



CODEYLABS

**DRTE**

**User Guide**



**DRTE**

## Overview

Welcome to the CodeyLabs **DRTE** for Salesforce. This comprehensive guide will help you create, configure, and manage dynamic documents with integrated e-signature capabilities directly within your Salesforce environment.

# Table of Contents

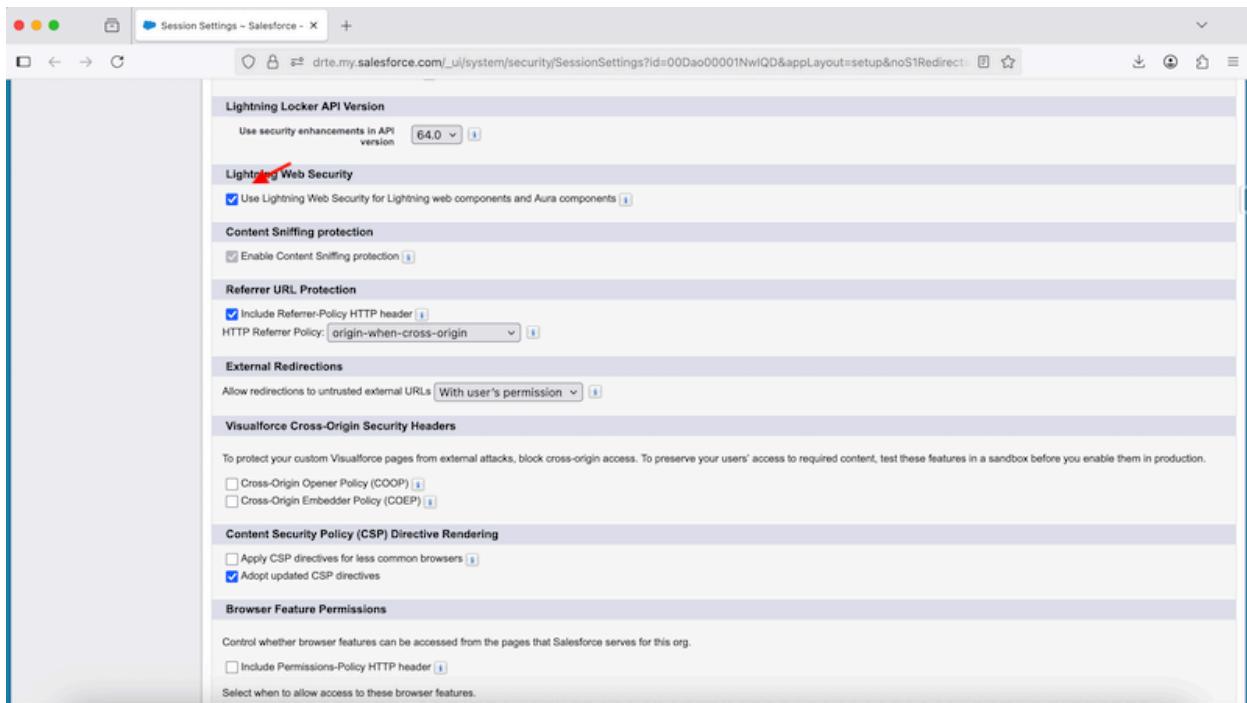
1. Prerequisites
2. Administrator Setup
3. UI Integration and Workflow
4. End-User Workflow
5. Additional Features
6. Troubleshooting

# Prerequisites

Before beginning the installation, ensure that **Lightning Web Security** is enabled in your Salesforce instance.

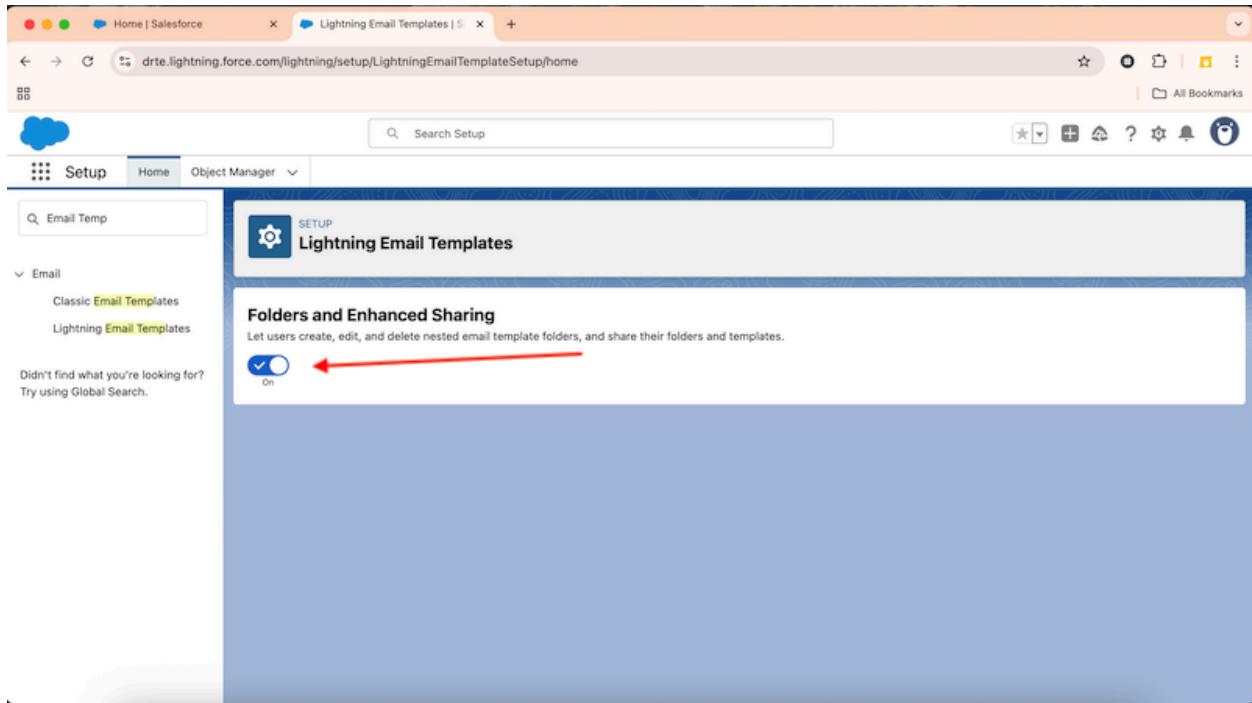
## To enable Lightning Web Security:

1. Navigate to **Setup** → **Session Settings** → **Lightning Web Security**
2. Enable the setting if not already active



## Enable Folders and Enhanced Sharing:

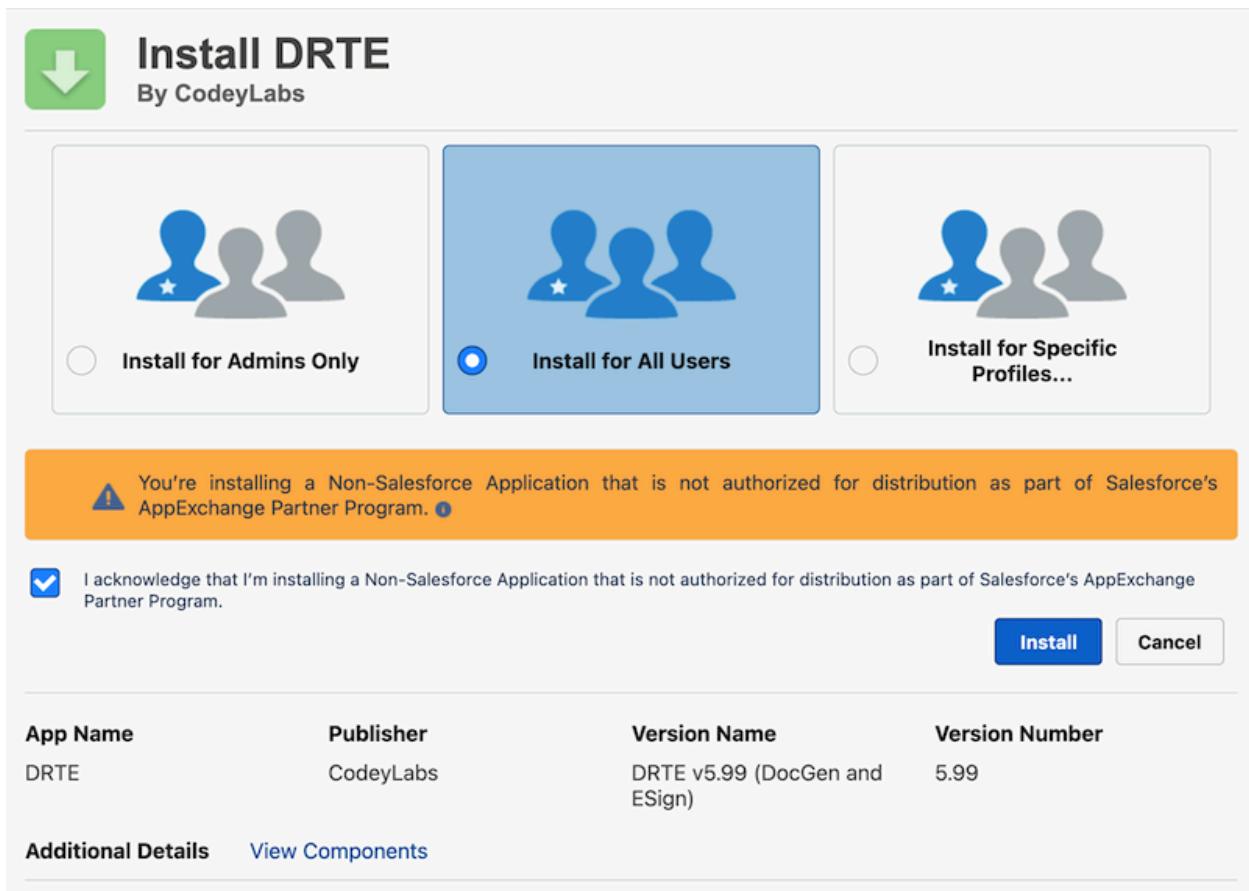
Enhanced sharing must be enabled for proper document management functionality.



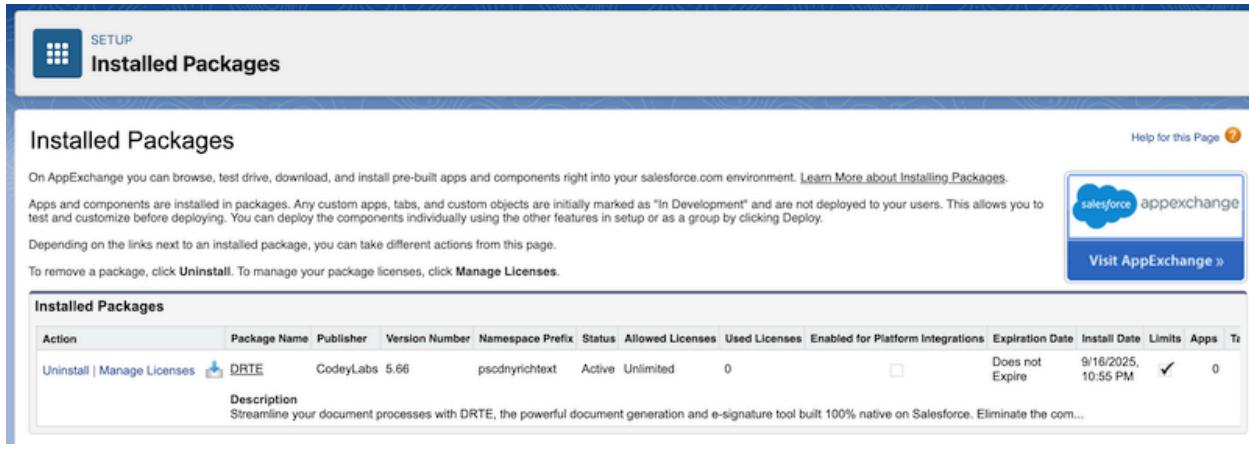
# Administrator Setup

## Step 1: Install the Managed Package

1. Obtain the DRTE installation URL from your provider
2. Paste the URL into your browser while logged into Salesforce
3. On the installation screen:
  - o Select "**Install for All Users**" (recommended)
  - o Check the acknowledgement box for installing a non-AppExchange application
  - o Click **Install**



4. You will receive a confirmation email upon successful completion
5. Verify installation by checking **Installed Packages**



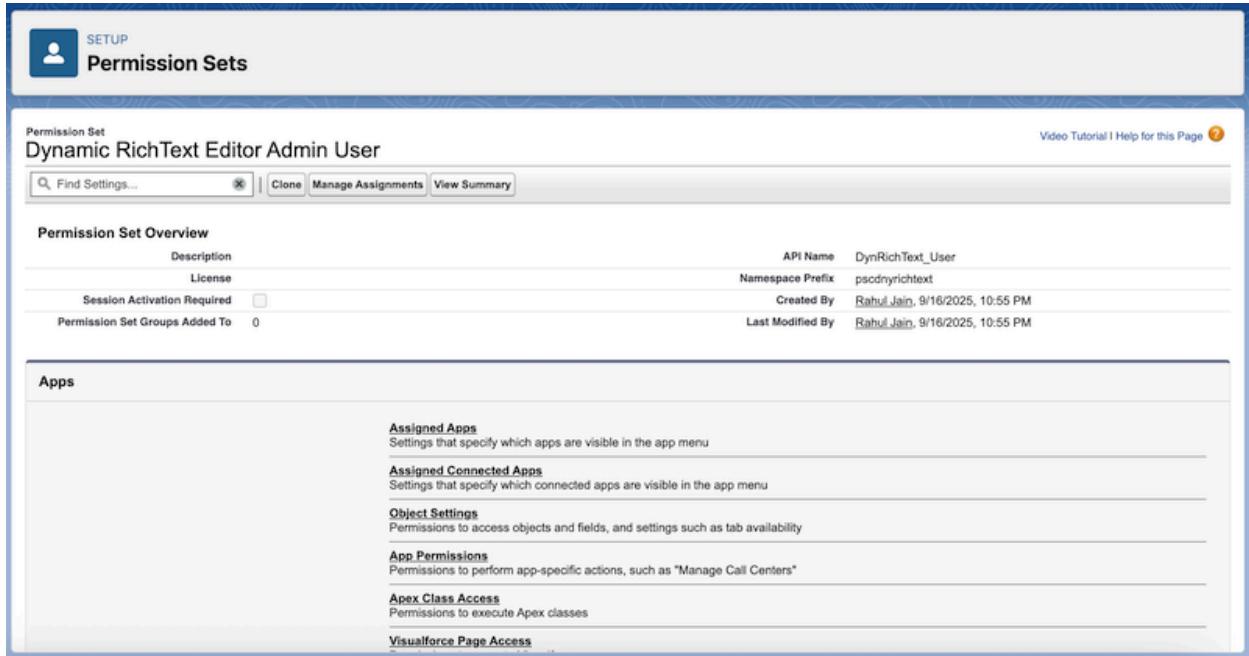
The screenshot shows the 'Installed Packages' section of the Salesforce Setup. At the top, there's a 'Help for this Page' link and a 'Visit AppExchange' button. The main table lists the DRTE package by CodeyLabs, version 5.66, with a namespace prefix of 'pscdnyrichtext'. The package is active and unlimited, with 0 used licenses. It has a 9/16/2025 expiration date and was installed on 9/16/2025 at 10:55 PM. The 'Description' field states: 'Streamline your document processes with DRTE, the powerful document generation and e-signature tool built 100% native on Salesforce. Eliminate the com...'. Action buttons for 'Uninstall' and 'Manage Licenses' are also present.

## Step 2: Configure Permission Sets

Permission sets control user access to DRTE features. Proper configuration ensures security and appropriate access levels.

### To assign permission sets:

1. Navigate to **Setup → Permission Sets**



The screenshot shows the 'Permission Sets' page for the 'Dynamic RichText Editor Admin User' permission set. The 'Permission Set Overview' section includes fields for 'Description' (DynRichText\_User), 'License' (pscdnyrichtext), 'Session Activation Required' (unchecked), and 'Permission Set Groups Added To' (0). The 'Apps' section lists several settings: 'Assigned Apps' (Settings that specify which apps are visible in the app menu), 'Assigned Connected Apps' (Settings that specify which connected apps are visible in the app menu), 'Object Settings' (Permissions to access objects and fields, and settings such as tab availability), 'App Permissions' (Permissions to perform app-specific actions, such as "Manage Call Centers"), 'Apex Class Access' (Permissions to execute Apex classes), and 'Visualforce Page Access'.

2. For Administrators:

- Locate "**Dynamic RichText Editor Admin User**"
- Click **Manage Assignments** → **Add Assignments**
- Select all system administrators
- Click **Assign**

### 3. For Standard Users:

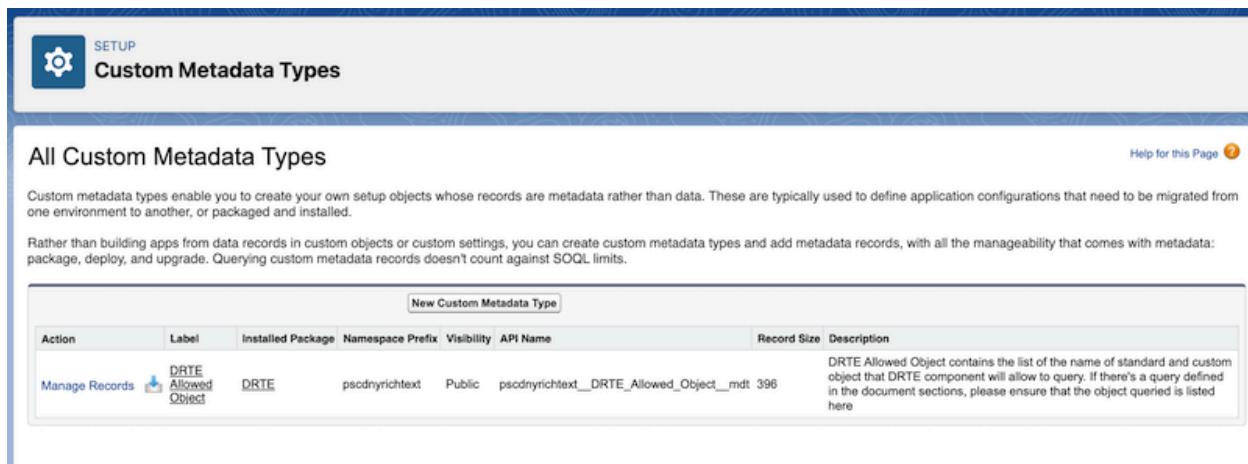
- Clone the "**Dynamic RichText Editor Standard User**" permission set
- Remove administrative permissions not required for standard users
- Assign the cloned permission set to appropriate users

**Important Note:** The DRTE namespace is **pscdnyrichtext**. Use the prefix **pscdynrichtext\_\_** when configuring custom objects and fields.

---

### Step 3: Configure Allowed Objects

DRTE requires explicit permission to query Salesforce objects for dynamic content.



Action	Label	Installed Package	Namespace Prefix	Visibility	API Name	Record Size	Description
Manage Records	DRTE Allowed Object	DRTE	pscdnyrichtext	Public	pscdnyrichtext__DRTE_Allowed_Object__mdt	396	DRTE Allowed Object contains the list of the name of standard and custom object that DRTE component will allow to query. If there's a query defined in the document sections, please ensure that the object queried is listed here

### To add allowed objects:

1. Navigate to **Setup** → **Custom Metadata Types**
2. Find "**DRTE Allowed Object**" and click **Manage Records**

DRTE Allowed Object Edit

Information

Label: Contract

DRTE Allowed Object Name: Contract

Object API Name: Contract

Protected Component:

3. Click **New** to create a new record
4. Enter the **Object API Name** (e.g., **Contract** for standard objects)

### Example for managed package objects:

DRTE Allowed Object (Managed)

This DRTE Allowed Object is managed, meaning that you may only edit certain attributes. [Display More Information](#)

DRTE Allowed Object Detail

Label: Document Section

DRTE Allowed Object Name: Document\_Section

Object API Name: pscdnyrichtext\_PSC\_Document\_Section\_\_c

Created By: Rahul Jain, 10/4/2025, 1:11 AM

Protected Component:

Namespace Prefix: pscdnyrichtext

Last Modified By: Rahul Jain, 10/4/2025, 1:11 AM

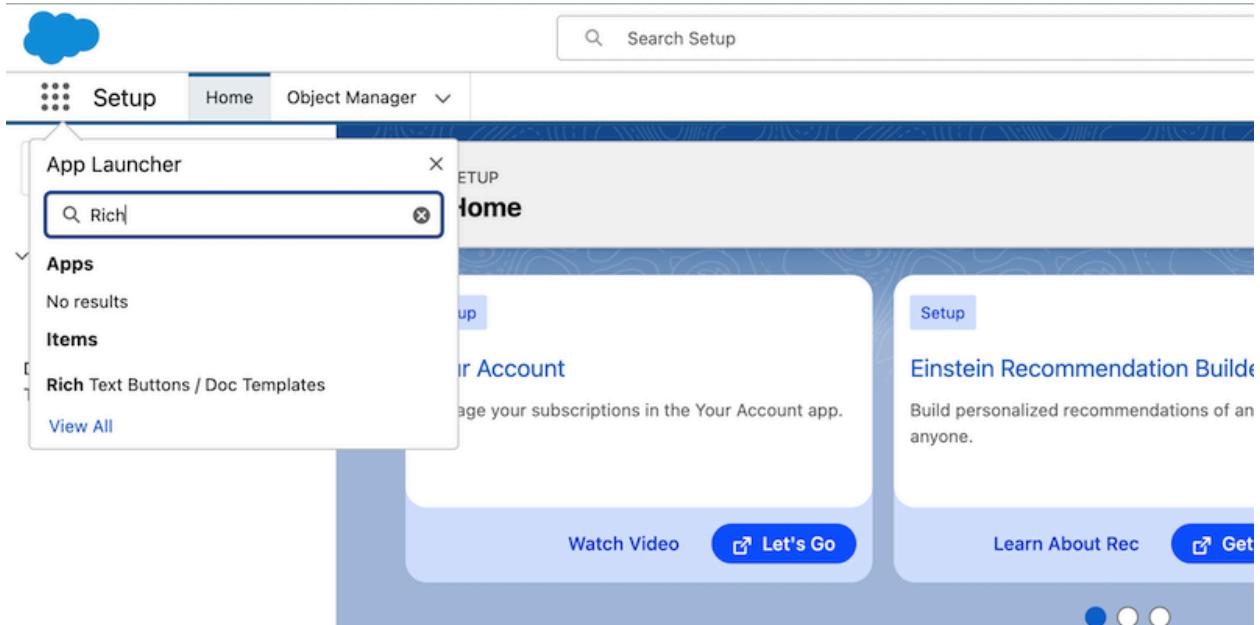
**Note:** Without adding an object to this list, DRTE components cannot query that object for dynamic data.

### Step 4: Create Document Templates

Document templates define the structure and content of your generated documents.

## To create a template:

1. Open the App Launcher and search for "Rich"
2. Select "**Rich Text Buttons/Doc Templates**"



3. Click **New** to create a template record

New Rich Text Button / Doc Template

\* = Required Information

**Information**

Rich Text Button Number	Owner
* Template Name	Rahul Jain
Contract Template	Category <small>i</small>
SLDS icon-name <small>i</small>	Deactivated <small>i</small>
utility:contract_doc	<input checked="" type="checkbox"/>
Generate Content Using Gen AI	* Display Order
<input type="checkbox"/>	1,000
Instructions To Gen AI	Test SFDC Record Id <small>i</small>
	800al00000fVNckAAG

Cancel Save & New Save

There's nothing in your list yet. Try adding a new record.

#### 4. Configure the following fields:

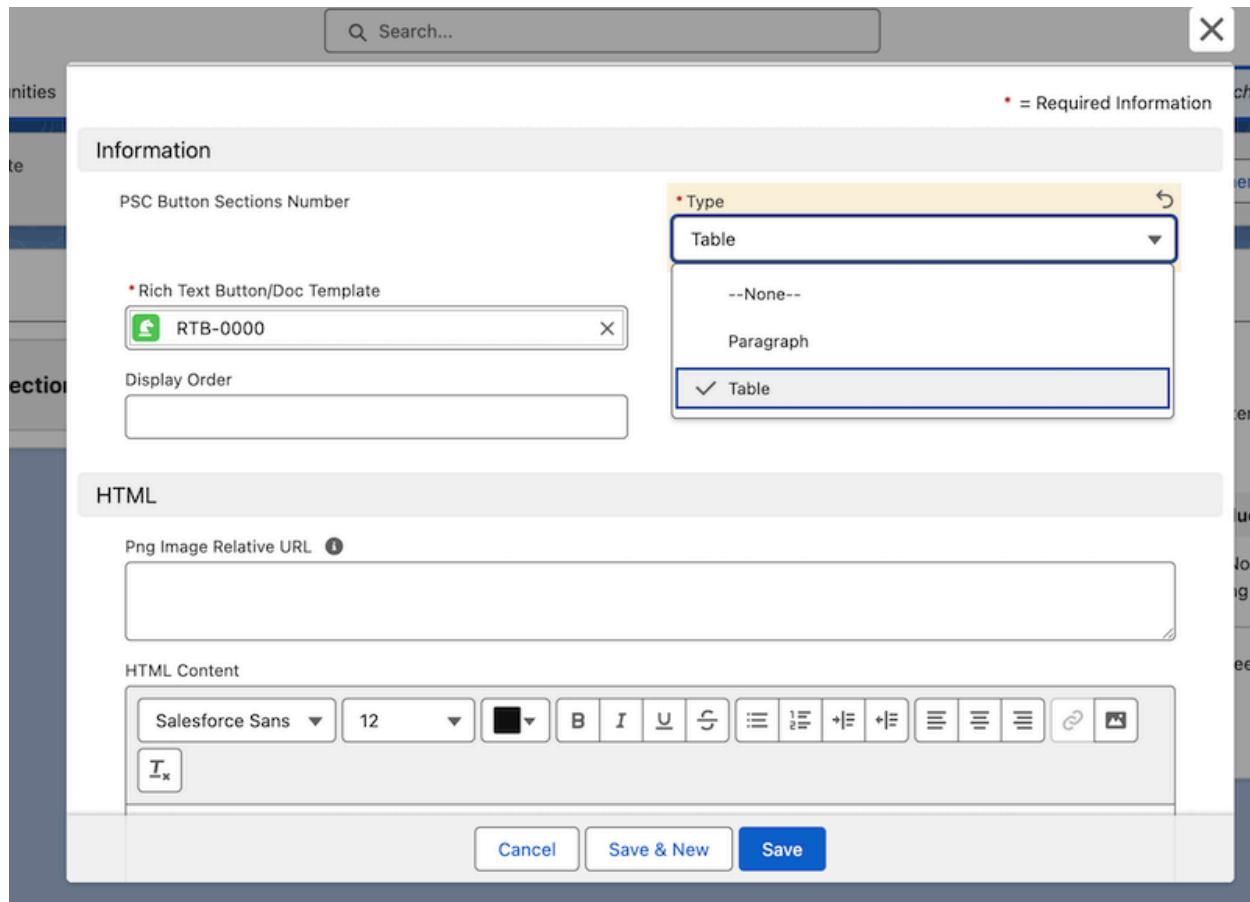
- **Template Name:** Enter a descriptive name (e.g., "Contract Template")
- **Deactivated:** Check this box during initial setup
- **SLDS Icon Name:** Enter an icon name (e.g., `utility:contract_doc`)
- **Test SFDC Record ID:** Enter an existing record ID for testing

#### Step 5: Add Document Sections and SOQL Queries

Document sections define the dynamic content and data sources for your templates.

#### To create a document section:

1. From your template record, scroll to the related list
2. Click **New Doc Section**



3. Configure section details:

- **Type:** Select **Table** for dynamic content or **Paragraph** for static content
- **Display Order:** Set to **10** (allows for future insertions)
- **HTML Content:** Paste your template HTML
- **Iterate HTML for Records:** Check this box for dynamic content to show multiple records only. For single record merge context, there's no need to check this box.

Button Section/Doc Section  
BS-0000

Related Details

PSC Button Sections Number BS-0000	Type Table
Rich Text Button/Doc Template RTB-0000	Is Active <input checked="" type="checkbox"/>
Display Order 10	

HTML

Png Image Relative URL

HTML Content

## Non-Disclosure Agreement (NDA)

This Non-Disclosure Agreement (the "Agreement"), effective as of the last date of signature below (the "Effective Date"), is made and entered into by and between:

#### 4. Add SOQL Query:

Enter a SOQL query to retrieve data. Example:

##### Example sql

```
SELECT Id, ContractNumber, AccountId, Account.Name,  
Account.BillingState, Status, StartDate, EndDate,  
SpecialTerms, Description  
FROM Contract  
WHERE ID = '{pv0}'
```

Button Section/Doc Section  
BS-0000

Table

Show Table Header

SOQL Query [?](#)

```
SELECT
  Id,
  ContractNumber,
  Name,
  AccountId,
  Account.Name,
  Status,
  StartDate,
  EndDate,
  SpecialTerms,
  Description
FROM
  Contract
WHERE
  ID = '{pv0}'
```

Table Config JSON [?](#)

[Cancel](#) [Save](#)

**Important:** The `{pv0}` placeholder automatically captures the current record ID from the page context.

To show **Tables** in the document, After you define the SOQL query, use the **Table Config & Style Builder** action (instead manually defining them) to build the table columns and style them.

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Search...

Button Section/Doc Section  
BS-0002

Rich Text Button/Doc Template Type Display Order Is Active

RTB-0001 20

Related Details

PSC Button Sections Number: BS-0002

Rich Text Button/Doc Template: RTB-0001

Display Order: 20

HTML

Png Image Relative URL: [\(1\)](#)

Preview Document Table Config & Style Builder Update HTML Content Source Clone

Activity

Filters: All time • All activities • All types [\(8\)](#)

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

For applying html styles (not supported directly by the editor of HTML Content field), use **Update HTML Content Source action**.

For example, you can use page break class to apply page break in the downloaded pdf document automatically.

DRTE supports css classes for applying page break after or before any element in the final rendered server side pdf.

- page-break-before-always
  - page-break-after-always

5. Click **Preview Document** to validate your configuration

Cloud Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Button Section/Doc Section  
BS-0000

Preview Document Edit Labels Clone

HTML Content

## Non-Disclosure Agreement (NDA)

This Non-Disclosure Agreement (the "Agreement"), effective as of the start date mentioned below (the "Effective Date"), is made and entered into by and between:

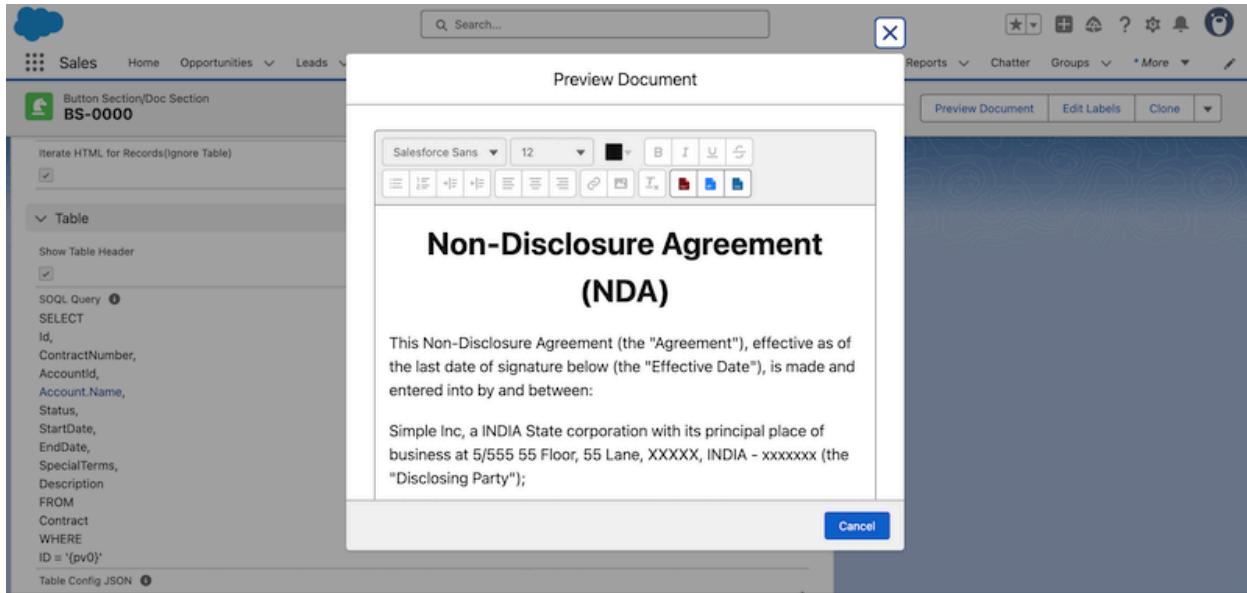
**Simple Inc**, a INDIA State corporation with its principal place of business at 5/555 55 Floor, 55 Lane, XXXXX, INDIA - xxxxxx (the "Disclosing Party");

AND

{{Account.Name}}, a {{Account.BillingState}} corporation with its principal place of business at {{Account.BillingStreet}} {{Account.BillingCity}} {{Account.BillingState}} {{Account.BillingCountry}} (the "Receiving Party").

**Start Date:** {{StartDate}}

**Valid For:** {{ContractTerm}} months



## Step 6: Add E-Signature Placeholders

E-signature placeholders define where signers will input information and sign the document.

### General Placeholders

Format: `[type[label]]`

#### Examples:

- `[text[First Name]]` - Text input field
- `[date[Service Date]]` - Date field

### Signature-Specific Placeholders

Format: `[type[label] : [signature]]`

#### Examples:

- `[text[First Name] : [Signature1]]` - Assigned to first signer
- `[Signature1]` - Signature field for client

### Single Signer Example:

Button Section/Doc Section  
BS-0000

**11. Special Terms**  
{{SpecialTerms}}

**IN WITNESS WHEREOF**, the parties hereto have executed this Agreement as of the date(s) written below.

**DISCLOSING PARTY:**

Simple Inc

[Signature1]

By: \_\_\_\_\_

Name: [text[Authorized Signatory Name]:[Signature1]]

Title: [text[Authorized Signatory Title]:[Signature1]]

[date[Signed Date]:[Signature1]]

Date: \_\_\_\_\_

## Multiple Signers Example:

Button Section/Doc Section  
BS-0000

**RECEIVING PARTY:**  
{{Account.Name}}

[Signature2]

By: \_\_\_\_\_

Name: [text[Authorized Signatory Name]:[Signature2]]

Title: [text[Authorized Signatory Title]:[Signature2]]

[date[Signed Date]:[Signature2]]

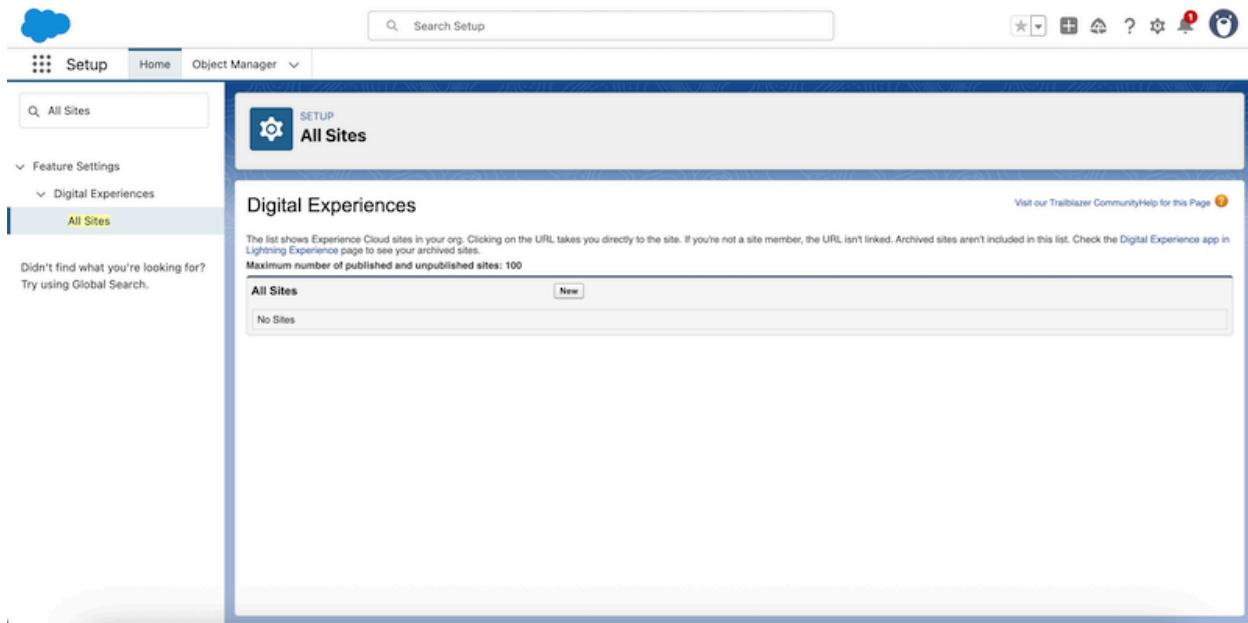
Date: \_\_\_\_\_

Iterate HTML for Records(ignore Table)

# UI Integration and Workflow

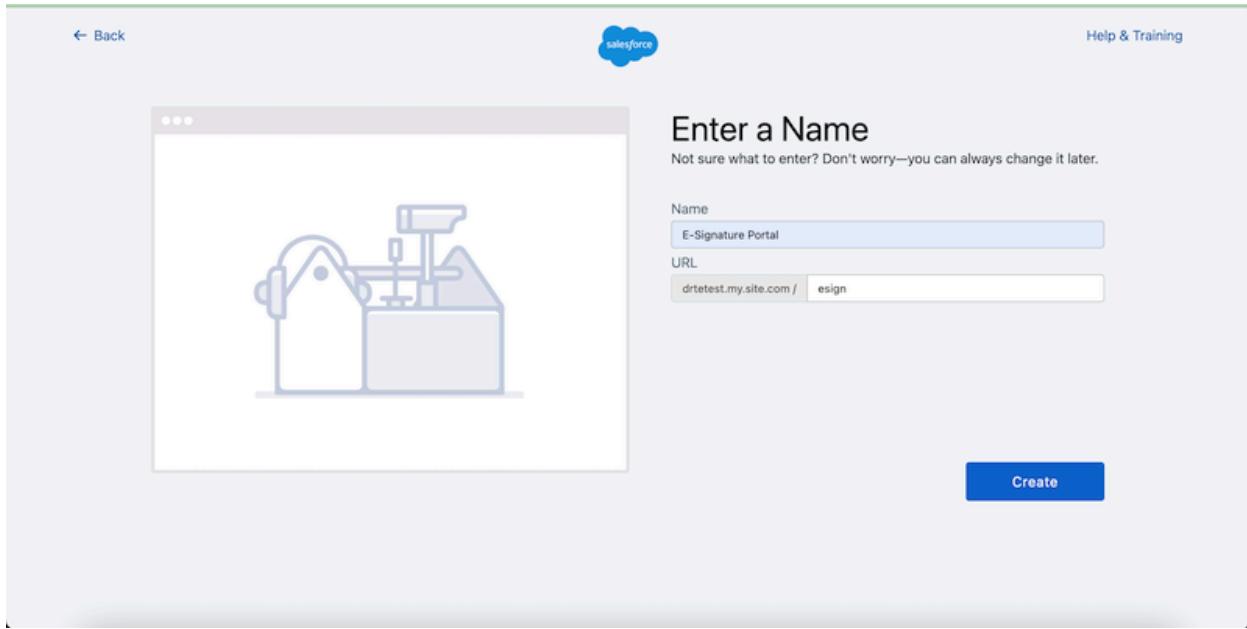
## Step 7: Create E-Signature Site

Create a public-facing site where external signers can view and sign documents.

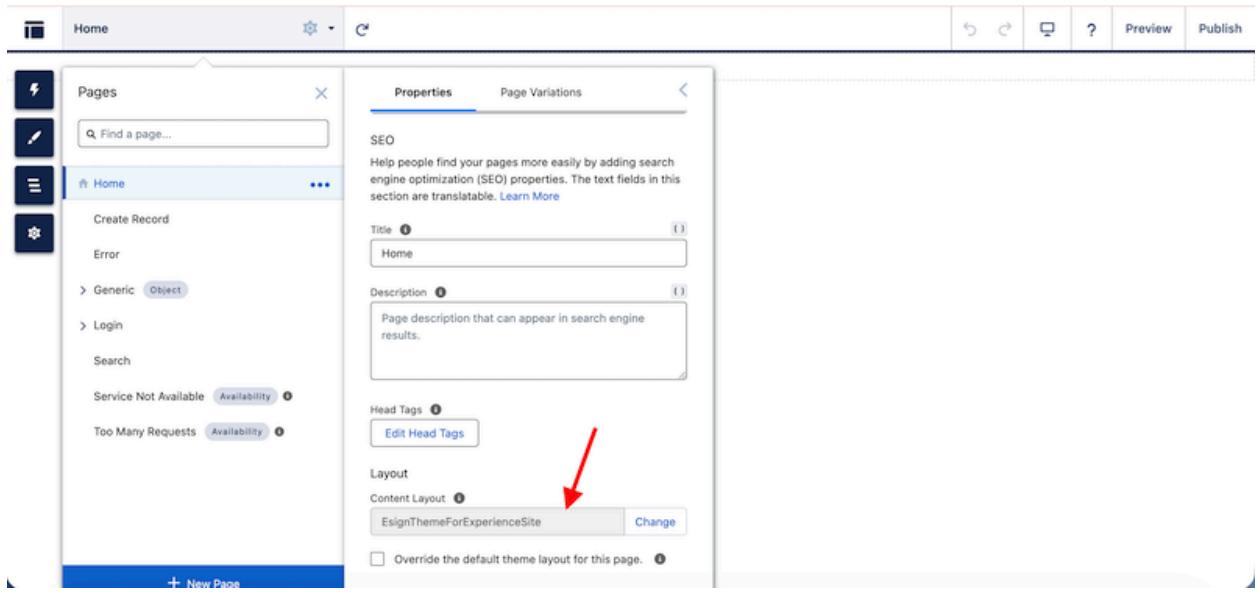


**To create the site:**

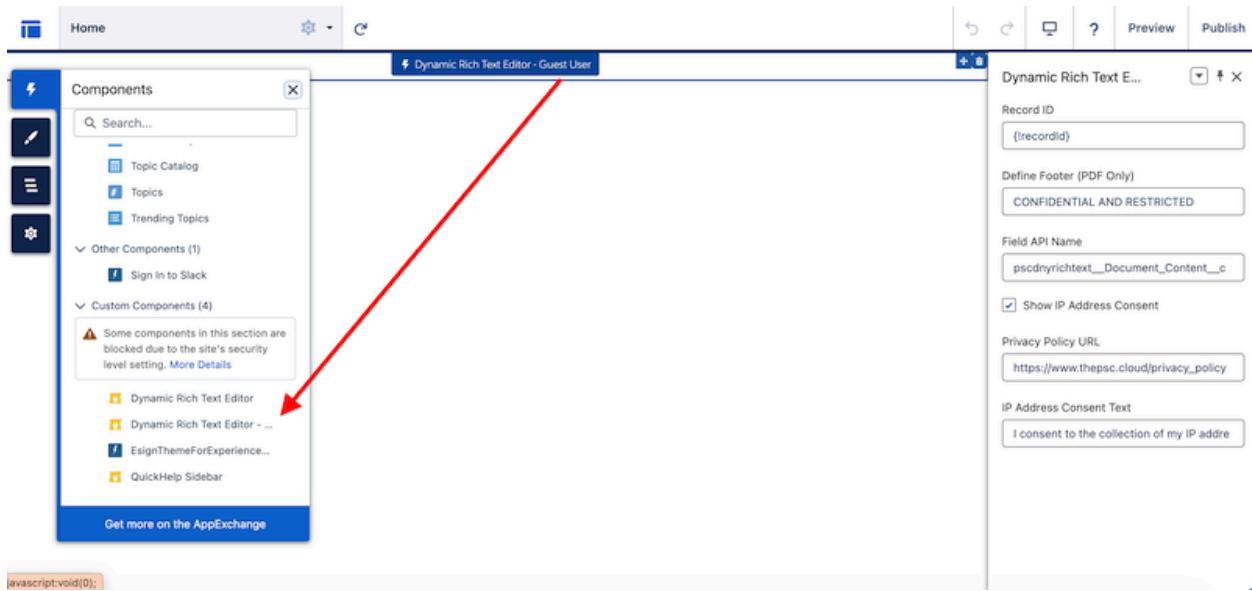
1. Navigate to **Setup** → **Digital Experiences** → **All Sites**
2. Click **New Site**
3. Select "**Build Your Own (Aura)**" template
4. Name your site (e.g., "DRTE\_Sign\_Site")



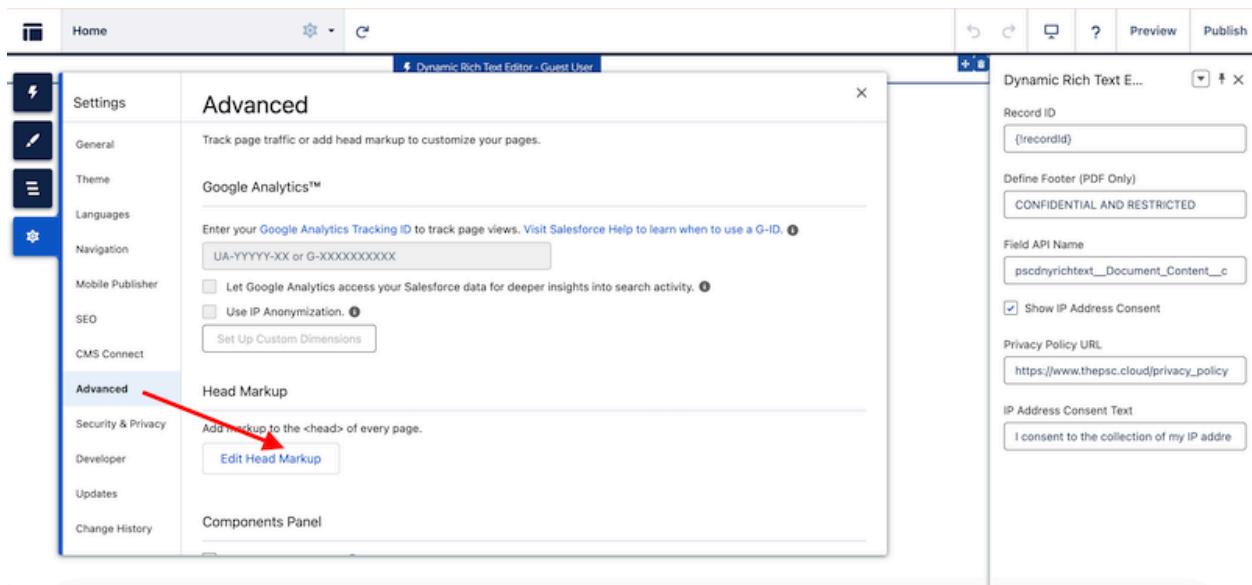
5. Open the site in **Builder**
6. Change the home page theme to DRTE  
**EsignThemeForExperienceSite** with only one content region on the page.

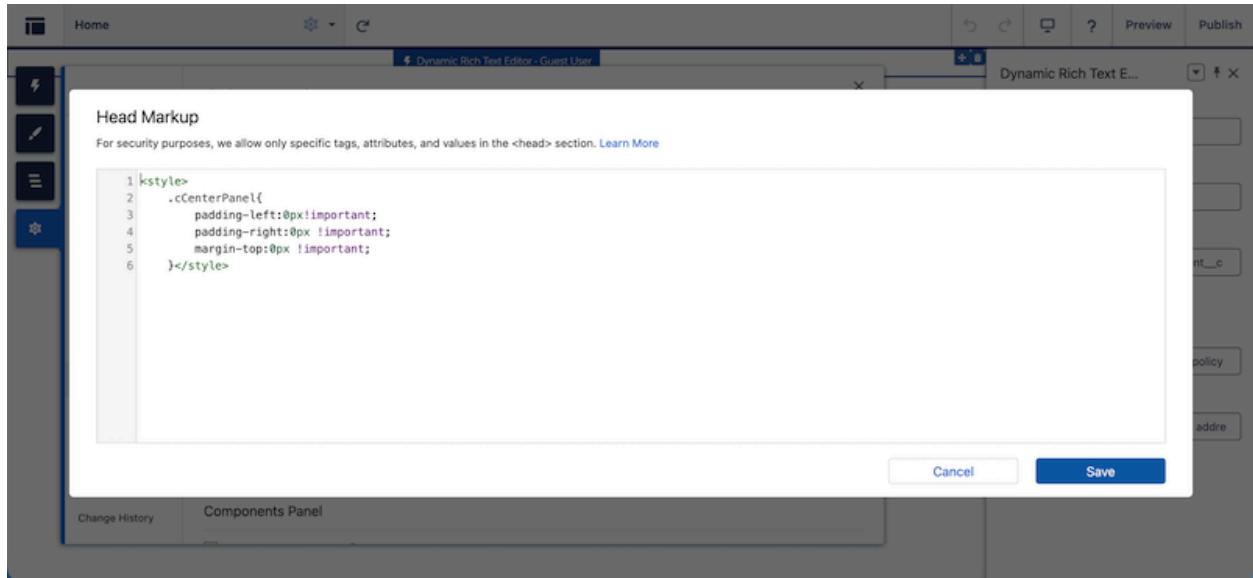


7. Drag the "Dynamic Rich Text Editor for Guest User" component onto the home page.



8. In Advance, Edit Head Markup, and add below style tag to remove extra spaces around the DRTE component to give a full page view.



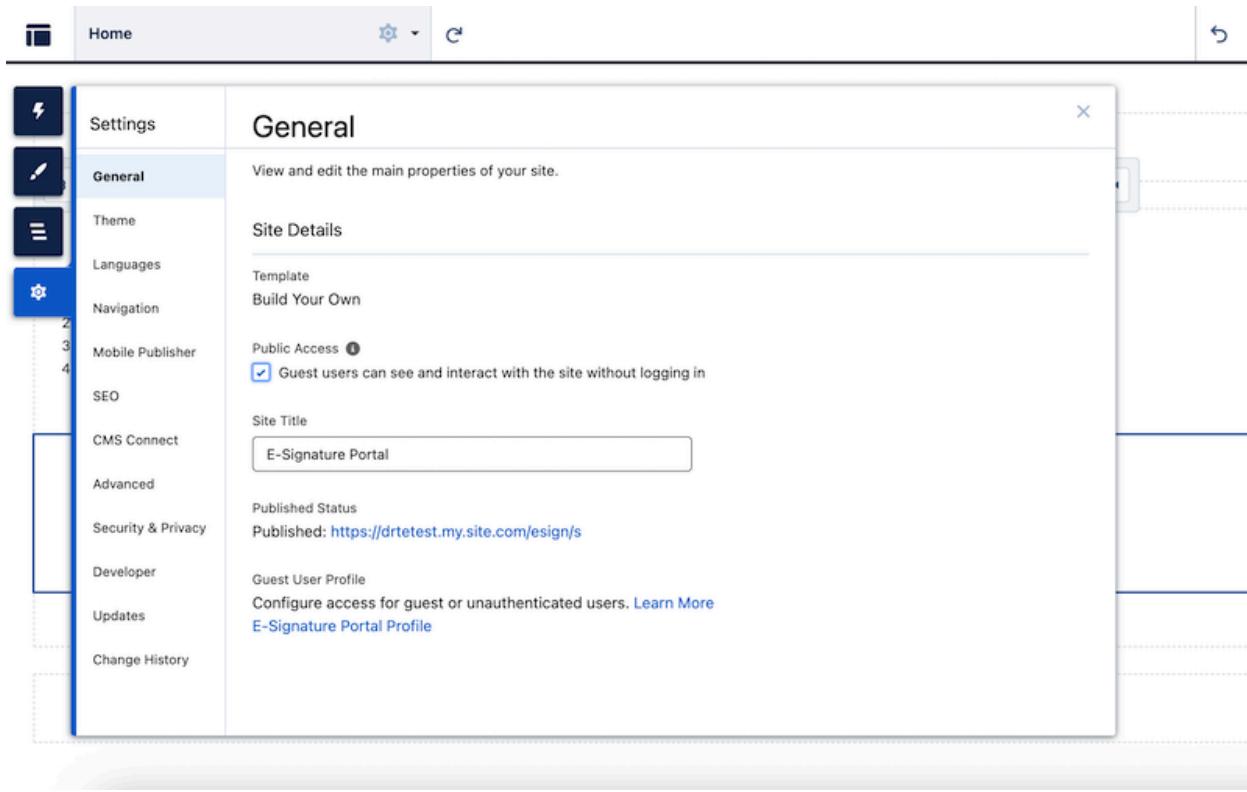


**<style>**

```
.cCenterPanel{
  padding-left:0px!important;
  padding-right:0px !important;
  margin-top:0px !important;
}
```

**</style>**

9. In settings, enable **"Guest users can see and interact with the site without logging in"**



## Step 8: Configure Guest User Permissions

**To set guest user permissions:**

1. Access the **Guest User Profile** from Builder settings

SETUP  Profiles

Profile E-Signature Portal Profile Help for this Page 

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail

Name	E-Signature Portal Profile	<a href="#">Edit</a>	<a href="#">View Users</a>
User License	Guest User License	<a href="#">View Users</a>	Custom Profile <input checked="" type="checkbox"/>
Description			
Created By	Rahul Jain, 9/17/2025, 12:59 AM	Modified By	Rahul Jain, 9/17/2025, 12:59 AM

Page Layouts

Standard Object Layouts

Global	Global Layout [ View Assignment ]	Document Type	Document Type Layout [ View Assignment ]
Email Application	Not Assigned [ View Assignment ]	Email Message	Email Message Layout [ View Assignment ]
Home Page Layout	Home Page Default [ View Assignment ]	Employee	Employee Layout [ View Assignment ]
Access	Access Layout [ View Assignment ]	Employee Crisis Assessment	Employee Crisis Assessment Layout [ View Assignment ]

## 2. Assign the "DRTE guest user" permission set

SETUP  Permission Sets

Permission Set Assignments E-Signature Portal Site Guest User Help for this Page 

Available Permission Sets

- Context Service Runtime
- Customer Experience Analytics Admin
- Customer Experience Analytics User
- Data Cloud Home Org Integration User
- Data Pipelines Base User
- DecimalQuantityDesigntime
- DecimalQuantityRuntime
- DeliveryEstimationServicePermSet
- Document Checklist
- Dynamic RichText Editor Admin User

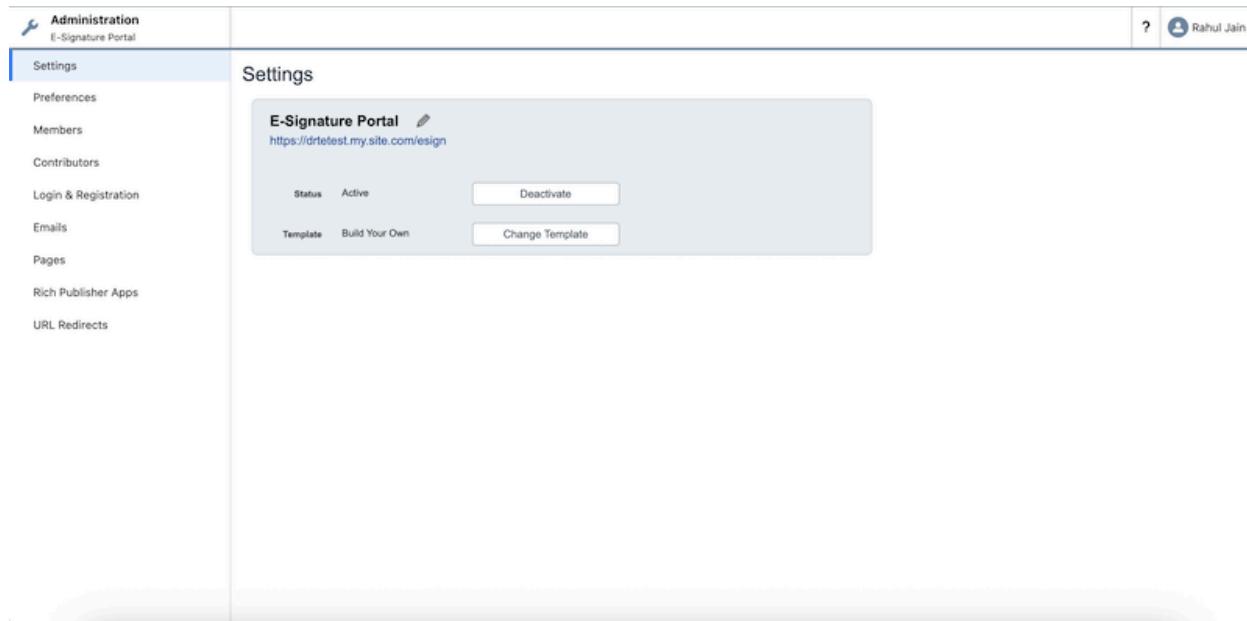
Enabled Permission Sets

- DRTE Esign Guest User Permission Set

Add  Remove 

Save Cancel

## 3. Activate the site



The screenshot shows the 'Administration E-Signature Portal' interface. The left sidebar has a 'Settings' tab selected, with other options like 'Preferences', 'Members', 'Contributors', 'Login & Registration', 'Emails', 'Pages', 'Rich Publisher Apps', and 'URL Redirects'. The main content area is titled 'Settings' and contains a box for 'E-Signature Portal'. It shows the URL 'https://drftest.my.site.com/esign'. Below this are buttons for 'Status' (Active/Deactivate), 'Template' (Build Your Own/Change Template), and a pencil icon for editing.

## Step 9: Configure Sharing Rules

Sharing rules ensure guest users can only access documents intended for them.

**To create sharing rules:**

1. Navigate to **Setup → Sharing Settings**

Sharing Settings

No sharing rules specified.

**Work Plan Template Sharing Rules** [New](#) [Recalculate](#) [Work Plan Template Sharing Rules Help](#)

No sharing rules specified.

**Work Step Template Sharing Rules** [New](#) [Recalculate](#) [Work Step Template Sharing Rules Help](#)

No sharing rules specified.

**E Signature Log/Signed Document Sharing Rules** [New](#) [Recalculate](#) [E Signature Log/Signed Document Sharing Rules Help](#)

No sharing rules specified.

**E Signature Request Sharing Rules** [New](#) [Recalculate](#) [E Signature Request Sharing Rules Help](#)

No sharing rules specified.

**Rich Text Button / Doc Template Sharing Rules** [New](#) [Recalculate](#) [Rich Text Button / Doc Template Sharing Rules Help](#)

No sharing rules specified.

**Rich Text Preview Sharing Rules** [New](#) [Recalculate](#) [Rich Text Preview Sharing Rules Help](#)

No sharing rules specified.

2. Create sharing rules for both:
  - **E Signature Log/Signed Document**
  - **E Signature Request**
3. For each object:
  - Click **New**
  - Set **Rule Type** to "**Guest User Access**"
  - Define criteria (e.g., token not null and status is sent) **exactly shown in the screen shot below**.

Sharing Settings

No sharing rules specified.

**E Signature Log/Signed Document Sharing Rules** [New](#) [Recalculate](#) [E Signature Log/Signed Document Sharing Rules Help](#)

Action	Criteria	Shared With	Access Level
Edit   Del	(E Signature Log/Signed Document: Token NOT EQUAL TO ) AND (E Signature Log/Signed Document: Do Not Share The Record EQUALS False)	E-Signature Portal Site Guest User	Read Only

**E Signature Request Sharing Rules** [New](#) [Recalculate](#) [E Signature Request Sharing Rules Help](#)

Action	Criteria	Shared With	Access Level
Edit   Del	(E Signature Request: Token NOT EQUAL TO ) AND (E Signature Request: Status EQUALS Sent For Signature)	E-Signature Portal Site Guest User	Read Only

**Rich Text Button / Doc Template Sharing Rules** [New](#) [Recalculate](#) [Rich Text Button / Doc Template Sharing Rules Help](#)

No sharing rules specified.

**Rich Text Preview Sharing Rules** [New](#) [Recalculate](#) [Rich Text Preview Sharing Rules Help](#)

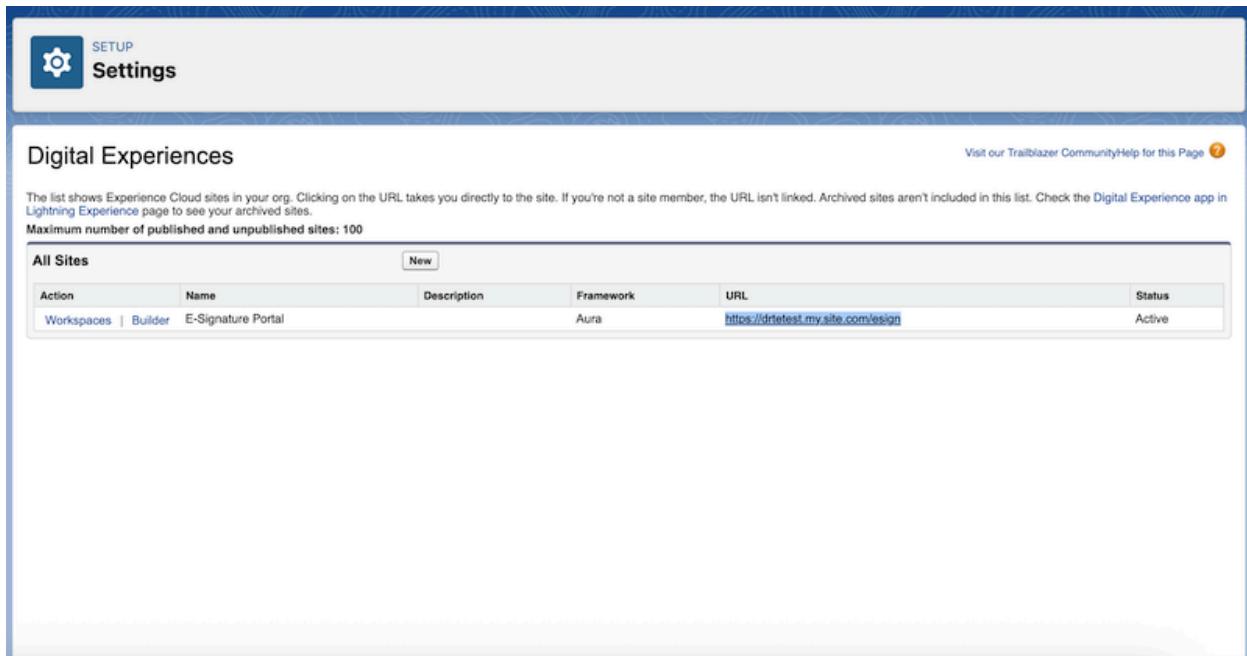
No sharing rules specified.

---

## Step 10: Link DRTE to E-Signature Site

To configure the site URL:

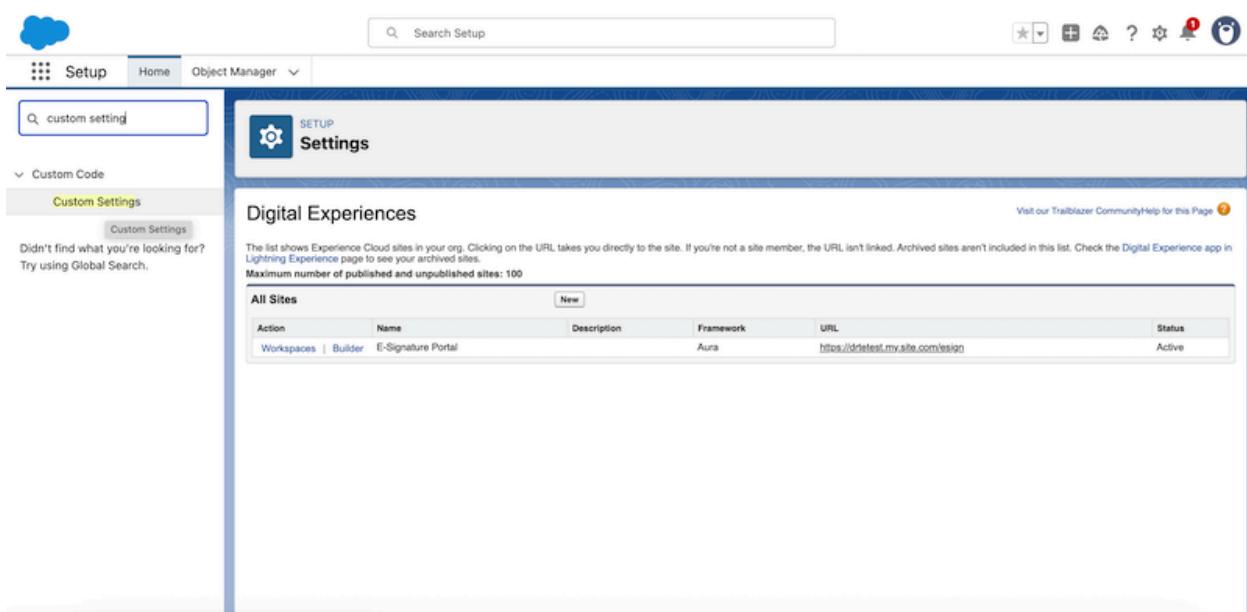
1. Copy your site URL from **All Sites**



The screenshot shows the 'Digital Experiences' page in the 'All Sites' section. The table lists one site: 'E-Signature Portal' with URL <https://drtest.my.site.com/esign> and status 'Active'.

Action	Name	Description	Framework	URL	Status
Workspaces   Builder	E-Signature Portal		Aura	<a href="https://drtest.my.site.com/esign">https://drtest.my.site.com/esign</a>	Active

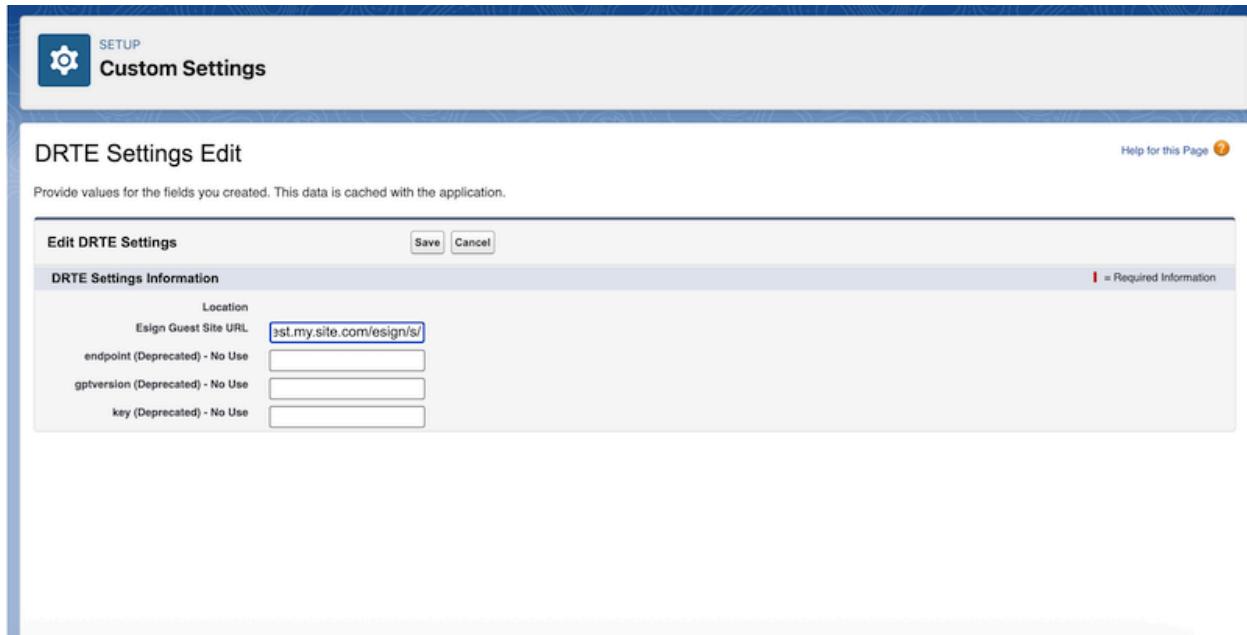
2. Navigate to **Setup → Custom Settings**



The screenshot shows the 'Custom Settings' page in the 'Digital Experiences' section. The table lists the same site: 'E-Signature Portal' with URL <https://drtest.my.site.com/esign> and status 'Active'.

Action	Name	Description	Framework	URL	Status
Workspaces   Builder	E-Signature Portal		Aura	<a href="https://drtest.my.site.com/esign">https://drtest.my.site.com/esign</a>	Active

3. Click **Manage** next to "**DRTE Settings**"
4. Paste the site URL in the default org-wide value field



## Step 11: Add DRTE to Record Pages

Configure the DRTE component on your object record pages (e.g., Contract or any SFDC object).

### To add DRTE components:

1. Open the **Lightning App Builder** for your record page

## 2. Add a new tab named "Contract Document"

### 3. Add the following components:

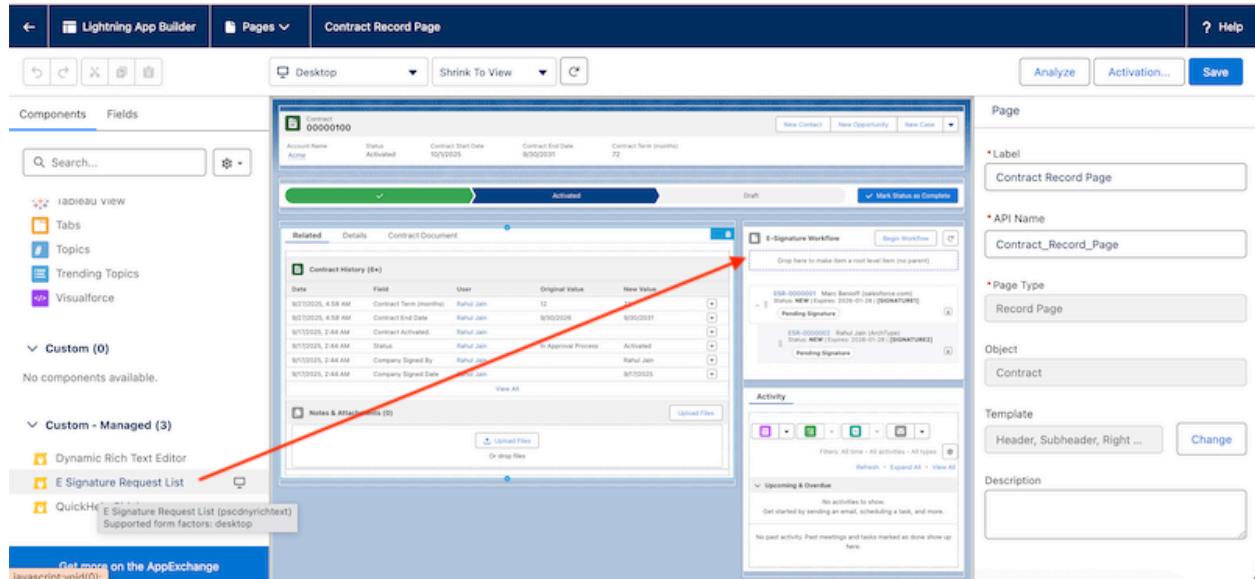
- **Dynamic Rich Text Editor** (main area)
- **E-Signature Request List** (right panel)

### 4. Configure component properties:

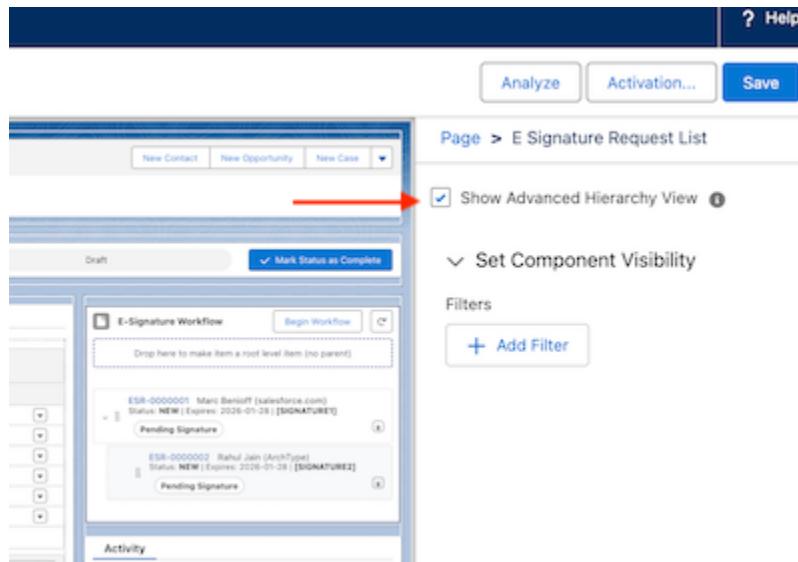
- **Default Template SFDC Id:** Enter your template record ID
- **Footer:** Optional footer text

- **Show Page Number:** Enable/disable page numbers
- **Read Only:** Restrict manual editing (only keep it unchecked when needed to make it editable on the fly)
- **Enable to request E-Signature:** Enable signature functionality

## 5. Add the E Signature Workflow component



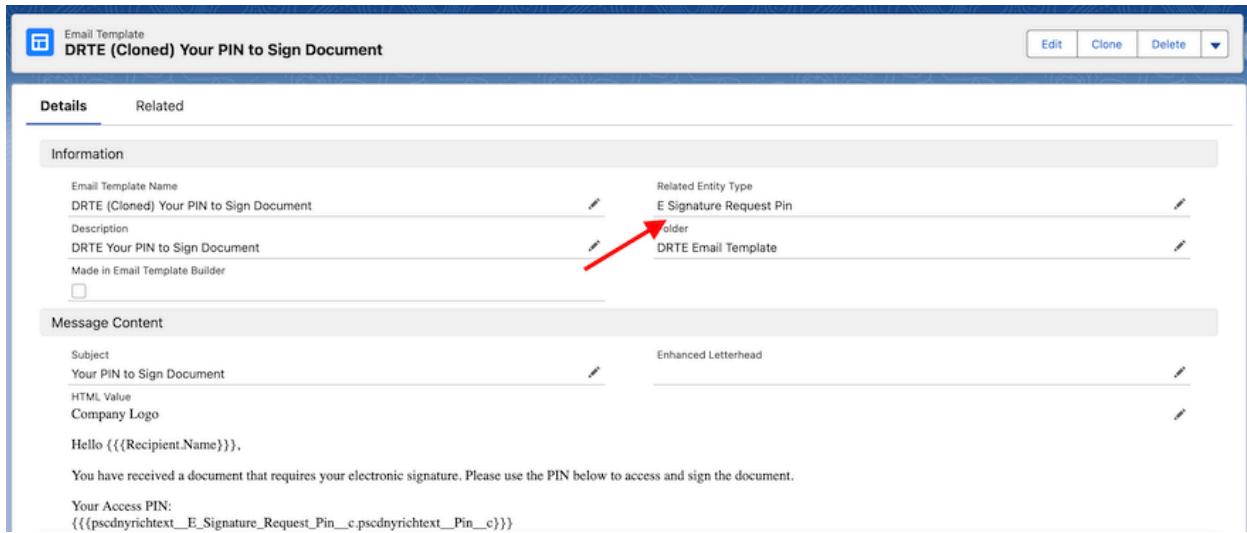
For the latest upgraded version of E Signature Request List, select **Show Advanced Hierarchy View** in the component property.



## Step 12: Configure Email Templates

To set up PIN email notifications (this is a **mandatory** step, as the packaged email template is referencing wrong entity type):

1. Clone the package-included email template
2. Change Entity Type to "E Signature Request Pin"



DRTE (Cloned) Your PIN to Sign Document

Details Related

Information

Email Template Name	DRTE (Cloned) Your PIN to Sign Document	Related Entity Type	E Signature Request Pin
Description	DRTE Your PIN to Sign Document	Folder	DRTE Email Template
Made in Email Template Builder			

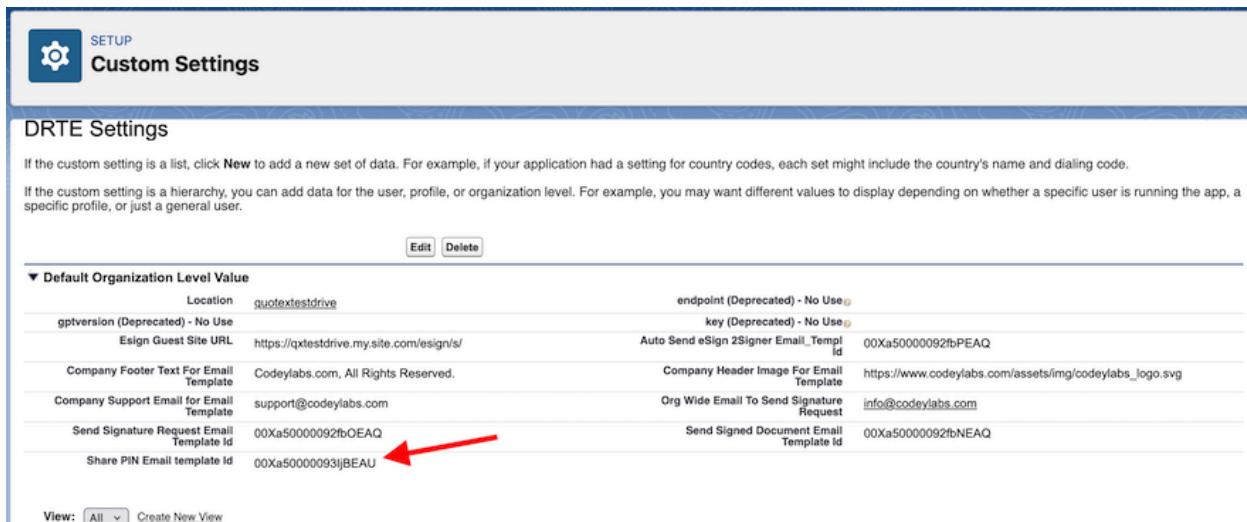
Message Content

Subject: Your PIN to Sign Document

HTML Value:

```
Hello {{Recipient.Name}},  
You have received a document that requires your electronic signature. Please use the PIN below to access and sign the document.  
Your Access PIN:  
{{{pscdnyrichtext_E_Signature_Request_Pin_c.pscdnryrichtext_Pin_c}}}
```

3. Update the Share PIN Email Template Id in DRTE Settings



Custom Settings

DRTE Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

Location	Value	Location	Value
gptversion (Deprecated) - No Use	quotexttestdrive	endpoint (Deprecated) - No Use	
Esign Guest Site URL	https://qxtestdrive.my.site.com/esign/s/	key (Deprecated) - No Use	
Company Footer Text For Email Template	Codeylabs.com, All Rights Reserved.	Auto Send eSign 2Signer Email_Template Id	00Xa50000092fbPEAQ
Company Support Email for Email Template	support@codeylabs.com	Company Header Image For Email Template	https://www.codeylabs.com/assets/img/codeylabs_logo.svg
Send Signature Request Email Template Id	00Xa50000092fbOEAQ	Org Wide Email To Send Signature Request	info@codeylabs.com
Share PIN Email template Id	00Xa50000093ljBEAU	Send Signed Document Email Template Id	00Xa50000092fbNEAQ

To enable PIN authentication:

Check the **Require PIN** field on the E Signature Request record, manually or programmatically as per your organisation requirements. When this is

checked, it will always asks end user to verify PIN before watching the document.

E Signature Request  
**Howard Jones (Acme Inc)**

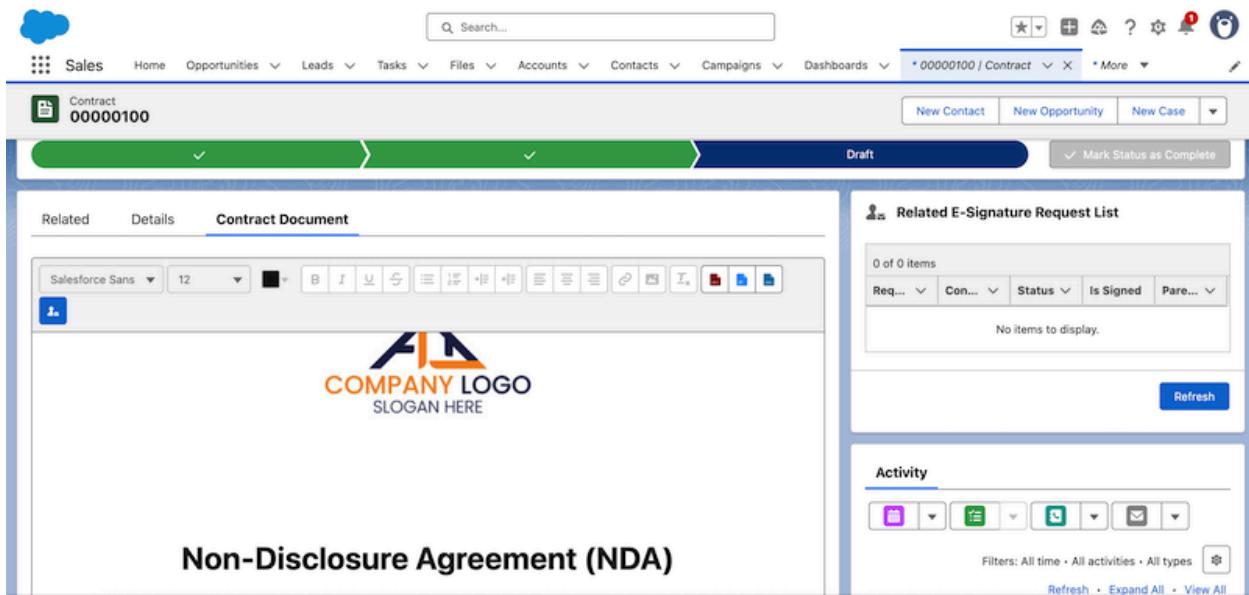
Howard Jones	Is Expired
Contact Name	<input type="checkbox"/>
Howard Jones (Acme Inc)	Only After Signing
Request Name	<b>ESR-0000003</b>
ESR-0000004	Expiration Date
Signature URL	11/15/2025
<a href="https://qxtestdrive.my.site.com/esign/s/?token=fabbe519-9462-47cd-a112-c5678e693115">https://qxtestdrive.my.site.com/esign/s/?token=fabbe519-9462-47cd-a112-c5678e693115</a>	Signature Placeholder
Request Sent On	[Signature2]
10/16/2025, 12:44 AM	Document Name
Request Signed On	quotextestdrive_CustomerAgreement
10/16/2025, 12:46 AM	
Require PIN	<input type="checkbox"/>
<input type="checkbox"/>	← Red arrow pointing to the checkbox
Auto Send To Next Signer (If Available)	<input type="checkbox"/>
<input type="checkbox"/>	
Acknowledged and Viewed?	
0	
First View Date and Time	
Last View Date and Time	

# End-User Workflow

## Step 13: Generate and Review Documents

To generate a document:

1. Open the relevant record (e.g., Contract)
2. Click the "Contract Document" tab



3. Review the automatically generated document
4. Update the record status as needed (e.g., "In Approval Progress")

Contract  
00000100

In Approval Process      Activated

Related      **Details**      Contract Document

Contract Owner  <a href="#">Rahul Jain</a>	Contract Start Date 10/1/2025
Contract Number 00000100	Contract End Date 9/30/2026
Account Name <a href="#">Acme</a>	Contract Term (months) 12
Status In Approval Process	Owner Expiration Notice

▼ Address Information

Billing Address	Shipping Address
-----------------	------------------

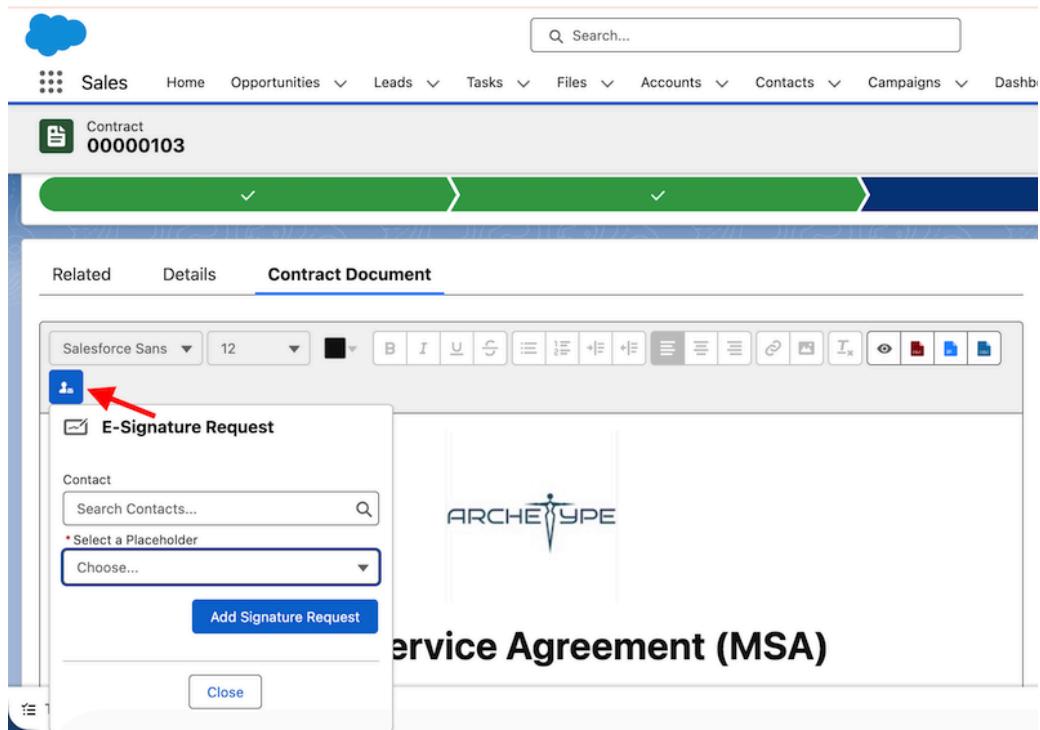
▼ Description Information

---

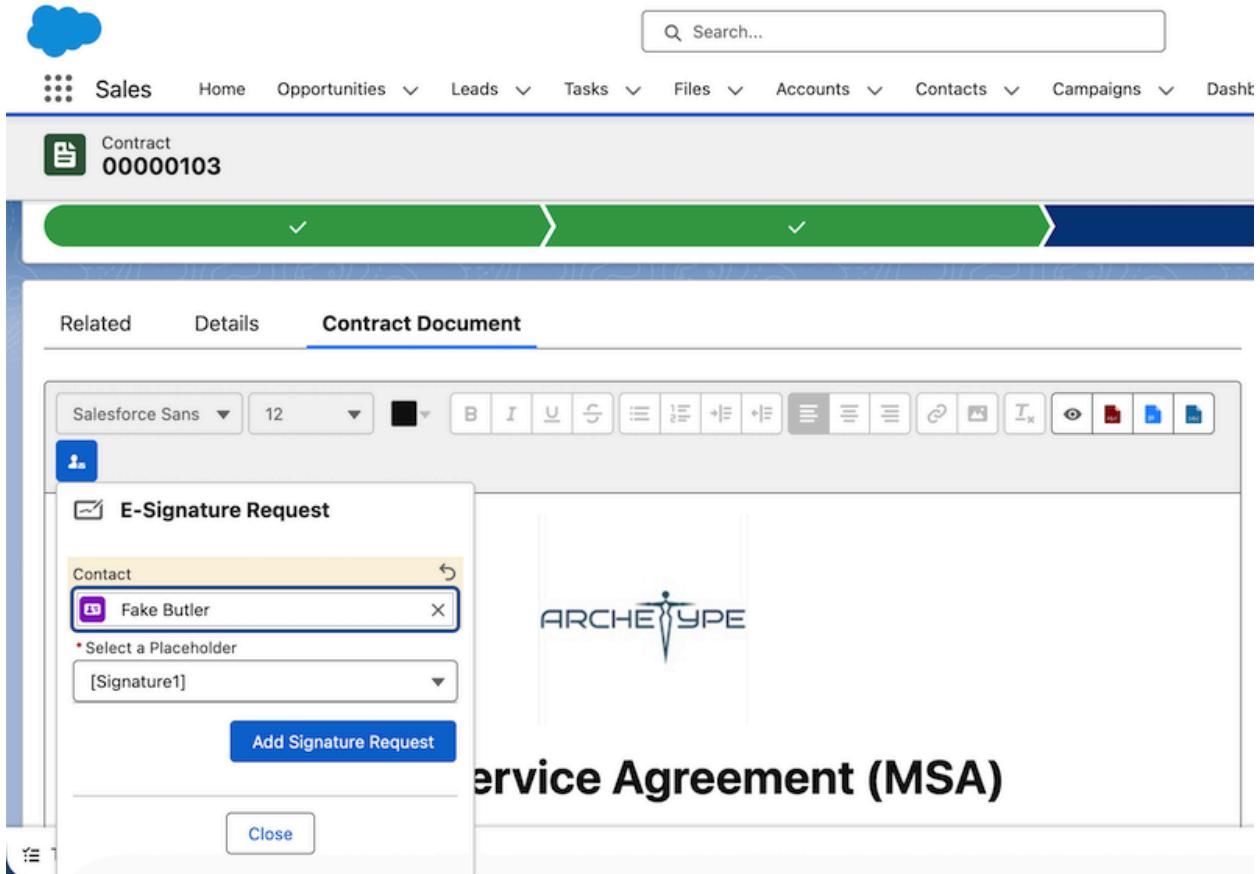
## Step 14: Send for E-Signature (First Signer)

**To request a signature:**

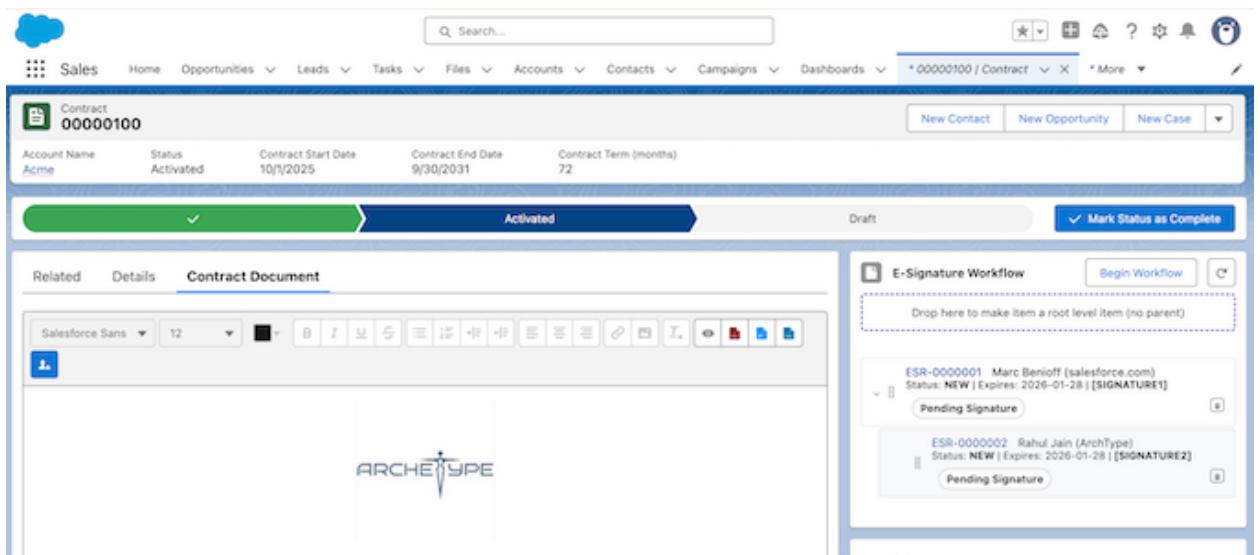
1. Click the "Request E-Signature" button



2. Enter the first signer's information (a Signature placeholder in document is **mandatory** to be able to generate a **E-Signature Request**, the DRTE system automatically parses the document to find the unique signature placeholders in the document and generates a list in 'Select a Placeholder' picklist.



The screenshot shows the Salesforce interface for a Contract record (ID: 00000103). The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, and Dashboards. The main content area displays the Contract Document tab. A modal window titled "E-Signature Request" is open, showing a contact placeholder "Fake Butler" and a signature placeholder "[Signature1]". The background document header reads "Service Agreement (MSA)".



The screenshot shows the Salesforce interface for the Contract record (ID: 00000100). The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and more. The main content area displays the Contract Details tab. A sidebar on the right shows the "E-Signature Workflow" section, which lists two pending signature requests: "ESR-00000001" for Marc Benioff and "ESR-00000002" for Rahul Jain, both associated with the "ArchType" placeholder.

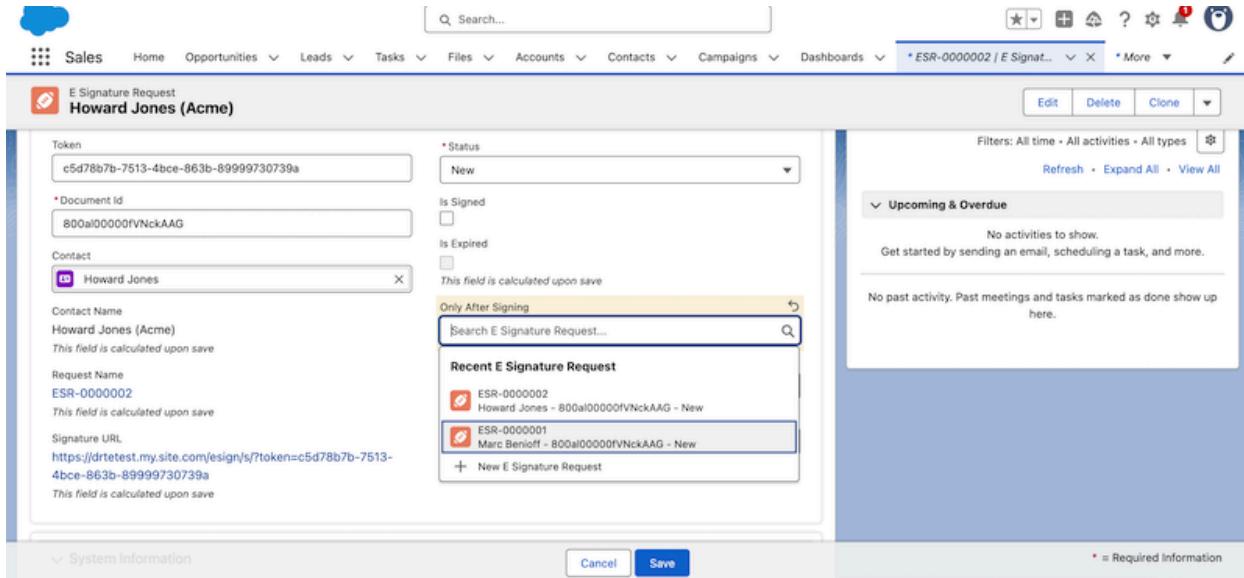
3. Verify signature placeholder matches signer details
4. Refresh the **E-Signature Request List** to confirm (when it doesn't automatically refreshed)

5. Drag and Drop the second signer box in the workflow over first signer to create a link between them.
  6. Click on Begin Workflow, to kick off signature process automatically while on the same screen (or you can always manually start it from first E Signature Request record)

## Step 15: Configure Signing Order

## To set up sequential signing (Manually):

1. Create a second e-signature request for the next signer



2. Open the second request record
3. In the "**Only After Signing**" field, select the first request

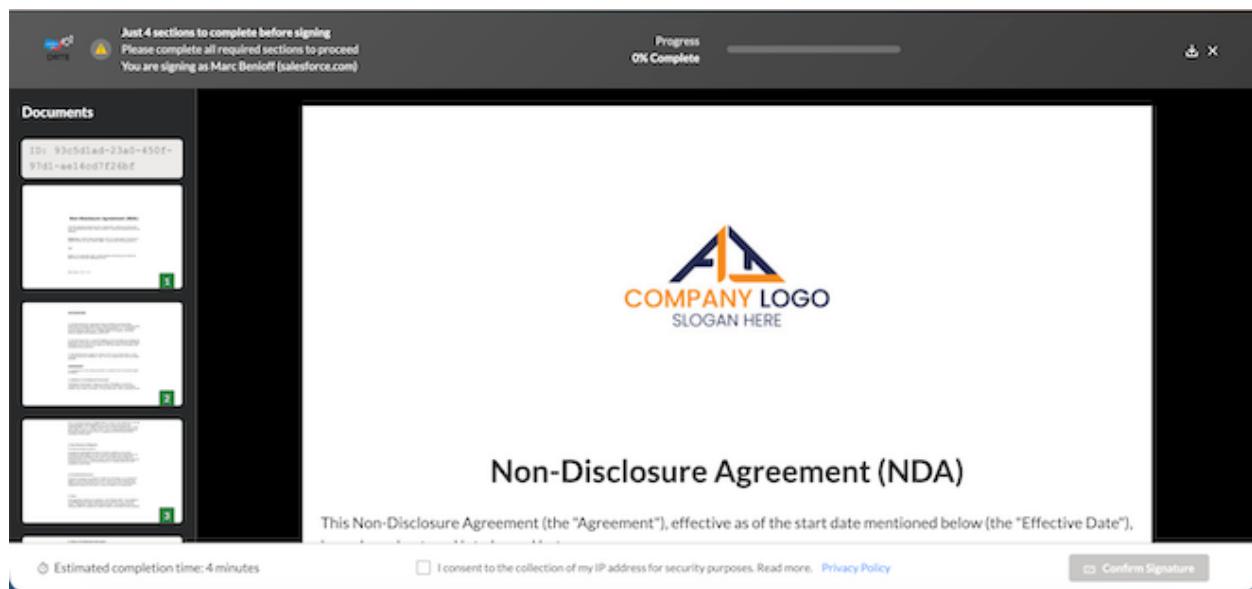
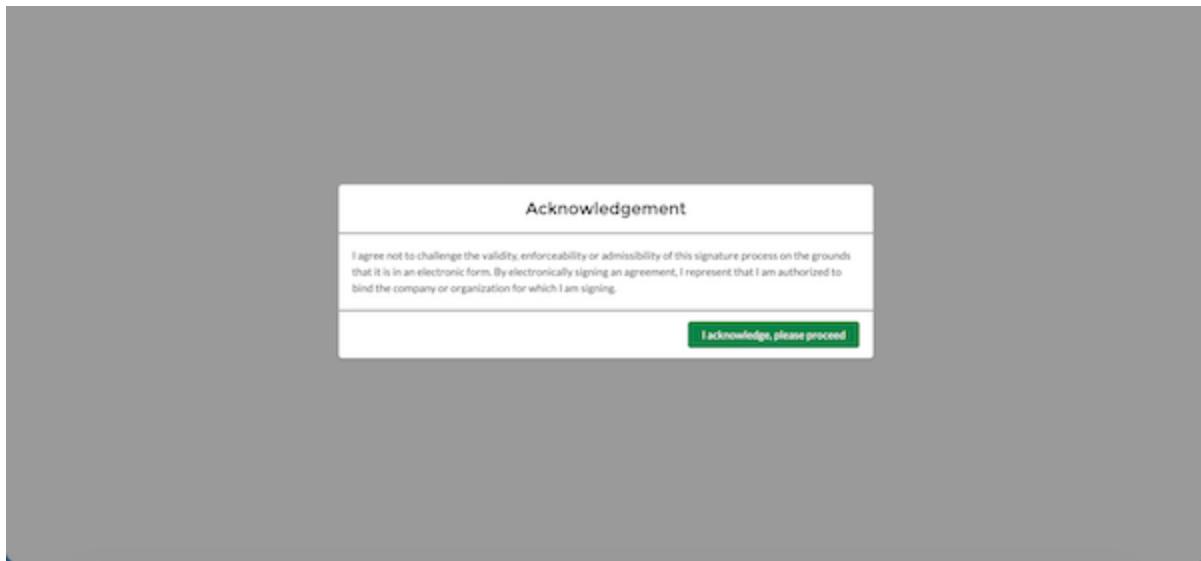
This ensures the second signer receives notification only after the first signer completes their signature.

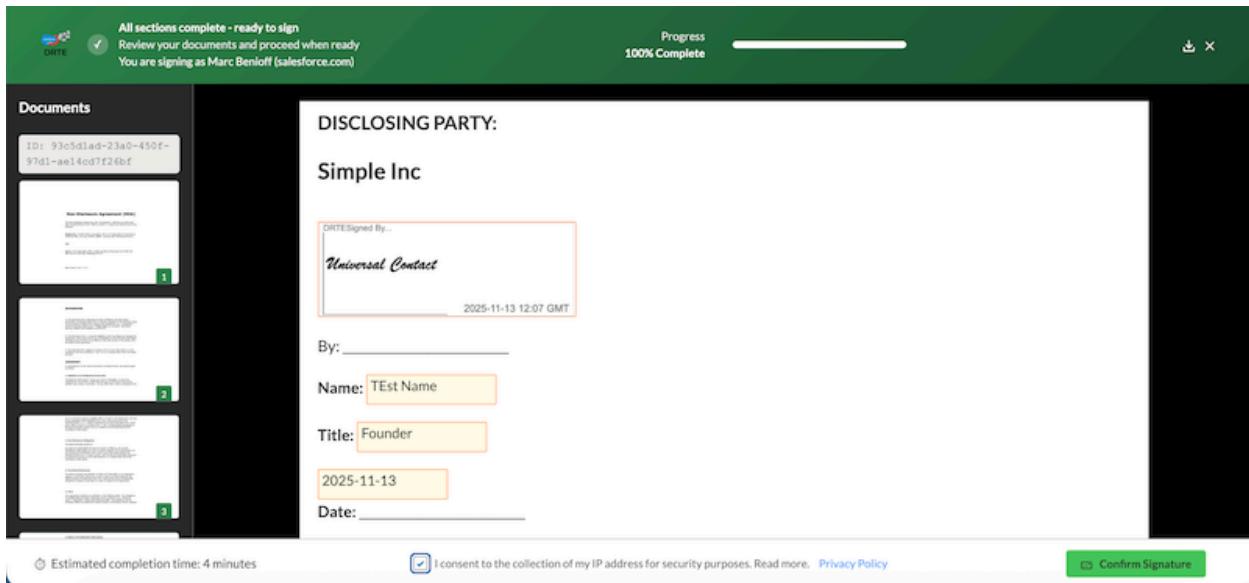
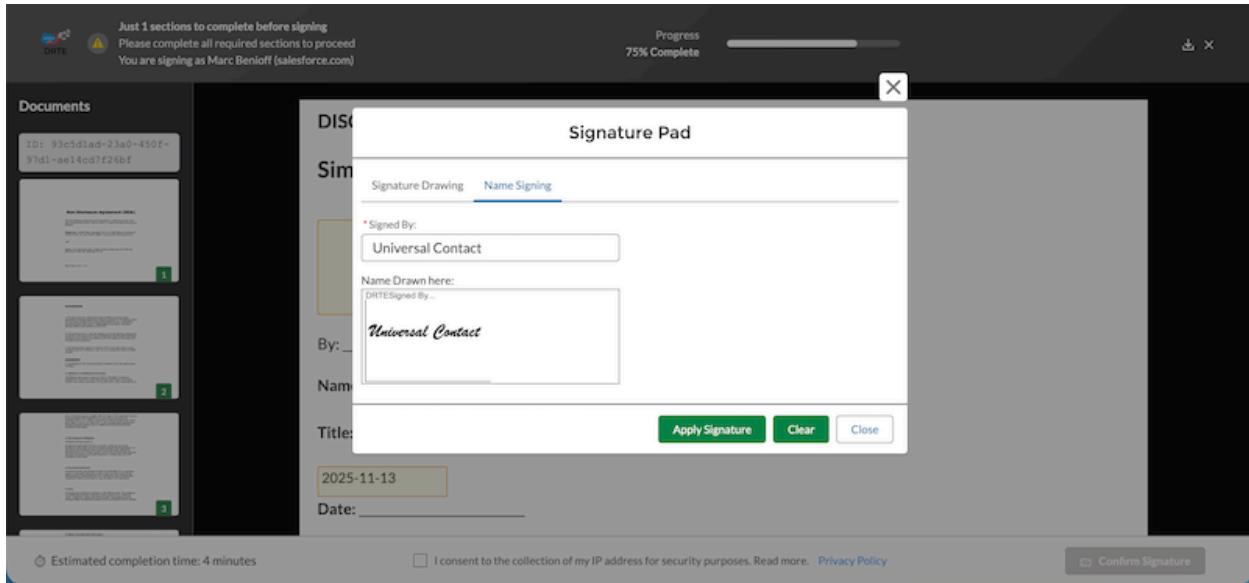
---

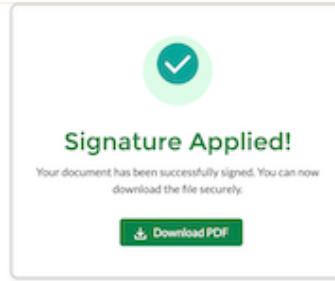
## Step 16: Send Signature Requests

### To trigger the signing process (Manually):

1. Open the first e-signature request
2. Change **Status** to "**Sent for Signature**"
3. The first signer receives an email notification and starts signing from there.







## 4. Monitor status updates in the E-Signature Request List

A screenshot of the Salesforce interface showing the E-Signature Request List. The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and a search bar. The main content area shows a "Contract" record for account "Acme" with ID "00000100". The status is "Activated". Below the record, a progress bar shows the status "Activated". To the right, there are buttons for "Mark Status as Complete" and "Begin Workflow". On the right side, there is a sidebar titled "E-Signature Workflow" with two items: "ESR-0000001" (status: COMPLETED, signed on 2025-11-13 17:38, [SIGNATURE1], signed) and "ESR-0000002" (status: READY TO SEND, expires 2026-01-28, [SIGNATURE2], pending signature).

Contract  
00000100

Account Name: Acme Status: Activated Contract Start Date: 10/1/2025 Contract End Date: 9/30/2031 Contract Term (months): 72

Activated

Draft

Mark Status as Complete

E-Signature Workflow

ESR-0000001 Marc Benioff (salesforce.com)  
Status: COMPLETED | Signed on: 2025-11-13 17:38 |  
[SIGNATURE1]

ESR-0000002 Rahul Jain (ArchType)  
Status: READY TO SEND | Expires: 2026-01-28 |  
[SIGNATURE2]

Pending Signature

## 5. Repeat for subsequent signers (manually)

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards \* ESR-0000002 | E Signat... More

**E Signature Request**  
Howard Jones (Acme)

**Related** **Details** Requested Document

Information

E Signature Request Name: ESR-0000002

Owner: Rahul Jain

Status: Ready To Send

Document Id: c5d78a7b-7513-4bce-863b-89999730739a

Contact: Howard Jones

Contact Name: Howard Jones (Acme)

This field is calculated upon save

Request Details: ESR-0000002

10/17/2025

Cancel Save

Signed Document/Logs (0)

Activity

Filters: All time - All activities - All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

\* = Required information

## Step 17: Mobile Signing Experience

## Mobile signing workflow:

## **Step 1:** Signer opens the email on mobile device

The image displays two screenshots of a digital signature or document signing application interface.

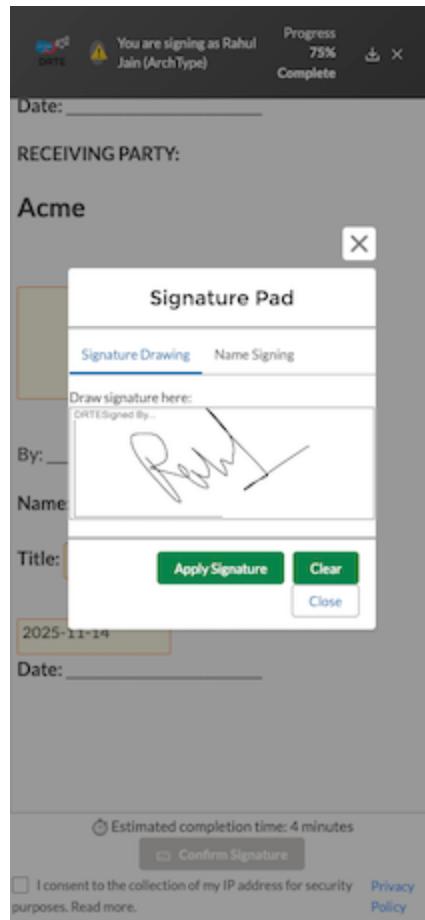
**Left Screenshot (Acknowledgement Step):**

- Header: "You are signing as Rahul Jain (ArchType)"
- Progress: "0% Complete"
- Content: "COMPANY LOGO" with "SLOGAN HERE" below it.
- Text Box: "I agree not to challenge the validity, enforceability or admissibility of this signature process on the grounds that it is in an electronic form. By electronically signing an agreement, I represent that I am authorized to bind the company or organization for which I am signing."
- Button: "I acknowledge, please proceed"

**Right Screenshot (Non-Disclosure Agreement Step):**

- Header: "You are signing as Rahul Jain (ArchType)"
- Progress: "0% Complete"
- Content: "COMPANY LOGO" with "SLOGAN HERE" below it.
- Section: "Non-Disclosure Agreement (NDA)"
- Text: "This Non-Disclosure Agreement (the "Agreement"), effective as of the start date mentioned below (the "Effective Date"), is made and entered into by and between: Simple Inc, a INDIA State corporation with its principal place of business at 5/555 55 Floor, 55"
- Information: "Estimated completion time: 4 minutes" (with a progress bar)
- Buttons: "Confirm Signature" (disabled)
- Checkboxes: "I consent to the collection of my IP address for security purposes. Read more." (unchecked)
- Links: "Privacy Policy"

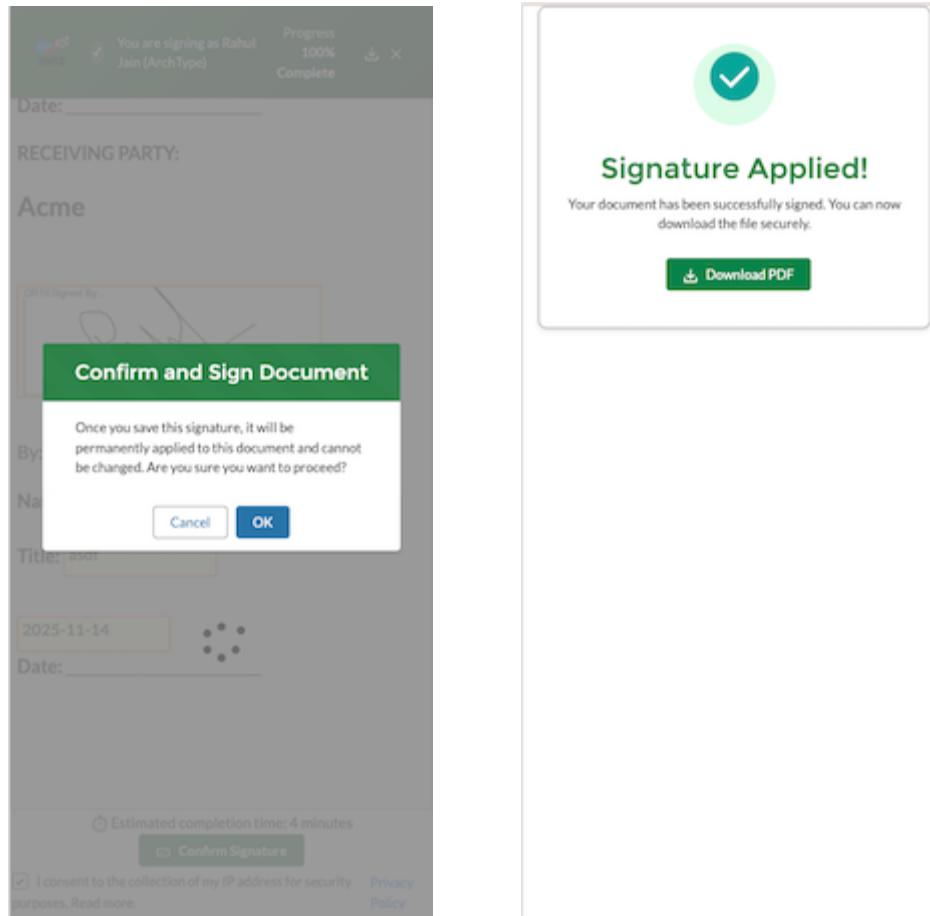
## Step 2: Signer reviews the document



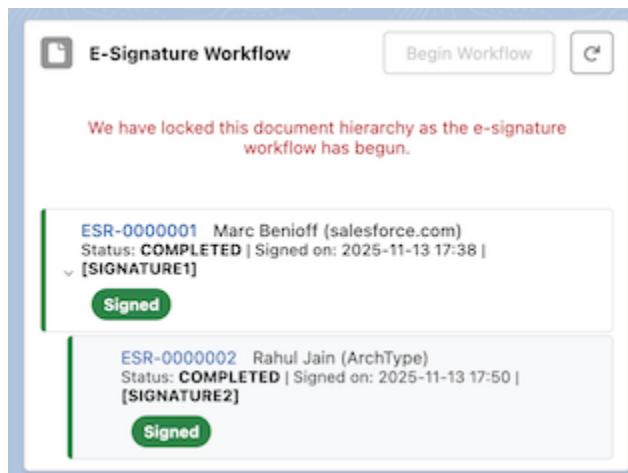
### Step 3: Signer fills in details and signs



#### Step 4: Signature is applied with timestamp

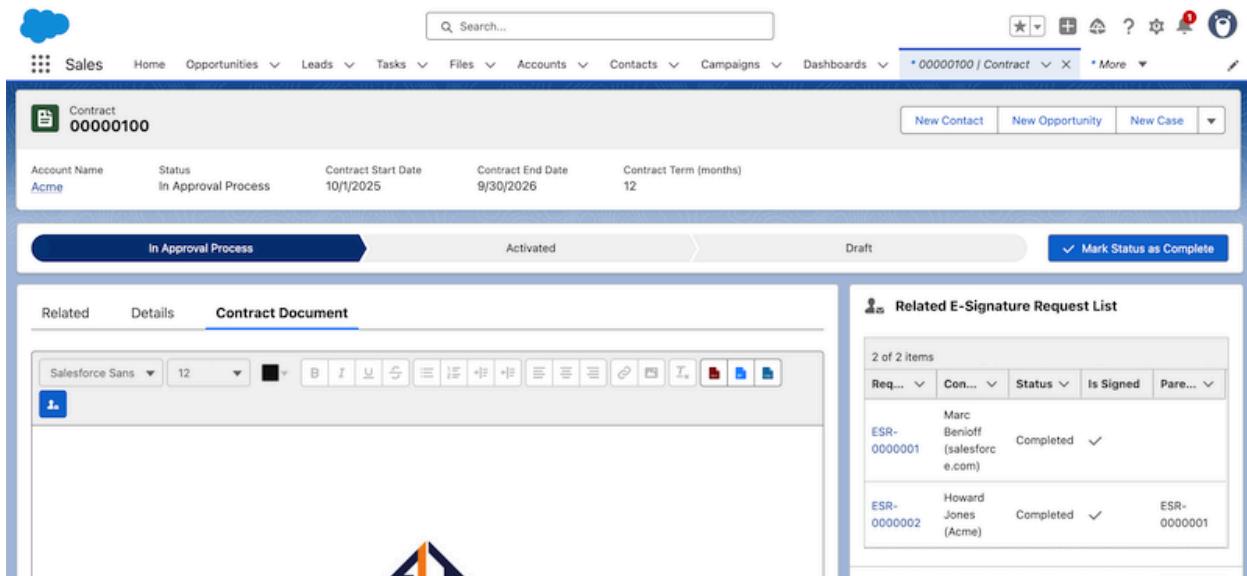


## Step 18: Finalize and Store Documents



## To complete the process:

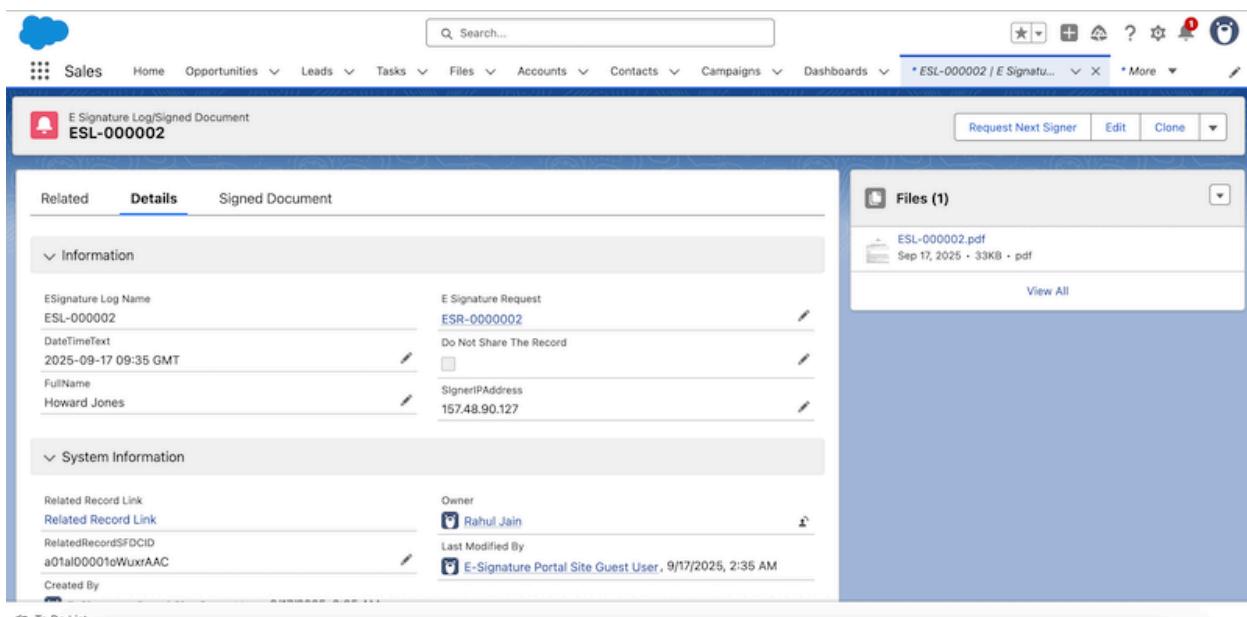
1. After all signatures are collected, open the **E-Signature Log** record



The screenshot shows a Salesforce Contract record for '00000100'. The 'Status' is 'In Approval Process'. The 'Contract Start Date' is '10/1/2025' and the 'Contract End Date' is '9/30/2026'. The 'Contract Term (months)' is '12'. The 'Contract Document' tab is selected, showing a rich text editor with a blue ribbon toolbar. To the right, the 'Related E-Signature Request List' sidebar shows two items: 'Marc Benioff (salesforce.com)' and 'Howard Jones (Acme)', both marked as 'Completed' with a checkmark.

2. Verify all signature details:

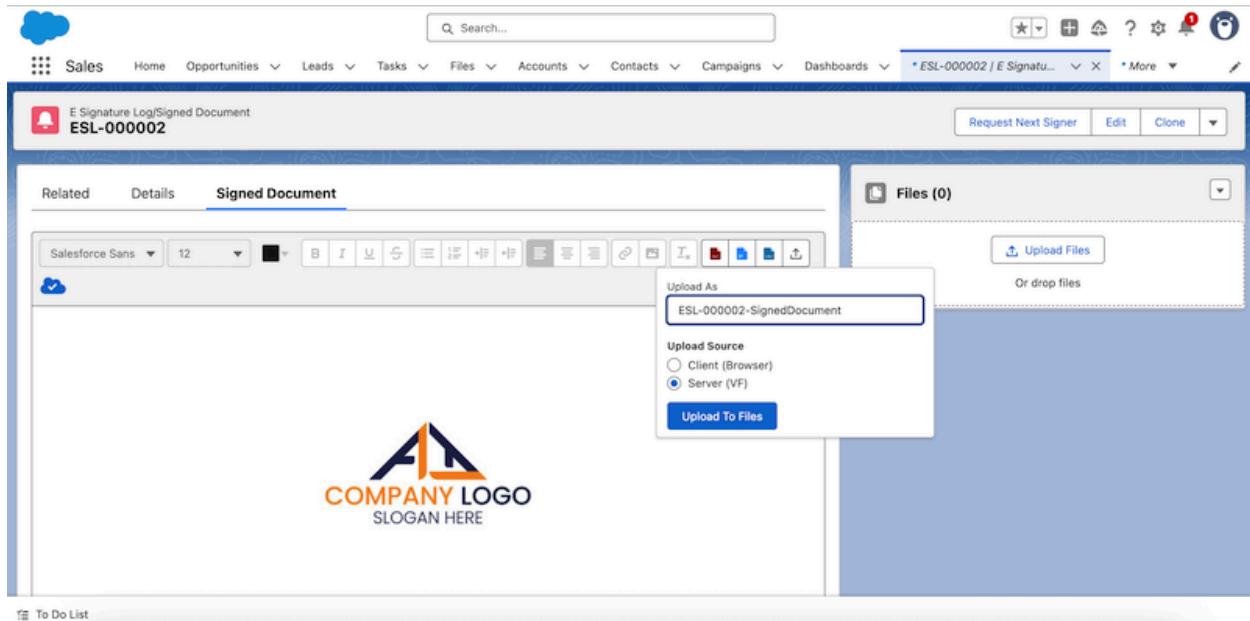
- Date and time
- IP address
- Full name



The screenshot shows the E-Signature Log record for 'ESL-000002'. The 'Details' tab is selected. The 'Information' section shows the E-Signature Log Name 'ESL-000002', the E-Signature Request 'ESR-0000002', the Date/Time '2025-09-17 09:35 GMT', the Full Name 'Howard Jones', and the Signer IP Address '157.48.90.127'. The 'System Information' section shows the Related Record Link 'a01a00001oWuxrAAC', the Owner 'Rahul Jain', and the Last Modified By 'E-Signature Portal Site Guest User, 9/17/2025, 2:35 AM'. The 'Files (1)' sidebar shows a single PDF file named 'ESL-000002.pdf' from Sep 17, 2025.

3. Click the button to upload the signed document to **Files**

**Important:** Always use **Server Side Upload Source**

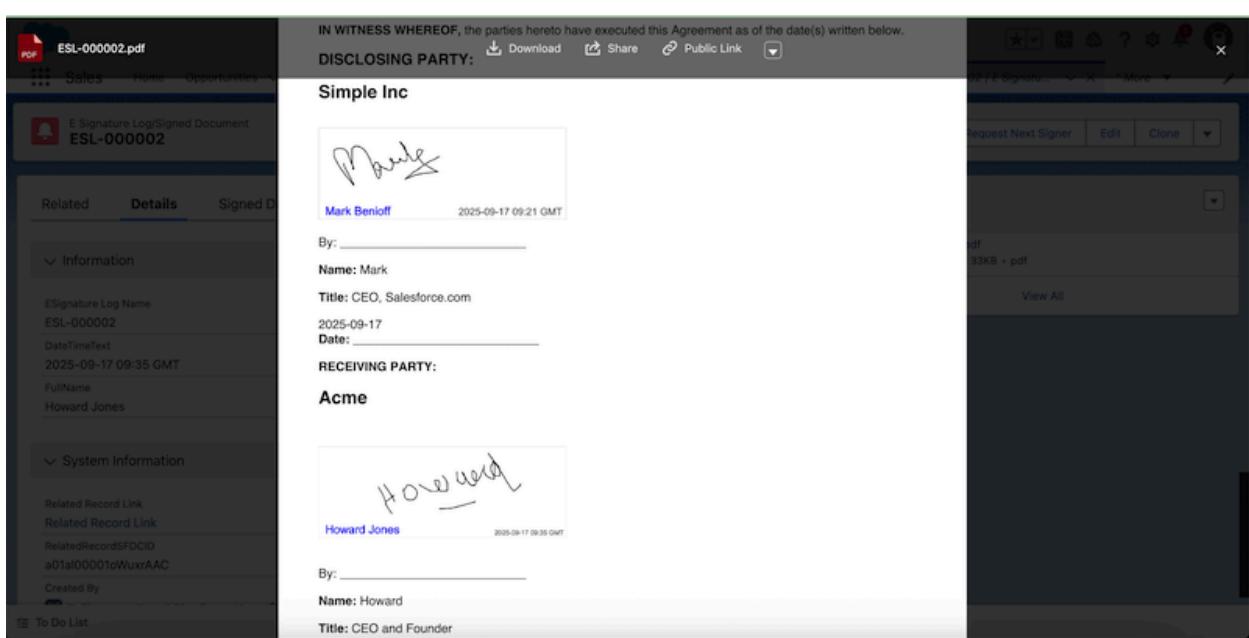
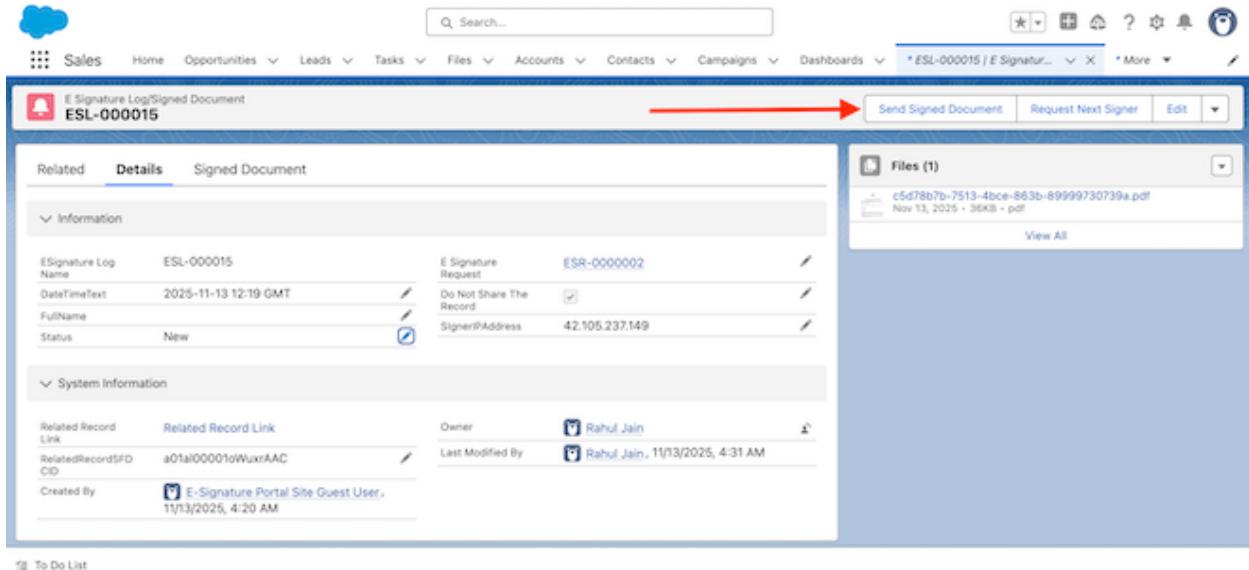


---

### Step 19: Share and Activate

**To finalize the contract:**

1. Share the signed document with all parties

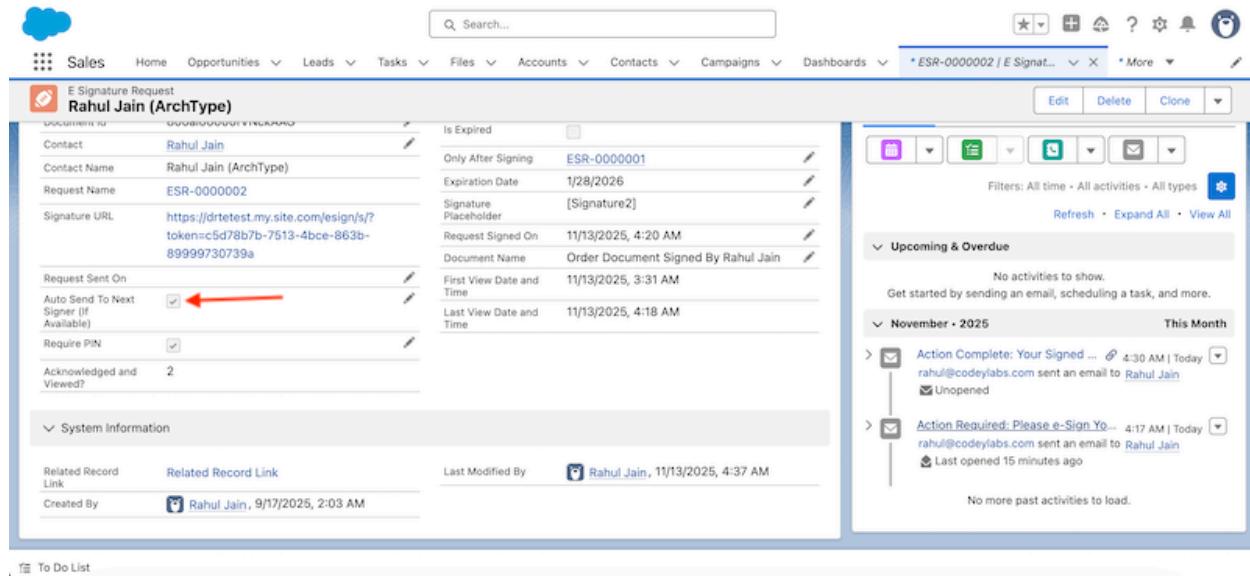


2. Next steps, for example, update the contract status to "**Activated**" **(manually)**

# Additional Features

## 1. Automatic Sequential Signing

Configure automatic sending to the next signer upon completion, define this on the first signer E Signature Request record:



E Signature Request  
Rahul Jain (ArchType)

Contact: Rahul Jain  
Contact Name: Rahul Jain (ArchType)  
Request Name: ESR-0000002  
Signature URL: https://drtetest.my.site.com/esign/s/?token=c5d78b7b-7513-4bce-863b-89999730739a  
Request Sent On: 11/13/2025, 4:20 AM  
Auto Send To Next Signer (If Available):  (Red arrow points here)  
Require PIN:   
Acknowledged and Viewed?: 2

System Information

Related Record Link: Related Record Link  
Created By: Rahul Jain, 9/17/2025, 2:03 AM  
Last Modified By: Rahul Jain, 11/13/2025, 4:37 AM

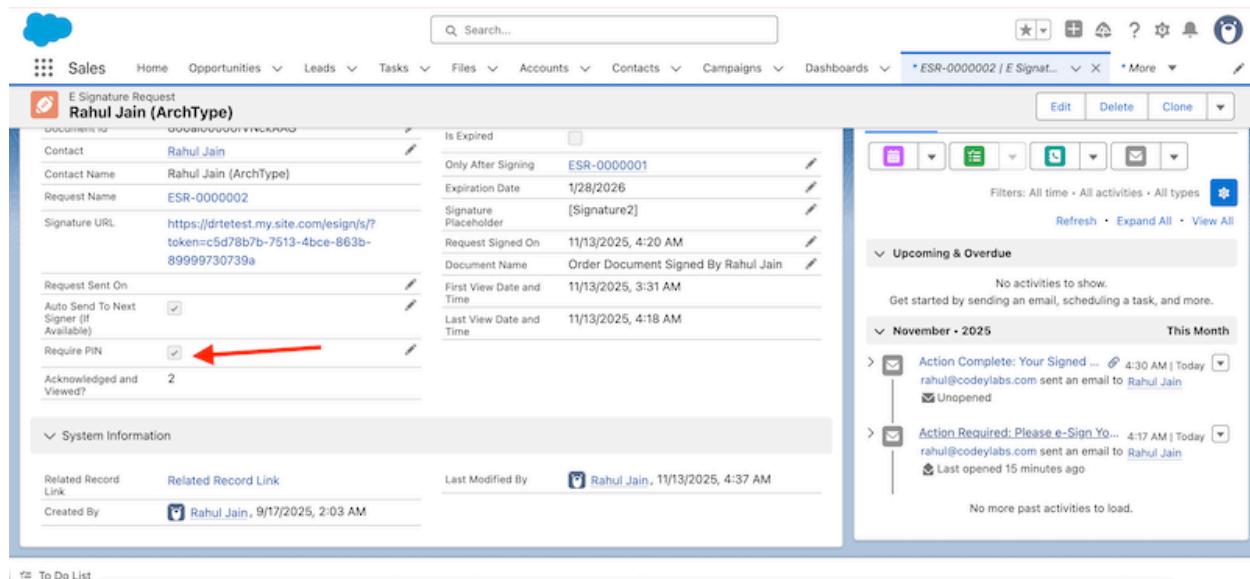
Upcoming & Overdue

Action Complete: Your Signed ... 4:30 AM | Today  
rahuil@codeylabs.com sent an email to [Rahul Jain](#)  
Unopened

Action Required: Please e-Sign Yo... 4:17 AM | Today  
rahuil@codeylabs.com sent an email to [Rahul Jain](#)  
Last opened 15 minutes ago

## 2. Enhanced Security with PIN

Add PIN-based authentication for additional security:



E Signature Request  
Rahul Jain (ArchType)

Contact: Rahul Jain  
Contact Name: Rahul Jain (ArchType)  
Request Name: ESR-0000002  
Signature URL: https://drtetest.my.site.com/esign/s/?token=c5d78b7b-7513-4bce-863b-89999730739a  
Request Sent On: 11/13/2025, 4:20 AM  
Auto Send To Next Signer (If Available):   
Require PIN:  (Red arrow points here)  
Acknowledged and Viewed?: 2

System Information

Related Record Link: Related Record Link  
Created By: Rahul Jain, 9/17/2025, 2:03 AM  
Last Modified By: Rahul Jain, 11/13/2025, 4:37 AM

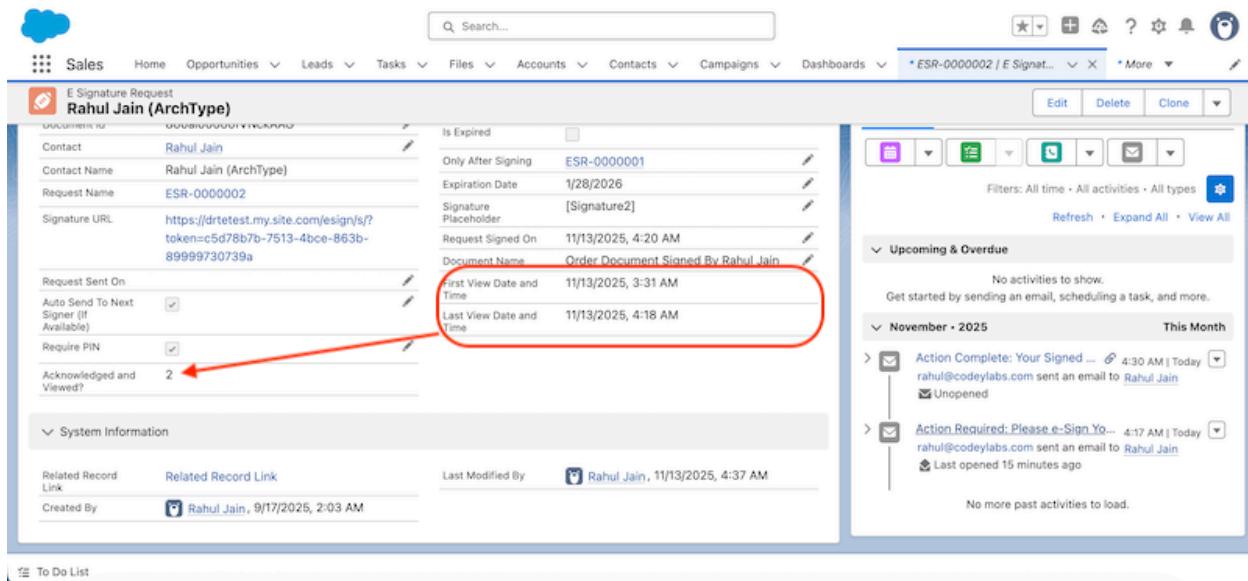
Upcoming & Overdue

Action Complete: Your Signed ... 4:30 AM | Today  
rahuil@codeylabs.com sent an email to [Rahul Jain](#)  
Unopened

Action Required: Please e-Sign Yo... 4:17 AM | Today  
rahuil@codeylabs.com sent an email to [Rahul Jain](#)  
Last opened 15 minutes ago

### 3. Document View Tracking

Track when signers view the document:



E Signature Request  
Rahul Jain (ArchType)

Contact	Rahul Jain
Contact Name	Rahul Jain (ArchType)
Request Name	ESR-0000002
Signature URL	<a href="https://drtest.my.site.com/esign/s/?token=c5d78b7b-7513-4bce-863b-89999730739a">https://drtest.my.site.com/esign/s/?token=c5d78b7b-7513-4bce-863b-89999730739a</a>
Request Sent On	
Auto Send To Next Signer (If Available)	<input checked="" type="checkbox"/>
Require PIN	<input checked="" type="checkbox"/>
Acknowledged and Viewed?	2

Is Expired

Only After Signing ESR-0000001

Expiration Date 1/28/2026

Signature Placeholder [Signature2]

Request Signed On 11/13/2025, 4:20 AM

Document Name Order Document Signed By Rahul Jain

First View Date and Time 11/13/2025, 3:31 AM

Last View Date and Time 11/13/2025, 4:18 AM

System Information

Related Record Link [Related Record Link](#)

Created By  Rahul Jain, 9/17/2025, 2:03 AM

Last Modified By  Rahul Jain, 11/13/2025, 4:37 AM

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

November - 2025 This Month

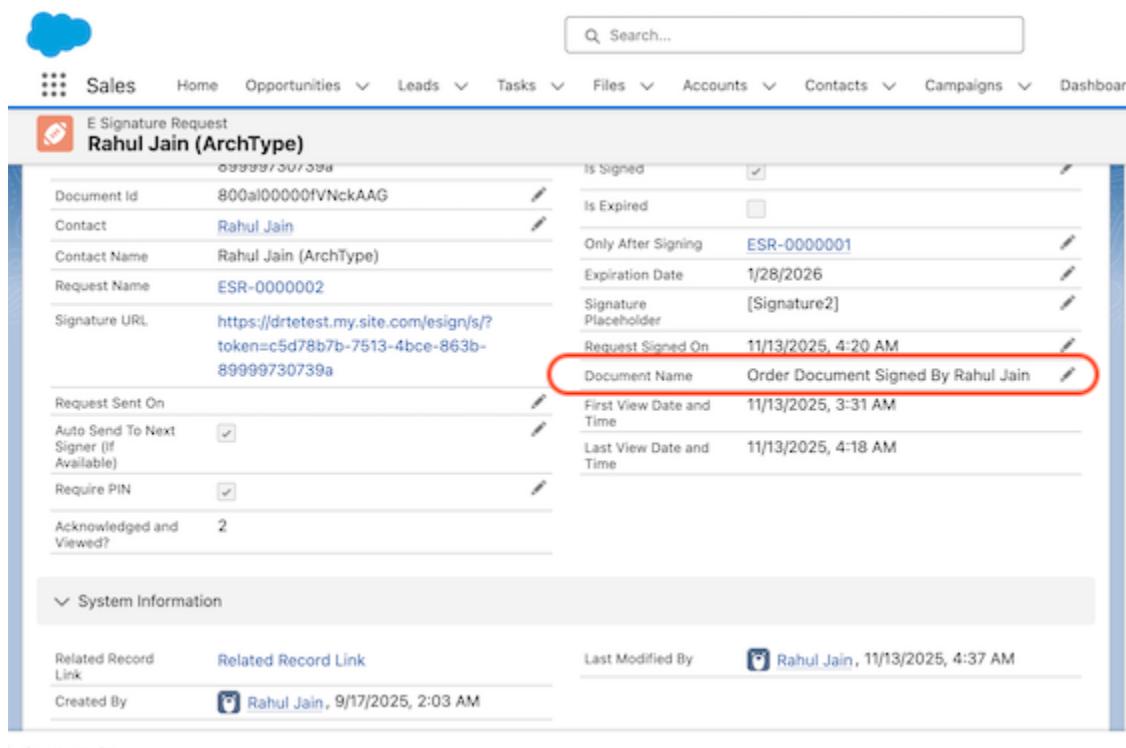
Action Complete: Your Signed ... 4:30 AM | Today rahul@codeylabs.com sent an email to [Rahul Jain](#) Unopened

Action Required: Please e-Sign Yo... 4:17 AM | Today rahul@codeylabs.com sent an email to [Rahul Jain](#) Last opened 15 minutes ago

No more past activities to load.

### 4. Custom File Names

Apply custom file names to signed documents:



E Signature Request  
Rahul Jain (ArchType)

Document Id	800a00000fVNckAAG
Contact	Rahul Jain
Contact Name	Rahul Jain (ArchType)
Request Name	ESR-0000002
Signature URL	<a href="https://drtest.my.site.com/esign/s/?token=c5d78b7b-7513-4bce-863b-89999730739a">https://drtest.my.site.com/esign/s/?token=c5d78b7b-7513-4bce-863b-89999730739a</a>
Request Sent On	
Auto Send To Next Signer (If Available)	<input checked="" type="checkbox"/>
Require PIN	<input checked="" type="checkbox"/>
Acknowledged and Viewed?	2

Is Signed

Is Expired

Only After Signing ESR-0000001

Expiration Date 1/28/2026

Signature Placeholder [Signature2]

Request Signed On 11/13/2025, 4:20 AM

Document Name Order Document Signed By Rahul Jain

First View Date and Time 11/13/2025, 3:31 AM

Last View Date and Time 11/13/2025, 4:18 AM

System Information

Related Record Link [Related Record Link](#)

Created By  Rahul Jain, 9/17/2025, 2:03 AM

Last Modified By  Rahul Jain, 11/13/2025, 4:37 AM



## Troubleshooting

### Images Not Displaying in Guest Portal

**Issue:** Document images are not visible in the e-signature guest user portal.

**Solution:** Add a trusted URL entry for

[https://\[domain\].lightning.force.com](https://[domain].lightning.force.com) where [domain] is your Salesforce org's My Domain.

---

### Document Section Not Displaying

**Issue:** Document section is not displaying despite correct SOQL query.

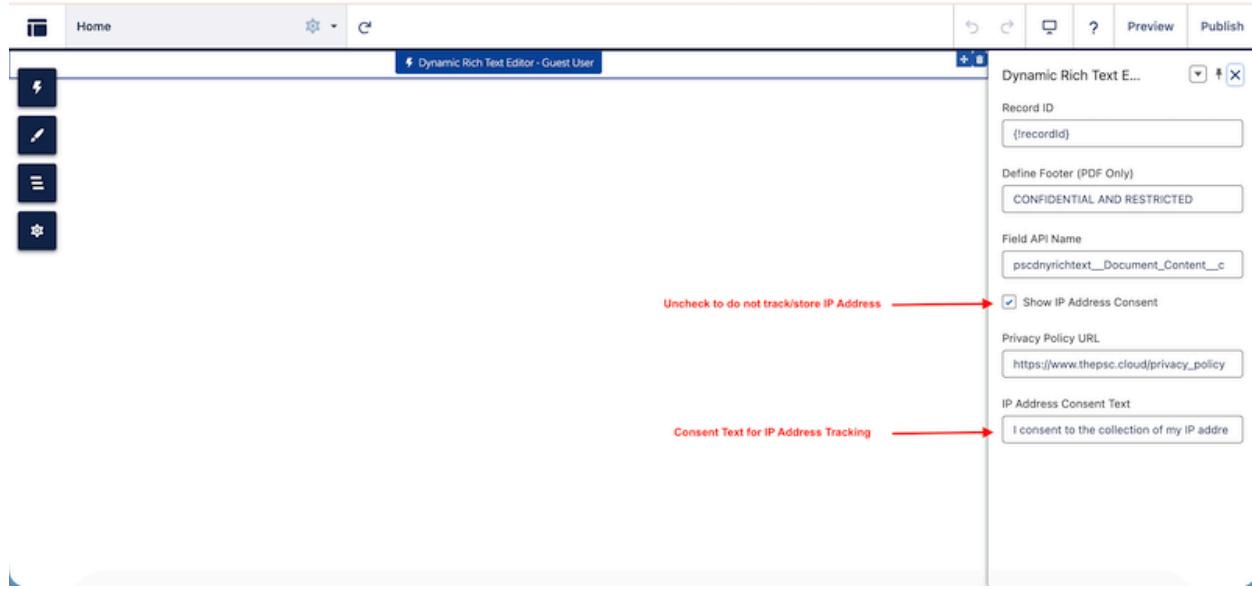
**Solution:** Verify that the object API name is listed in **DRTE Allowed Objects** records. Only objects in this list can be queried.

---

### IP Address Tracking

**Question:** We do not want to track/store signer IP Address ? Can we stop that ?

**Answer:** Yes. You can stop tracking and storing external signer IP addresses.



## Custom Email Templates

**Question:** Can I use my own branded email templates?

**Answer:** Yes. Clone the existing packaged email templates or create new ones. Update the template IDs in **DRTE Settings** custom settings to reflect your new templates.

---

## Button-Triggered Document Generation

**Question:** Can I generate documents via button click instead of a tab?

**Answer:** Yes. The DRTE managed package exposes several flow actions:

### 1. Build Document and Return Preview Id

- Apex: `pscnyrichtext__DocumentGeneratorService`
- Uses Document Template Id and Related Record Id ('pv0')
- Builds document on server and updates preview record

### 2. Generate Document Directly on Server

- Apex: `pscnyrichtext__GenerateDocumentAction`
- Generates PDF and saves to Files without editor

### 3. Upload Signed Document from E-Signature Log

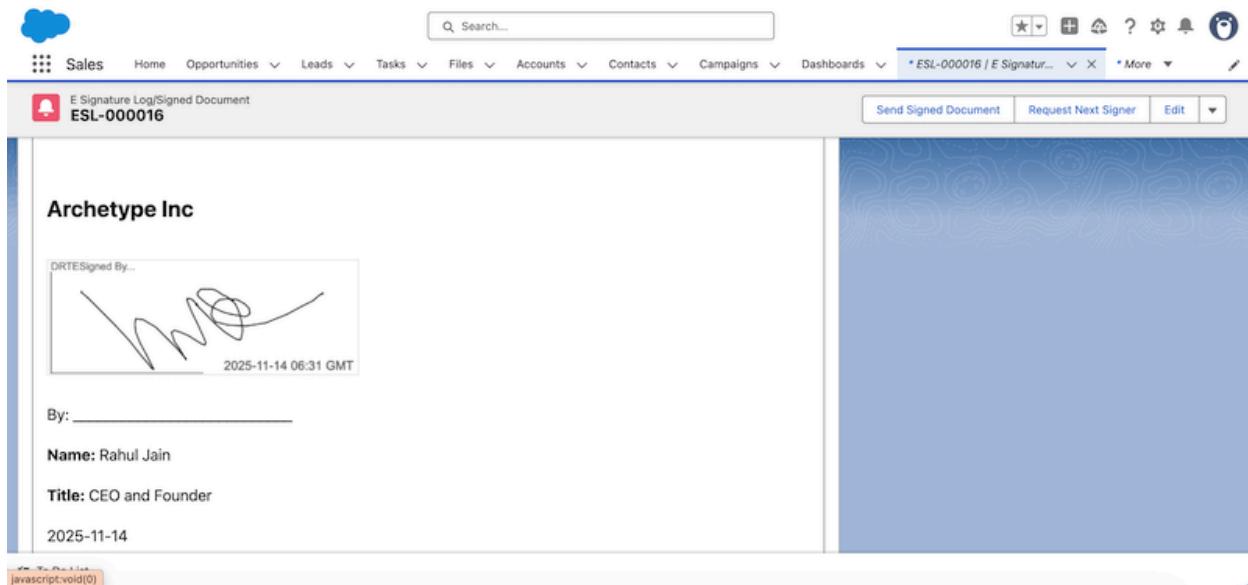
- Apex: `pscndnyrichtext__UploadSignedDocument`
- Generates PDF and saves to Files on related E-Signature Log record

---

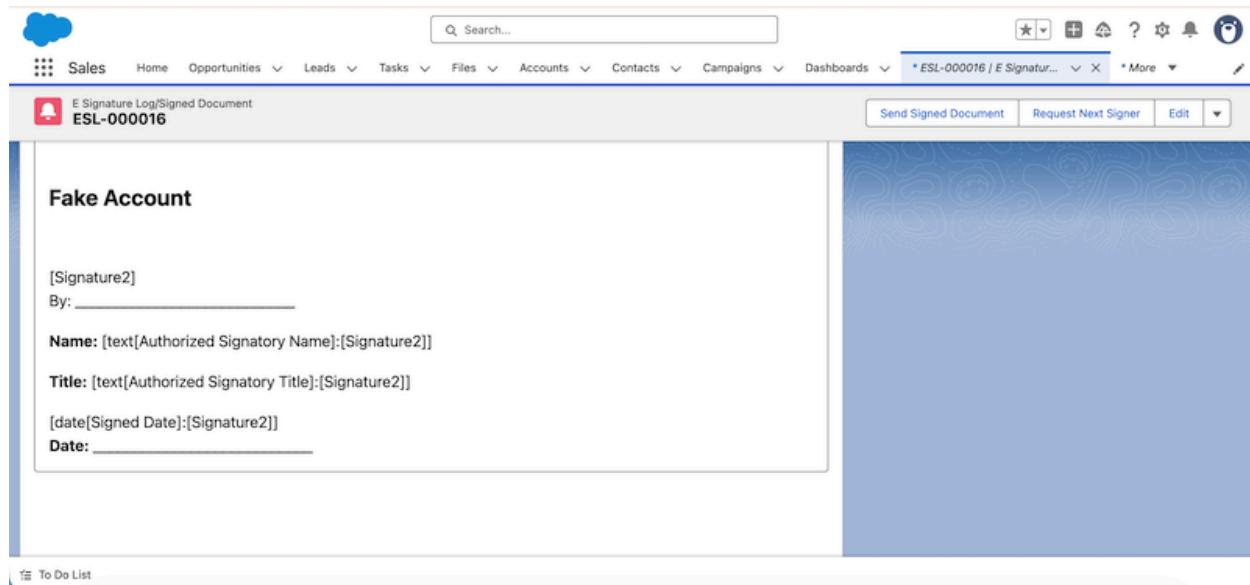
**Question:** I was supposed to create 2 E Signature requests on a document but accidentally/overlooked to create just Signature1 and begin the workflow. Apparently the first signer has also signed the document. Add Signature2 later from the DRTE editor is not bringing already signed content in the request document. What to do ?

**Solution:** Don't worry. DRTE has an answer to this problem.

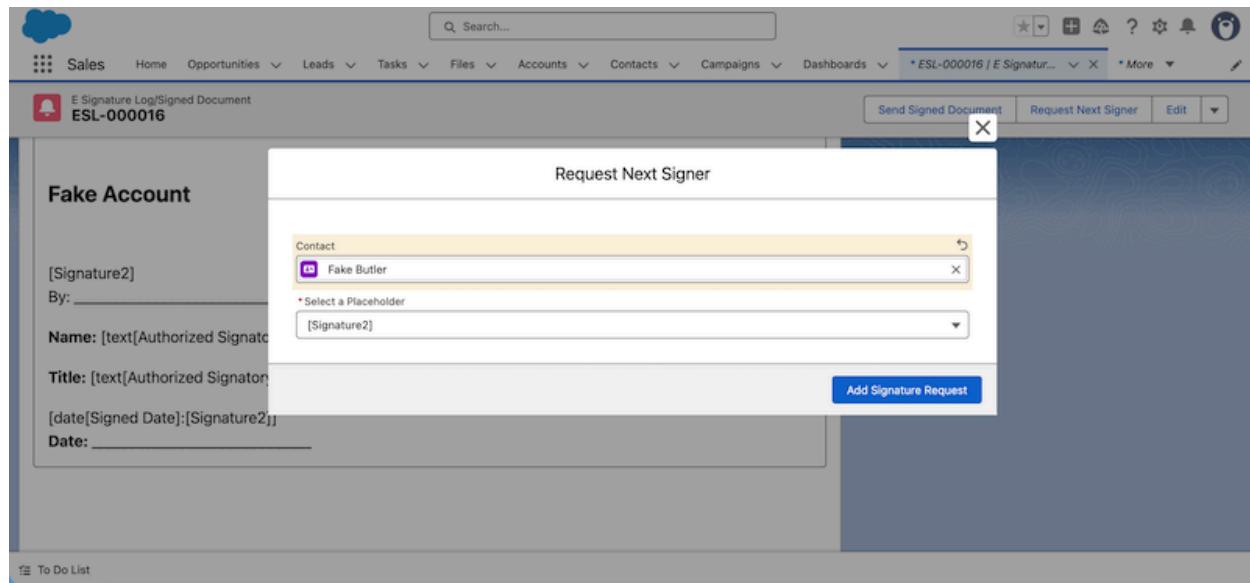
Simply navigate to the E Signature Log/Singed Document record created under Signature1 E Signature Request record. Notice that the Signee 1 has signed.



Also validate, the placeholders for Signee 2 (Signature 2) exists on the response document.

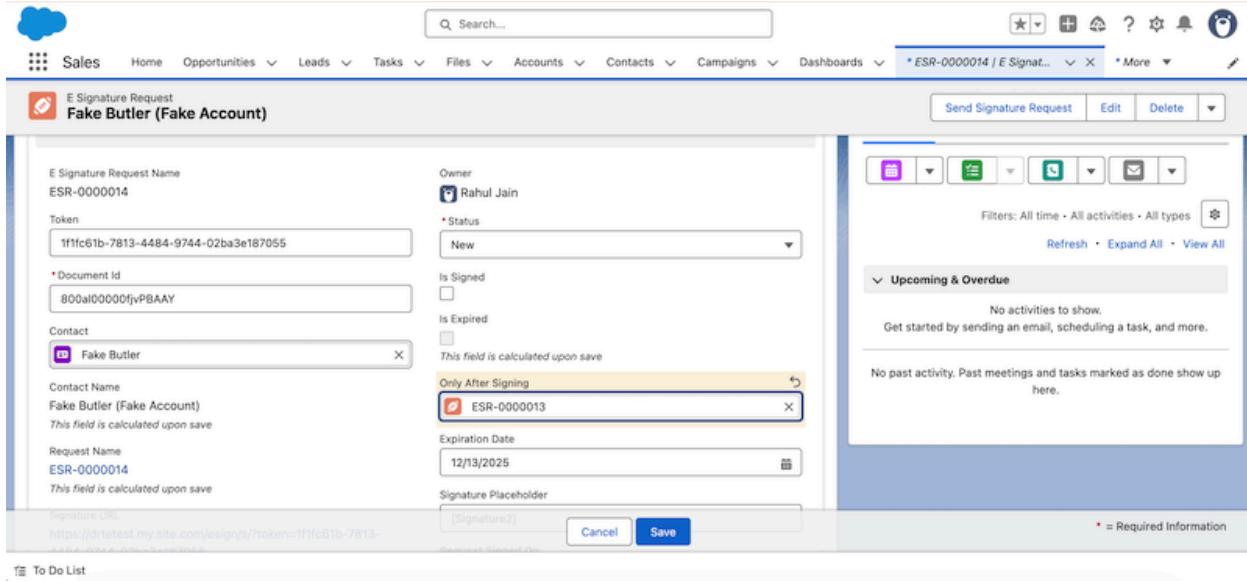


After all validations are complete, simply 'Request Next Signer' and associate Signature 2 - contact and placeholder to add a new signature request for the document.



Create a link on a newly created signature 2 request record with the Signature 1 request record through **Only After Signing** field.

And hit the **Send Signature Request** Button. Done. You have signature request to your second signee with the document including the signature from 1st Signee



Notice the correct linking now on the document record page.



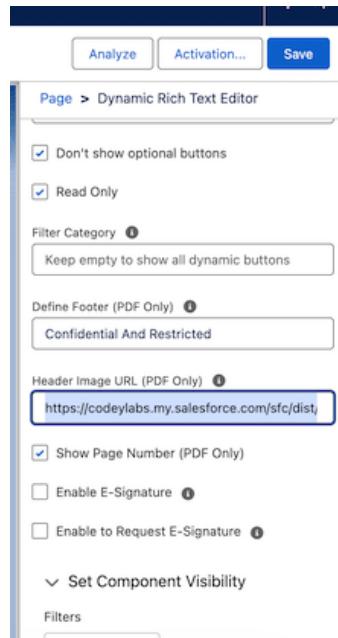
**Question:** For Invoices or any other financial transactional objects, can we use a custom company header template on the generated PDF within DRTE (Dynamic Rich Text Engine)?

**Solution:**

**Yes, this can be achieved using a custom image file as the header.**

To implement this, follow these three steps:

- 1. Prepare the Image:** Create your header image with the specific dimensions of **1340 px (width) x 200 px (height), preferred.**
- 2. Generate Public Link:** Upload this image to **Salesforce Files** and generate a **non-expirable public link (URL)** for the file.
- 3. Configure DRTE:** Copy the image URL and paste it into the '**Header Image URL (PDF only)**' property within your DRTE template configuration.



## Support

For additional assistance or questions not covered in this guide, please contact your Salesforce administrator or DRTE support team at [\*\*support@codeylabs.com\*\*](mailto:support@codeylabs.com).

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*DRTE Version v5.134 | Last Updated: November 2025*