



Configuring Alternative Template Buttons in DRTE

User Guide



DRTE


In many business scenarios, a single default template covers the majority of your needs (e.g., T&M Quotes). However, for the remaining edge cases (e.g., Fixed Fee Quotes), the **DRTE Editor** allows you to surface alternative templates as clickable SLDS icon buttons directly within the editor interface.

Phase 1: Configuring the Rich Text Button Template

Before a template can appear as a button, it must be properly configured in the **Rich Text Button / Doc Template** object.

Step 1: Understanding Deactivation Logic






- **Active Templates:** If a template record is **not** deactivated, it is eligible to appear as an additional shortcut button on the DRTE Editor toolbar.
- **Deactivated Templates:** When the **Deactivated** checkbox is selected, the template will not appear as an optional button. However, it can still be used as a "Default Template" for the editor if its SFDC ID is hardcoded in the component settings.

 Rich Text Button / Doc Template
RTB-0008


Related

Details

Information

Rich Text Button Number	RTB-0008	Owner	 Rahul Jain
Template Name	SOW (USD) ON Quote Request	Category	
SLDS icon-name 	utility:contract_doc	Deactivated 	<input checked="" type="checkbox"/>
		Display Order	1
		Test SFDC Record Id 	a0La500000Z5lszEAF


This template is deactivated, which means can only be used as default template for editors, and not available as optional/additional button on editor



System Information

Step 2: Assigning Categories and Icons

- Category: Assign a specific name (e.g., QuoteRequestSOW) to the Category field. This value is used to filter which buttons appear on specific Editor instances.
- SLDS Icon Name: Define the visual identity of your button by entering a standard SLDS icon string (e.g., utility:contract_doc).

 Rich Text Button / Doc Template
RTB-0009

Related

Details

Information

Rich Text Button Number

RTB-0009


Template Name

Fixed Fee SOW (USD) ON Quote Request

SLDS icon-name ⓘ

utility:contr

Owner

 [Rahul Jain](#)

Category ⓘ

QuoteRequestSOW

Deactivated ⓘ

☐

Display Order

1

Test SFDC Record Id ⓘ

a15GB00000SOGYsYAP

Note this Category Name, it will be used to filter buttons on DRTE Editor

This isn't deactivated so available to be shown as additional button on DRTE Editor

System Information

Phase 2: Editor Component Setup

Once your template records are ready, you must configure the **Dynamic Rich Text Editor** component on the Lightning Page.

Step 3: Filtering Buttons by Category

- **Default Behavior:** If the **Filter Category** field in the component properties is left empty, the editor will display **all** active template buttons.

The screenshot shows the Dynamic Rich Text Editor (DRTE) interface. On the left, the editor toolbar is visible with a red box highlighting the button icons. A red arrow points from the text "Without category filter, showing all the active template buttons" to the highlighted buttons. The main content area displays a "STATEMENT OF WORK" document. On the right, the component properties panel is shown with the "Filter Category" field set to "Keep empty to show all dynamic buttons".

Page > Dynamic Rich Text Editor

PDF Height 1
841.89

Default Template SFDC Id 1
a14a50000Dn0ozAAB

☐ Don't show optional buttons

☐ Read Only

Filter Category 1
Keep empty to show all dynamic buttons

Define Footer (PDF Only) 1
Confidential and Restricted

Header Image URL (PDF Only) 1

☒ Show Page Number (PDF Only)

☒ Enable E-Signature 1

- **Targeted Visibility:** To show only specific buttons (like the "Fixed Fee SOW"), enter the exact Category Name defined in Step 2 into the **Filter Category** attribute.

The screenshot shows the Dynamic Rich Text Editor (DRTE) interface with the "Filter Category" field set to "QuoteRequestSOW". A red box highlights the button icons in the toolbar, and a red arrow points from the text "Showing the buttons having Category equals to Filter Category value." to the highlighted buttons. The main content area displays the "STATEMENT OF WORK" document. On the right, the component properties panel is shown with the "Filter Category" field set to "QuoteRequestSOW".

Page > Dynamic Rich Text Editor

PDF Height 1
841.89

Default Template SFDC Id 1
a14a50000Dn0ozAAB

☐ Don't show optional buttons

☐ Read Only

Filter Category 1
QuoteRequestSOW

Define Footer (PDF Only) 1
Confidential and Restricted

Header Image URL (PDF Only) 1

☒ Show Page Number (PDF Only)

☒ Enable E-Signature 1

Phase 3: End-User Workflow

Once configured, the user experience is streamlined for handling exceptions.

Step 4: Default Template Loading

- Upon opening the DRTE tab, the system automatically loads the **Default Template** (e.g., the standard Statement of Work). This ensures 98% of users can proceed immediately without extra clicks.

The screenshot displays the Pre Sales Cloud user interface. At the top, a navigation bar includes a search bar and various icons. Below this, a breadcrumb trail shows the path: Home > Accounts > Opportunities > PSC Quote Requests > PSC Quotes. The main content area is titled 'PSC Quote Request' and 'Salesforce Upgrade - Sale Process Refinement - Demo'. It features a table with key metrics:

Type	As Sold Margin	Net Fees	Discount Amount	Status	Milestone Total Value
Detailed Level of Effort Estimate (LOE)	53.42%	USD 977,408.11	USD 51,716.51	Quote Approved	USD 97,740.81

Below the table, there are tabs for 'Details', 'Summary (Primary Quote)', 'Document (Primary Quote)', and 'DRTE'. The 'DRTE' tab is active, and a red arrow points to it with the text 'Default Template Loaded'. The document content area shows a 'STATEMENT OF WORK' template. At the bottom, a disclaimer states: '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.html and hereby entered into between Simple Inc'.

On the right side, there is a sidebar titled 'PSC Quotes (2)' which lists two quotes:

- Salesforce Upgrade - Sale Process Refinement - Demo**
Net Fees Summ... USD 977,408.11
Primary: ✓
As Sold Margin ... 53.42%
- Salesforce Upgrade - Sale Process Refinement - Demo - Staff**
Net Fees Summ... USD 14,500.00
Primary: ⚙️
As Sold Margin ... 17.24%

A 'View All' link is present at the bottom of the sidebar.

Step 5: Clearing the Editor and Switching Templates If the user needs to generate the "2% exception" document (e.g., a Fixed Fee quote):

1. **Clear Content:** Click the **[X] (Clear)** button on the toolbar to empty the editor.
2. **Select Alternative:** Click the specific **Template Button** (identified by the SLDS icon, such as the bottom-align icon shown in the toolbar).
3. **Hover Verification:** Users can hover over the icon to see a tooltip (e.g., *"Fixed Fee SOW (USD) ON Quote Request"*) to ensure they are selecting the correct version.

The screenshot displays the Salesforce Pre Sales Cloud interface. At the top, there's a navigation bar with options like Home, Accounts, Opportunities, PSC Quote Requests, PSC Quotes, Collection Forecast Dashboard, Invoices, My Time, and More. Below this, a section titled 'PSC Quote Request' shows details for 'Salesforce Upgrade - Sale Process Refinement - Demo'. Key metrics include Type (Detailed Level of Effort Estimate (LOE)), As Sold Margin (53.42%), Net Fees (USD 977,408.11), Discount Amount (USD 51,716.51), Status (Quote Approved), and Milestone Total Value (USD 97,740.81). The main area is divided into tabs: Details, Summary (Primary Quote), Document (Primary Quote), and **WRITE**. The **WRITE** tab is active, showing a rich text editor toolbar. Red arrows highlight the 'Clear' button (X icon) and the 'Fixed Fee SOW (USD) ON Quote Request' template button. A tooltip for the template button is visible, showing the text 'Fixed Fee SOW (USD) ON Quote Request'. On the right, a sidebar titled 'PSC Quotes (2)' lists two quotes: 'Salesforce Upgrade - Sale Process Refinement - Demo' and 'Salesforce Upgrade - Sale Process Refinement - Demo - Staff', each with its own Net Fees and As Sold Margin.

Step 6: Success - Document Re-Generation

- The editor will immediately refresh and generate the document using the alternative template logic. The user can now proceed with the specialized content without ever leaving the DRTE interface.

The screenshot displays the Salesforce DRTE (Document Re-Generation Tool) interface. At the top, a navigation bar includes a search bar and various icons. Below this, a breadcrumb trail shows the path: Pre Sales Cloud > Home > Accounts > Opportunities > PSC Quote Requests > PSC Quotes > Collection Forecast Dashboard > Invoices > My Time. The main header area shows the document title "Salesforce Upgrade - Sale Process Refinement - Demo" and a status of "Quote Approved". A table below the header lists key metrics: Type (Detailed Level of Effort Estimate (LOE)), As Sold Margin (53.42%), Net Fees (USD 977,408.11), Discount Amount (USD 51,716.51), and Milestone Total Value (USD 97,740.81). A red banner indicates "Document Generated with Different Template Than Default". The main content area is divided into two tabs: "Details" and "Summary (Primary Quote)". The "Details" tab is active, showing a rich text editor with a toolbar and a list of deliverables under the heading "SCOPE OF WORK". The deliverables include: "Sales Process Refinement: {{psce__Description__c}}", "Opportunity Creation & Qualification Framework Logic: Implementation of the one-click creation logic from the Sales Cloud Lead module and the technical setup of the Qualification Framework (BANT/MEDDIC). The developer will build the logic to engage collaborators and ensure validations are enforced during creation.", and "Opportunity Context Capture & Categorization Automation: Development of auto-capture scripts for Industry, Problem". A red arrow points from the "Opportunity Creation & Qualification Framework Logic" deliverable to the "DRTE" tab. On the right side, a sidebar shows a list of "PSC Quotes (2)" with details for each quote, including Net Fees Summ... and As Sold Margin

Search...

Pre Sales Cloud Home Accounts Opportunities PSC Quote Requests PSC Quotes Collection Forecast Dashboard Invoices My Time More

PSC Quote Request
Salesforce Upgrade - Sale Process Refinement - Demo

Change Primary Quote Create Milestones (Outcome based) Sharing Edit Delete Clone Submit for Approval

Type	As Sold Margin	Net Fees	Discount Amount	Status	Milestone Total Value
Detailed Level of Effort Estimate (LOE)	53.42%	USD 977,408.11	USD 51,716.51	Quote Approved	USD 97,740.81

Document Generated with Different Template Than Default

Details Summary (Primary Quote) Document (Primary Quote) **DRTE**

Salesforce Sans 12 B I U C L R T A S

SCOPE OF WORK

Deliverables

- Sales Process Refinement: {{psce__Description__c}}
- Opportunity Creation & Qualification Framework Logic: Implementation of the one-click creation logic from the Sales Cloud Lead module and the technical setup of the Qualification Framework (BANT/MEDDIC). The developer will build the logic to engage collaborators and ensure validations are enforced during creation.
- Opportunity Context Capture & Categorization Automation: Development of auto-capture scripts for Industry, Problem

PSC Quotes (2)

Salesforce Upgrade - Sale Process Refinement - Demo

Net Fees Summ... USD 977,408.11

Primary: ✓

As Sold Margin ... 53.42%

Salesforce Upgrade - Sale Process Refinement - Demo - Staff

Net Fees Summ... USD 14,500.00

Primary: ⚙

As Sold Margin ... 17.24%

View All

E-Signature Workflow Begin Workflow