



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 'Custom Settings' interface for 'DRTE Settings'. At the top, there's a header with a gear icon and the text 'SETUP Custom Settings'. Below this, the page title 'DRTE Settings' is displayed with a 'Help for this Page' link. Two instructional paragraphs are present: one for list-based settings and another for hierarchy-based settings. A 'New' button is highlighted with a red arrow and a red text box that reads: 'To Configure DRTE Settings, Hit 'New' Button to create a record for default Organization level value'. Below the instructions, there's a section titled '▼ Default Organization Level Value'. Under this section, there's a 'View:' dropdown set to 'All' and a 'Create New View' link. A navigation bar with letters A through Z and 'Other' is visible. At the bottom, a table header shows 'Setup Owner' and 'Location', with a 'New' button above it. The table body currently displays 'No records to display.'

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/>).*

Custom Settings

Edit DRTE Settings [Save] [Cancel]

DRTE Settings Information ⓘ = Required Information

Location

Esign Guest Site URL 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

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

- **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

Save

Cancel

DRTE Settings Information

! = Required Information

Location

Esign Guest Site URL

<https://drtetest.my.site.c>

endpoint (Deprecated) - No Use

gptversion (Deprecated) - No Use

key (Deprecated) - No Use

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

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

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://codeylabs.com)).

SETUP
Custom Settings

Edit DRTE Settings [Save] [Cancel]

DRTE Settings Information ⓘ = Required Information

Location

Esign Guest Site URL

endpoint (Deprecated) - No Use

gptversion (Deprecated) - No Use

key (Deprecated) - No Use

Company Footer Text For Email Template Define 'Footer Text' for Email Templates supplied with DRTE package
All the DRTE managed email templates use this field value for each DRTE 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

- **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

SaveCancel

DRTE Settings Information

= Required Information

Location

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

ylabslogo/400x100.png

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

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).

SETUP

Custom Settings

Edit DRTE Settings

SaveCancel

DRTE Settings Information

= Required Information

Location

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

Send Signature Request Email Template Id

Send Signed Document Email Template Id

Auto Send eSign 2Signer Email_Templ Id

Share PIN Email template Id

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.

The screenshot shows the 'Edit DRTE Settings' page in Salesforce Setup. The page title is 'Custom Settings' with a 'SETUP' icon. Below the title bar, there are 'Save' and 'Cancel' buttons. The main section is 'DRTE Settings Information', which includes a 'Location' section with fields for 'Esign Guest Site URL' (https://drtetest.my.site.c), 'endpoint (Deprecated) - No Use', 'gptversion (Deprecated) - No Use', and 'key (Deprecated) - No Use'. Below these are fields for 'Company Footer Text For Email Template' (@ 2026, Codeylabs.cor), 'Company Header Image For Email Template' (https://www.codeylabs.i), and 'Company Support Email for Email Template' (support@codeylabs.cor). The 'Org Wide Email To Send Signature Request' field is highlighted with a red box and contains the value 'info@codeylabs.com'. To the right of the form, a red warning box contains the following text: '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*.

SETUP
Custom Settings

Edit DRTE Settings [Save] [Cancel]

DRTE Settings Information ⓘ = Required 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

DRTE 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: Action Required: Please e-Sign Your Document > 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

- **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

Esign Guest Site URL

https://drtestet.my.site.c

endpoint (Deprecated) - No Use

gptversion (Deprecated) - No Use

key (Deprecated) - No Use

Company Footer Text For Email Template

© 2026, Codeylabs.c

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

DRTE 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 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

Esign Guest Site URL

https://drtestet.my.site.c

endpoint (Deprecated) - No Use

gptversion (Deprecated) - No Use

key (Deprecated) - No Use

Company Footer Text For Email Template

© 2026, Codeylabs.c

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

00Xal000008P0TFEA0

Share PIN Email template Id

DRTE 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: 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

SaveCancel

DRTE Settings Information

= Required Information

Location

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 2 Signer Email - Templ Id

00Xal000008P0TFEA0

Share PIN Email template Id

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.