



CODEYLABS

DRTE - ADD ON

Button - Send Dynamic
Email

User Guide



DRTE

This documentation provides a generic framework for the **DRTE (Dynamic Rich Text Editor) "Send Dynamic Email"** feature.

This tool allows admins to bridge the gap between static email templates and complex Salesforce data by injecting dynamic SOQL-driven content into a flexible editor.

Feature Overview: Send Dynamic Email

The **Send Dynamic Email** feature is a Flow-based extension that enables users to:

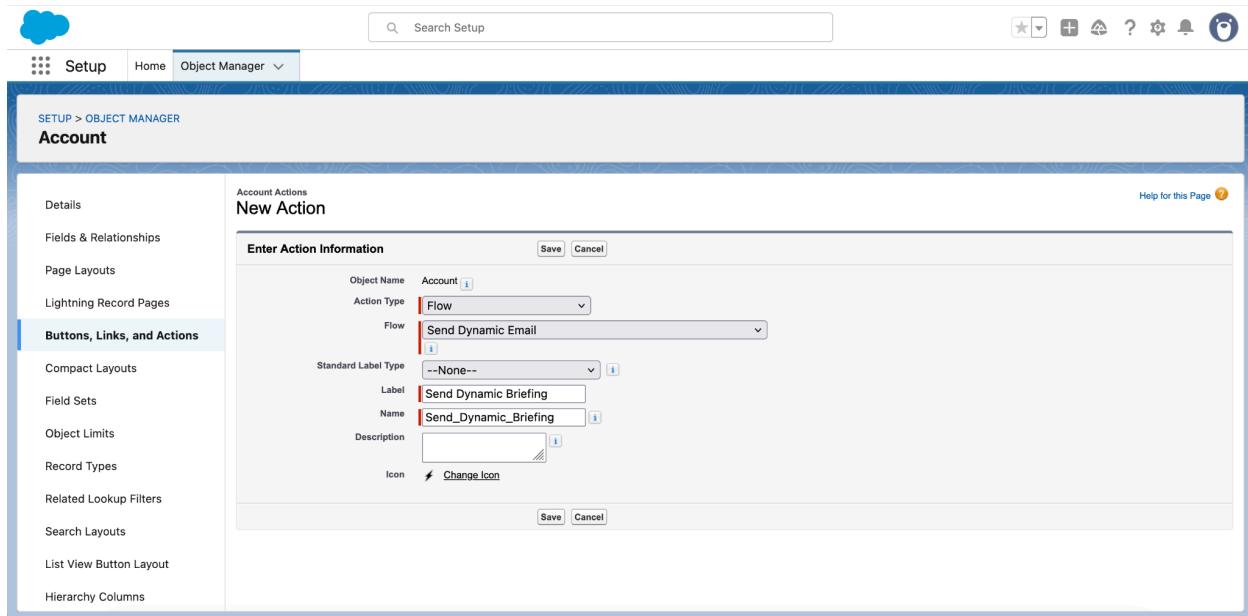
1. **Select** a pre-configured DRTE Rich Text/HTML template.
2. **DRTE Generate** real-time data tables or lists via SOQL queries.
3. **Personalize** the content in a "What You See Is What You Get" (WYSIWYG) editor before sending.
4. **Auto-Log** the communication to the Salesforce Activity Timeline.

Configuration Guide (Admin)

1. The Object Action

To make the feature accessible, create a record-level action:

- **Location:** Object Manager > [Your Object] > Buttons, Links, and Actions.
- **Action Type:** Flow.
- **Flow Name:** Send_Dynamic_Email (provided by the extension).
- **Label:** Custom (e.g., *Send Report*, *Email Briefing*, *Client Update*).



2. Template Definition (Rich Text Button / Doc Template)

The core of the logic lives in the Template record.

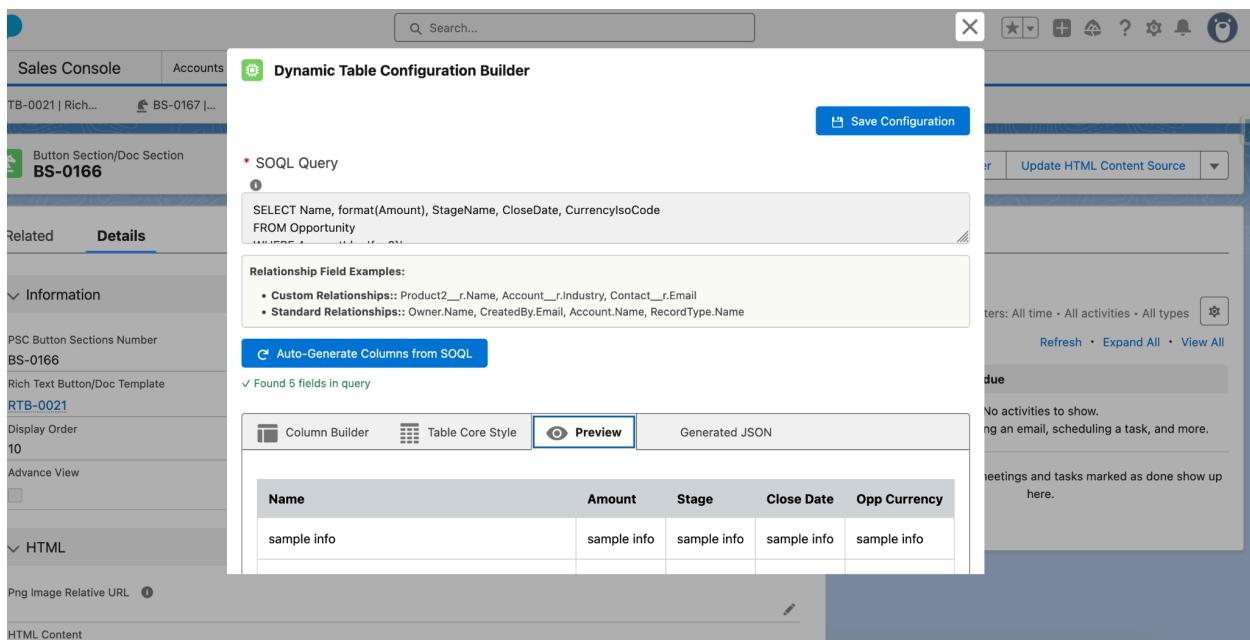
- **Category:** Map this to the Object API Name (e.g., Account, Lead, Custom_Object__c).
- **Is Email Template:** Must be checked to appear in the email flow.
- **Test SFDC Record Id:** Use a valid ID to preview data during configuration.

The screenshot shows the Salesforce 'Rich Text Button / Doc Template' object page. At the top, there's a navigation bar with 'Rich Text Button / Doc Template' and 'RTB-0021'. On the right, there are buttons for 'Preview Document', 'Delete', and 'Change Owner'. Below the header, there are two main sections: 'Information' and 'System Information'. The 'Information' section contains fields for Rich Text Button Number (RTB-0021), Template Name (Account Summaries), SLDS icon-name, Available For Selection (checked), Is Email Template (checked), Owner (Rahul Jain), Category (Account), Deactivated (checked), Display Order (0), and Test SFDC Record Id (001a500000ZPM62AAH). The 'System Information' section shows Created By (Rahul Jain, 1/24/2026, 4:10 AM) and Currency (USD - U.S. Dollar). To the right, there's a sidebar titled 'Document Section Export/Import' with 'Export Sections' and 'Import Sections' buttons, and a message 'Current: 2 document sections'. Below that is the 'Activity' section, which is currently empty, showing a message 'No activities to show. Get started by sending an email, scheduling a task, and more.' and a note 'No past activity. Past meetings and tasks marked as done show up here.'

3. Data Integration (Dynamic Tables)

Create a document section of Table type with SOQL Query. Instead of manual entry, use the **Dynamic Table Configuration Builder**:

- **SOQL Query:** Define which child records or related data to pull.
 - Example: `SELECT Name, Amount, StageName FROM Opportunity WHERE AccountId = :recordId`
- **Column Builder:** Assign labels and formatting (Currency, Date, etc.) to the query results.
- **JSON Integration:** The builder generates the logic required to render this table inside the email body automatically.



Use Case Gallery

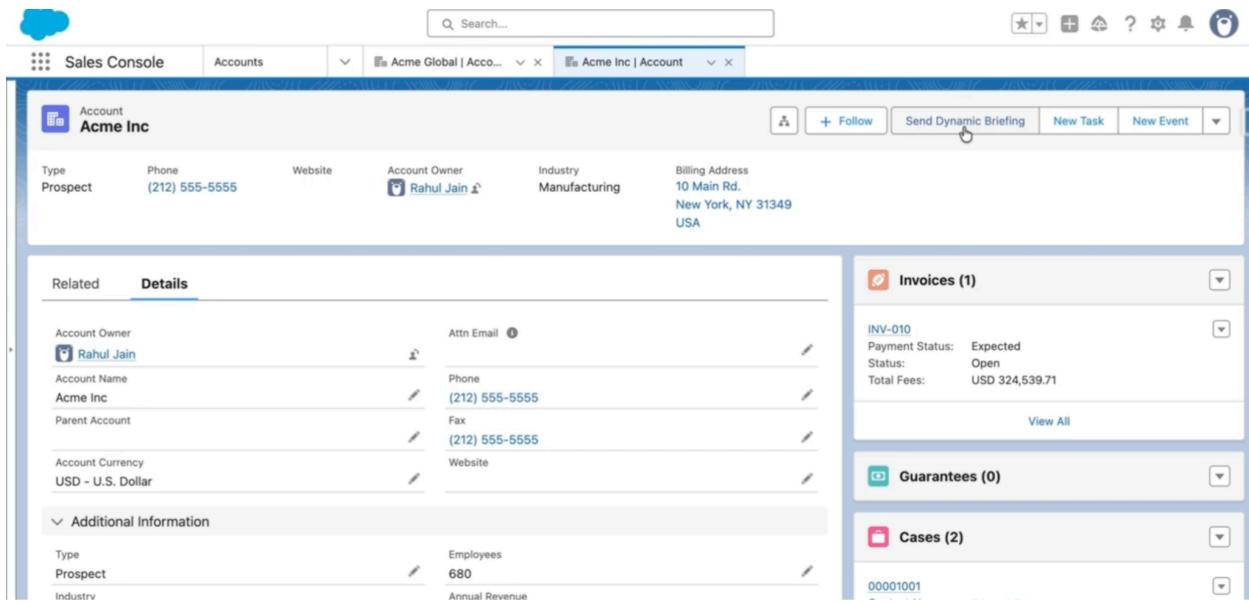
The flexibility of the DRTE extension allows for various applications beyond simple briefings:

Use Case	Data Source (SOQL)	Target Audience
Project Status	Milestones__c & Tasks__c	Stakeholders / Clients
Collections/Invoicing	Invoices__c where Status = 'Overdue'	Finance Contacts
Onboarding Checklist	Requirements__c where Completed = False	New Customers
Case Summary	Cases related to an Account	Success Managers

User Workflow

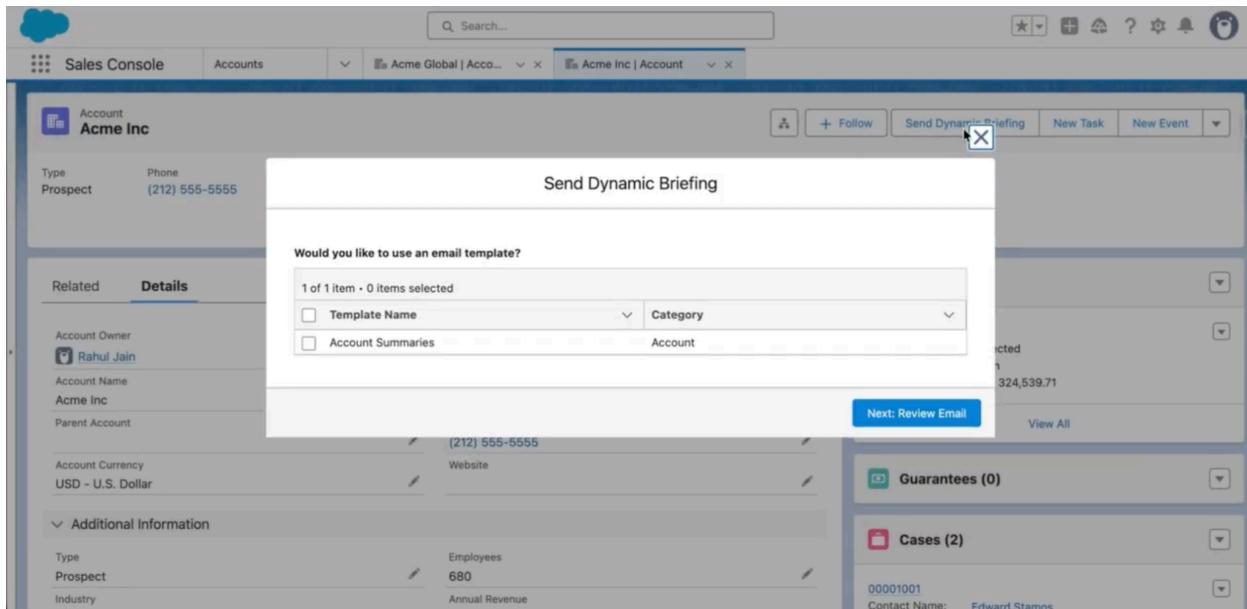
Step 1: Initialize

The user clicks the custom button (e.g., **Send Dynamic Briefing**) on any record. This passes the `recordId` into the engine.



Step 2: Template Selection

The user chooses from a list of templates filtered by the current object. This ensures the user only sees relevant email formats.



Step 3: Real-Time Preview & Edit

The engine executes the SOQL queries and renders the document sections dynamically. The user can:

- Search and select a contact from the system to send email to.
- Add a personalized introduction.
- Format text using the rich text toolbar (Bold, Colors, Links).

Sales Console Accounts

Send Dynamic Briefing

Compose Email

* To (Search Contacts) Acme CEO

Email ceo@codeylabs.com

* Subject Account Summaries

Salesforce Sans 12 B I U

Hi,

Previous Send Email Now

Related Details

Account Owner Rahul Jain

Account Name Acme Inc

Parent Account

Account Currency USD - U.S. Dollar

Additional Information

Type Prospect Employees 680

Industry Annual Revenue 00001001

Sales Console Accounts

Send Dynamic Briefing

ceo@codeylabs.com

* Subject Account Summaries

Salesforce Sans 12 B I U

Hi Sarah,

following up on our Q3 planning session. I've summarized our five active projects below. Note that the 'Expansion' deal is currently ahead of schedule.

Summary of active projects below:

Name	Amount	Stage	Close Date	Opp Currency

Previous Send Email Now

Related Details

Account Owner Rahul Jain

Account Name Acme Inc

Parent Account

Account Currency USD - U.S. Dollar

Additional Information

Type Prospect Employees 680

Industry Annual Revenue 00001001

Step 4: Dispatch & Log

Upon clicking **Send Email Now**, the extension:

1. Sends the email via the Salesforce platform.
2. Creates an **Email Message** and **Task** record.
3. Attaches the final HTML content to the record's **Activity History** for future reference and compliance.

The screenshot shows the Salesforce Sales Console interface. On the left, there are two account records for 'Acme Global' and 'Acme Inc'. Both records display a map of 'LIBERTY PARK' with a red pin indicating a location. Below the maps, there are sections for 'System Information' and 'Custom Links'. In the 'System Information' section, it shows 'Created By' as 'Rahul Jain, 5/19/2024, 10:22 PM' and 'Last Modified By' as 'Rahul Jain, 10/15/2025, 11:34 PM'. In the 'Custom Links' section, there are links to 'Google Search', 'Google Maps', and 'Google News'. On the right side of the screen, there is a separate window titled 'Activity' which lists a single task: 'raj@thepsc.cloud sent an email to Acme CEO' at 4:31 AM | Today, with the status 'Unopened'.

The screenshot shows the Salesforce Email Message screen for an account summary email. The message content is as follows:
From: Rahul Jain
To: Acme CEO
Hi Sarah, following up on our Q3 planning session. I've summarized our active projects below. Note that the 'CTRM' deal is currently ahead of schedule.

Summary of active projects below:

Name	Amount	Stage	Close Date	Opp Currency
Acme - 200 Widgets	USD 20,000.00	Prospecting	2026-01-31 00:00:00	USD
Acme - 600 Widgets	USD 70,000.00	Needs Analysis	2026-02-26 00:00:00	USD
Opportunity Commodity Trading & Risk Management (CTRM)	USD 140,936.72	Needs Analysis	2026-02-28 00:00:00	USD
Acme - 1,200 Widgets	USD 140,000.00	Value Proposition	2026-03-18 00:00:00	USD

On the right side, there is a 'Related' sidebar with sections for 'Attachments (0)', 'Sender and Recipients (1)', 'Other Related People (0)', and 'Related To (1)'. The 'Sender and Recipients' section shows 'Acme CEO' as a contact type.



Best Practices

- **Dynamic Filters:** Always use `:recordId` in your SOQL queries within the Template Builder to ensure data is context-specific.
- **Branding:** Use the HTML section of the template to include company logos and standard signatures.
- **Testing:** Use the **Test SFDC Record Id** field on the Template record to verify that your SOQL query returns the expected data before deploying to users.