



CODEYLABS

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.

The screenshot shows the Salesforce Package Documentation page for record PD-00012. The page has a header with a cloud icon, a search bar, and navigation links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and More. The main content area displays the following information:

- Package Documentation**: PD-00012
- Created By**: Rahul Jain, 7/31/2024, 11:03 AM
- Owner**: Rahul Jain
- Package**: DRTE
- Note**: Let say, we have to generate and send an email with the document generated for this record to a contact with a predefined DRTE email template.
- Details** tab selected: Shows Package Documentation Name (PD-00012), Category (FAQ), Owner (Rahul Jain), and Currency (USD - U.S. Dollar).
- Related** tab: Not visible in the screenshot.
- Package Details** section:
 - Short Description**: Elevate your Salesforce experience with the Dynamic Rich Text Editor. Create dynamic, branded content, export documents as PDFs or Google Docs, and customize toolbars—all seamlessly integrated into Salesforce with no external plugins and VF page required.
 - Usage**: (link)
- To Do List**: (link)

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).

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main area displays the details for the 'Package Documentation' object. The 'Details' section includes fields like API Name (Package_Documentation__c), Singular Label (Package Documentation), and Plural Label (Package Documentations). On the right, there are sections for Reports, Activities, Field History, Deployment Status, and Help Settings. The top navigation bar includes links for Home, Object Manager, and various system icons.

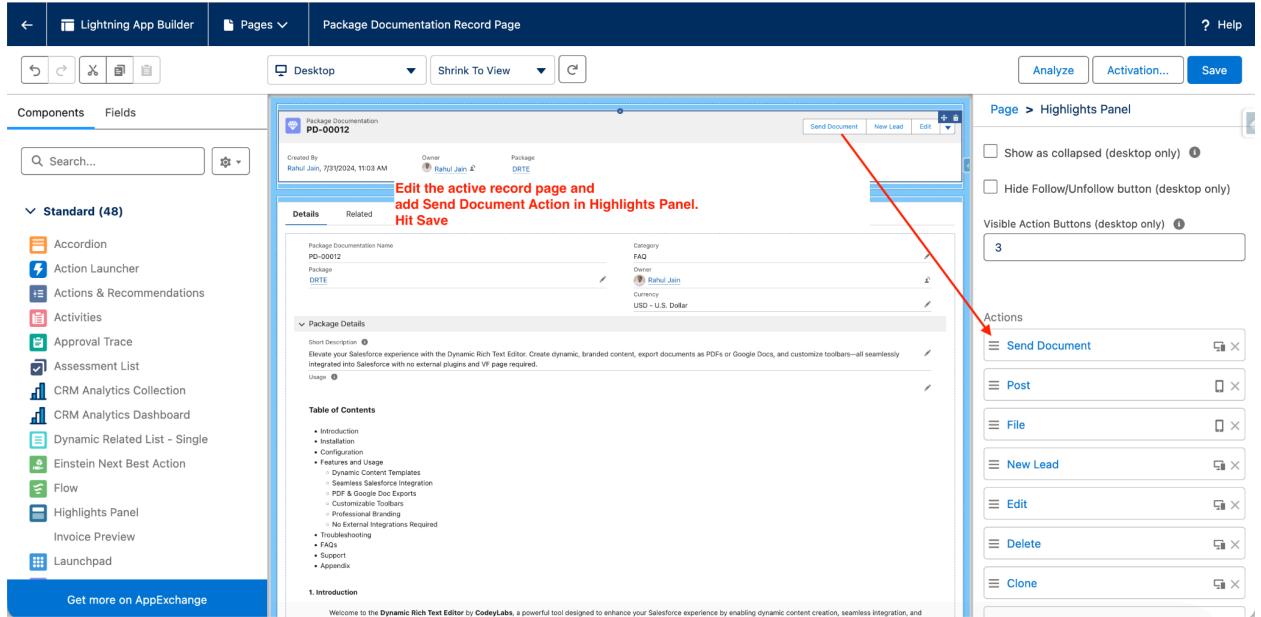
- Click on **Buttons, Links, and Actions** and select **New Action**.
- **Action Type:** Flow.
- **Flow:** Select **Generate and Send using DRTE** (provided by the managed package).

The screenshot shows the 'New Action' dialog for the 'Package Documentation' object. The 'Action Type' dropdown is set to 'Flow', and the 'Flow' dropdown is set to 'Generate and Send using DRTE'. A red arrow points from the text 'In Flow Dropdown, Select "Generate and Send Using DRTE" Flow.' located above the flow selection field. The dialog also includes fields for 'Label' (Send Document), 'Name' (Send_Document), and 'Description'. The 'Save' and 'Cancel' buttons are at the bottom. The left sidebar shows other object categories like Fields & Relationships, Page Layouts, and Lightning Record Pages.

- **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

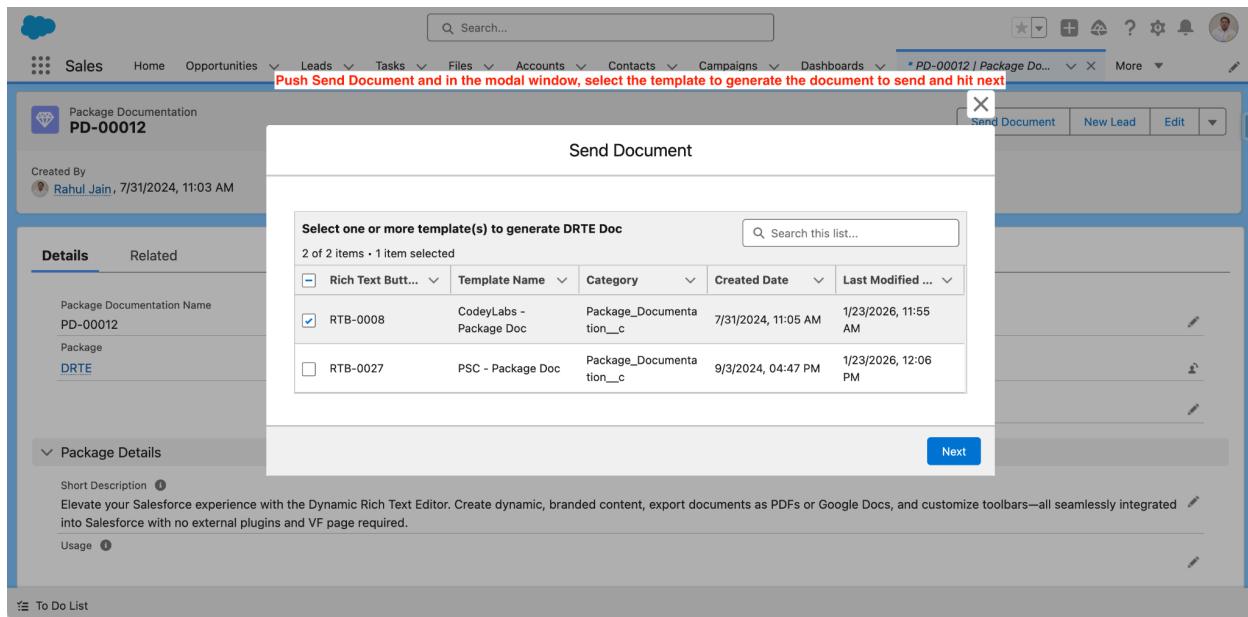
Once the setup is complete, follow these steps to send a document to a contact.

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**.

Package Documentation
PD-00012

Created By
Rahul Jain, 7/31/2024, 11:03 AM

Details Related

Package Documentation Name
PD-00012

Package
DRTE

Package Details

Short Description
Elevate your Salesforce experience with the Dynamic Rich Text Editor. Create dynamic, branded content, export documents as PDFs or Google Docs, and customize toolbars—all seamlessly integrated into Salesforce with no external plugins and VF page required.

Usage

To Do List

Select an email template (DRTE) and hit Next

Send Document

All Documents Generated, next select an email template now.

Select an email template

1 of 1 item - 1 item selected

Template Name Category

Package document for [] Package_Documentation__c

Next

Step 4: Configure Recipient and Review

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

Send Document

Search for a contact and select

Send Email

* To Email
Search a contact you@example.com

Enter a valid value

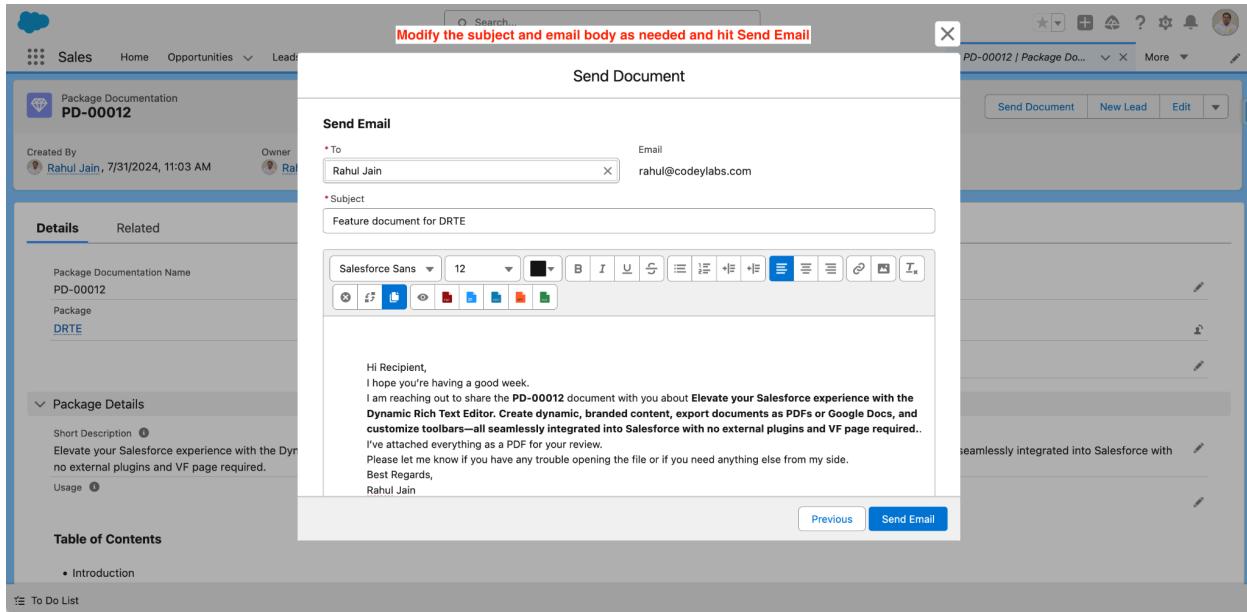
* Subject
Package document for []

Salesforce Sans 12

Hi Recipient,
I hope you're having a good week.
I am reaching out to share the PD-00012 document with you about **Elevate your Salesforce experience with the Dynamic Rich Text Editor. Create dynamic, branded content, export documents as PDFs or Google Docs, and customize toolbars—all seamlessly integrated into Salesforce with no external plugins and VF page required.**
I've attached everything as a PDF for your review.
Please let me know if you have any trouble opening the file or if you need anything else from my side.
Best Regards,
Rahul Jain

Previous Send 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.

The screenshot shows the Salesforce Activity Tab for a record titled 'Package Documentation PD-00012'. The tab header includes a search bar and various navigation links. Below the header, two email entries are listed: one from 'Rahul Jain' at 7/31/2024, 11:03 AM and another from 'Shweta Jain' at 11/8/2024, 2:37 PM. The main content area displays an 'Upcoming & Overdue' section for January 2026. A red arrow points to the first email entry, which is highlighted with a red border. The text 'Email Sent and logged as an activity on the record.' is overlaid in red. The interface includes filters, a refresh button, and a 'Show All Activities' button.

The screenshot shows the Salesforce Email message page for an email titled 'Feature document for DRTE'. The message content is as follows:

Hi Recipient,
I hope you're having a good week.
I am reaching out to share the PD-00012 document with you about **Elevate your Salesforce experience with the Dynamic Rich Text Editor. Create dynamic, branded content, export documents as PDFs or Google Docs, and customize toolbars—all seamlessly integrated into Salesforce with no external plugins and VF page required.** I've attached everything as a PDF for your review.
Please let me know if you have any trouble opening the file or if you need anything else from my side.
Best Regards,
Rahul Jain

The message has a recipient named 'Rahul Jain'. The timestamp is 12:17 PM | Today. On the right side, there is a 'Related' sidebar with sections for 'Attachments (1)', 'Approval History (0)', 'Sender and Recipients (1)', and 'Other Related People (0)'. The attachment is a PDF file named 'CodeyLabs - Package Doc_2026-01-23 06:42:20Z.pdf'.