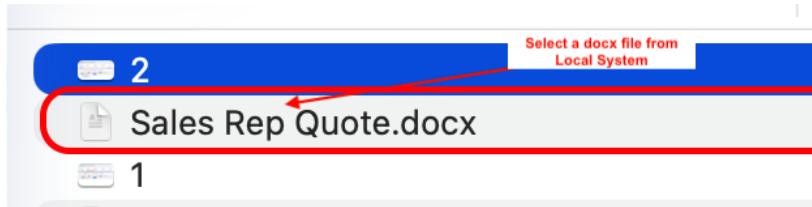
Allows Importing PDF or DOCx from your local system.

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

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3. Select Your File:

- **Drag & Drop:** You can drag your file directly onto the upload zone.
- **File Browser:** Click to browse your local system and select your **.docx** or **.pdf** file.



4. Process and Review: The system will process the file and render the content directly inside the editor window.

A screenshot of a Salesforce quote request page titled "PSC Quote Request" and "Salesforce Upgrade - Sale Process Refinement - Demo". The page displays various quote details like Type, As Sold Margin, Net Fees, Discount Amount, and Status. A note states: "The import processes the docx file and render it in the editor in same format from docx including tables, images. Possibly user has to review and make some indentation changes, takes not more than a few mins". Below this, there are tabs for Details, Summary (Primary Quote), Document (Primary Quote), and DRTE. The DRTE tab is selected, showing a rich text editor toolbar with icons for font, size, bold, italic, etc. Below the toolbar, the text "STATEMENT OF WORK" is visible, followed by a detailed legal disclaimer about the Statement of Work (SOW) and its governing terms.

3. Supported File Types & Behavior

While the process is identical for both file types, the editor handles them differently based on the source formatting:

Microsoft Word (.docx)

- **Best For:** Complex text, multi-page proposals, and collaborative drafting.
- **Result:** High-fidelity rendering. Most tables, bullet points, bold/italic styling, and embedded images are preserved and remain **fully editable** within the DRTE.

Adobe PDF (.pdf)

- **Best For:** Simple documents or documents that are primarily image-based.
- **Minimalist Rendering:** PDF conversion is more restrictive.
 - **Images:** Typically render clearly within the editor.
 - **Tables/Complex Elements:** May require manual adjustment after import. Users should review the alignment and spacing to ensure the document looks correct before saving.

4. Best Practices for Sales Teams

- **Final Review:** Always scroll through the document after import to ensure page breaks and table widths align with your system's display settings.
- **Image Optimization:** If your .docx contains very high-resolution images, try to compress them before importing to ensure the editor remains fast and responsive.

5. Frequently Asked Questions (FAQ)

Q: Can I edit the text after I import a PDF? A: Yes, once the content is rendered in the DRTE, it becomes standard HTML text. However, for heavily formatted PDFs, some text may import as an image or require re-spacing.

Q: Will the "Track Changes" from my Word document show up? A: No.

Q: Is there a file size limit? A: 5MB is recommended for optimal performance.