



Developer Documentation: Upload Signed Document On E Signature Log



1. Overview

The `uploadAndGetFileIdOFSignedDocument` (**Upload Signed Document from E-Signature Log Record**) method is a global Invocable Action provided by the DRTE package. It is designed to be called within a **Salesforce Flow** after a signing process is completed.

The method performs the following server-side operations:

1. **PDF Generation:** Renders the finalized document (including signatures) using the internal DRTE PDF engine.
2. **File Creation:** Generates a standard Salesforce **ContentVersion** (File).
3. **Automatic Linking:** Attaches the generated File to the specified **E-Signature Log** record.
4. **ID Return:** Returns the unique ID of the new File for use in subsequent Flow steps (e.g., sending an email with the attachment).

2. Input Parameters

When configuring the "Apex Action" in Flow, the following input variables are available:

Parameter	API Name	Data Type	Required	Description
Record ID	recordId	Text	Yes	The Salesforce ID of the E-Signature Log record.
Envelope Token	token	Text	Yes	The unique security token/Envelope ID associated with the signing request.
File Name	fileName	Text	No	The desired name for the PDF file (omit ".pdf"). Defaults to the Token value if left blank.
Footer Text	footerText	Text	No	Custom text to appear in the footer of the generated PDF.

Header Image URL	headerImageURL	Text	No	A public URL for a logo to be rendered in the PDF header.
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3. Output Values

Parameter	Data Type	Description
Output Value	Text (String)	The ID of the generated ContentVersion record (The File ID).

4. How to Use in Salesforce Flow

Step 1: Trigger the Flow

Typically, this action is used in a **Record-Triggered Flow** on the pscdnyrichtext__ESignature_Log__c object when the **Status** changes to "Completed" or "Signed."

Step 2: Add the Apex Action

1. In the Flow Builder, add a new **Action** element.
2. Search for **"Upload Signed Document from E-Signature Log Record"**.
3. Map your variables:
 - **Record ID:** {!\$Record.Id}
 - **Envelope Token:** {!\$Record.pscdnyrichtext__Token__c}
 - **File Name:** "Executed_Contract_{!\$Record.Name}"

Step 3: Utilize the Output

Since the action returns the **File ID**, you can add a subsequent step to:

- Post the file to a Chatter feed.
- Send an Email Alert with the File attached (using the **ContentVersion** ID).
- Update the parent record (e.g., Opportunity) with a link to the new file.

5. Technical Considerations & Security

- **PDF Rendering Context:** This method uses **Page.getContentAsPDF()**. Please note that this is a **callout-like operation**. If you are calling this from a loop, ensure you stay within Salesforce governor limits for heap size and CPU time.

- **Atomic Operation:** The file insertion and the link to the `recordId` happen in a single transaction. If the file creation fails, the transaction rolls back to maintain data integrity.