DRTE - ADD ON

Button - Generate and Send Document

User Guide

DRTE

This guide explains how to use the **"Generate and Send Document"** feature within the DRTE Extension package. This tool allows you to generate high-quality documents from your Salesforce records and email them immediately using predefined templates.
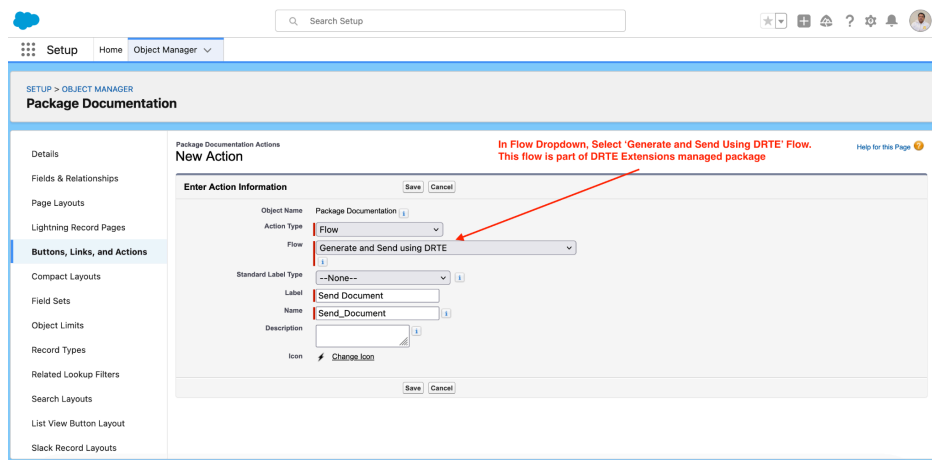
Part 1: Administrator Setup

Before users can send documents, an administrator must add the action to the record page.

1. Create the Action

- Go to **Setup** > **Object Manager** and select the desired Object (e.g., Package Documentation).

- Click on **Buttons, Links, and Actions** and select **New Action**.
- **Action Type:** Flow.
- **Flow:** Select `Generate and Send using DRTE` (provided by the managed package).

- **Label:** Send Document.
- **Name:** Send_Document.
- Click **Save**.

2. Add to Record Page

- Open a record of that object and click the **Gear Icon** > **Edit Page**.

- Select the **Highlights Panel** component.
- In the properties pane, click **Add Action** and search for your "Send Document" action.
- Click **Save** and then **Activate**.
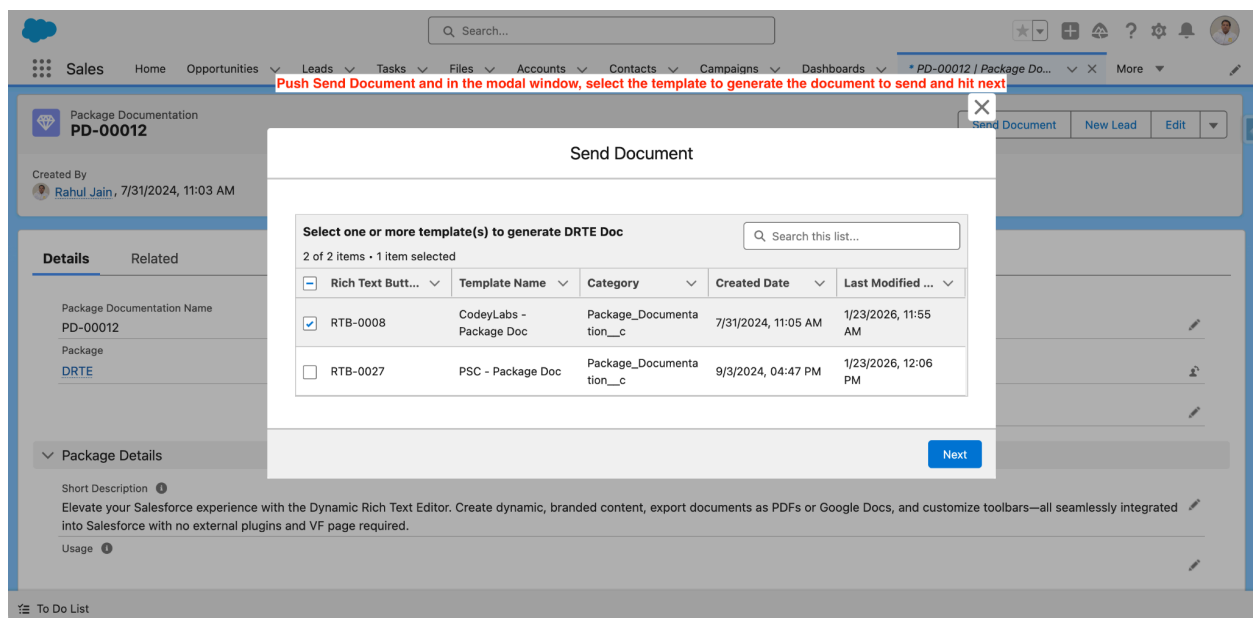
Part 2: How to Generate and Send a Document

Once the setup is complete, follow these steps to send a document to a contact.

Step 1: Launch the Action

Navigate to the record you wish to share and click the **Send Document** button in the top right highlights panel.
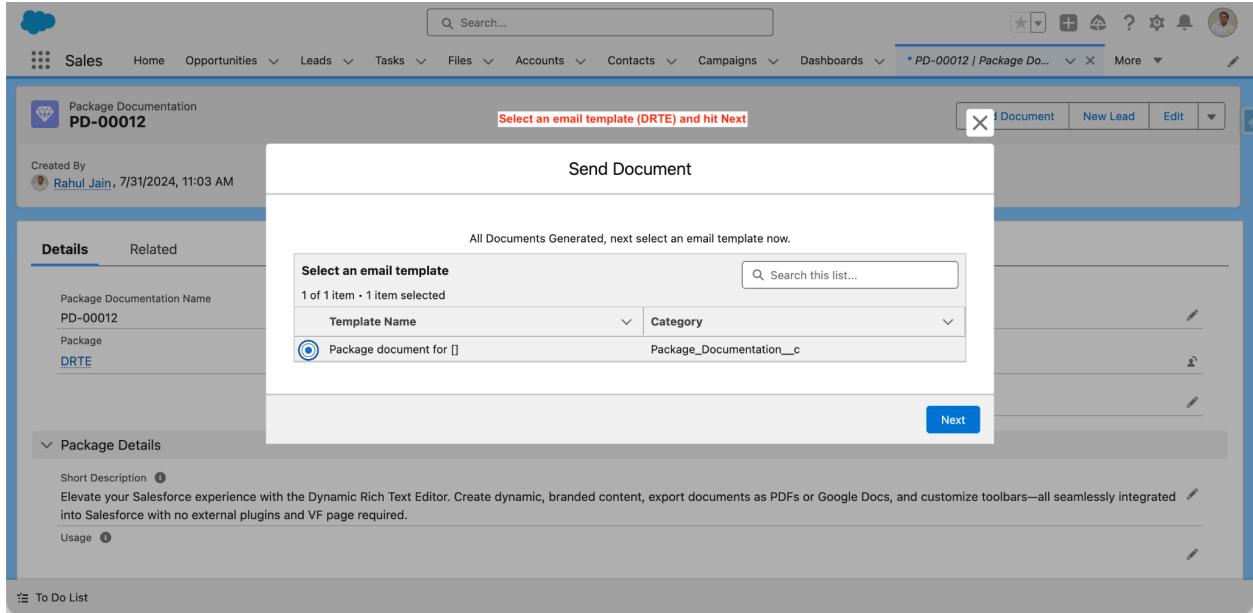
Step 2: Select Document Template

A modal window will appear. Select one or more **DRTE Doc templates** that you want to use to generate the content. Click **Next**.
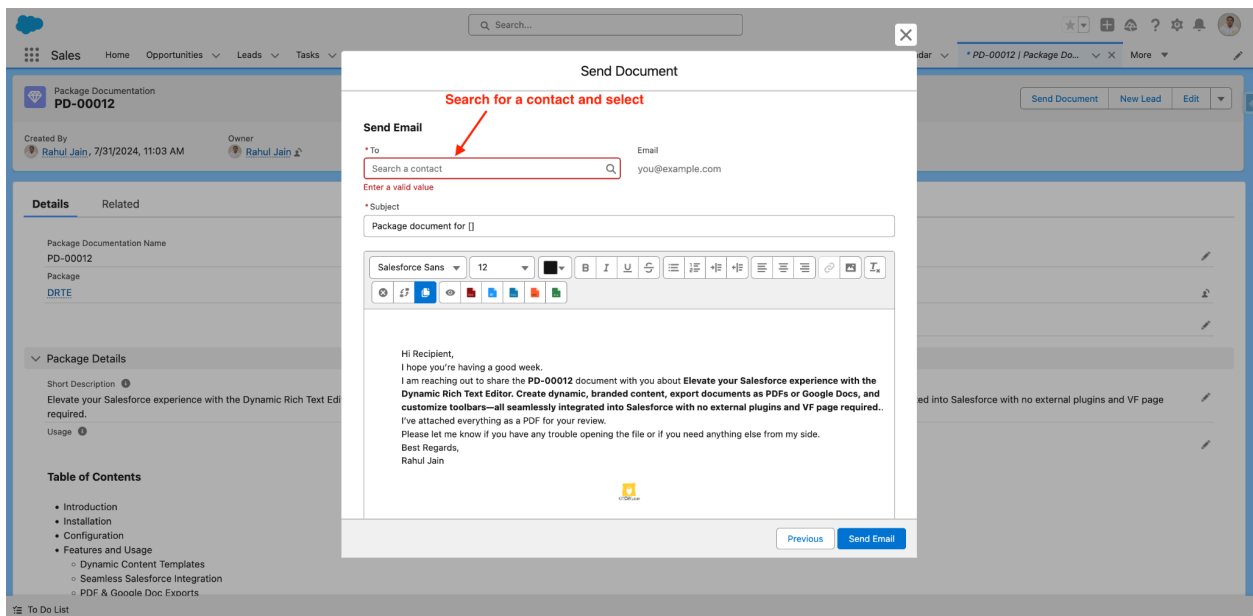

Step 3: Choose Email Template

Next, select the **Email Template** that defines the body and layout of your outgoing message. Click **Next**.
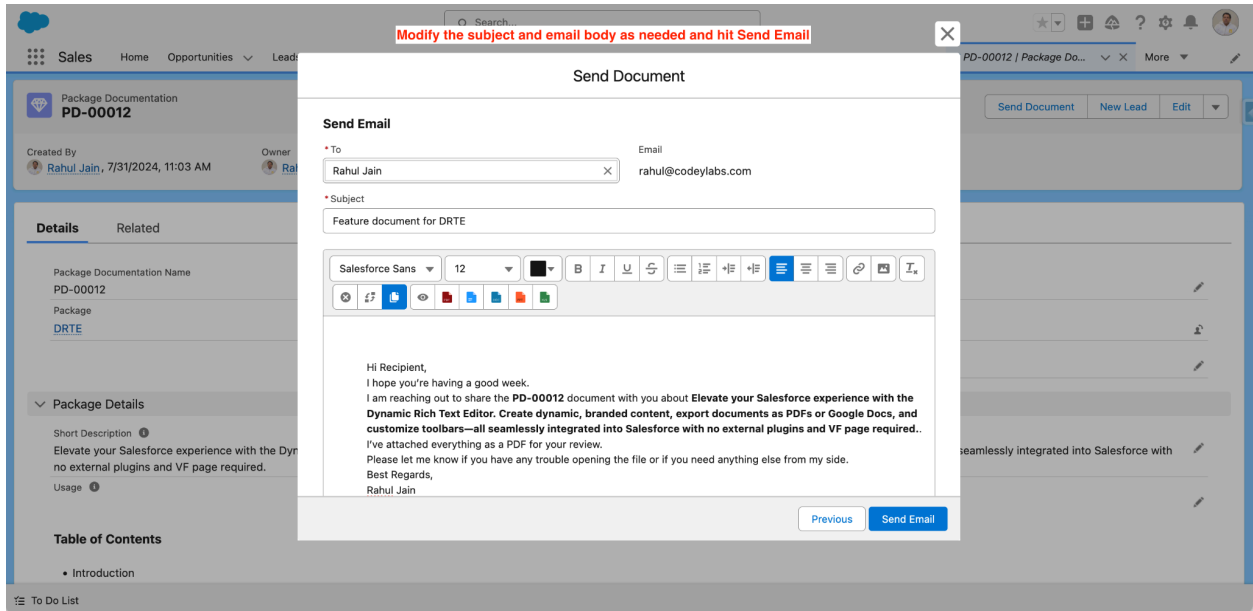
Step 4: Configure Recipient and Review

- **To:** Search for and select the Contact who should receive the email.

- **Review:** The email body will automatically populate with record details and the generated document. You can modify the **Subject** or **Body** text here if needed.
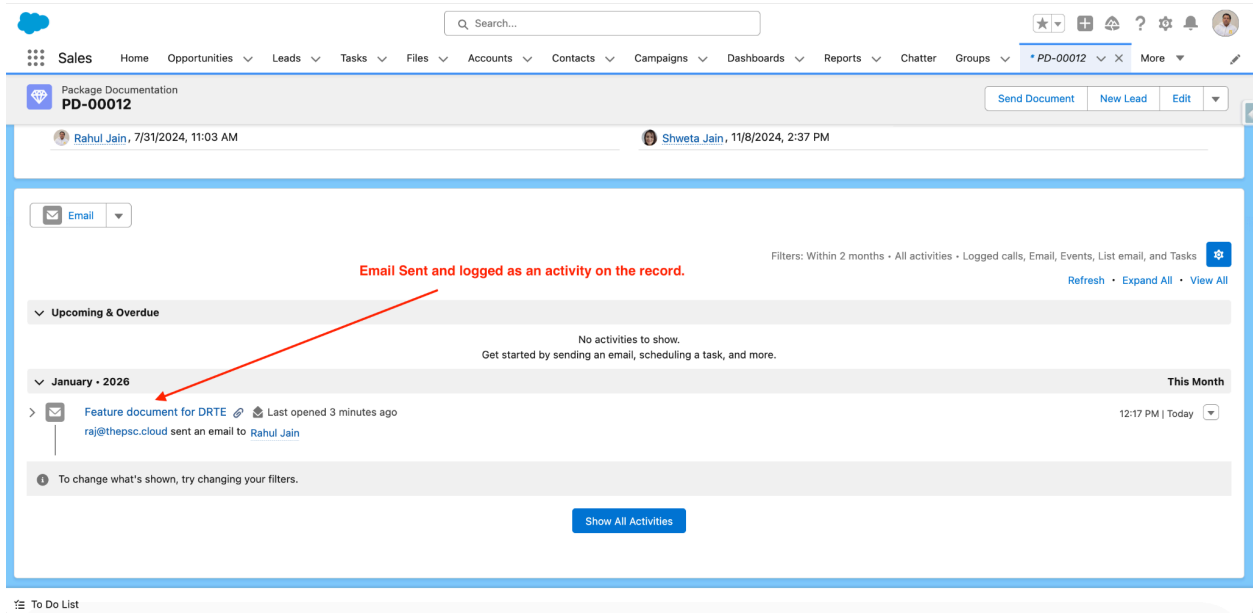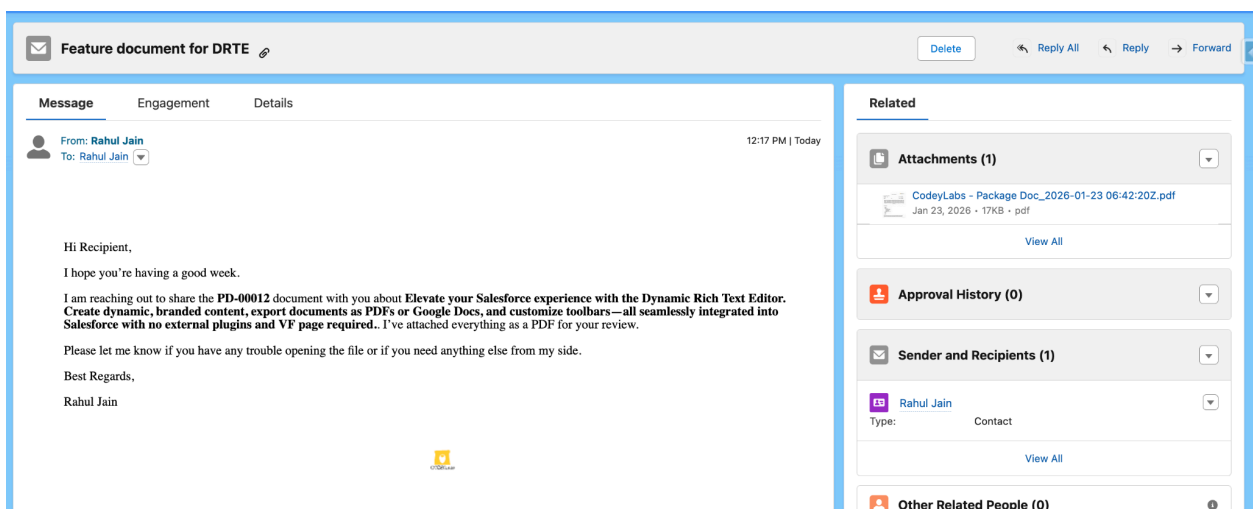
● Click **Send Email**.

Part 3: Tracking Activities

After sending, the system provides automatic tracking to ensure you have a record of the communication.

- Navigate to the **Activity Tab** on the record.
- You will see a logged email task (e.g., "Feature document for DRTE").
- This log includes the timestamp, recipient details, and a link to the document sent.