



CODEYLABS

Configuring Alternative Template Buttons in DRTE

User Guide



DRTE

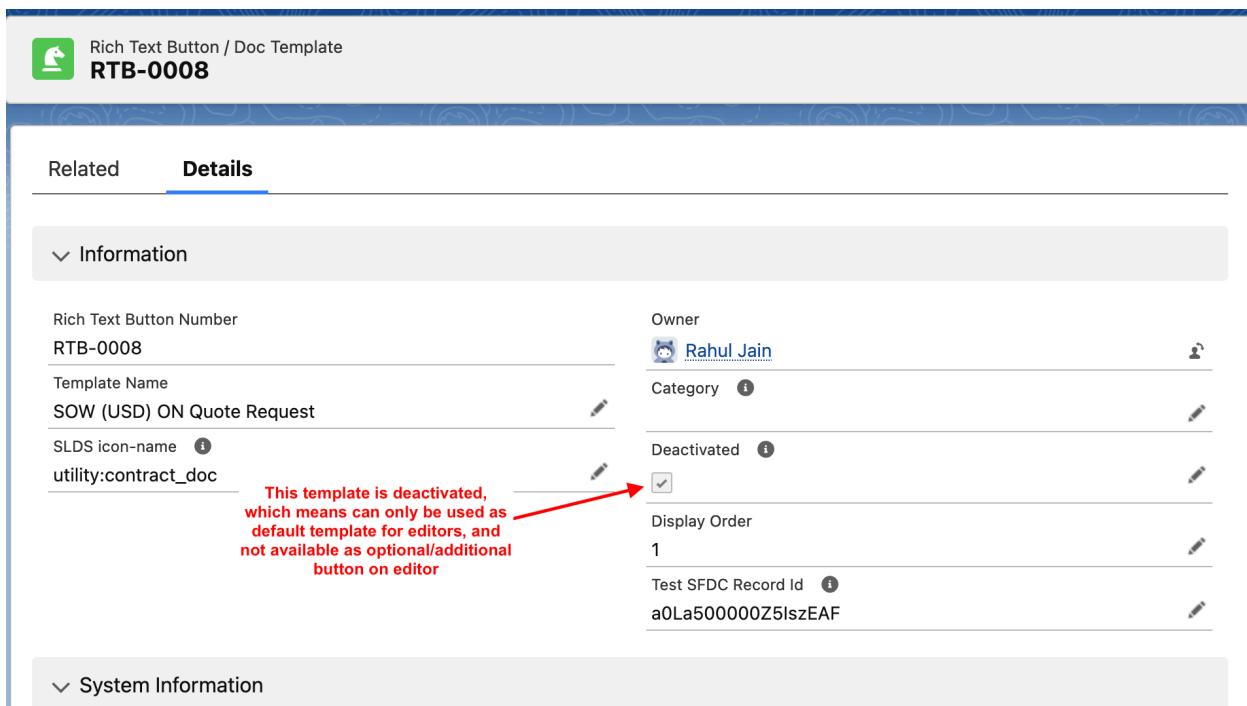
In many business scenarios, a single default template covers the majority of your needs (e.g., T&M Quotes). However, for the remaining edge cases (e.g., Fixed Fee Quotes), the **DRTE Editor** allows you to surface alternative templates as clickable SLDS icon buttons directly within the editor interface.

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"/>
<small>This template is deactivated, which means can only be used as default template for editors, and not available as optional/additional button on editor</small>		Display Order	1
		Test SFDC Record Id	a0La500000Z5lszEAF

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	Owner	Rahul Jain
Template Name	Fixed Fee SOW (USD) ON Quote Request	Category	QuoteRequestSOW
SLDS icon-name	utility:contr	Deactivated	<input type="checkbox"/>
This isn't deactivated so available to be shown as additional button on DRTE Editor		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.

Page > Dynamic Rich Text Editor

PDF Height

Default Template SFDC Id

Don't show optional buttons

Read Only

Filter Category

Define Footer (PDF Only)

Header Image URL (PDF Only)

Show Page Number (PDF Only)

Enable E-Signature

- **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.

Page > Dynamic Rich Text Editor

PDF Height

Default Template SFDC Id

Don't show optional buttons

Read Only

Filter Category

Define Footer (PDF Only)

Header Image URL (PDF Only)

Show Page Number (PDF Only)

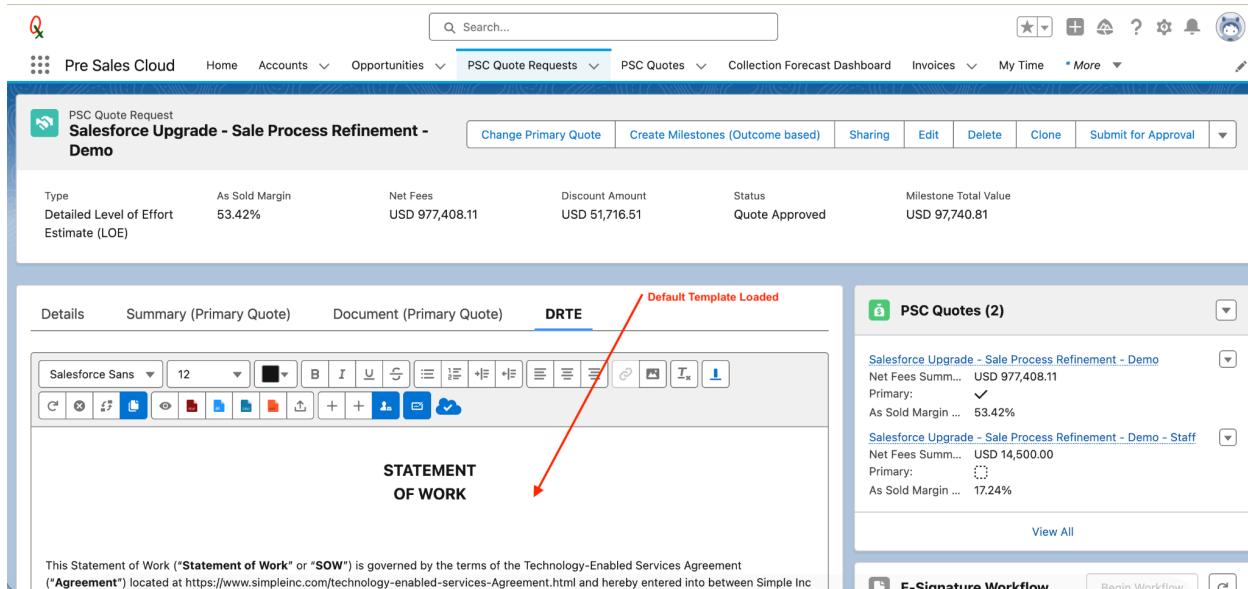
Enable E-Signature

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.



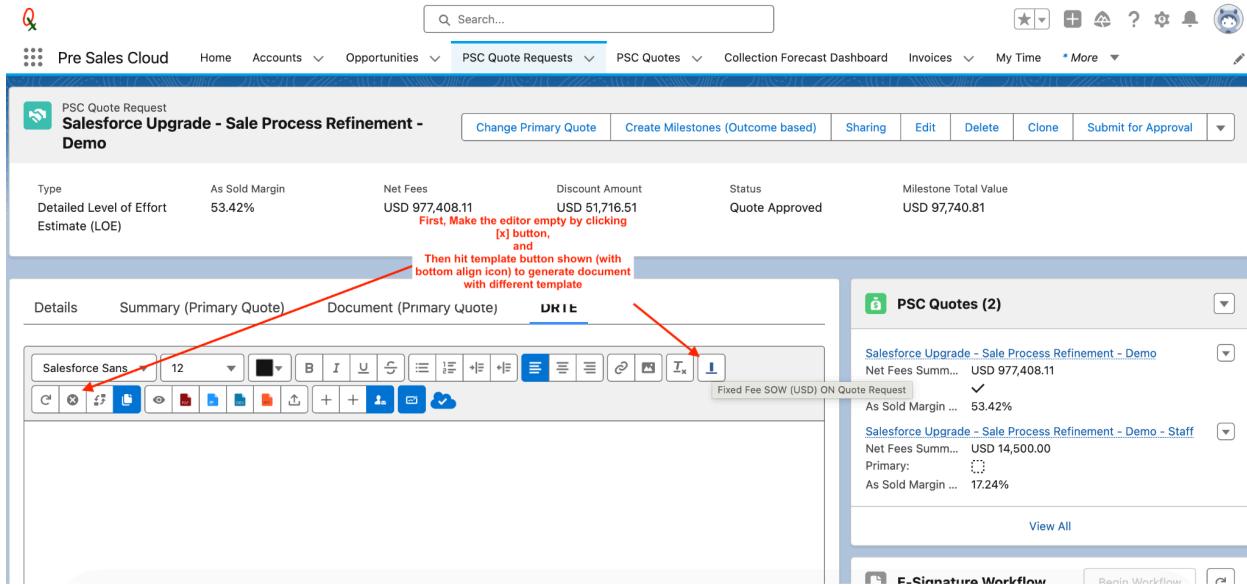
The screenshot shows the Pre Sales Cloud interface with the following details:

- Header:** Pre Sales Cloud, Home, Accounts, Opportunities, PSC Quote Requests, PSC Quotes, Collection Forecast Dashboard, Invoices, My Time, More.
- Page Title:** PSC Quote Request, Salesforce Upgrade - Sale Process Refinement - Demo.
- Table:** Summary of quote details:

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
- DRTE Tab:** The DRTE tab is active, showing a rich text editor toolbar with various formatting options like font, size, bold, italic, underline, etc. A red arrow points from the text "Default Template Loaded" to the toolbar.
- Content:** The main area displays the "STATEMENT OF WORK" text.
- Right Panel:** A sidebar titled "PSC Quotes (2)" lists two quote items with their details.
- Bottom:** A note about the Statement of Work and a "View All" link.

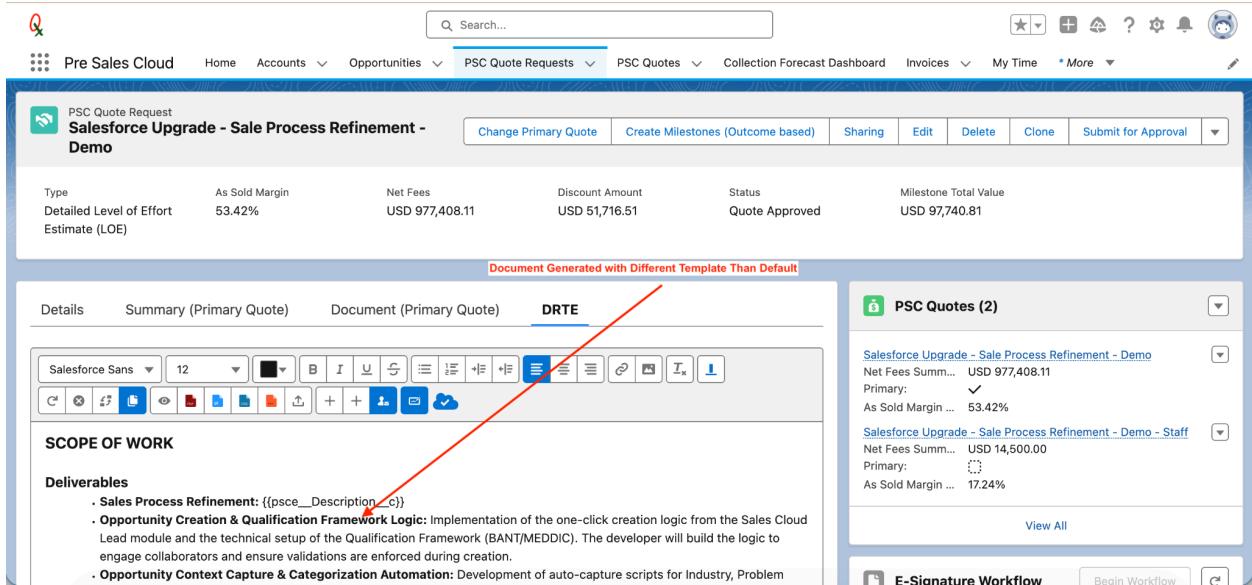
Step 5: Clearing the Editor and Switching Templates If the user needs to generate the "2% exception" document (e.g., a Fixed Fee quote):

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.



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 shows the Pre Sales Cloud interface with the following details:

- Header:** Search bar, navigation menu (Home, Accounts, Opportunities, PSC Quote Requests, PSC Quotes, Collection Forecast Dashboard, Invoices, My Time, More).
- Page Title:** PSC Quote Request - Salesforce Upgrade - Sale Process Refinement - Demo
- Toolbar:** Change Primary Quote, Create Milestones (Outcome based), Sharing, Edit, Delete, Clone, Submit for Approval.
- Table:** Summary of quote details:

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
- DRTE Editor:** Document Generated with Different Template Than Default. Contains a toolbar with text, font, and image icons, and a "SCOPE OF WORK" section with a "Deliverables" list:
 - 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
- Sidebar:** PSC Quotes (2) list:
 - 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%
- Bottom:** E-Signature Workflow, Brain Workflow.