



CODEYLABS

DRTE - ADD ON

**Manually Save Final Signed
Document With Certificate Of
Completion on Document**

User Guide



DRTE

CoC feature is an add-on designed to ensure legal compliance and provide irrefutable proof of execution for every document signed using DRTE.

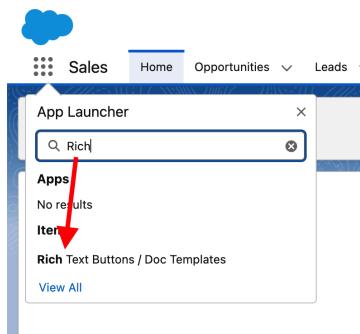
Once all parties have successfully signed a document, the CoC feature allows you to combine the final, executed document with a detailed, legally-compliant **Audit Log** into a single, secure PDF file.

Configuration - Certificate of Completion

Following installation, the module requires specific configuration within DRTE and Salesforce Setup.

Step 1: Create the Certificate of Completion Document Template

1. Navigate to the Rich Text Button/Document Templates Tab.



2. Create a **New** Document Template record and name it "**Certificate of Completion.**"

A screenshot of the 'New Rich Text Button / Doc Template' creation page. The page has a header 'New Rich Text Button / Doc Template' and a note '*= Required Information'. The main section is titled 'Information'. It contains the following fields:

- Rich Text Button Number (dropdown)
- Template Name: **Certificate of Completion** (highlighted in yellow)
- SLDS icon-name (input field)
- In Use (checkbox) (highlighted in yellow)
- Owner: **Rahul Jain** (with a small profile icon)
- Category (input field)
- Deactivated (checkbox) (highlighted in yellow)
- Display Order: **0** (highlighted in yellow)
- Test SFDC Record Id (input field)

At the bottom, there is a 'System Information' section with 'Cancel', 'Save & New', and 'Save' buttons.

3. Save the record.

4. Import the JSON Template:

- Open **Setup** in a new tab, search for **Static Resources**, and locate the **CertificateOfCompletionDocumentSectionsJSON** JSON file (this file is bundled with the managed package). **Download this file.**

- Return to the newly created Document Template record.
- Utilize the **Import** functionality to upload the downloaded JSON file.

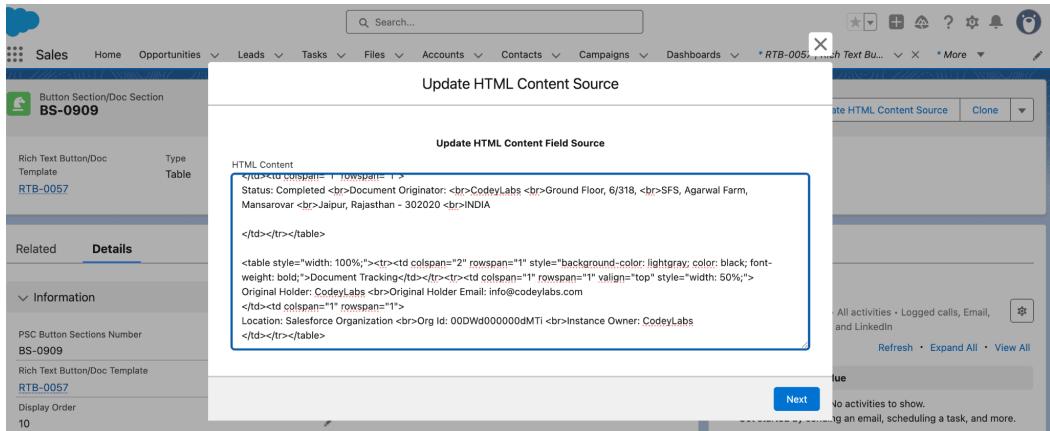
The screenshot shows the 'Rich Text Button / Doc Template' page for 'RTB-0060'. The main area displays the 'Details' tab with fields like 'Rich Text Button Number' (RTB-0060), 'Template Name' (Certificate of Completion), and 'Owner' (Rahul Jain). The sidebar on the right is titled 'Document Section Export/Import' and contains buttons for 'Export Sections' and 'Import Sections'. A red arrow points to the 'Import Sections' button.

5. Upon successful import, refresh the page. The pre-defined document sections will now be visible.

The screenshot shows the 'Rich Text Button / Doc Template' page for 'RTB-0060'. The main area displays the 'Details' tab with a table titled 'Button Sections/Doc Sections (6+)'. The sidebar on the right is titled 'Document Section Export/Import' and shows 'Current: 8 document sections'. A red arrow points to the 'Import Sections' button.

6. **Customize Placeholders:** Review each section and modify the static text placeholders as necessary to meet organizational branding and requirements.

The screenshot shows the 'Rich Text Button / Doc Template' page for 'RTB-0060'. The main area displays the 'HTML' tab with a section titled 'Certificate of Completion'. A red arrow points to a placeholder value within the HTML content. The sidebar on the right is partially visible.



Step 2: Configure DRTE Allowed Objects

This step ensures the DRTE query engine can access the relevant e-signature log data for certificate generation.

1. In **Setup**, search for **Custom Metadata Types**.
2. Locate and manage the records for the **DRTE Allowed Object** custom metadata type.

Action	Label	Installed Package	Namespace Prefix	Visibility	API Name	Record Size	Description
Manage Records	DRTE Allowed Object	DRTE	pscdnryrichtext	Public	pscdnryrichtext__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

3. Create two new records to include the following objects:
 - `pscdnryrichtext__ESignature_Log__c`
 - `pscdnryrichtext__ESignature_Request__c`

DRTE Allowed Object

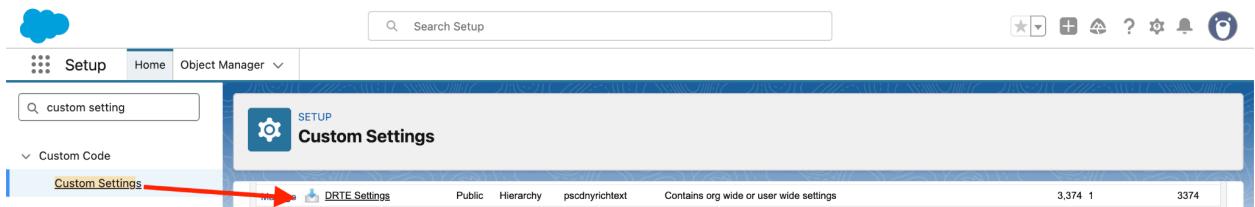
DRTE Allowed Object Detail		Edit	Delete	Clone
Label	pscdnyrichtext__E_Signature_Request__c	Protected Component <input type="checkbox"/>		
DRTE Allowed Object Name	pscdnyrichtext_E_Signature_Request_c	Namespace Prefix		
Object API Name	pscdnyrichtext__E_Signature_Request__c			

DRTE Allowed Object

DRTE Allowed Object Detail		Edit	Delete	Clone
Label	pscdnyrichtext__ESignature_Log_c	Protected Component <input type="checkbox"/>		
DRTE Allowed Object Name	pscdnyrichtext_ESignature_Log_c	Namespace Prefix		
Object API Name	pscdnyrichtext__ESignature_Log__c			

Step 3: Configure DRTE Settings - Custom Setting

1. Navigate to **Setup**, search for **Custom Settings**, and manage the **DRTE Settings** record.



2. Populate the following fields with the required values:
 - **CertificateOfCompletionTemplateId**: Enter the **Salesforce ID** (e.g., `a01XXXXXXXXXXXXXX`) of the "Certificate of Completion" Document Template record created in '**Configuration**'.
 - **CertificateOfCompletionDocumentPrefix**: Provide a unique text prefix (e.g., `COC-`) for the generated document's generic ID.

Step 4: Create and Implement the Generation Action

An action is required to trigger the flow that generates the COC document on the relevant record page.

1. In **Setup**, go to **Object Manager** and select the object on which your E-Signature workflow is enabled (e.g., Opportunity, Contract).
2. Navigate to **Buttons, Links, and Actions**.
3. Create a **New Action**:
 - **Action Type:** Flow
 - **Flow:** Select the packaged flow named **Save Completed Documents To Files**.
 - **Label/Name:** Choose a descriptive label, such as "**Save Signed Document To Files**"
4. **Add Action to Page Layout:**
 - Edit the Page Layout(s) for the target object.
 - Add the newly created Action to the **Salesforce Mobile and Lightning Actions** section of the record's **Highlight Panel**.