CODEYLABS

Internal Direct Signatures in DRTE

User Guide

DRTE

The **Internal Direct Signature** feature is designed for internal workflows where a formal, third-party e-signature (like DocuSign or Adobe Sign) is unnecessary. This allows a user, such as a Sales Manager or Director, to apply their digital signature to a Quote or SOW directly within the DRTE editor window while reviewing the record.

Key Use Case

A Sales Rep completes a Quote and asks their Manager for a quick sign-off. The Manager opens the record, reviews the content, and clicks a button to stamp their signature and the current date into the document instantly.

Key Benefits

- **Speed:** No need to generate and wait for an external e-signature email request.
- **Audit Trail:** Every signature creates an automatic **E-Signature Log** for compliance.
- **Seamless Integration:** The signature is rendered as a high-quality image directly within the document flow.

Admin Configuration

To use this feature, an administrator must enable the following in the Component Visibility settings:

- **Enable E-Signature:** Must be checked.
- **Toolbar Icon:** Once enabled, the **Blue Pen/Envelope** icon will appear in the DRTE toolbar.

How to Apply an Internal Signature

Follow these steps to sign a document internally:

Step 1: Insert the Placeholder

1. Navigate to the **DRTE** tab.
2. Type or ensure the placeholder tag **{{signature}}** is present in the document where you want the signature to appear.
   - *Note: This is the only template tag that the internal signature utility will recognize and replace.*

Step 2: Launch the Signature Utility

1. Click the **Internal Signature icon** (Blue Pen/Envelope) in the toolbar.
2. An **Internal Signature Utility** window will appear.

PSC Quote Request
Salesforce Upgrade - Sale Process Refinement - Demo

Change Primary Quote   Create Milestones (Outcome based)
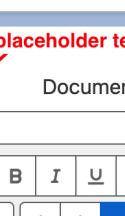
Type   As Sold Marg   * Signed By:
Detailed Level of Effort   53.42%   Rahul Jain
Estimate (LOE)

DRTESigned By...

Internal Signature Utility
mandatory requires the signer to proved
do name signing and signature
drawing both
to proceed with Apply Signature
on the document.

Details   Summary (Primary Quot   RTE

Salesforce Sans   12   Apply Signature   Clear

This Statement of Work ("**Statement of Work**" or "**SOW**") is governed by the terms of the Technology-Enabled Services Agreement ("**Agreement**") located at https://www.simpleinc.com/technology-enabled-services-Agreement.

{{signature}}

PROJECT DESCRIPTION

Step 3: Sign and Apply

1. **Name Signing:** Type your name into the "Signed By" field.
2. **Signature Drawing:** Use your mouse or touch device to draw your signature in the signature box.
   - *Both name typing and drawing are mandatory to proceed.*
3. Click **Apply Signature**.

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Internal Signature applied with name and date of signature, replacing the placeholder {{signature}}

PROJECT DESCRIPTION

Verification and Audit Logs

Document Rendering

The system automatically replaces the **{{signature}}** tag with a composite image containing your drawn signature, printed name, and the precise **Date/Time stamp** of the action.

The Audit Log (Compliance)

For every internal signature applied, the system generates an **E-Signature Log (Audit Log)** record. This log captures:

- **Signer's Full Name**
- **Signer's IP Address**
- **Precise Date and Time**
- **Signature Image Data**

E Signature Log/Signed Document
ESL-000030

Edit | Clone | Printable View ⌄

Related | **Details**

⌄ **Information**

ESignature Log Name
ESL-000030

E Signature Request ✎

DateTimeText
2026-01-08 11:18 GMT ✎

Do Not Share The Record ☐ ✎

FullName
Rahul Jain ✎

SIgnerIPAddress
157.33.25.59 ✎

Status
New ✎

Token ✎

Currency
USD - U.S. Dollar ✎

⌄ **System Information**

Related Record Link
Related Record Link

Owner
Rahul Jain ✎

Files (0)

⬆ Upload Files
Or drop files

For each Internal Signature applied, a E Signature Log record (Audit Log) is created which captures, signer's IP Address, Signature Image Data and DateTime of signature.

a Call | More

Set up an event... | Add

Filters: All time · All activities · All types ⚙
Refresh · Expand All · View All

⌄ **Upcoming & Overdue**

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

Summary Table

Feature	Requirement / Behavior
Required Tag	{{signature}}
Mandatory Input	Name typing AND Signature drawing
Tracking	Automatic creation of E-Signature Log record