



**CODEYLABS**

**Configuration Guide: DRTE Settings**

**User Guide**



**DRTE**

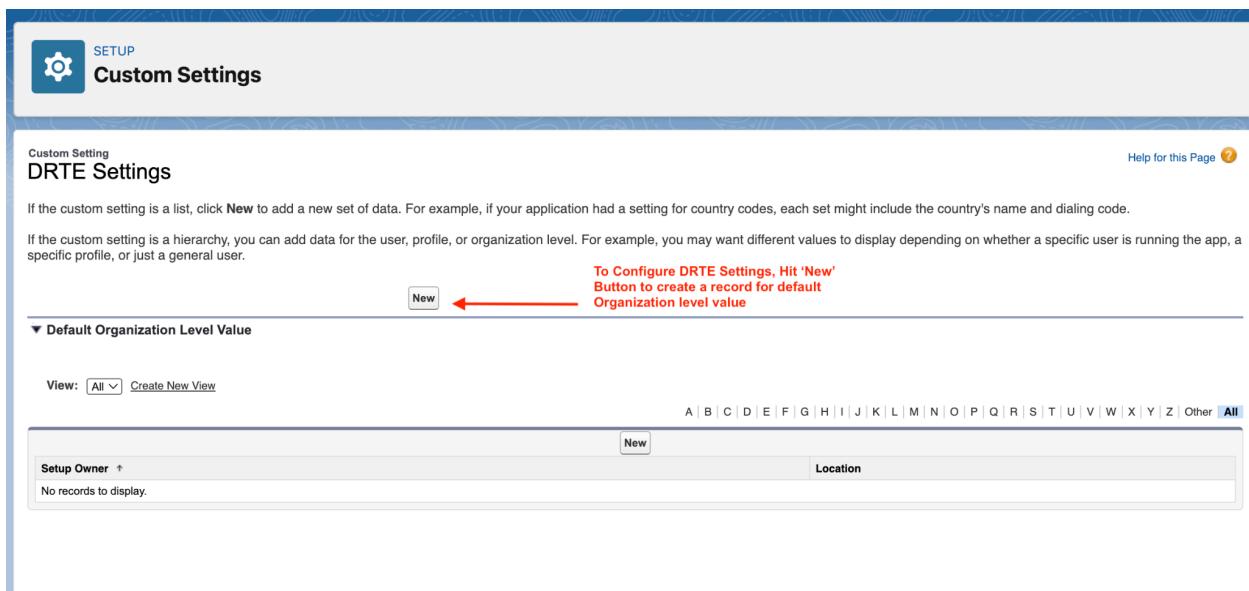
This help guide outlines the steps required to configure the **DRTE Settings** custom setting for the DRTE Managed Solution by CodeyLabs.

# Configuration Guide: DRTE Settings

Follow these steps to establish the foundational settings for the DRTE application, including site URLs, branding, and email automation.

## 1. Initialize the Settings Record

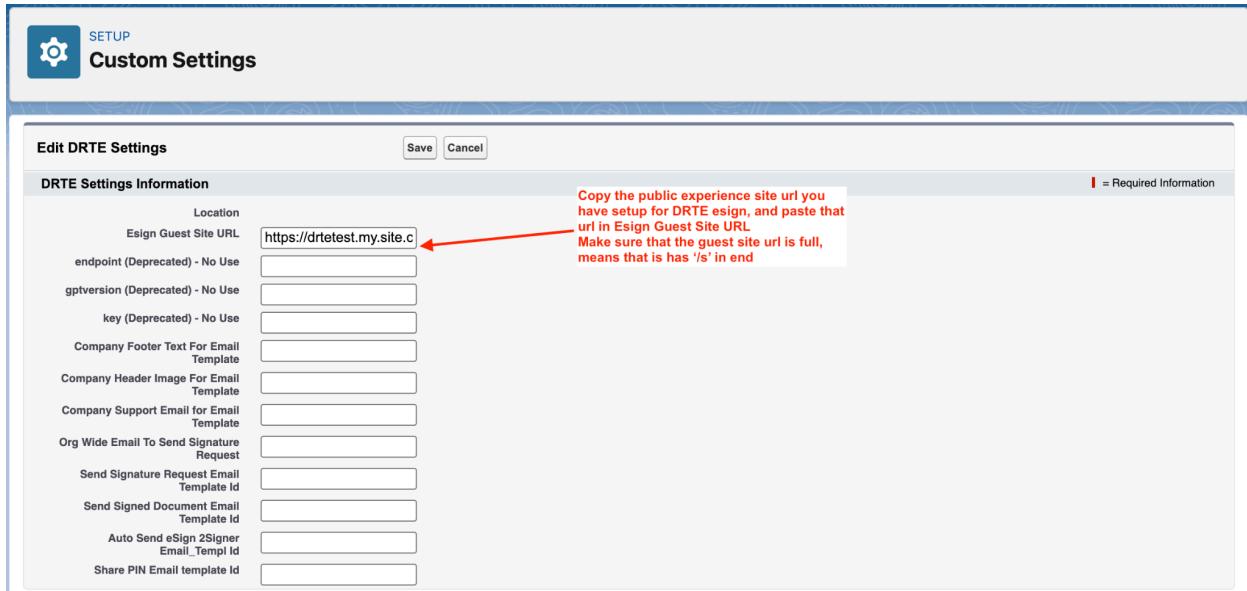
- Navigate to **Setup > Custom Settings**.
- Locate **DRTE Settings** and click **Manage**.
- To create the **default organization-level values**, click the **New** button located above the "Default Organization Level Value" section.



The screenshot shows the Salesforce Custom Settings page for the DRTE Settings custom object. The page title is "Custom Setting DRTE Settings". A callout box points to the "New" button with the text: "To Configure DRTE Settings, Hit 'New' Button to create a record for default Organization level value".

## 2. General Site & System Configuration

- **Esign Guest Site URL:** Paste the public experience site URL you have set up for DRTE eSign.
  - *Note: Ensure the URL is full and includes the `/s/` suffix at the end (e.g., <https://domain.my.site.com/s/>).*



The screenshot shows the 'Edit DRTE Settings' page within the 'Custom Settings' section of the Salesforce Setup menu. The page title is 'Edit DRTE Settings' with 'Save' and 'Cancel' buttons. The 'DRTE Settings Information' section contains various configuration fields, with the 'Esign Guest Site URL' field being the primary focus. A red arrow points from the text 'Copy the public experience site url you have setup for DRTE eSign, and paste that url in Esign Guest Site URL. Make sure that the guest site url is full, means that is has \'s\' in end' to the 'Esign Guest Site URL' input field, which contains the URL 'https://drtetest.my.site.c'. A small red box highlights the 'c' at the end of the URL. A note at the bottom right of the page indicates that a red vertical bar represents 'Required Information'.

- **Deprecated Fields:** Ignore the following fields as they are no longer required:
  - `endpoint (Deprecated)` - No Use
  - `gptversion (Deprecated)` - No Use
  - `key (Deprecated)` - No Use

SETUP

## Custom Settings

### Edit DRTE Settings

DRTE Settings Information

Location

Esign Guest Site URL

endpoint (Deprecated) - No Use

gptversion (Deprecated) - No Use

key (Deprecated) - No Use

Company Footer Text For Email Template

Company Header Image For Email Template

Company Support Email for Email Template

Org Wide Email To Send Signature Request

Send Signature Request Email Template Id

Send Signed Document Email Template Id

Auto Send eSign 2Signer Email\_Templ Id

Share PIN Email template Id

**Ignore, 'No Use' suffixed fields, those are not needed anymore in DRTE**

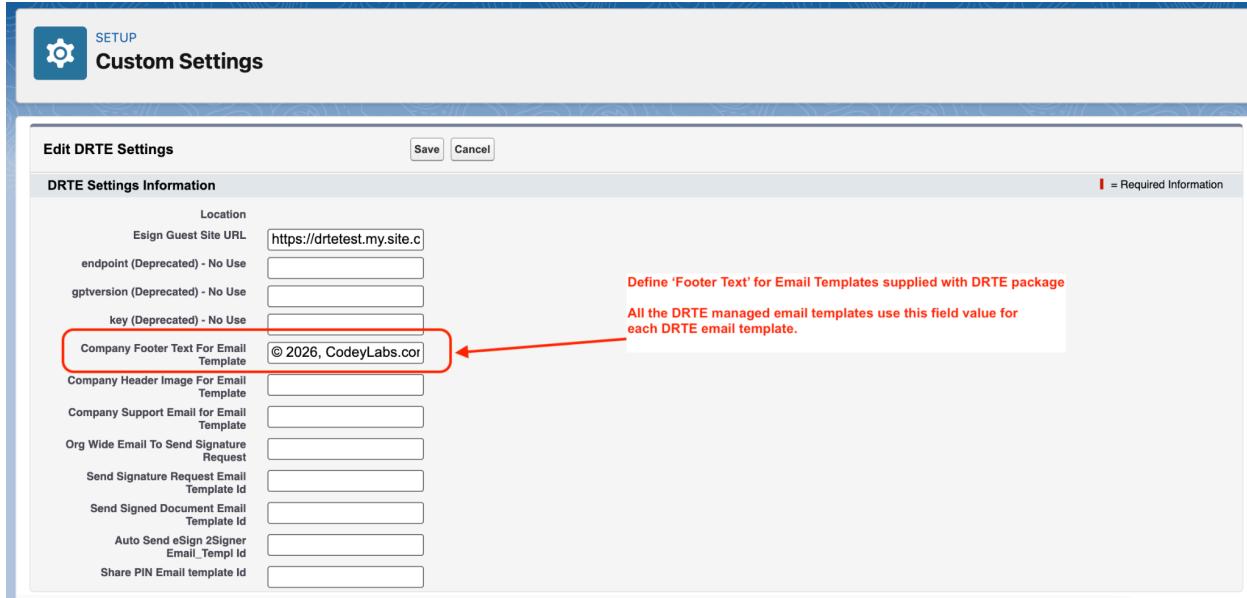
Save Cancel

■ = Required Information

### 3. Branding & Template Customization

These values are used to populate the header, footer, and support information in the pre-built email templates.

- **Company Footer Text For Email Template:** Enter your company's copyright or footer text (e.g., © 2026, [CodeyLabs.com](https://www.CodeyLabs.com)).



The screenshot shows the 'Edit DRTE Settings' page under 'Custom Settings'. The 'Company Footer Text For Email Template' field is highlighted with a red box. A red arrow points from this field to a note that reads: 'Define 'Footer Text' for Email Templates supplied with DRTE package' and 'All the DRTE managed email templates use this field value for each DRTE email template.'

Edit DRTE Settings	
DRTE Settings Information	<input type="button" value="Save"/> <input type="button" value="Cancel"/>
Location	<input type="text" value="https://drtetest.my.site.c"/>
Esign Guest Site URL	<input type="text" value="https://drtetest.my.site.c"/>
endpoint (Deprecated) - No Use	<input type="text"/>
gptversion (Deprecated) - No Use	<input type="text"/>
key (Deprecated) - No Use	<input type="text"/>
Company Footer Text For Email Template	<input type="text" value="© 2026, CodeyLabs.com"/>
Company Header Image For Email Template	<input type="text"/>
Company Support Email for Email Template	<input type="text"/>
Org Wide Email To Send Signature Request	<input type="text"/>
Send Signature Request Email Template Id	<input type="text"/>
Send Signed Document Email Template Id	<input type="text"/>
Auto Send eSign 2Signer Email_Templ Id	<input type="text"/>
Share PIN Email template Id	<input type="text"/>

- **Company Header Image For Email Template:** Provide the full URL of your company logo hosted on your website. This logo will appear at the top of outgoing emails.

SETUP  Custom Settings

Edit DRTE Settings Save Cancel

**DRTE Settings Information** | = Required Information

Location	<input type="text" value="https://drtest.my.site.c"/>
Esign Guest Site URL	<input type="text" value="https://drtest.my.site.c"/>
endpoint (Deprecated) - No Use	<input type="text"/>
gptversion (Deprecated) - No Use	<input type="text"/>
key (Deprecated) - No Use	<input type="text"/>
Company Footer Text For Email Template	© 2026, CodeyLabs.cor
Company Header Image For Email Template	<input type="text" value="ylabslogo/400x100.png"/>
Company Support Email for Email Template	<input type="text"/>
Org Wide Email To Send Signature Request	<input type="text"/>
Send Signature Request Email Template Id	<input type="text"/>
Send Signed Document Email Template Id	<input type="text"/>
Auto Send eSign 2Signer Email_Templ Id	<input type="text"/>
Share PIN Email template Id	<input type="text"/>

**Define 'Header Image URL' for Email Templates supplied with DRTE package**

All DRTE email templates uses this value for the header image for company logo on emails built using DRTE managed email templates.

The value is generally a url of the logo hosted on your company website.

- **Company Support Email for Email Template:** Enter your company's support email address (e.g., [support@codeylabs.com](mailto:support@codeylabs.com)).

SETUP  Custom Settings

Edit DRTE Settings Save Cancel

**DRTE Settings Information** | = Required Information

Location	<input type="text" value="https://drtest.my.site.c"/>
Esign Guest Site URL	<input type="text" value="https://drtest.my.site.c"/>
endpoint (Deprecated) - No Use	<input type="text"/>
gptversion (Deprecated) - No Use	<input type="text"/>
key (Deprecated) - No Use	<input type="text"/>
Company Footer Text For Email Template	© 2026, CodeyLabs.cor
Company Header Image For Email Template	<input type="text" value="https://www.codeylabs.c"/>
Company Support Email for Email Template	<input type="text" value="support@codeylabs.cor"/>
Org Wide Email To Send Signature Request	<input type="text"/>
Send Signature Request Email Template Id	<input type="text"/>
Send Signed Document Email Template Id	<input type="text"/>
Auto Send eSign 2Signer Email_Templ Id	<input type="text"/>
Share PIN Email template Id	<input type="text"/>

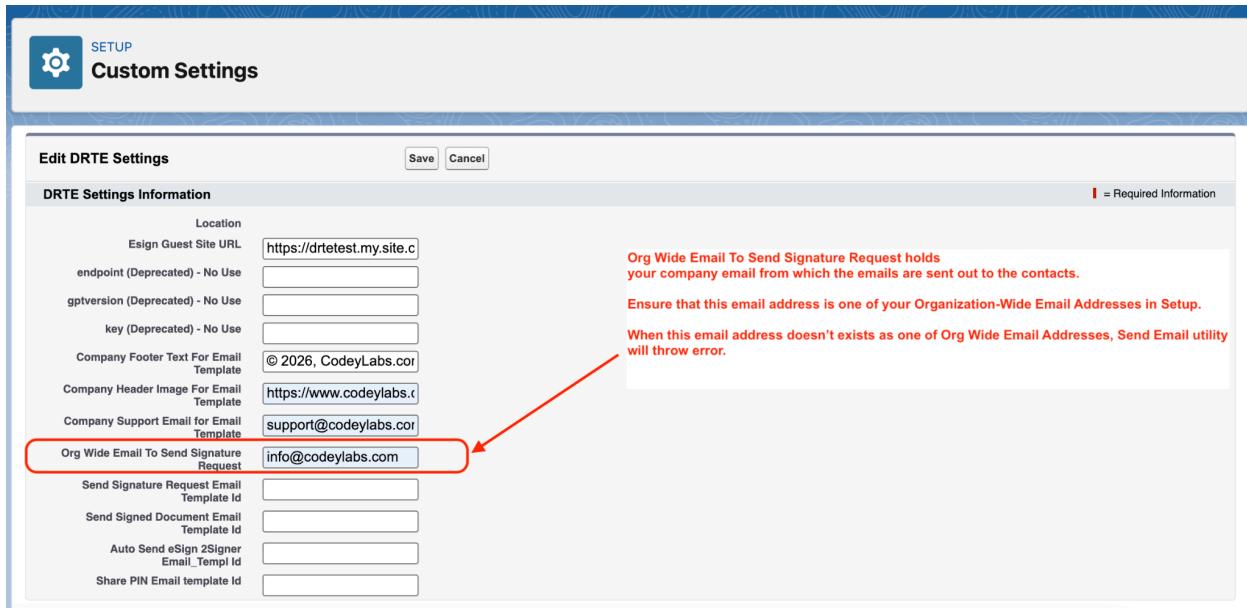
**Define 'Company Support Email Address' for Email Templates supplied with DRTE package**

All DRTE email templates uses this value for placing the company support email address in outgoing emails.

This value is generally your company support email address.

## 4. Organization-Wide Email Setup

- **Org Wide Email To Send Signature Request:** Enter the email address from which signature requests should be sent.
  - **CRITICAL:** This email address **must** be verified as an **Organization-Wide Email Address** in Salesforce Setup. If it is not, the "Send Email" utility will fail and throw an error.



SETUP

Custom Settings

Edit DRTE Settings

DRTE Settings Information

Location

Esign Guest Site URL:

endpoint (Deprecated) - No Use:

gptversion (Deprecated) - No Use:

key (Deprecated) - No Use:

Company Footer Text For Email Template:

Company Header Image For Email Template:

Company Support Email for Email Template:

Org Wide Email To Send Signature Request:  info@codeylabs.com

Send Signature Request Email Template Id:

Send Signed Document Email Template Id:

Auto Send eSign 2Signer Email\_Templ Id:

Share PIN Email template Id:

Save Cancel

| = Required Information

**Org Wide Email To Send Signature Request holds your company email from which the emails are sent out to the contacts.**

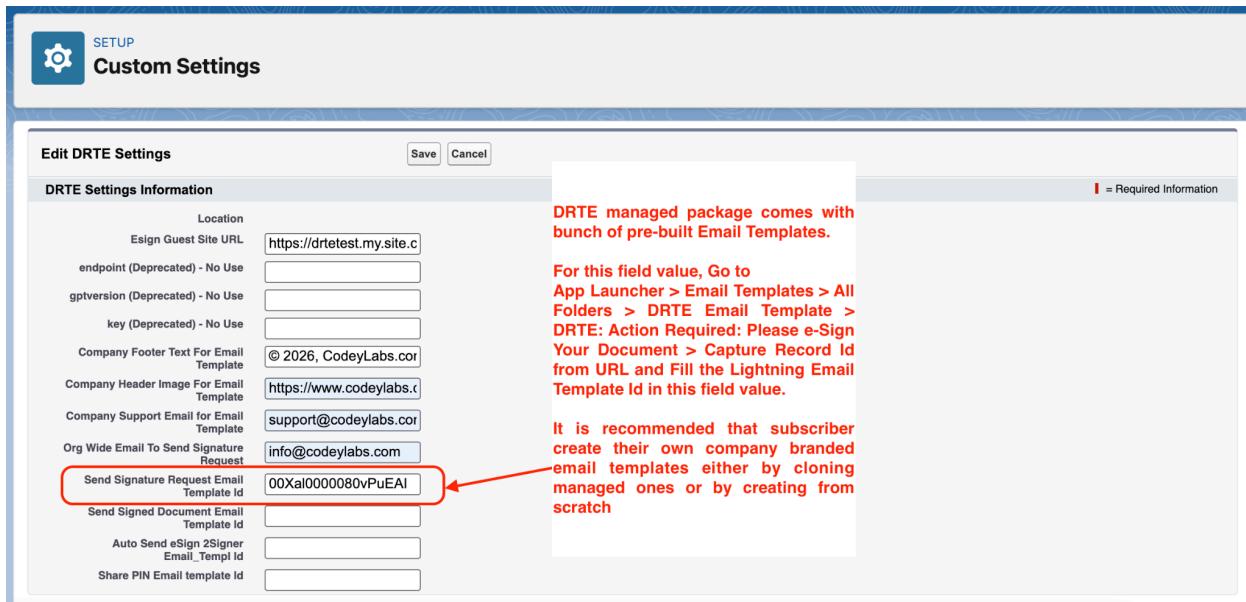
**Ensure that this email address is one of your Organization-Wide Email Addresses in Setup.**

**When this email address doesn't exists as one of Org Wide Email Addresses, Send Email utility will throw error.**

## 5. Configuring Email Template IDs

The DRTE managed package includes pre-built Lightning Email Templates. To link them, you must find their **Record IDs**:

1. Go to **App Launcher > Email Templates > All Folders > DRTE Email Template**.
2. Open the specific template, copy the **18-character Record ID** from the browser URL, and paste it into the corresponding field below:
  - **Send Signature Request Email Template Id:** Use ID for template: *DRTE: Action Required: Please e-Sign Your Document.*



- **Send Signed Document Email Template Id:** Use ID for template: *DRTE Action Complete: Your Signed Document is Ready.*

SETUP Custom Settings

Edit DRTE Settings Save Cancel

**DRTE Settings Information** | = Required Information

Location	DRTE managed package comes with bunch of pre-built Email Templates.
Esign Guest Site URL	https://drtetest.my.site.c
endpoint (Deprecated) - No Use	
gptversion (Deprecated) - No Use	
key (Deprecated) - No Use	
Company Footer Text For Email Template	© 2026, CodeyLabs.cor
Company Header Image For Email Template	https://www.codeylabs.c
Company Support Email for Email Template	support@codeylabs.cor
Org Wide Email To Send Signature Request	info@codeylabs.com
Send Signature Request Email Template Id	00Xal0000080vPuEAI
Send Signed Document Email Template Id	00Xal0000080vPtEAI
Auto Send eSign 2Signer Email_Templ Id	
Share PIN Email template Id	

For this field value, Go to App Launcher > Email Templates > All Folders > DRTE Email Template > DRTE Action Complete: Your Signed Document is Ready > Capture Record Id from URL and Fill the Lightning Email Template Id in this field value.

It is recommended that subscriber create their own company branded email templates either by cloning managed ones or by creating from scratch

- **Auto Send eSign 2Signer Email\_Templ Id:** Use ID for template: *DRTE: Action Required: Please e-Sign Your Document (Second Signer).*

SETUP Custom Settings

Edit DRTE Settings Save Cancel

**DRTE Settings Information** | = Required Information

Location	DRE managed package comes with bunch of pre-built Email Templates.
Esign Guest Site URL	https://drtetest.my.site.c
endpoint (Deprecated) - No Use	
gptversion (Deprecated) - No Use	
key (Deprecated) - No Use	
Company Footer Text For Email Template	© 2026, CodeyLabs.cor
Company Header Image For Email Template	https://www.codeylabs.c
Company Support Email for Email Template	support@codeylabs.cor
Org Wide Email To Send Signature Request	info@codeylabs.com
Send Signature Request Email Template Id	00Xal0000080vPuEAI
Send Signed Document Email Template Id	00Xal0000080vPtEAI
Auto Send eSign 2Signer Email_Templ Id	00Xal0000080vPTFEAO
Share PIN Email template Id	

For this field value, Go to App Launcher > Email Templates > All Folders > DRTE Email Template > DRTE: Action Required: Please e-Sign Your Document (Second Signer) > Capture Record Id from URL and Fill the Lightning Email Template Id in this field value.

It is recommended that subscriber create their own company branded email templates either by cloning managed ones or by creating from scratch

- **Share PIN Email\_Templ Id:** Use ID for template: *DRTE Your PIN to Sign Document...* the one that you cloned following the End User Document.

SETUP

## Custom Settings

Edit DRTE Settings
Save
Cancel

**DRTE Settings Information**

! = Required Information

Location	<input type="text" value="https://drtetest.my.site.c"/>
Esign Guest Site URL	<input type="text" value="https://drtetest.my.site.c"/>
endpoint (Deprecated) - No Use	<input type="text"/>
gptversion (Deprecated) - No Use	<input type="text"/>
key (Deprecated) - No Use	<input type="text"/>
Company Footer Text For Email Template	<input type="text" value="© 2026, CodeyLabs.cor"/>
Company Header Image For Email Template	<input type="text" value="https://www.codeylabs.c"/>
Company Support Email for Email Template	<input type="text" value="support@codeylabs.cor"/>
Org Wide Email To Send Signature Request	<input type="text" value="info@codeylabs.com"/>
Send Signature Request Email Template Id	<input type="text" value="00Xal0000080vPuEAI"/>
Send Signed Document Email Template Id	<input type="text" value="00Xal0000080vPIEA1"/>
Auto Send eSign 2Signer Email_Templ Id	<input type="text" value="00Xal000008P0TFEA0"/>
Share PIN Email template Id	<input style="border: 2px solid red; border-radius: 5px; padding: 2px; width: 150px; height: 20px;" type="text" value="00Xal000009mUkzEAE"/>

DRE managed package comes with bunch of pre-built Email Templates.

For this field value, Go to App Launcher > Email Templates > All Folders > DRTE Email Template > DRTE Your PIN to Sign Document (-The one you cloned--) > Capture Record Id from URL

It is recommended that subscriber create their own company branded email templates either by cloning managed ones or by creating from

**Pro Tip:** It is highly recommended that you clone the managed templates to create your own branded versions and use those unique IDs in these fields.