



**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**

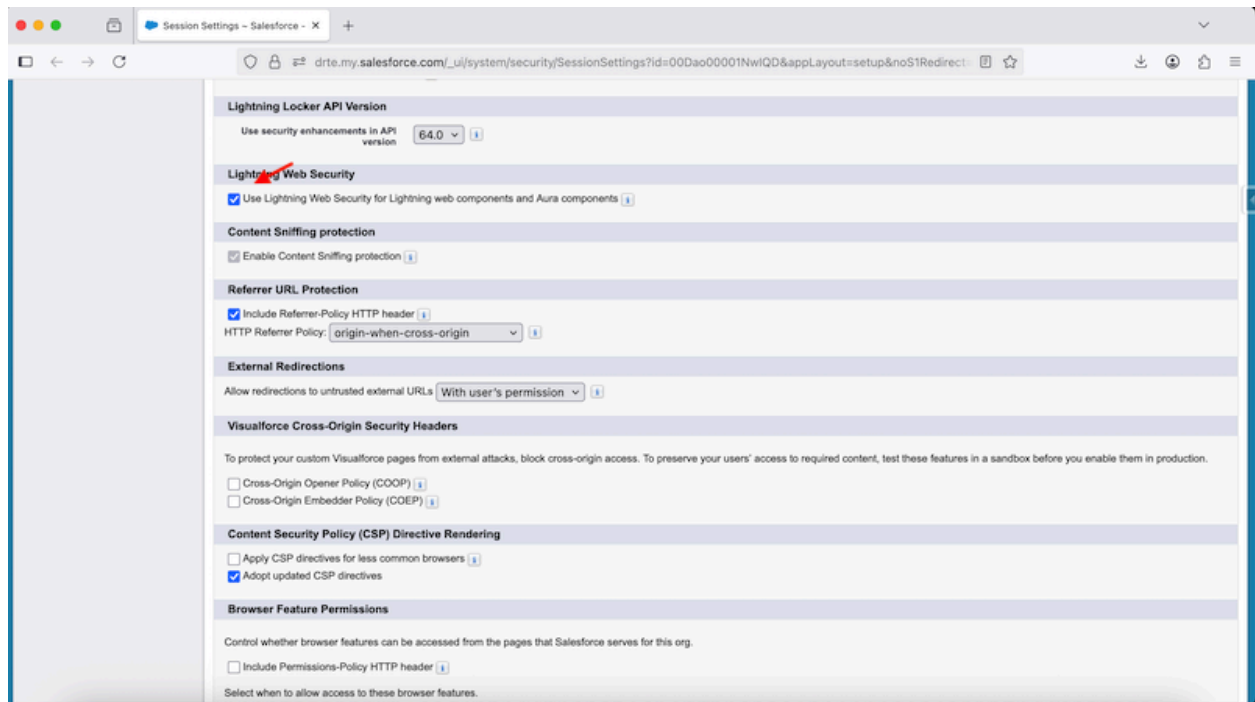
1. Prerequisites
2. Administrator Setup
3. UI Integration and Workflow
4. End-User Workflow
5. Additional Features
6. Troubleshooting

# Prerequisites

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

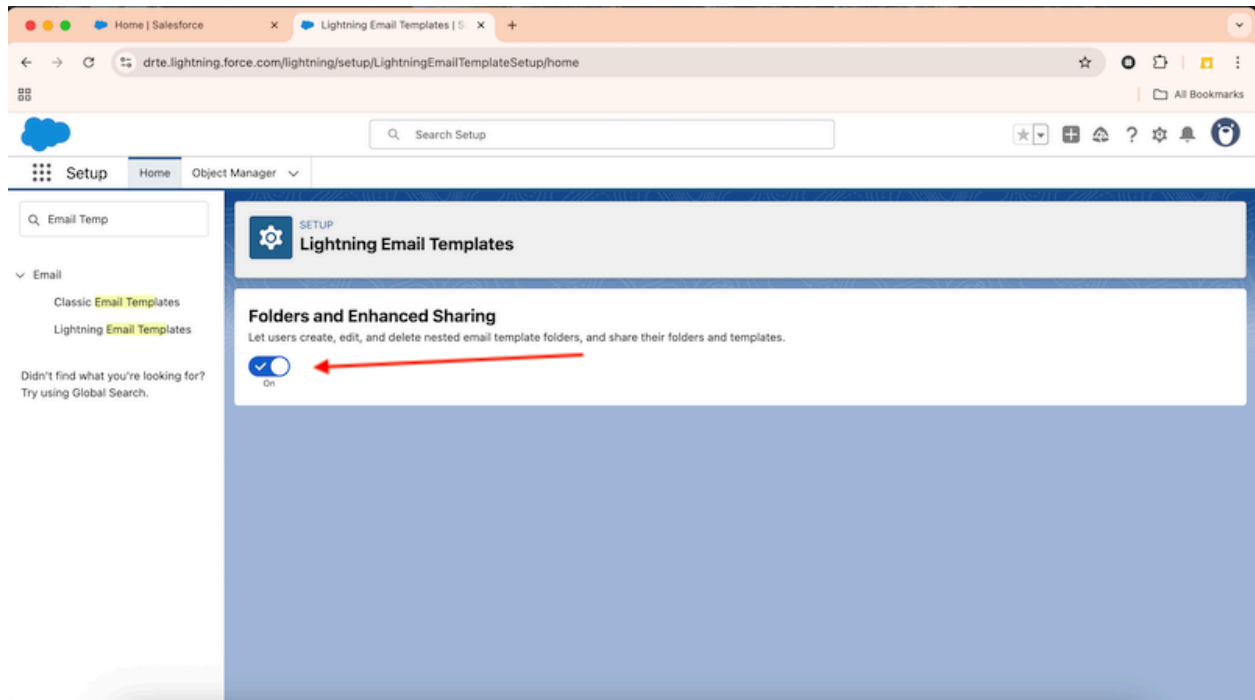
## To enable Lightning Web Security:

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:
  - Select **"Install for All Users"** (recommended)
  - Check the acknowledgement box for installing a non-AppExchange application
  - Click **Install**




### Install DRTE


By CodeyLabs




☐ Install for Admins Only



☒ Install for All Users



☐ Install for Specific Profiles...



You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program. ⓘ

☒ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install

Cancel

App Name	Publisher	Version Name	Version Number
DRTE	CodeyLabs	DRTE v5.99 (DocGen and ESign)	5.99

Additional Details

[View Components](#)

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

**SETUP**

**Installed Packages**

## Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

[Visit AppExchange »](#)

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date	Limits	Apps	Ti
<a href="#">Uninstall</a>   <a href="#">Manage Licenses</a>	DRTE	Codeylabs	5.66	pscdnyrichtext	Active	Unlimited	0	<input type="checkbox"/>	Does not Expire	9/16/2025, 10:55 PM	✓	0	
<b>Description</b> Streamline your document processes with DRTE, the powerful document generation and e-signature tool built 100% native on Salesforce. Eliminate the com...													

## 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**

**SETUP**

**Permission Sets**

Permission Set

### Dynamic RichText Editor Admin User

Find Settings... [Clone](#) [Manage Assignments](#) [View Summary](#)

**Permission Set Overview**

Description	API Name	DynRichText_User
License	Namespace Prefix	pscdnyrichtext
Session Activation Required <input type="checkbox"/>	Created By	Rahul Jain, 9/16/2025, 10:55 PM
Permission Set Groups Added To 0	Last Modified By	Rahul Jain, 9/16/2025, 10:55 PM

**Apps**

**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

**Visualforce Page Access**

2. For Administrators:

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

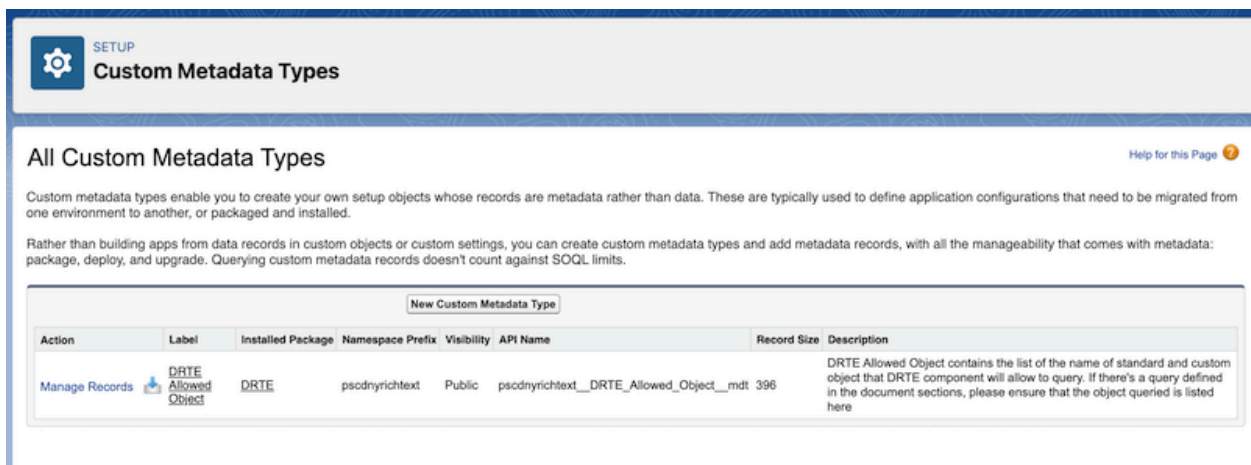
### 3. For Standard Users:

- 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.




**SETUP**  
**Custom Metadata Types**

**All Custom Metadata Types** [Help for this Page](#)

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define application configurations that need to be migrated from one environment to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, with all the manageability that comes with metadata: package, deploy, and upgrade. Querying custom metadata records doesn't count against SOQL limits.

[New Custom Metadata Type](#)

Action	Label	Installed Package	Namespace Prefix	Visibility	API Name	Record Size	Description
<a href="#">Manage Records</a>	 <b>DRTE Allowed Object</b>	DRTE	pscdnyrichtext	Public	pscdynrichtext__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**



The screenshot shows the 'Custom Metadata Types' setup page for 'DRTE Allowed Object'. The page has a header with a gear icon and the text 'SETUP Custom Metadata Types'. Below the header, the title 'DRTE Allowed Object' is displayed with a 'Help for this Page' link. The main content area is titled 'DRTE Allowed Object Edit' and contains a form with the following fields: 'Label' (value: Contract), 'DRTE Allowed Object Name' (value: Contract), and 'Object API Name' (value: Contract). There is a 'Protected Component' checkbox which is unchecked. At the bottom of the form are buttons for 'Save', 'Save & New', and 'Cancel'. A red asterisk icon and the text '\* Required Information' are visible on the right side of the form.

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:**

The screenshot shows the 'DRTE Allowed Object (Managed)' detail page. The page has a header with a gear icon and the text 'SETUP Custom Metadata Types'. Below the header, the title 'DRTE Allowed Object (Managed)' is displayed with a 'Help for this Page' link. A yellow banner at the top contains a warning icon and the text: 'This DRTE Allowed Object is managed, meaning that you may only edit certain attributes. [Display More Information](#)'. The main content area is titled 'DRTE Allowed Object Detail' and contains a table with the following rows:
 

Label	Document Section	Protected Component	<input type="checkbox"/>
DRTE Allowed Object Name	Document_Section	Namespace Prefix	psodnyrichtext
Object API Name	psodnyrichtext__PSC_Document_Section__c		
Created By	Rahul Jain, 10/4/2025, 1:11 AM		
Last Modified By	Rahul Jain, 10/4/2025, 1:11 AM		

 At the bottom of the table are buttons for 'Edit' and 'Clone'.

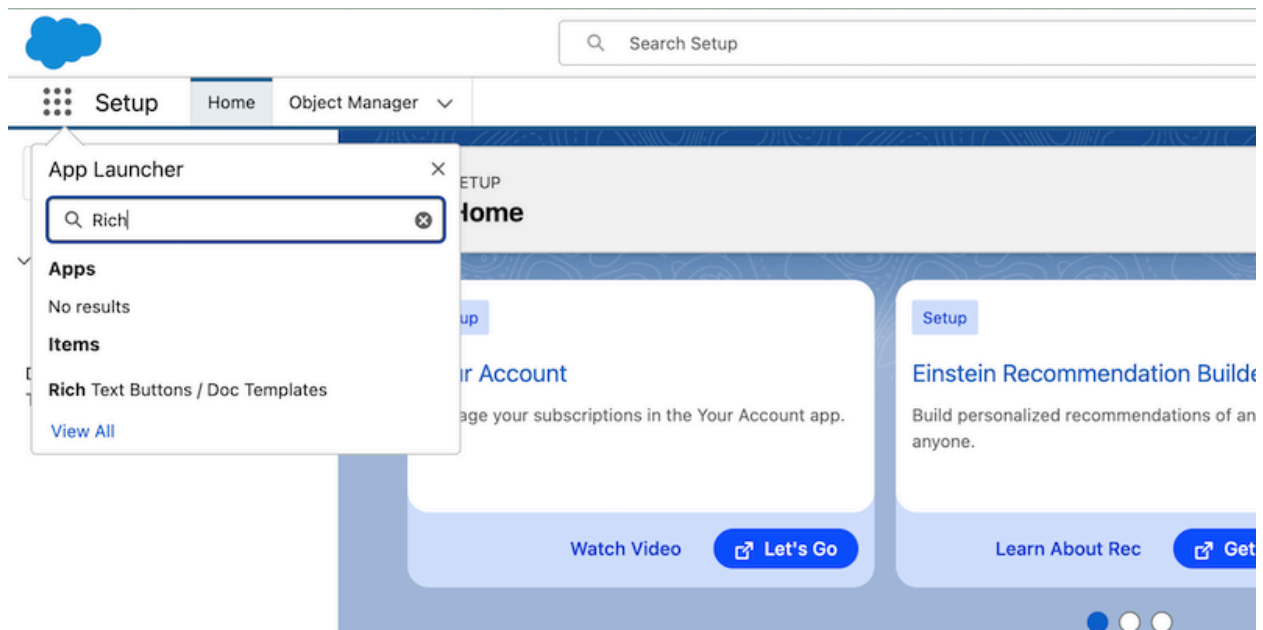
**Note:** Without adding an object to this list, DRTE components cannot query that object for dynamic data.

## Step 4: Create Document Templates

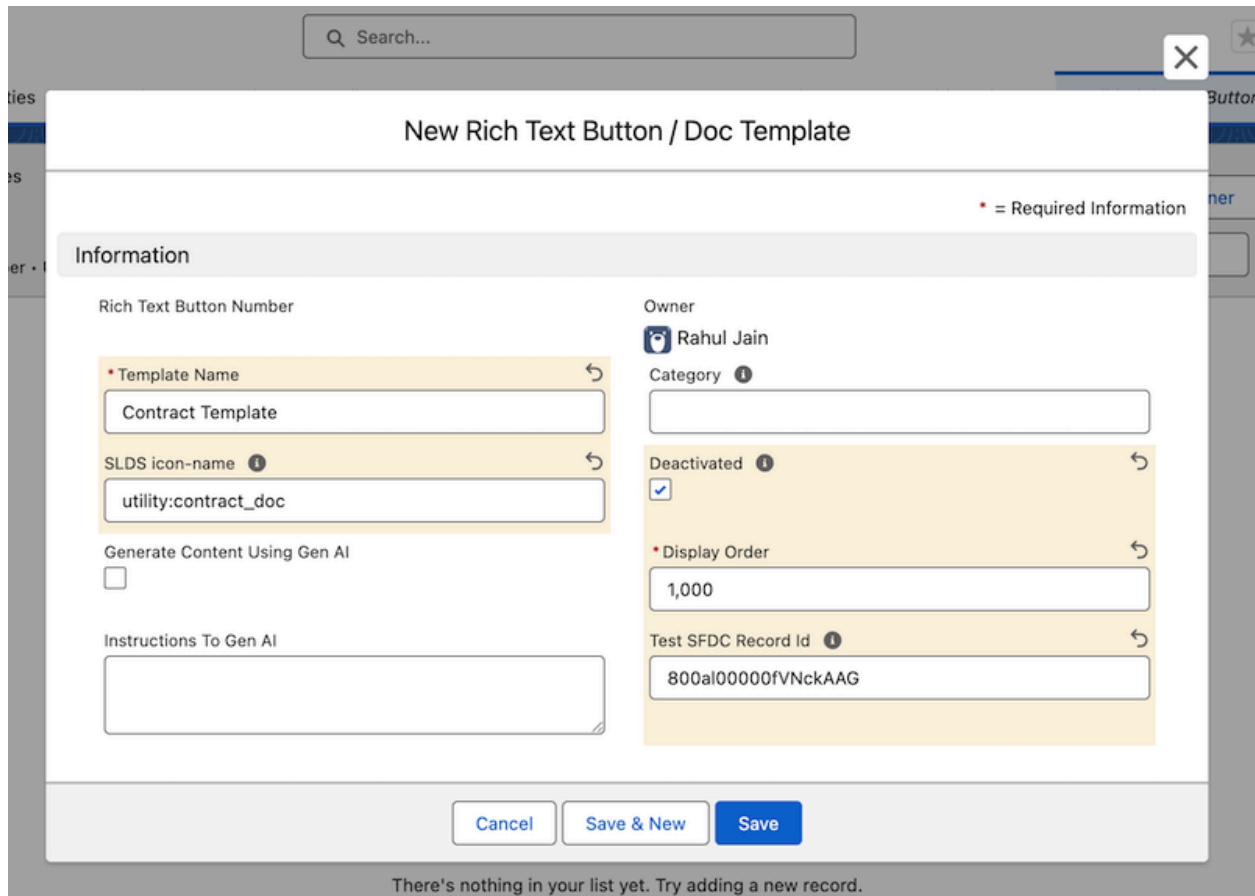
Document templates define the structure and content of your generated documents.

## 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



Search...

New Rich Text Button / Doc Template

\* = Required Information

Information

Rich Text Button Number

Owner  
Rahul Jain

Category

\* Template Name  
Contract Template

SLDS icon-name  
utility:contract\_doc

Generate Content Using Gen AI  
☐

Instructions To Gen AI

Deactivated  
☒

\* Display Order  
1,000

Test SFDC Record Id  
800a100000fVNckAAG

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**

Search...

\* = Required Information

**Information**

PSC Button Sections Number

\* Rich Text Button/Doc Template  
RTB-0000

Display Order

\* Type  
Table  
--None--  
Paragraph  
✓ Table

**HTML**


Png Image Relative URL ⓘ

HTML Content

Salesforce Sans 12 B I U

Cancel Save & New Save

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	Type
BS-0000	Table
Rich Text Button/Doc Template	Is Active
<a href="#">RTB-0000</a>	<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.

Search...

Star

Grid

Home

Help

Settings

Notifications

User

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

More

Button Section/Doc Section

BS-0002

Preview Document

Table Config & Style Builder

Update HTML Content Source

Clone

Rich Text Button/Doc Template

RTB-0001

Type

Table

Display Order

20

Is Active

☒

Related

Details

PSC Button Sections Number

BS-0002

Rich Text Button/Doc Template

RTB-0001

Display Order

20

HTML

Png Image Relative URL

Type

Table

Is Active

☒

Activity

Filters: All time • All activities • All types

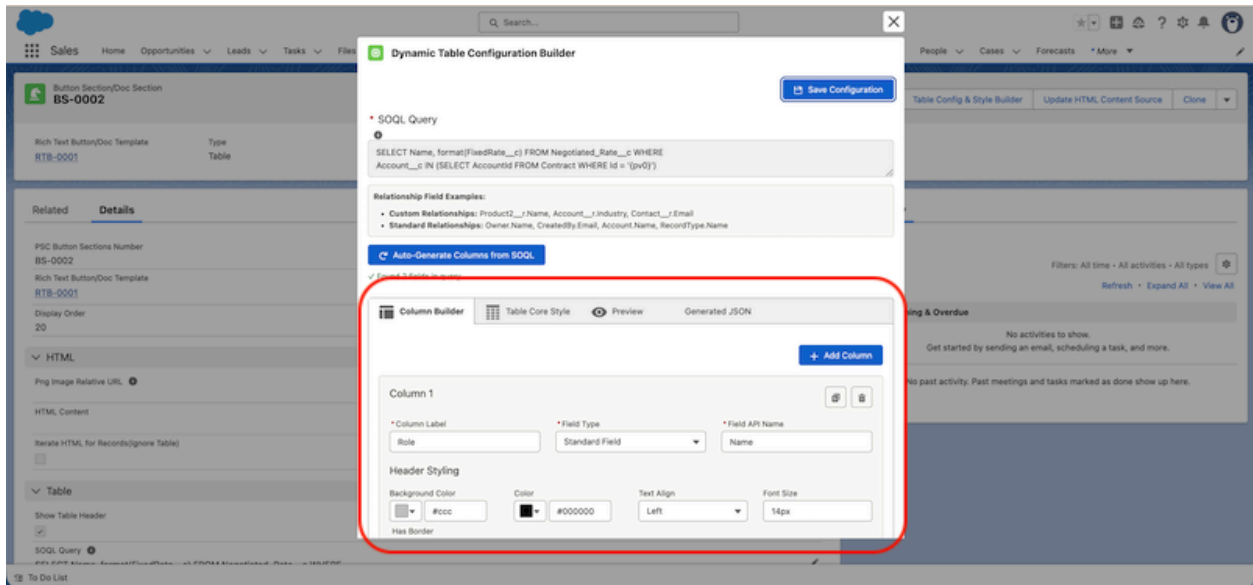
Refresh • Expand All • View All

Upcoming & Overdue

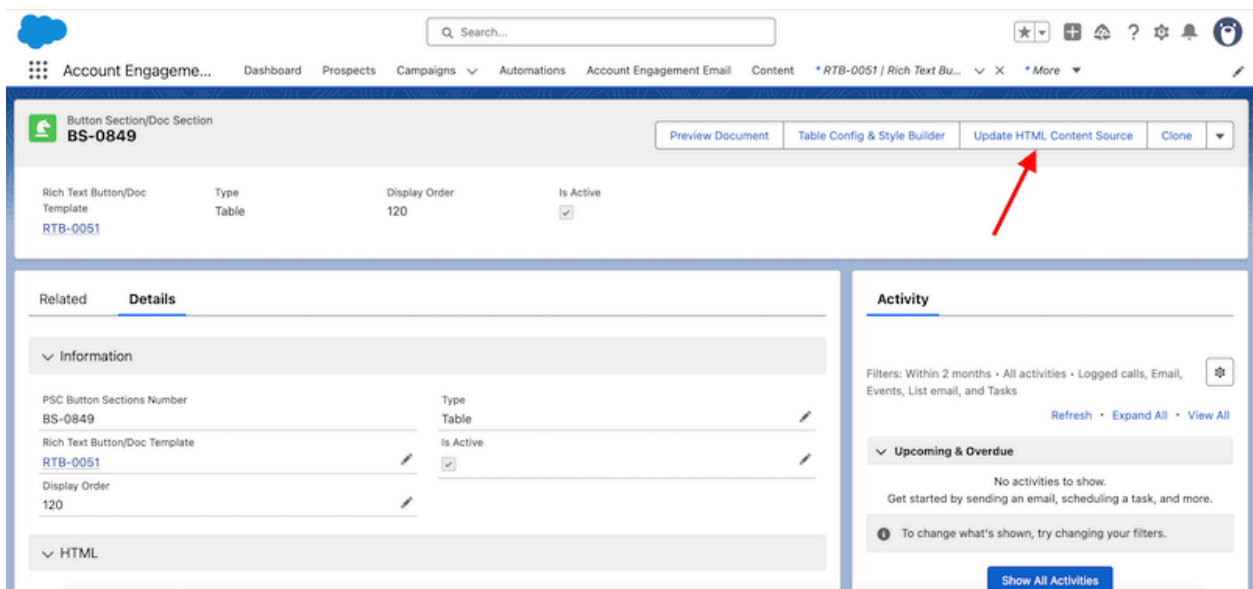
No activities to show.

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

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



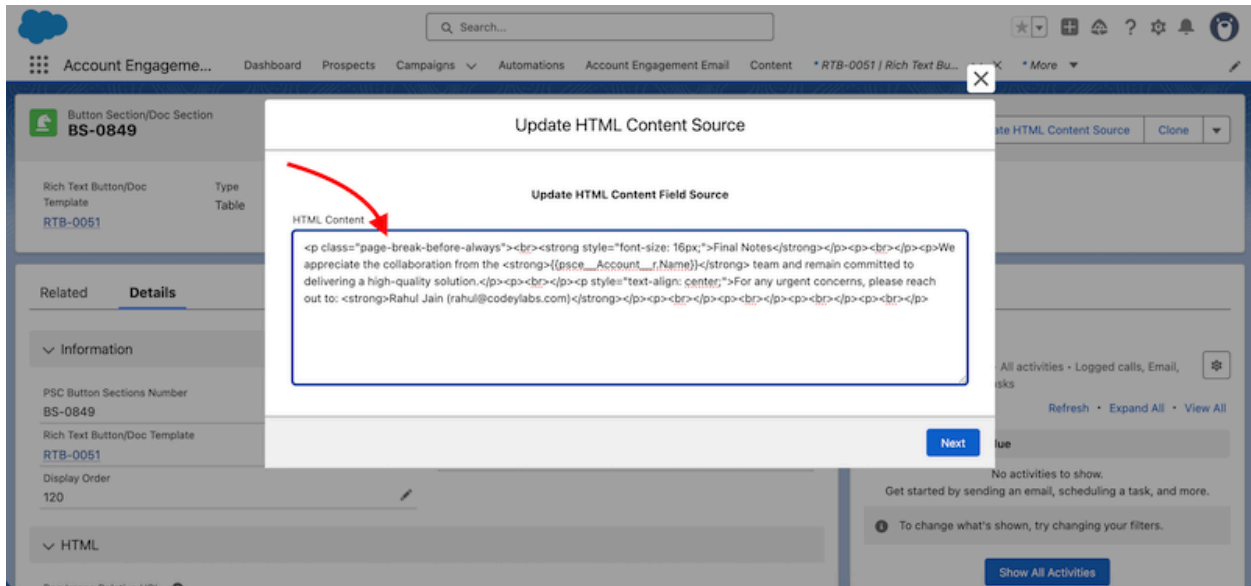
For applying html styles (not supported directly by the editor of HTML Content field), use **Update HTML Content Source** action.



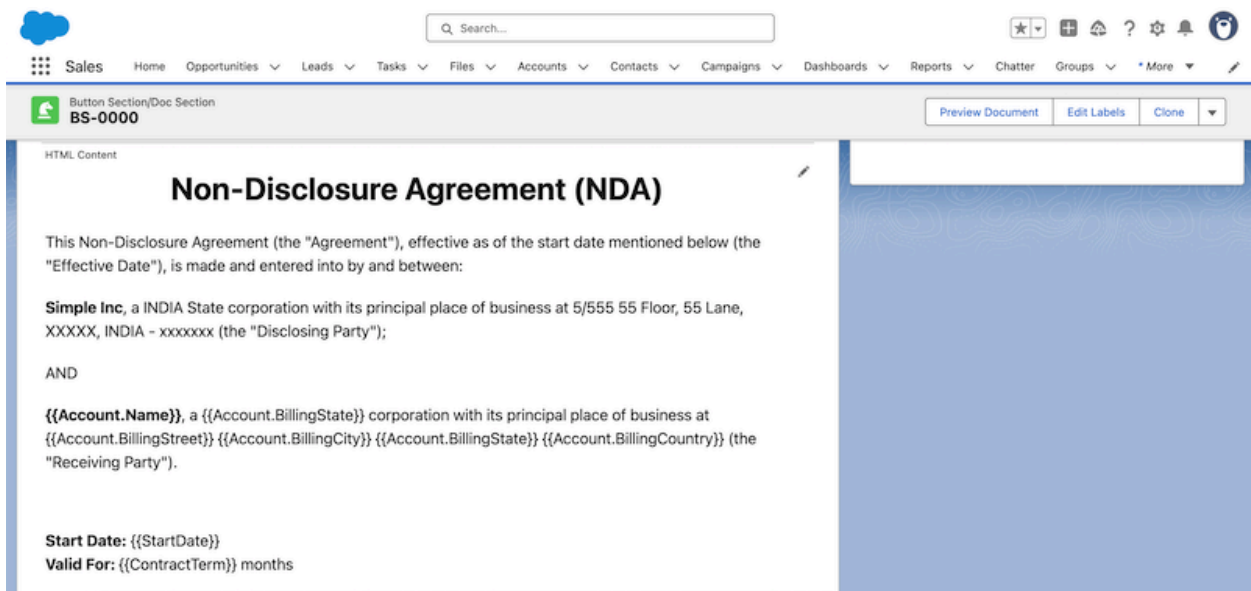
**For example**, you can use page break class to apply page break in the downloaded pdf document automatically.

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

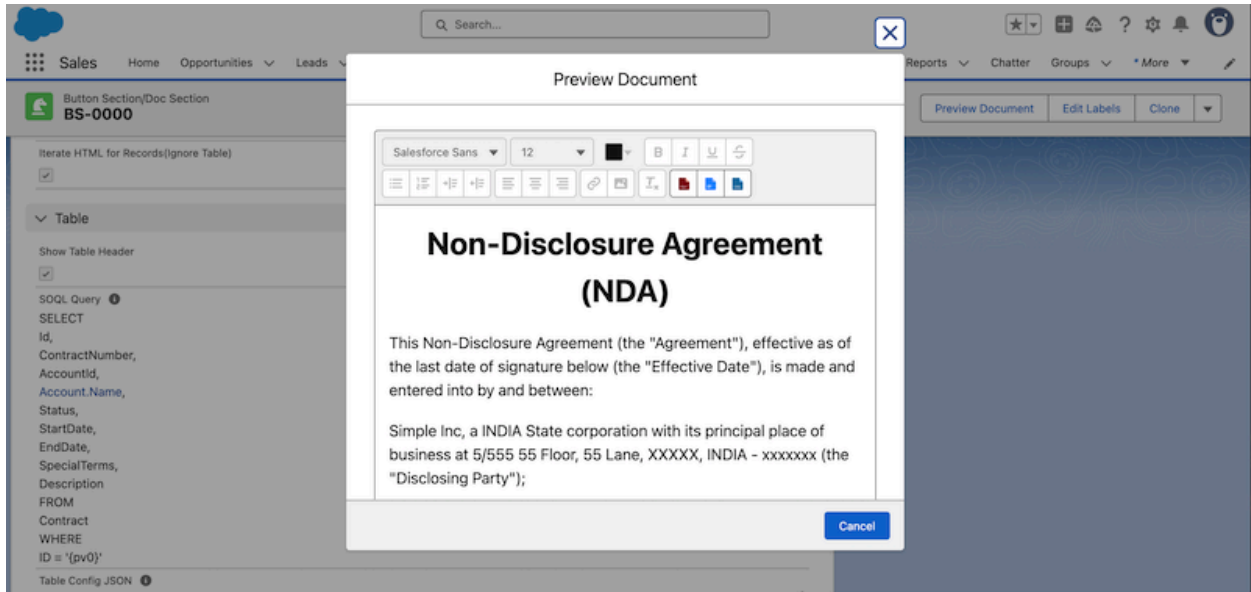
- page-break-before-always
- page-break-after-always



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







## 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:



★

+

🏠

?

⚙️

🔔

👤

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

**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:



★

+

🏠

?

⚙️

🔔

👤

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

**RECEIVING PARTY:**

{{Account.Name}}

[Signature2]

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

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

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

[date[Signed Date]:[Signature2]]

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

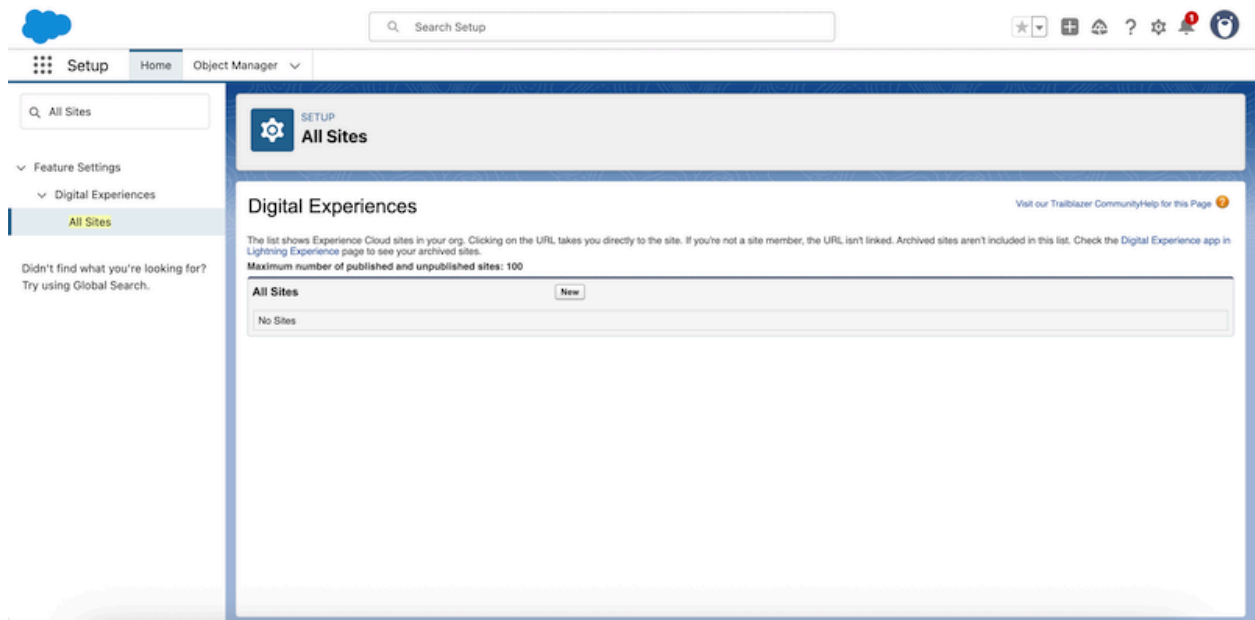
Iterate HTML for Records(ignore Table)

☒

# 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")

← Back Help & Training

**Enter a Name**

Not sure what to enter? Don't worry—you can always change it later.

Name  
E-Signature Portal

URL  
drtesttest.my.site.com / esign

**Create**

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

Home Preview Publish

**Pages**

Find a page...

Home

Create Record

Error

Generic Object

Login

Search

Service Not Available Availability

Too Many Requests Availability

**Properties**

SEO

Help people find your pages more easily by adding search engine optimization (SEO) properties. The text fields in this section are translatable. [Learn More](#)

Title Home

Description Page description that can appear in search engine results.

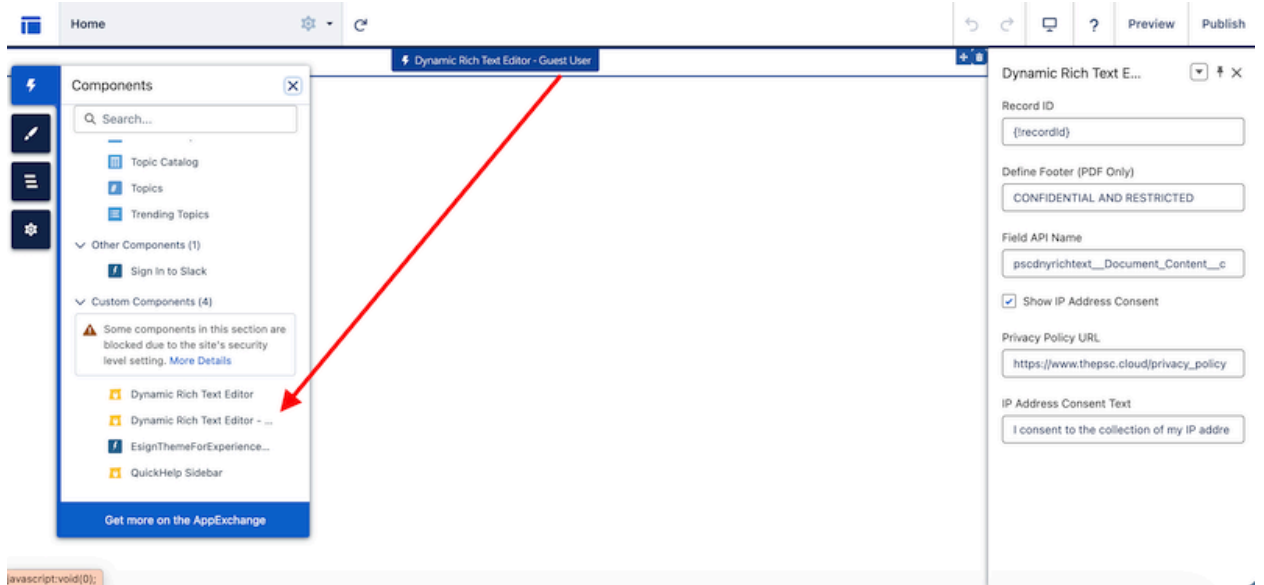
Head Tags Edit Head Tags

Layout

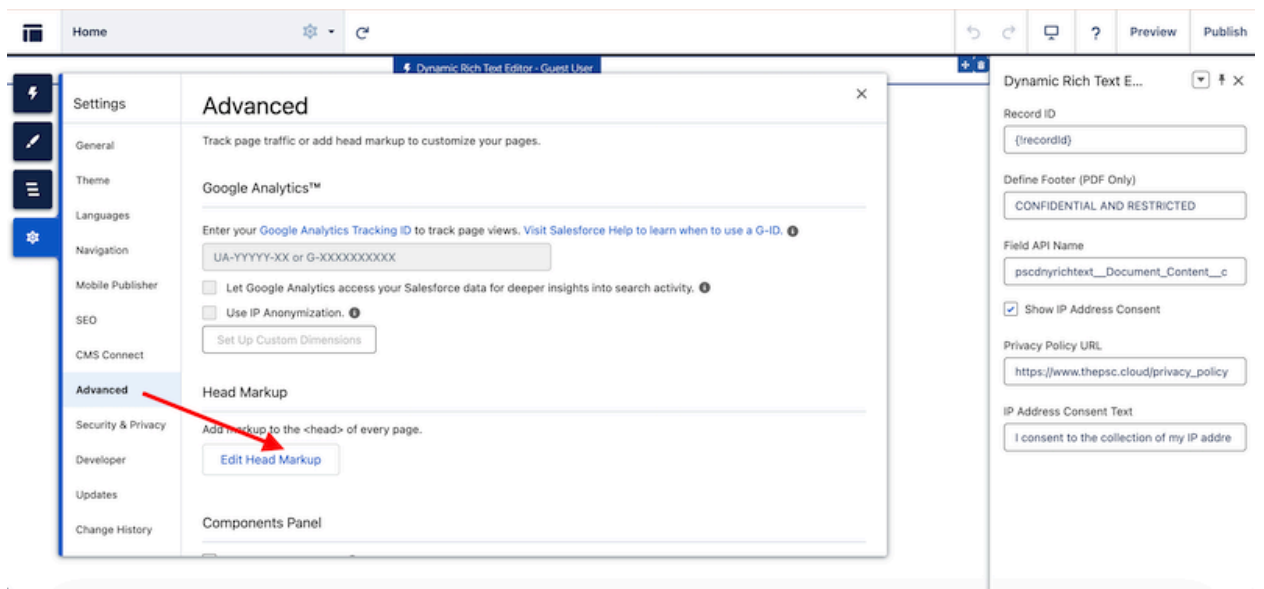
Content Layout EsignThemeForExperienceSite Change

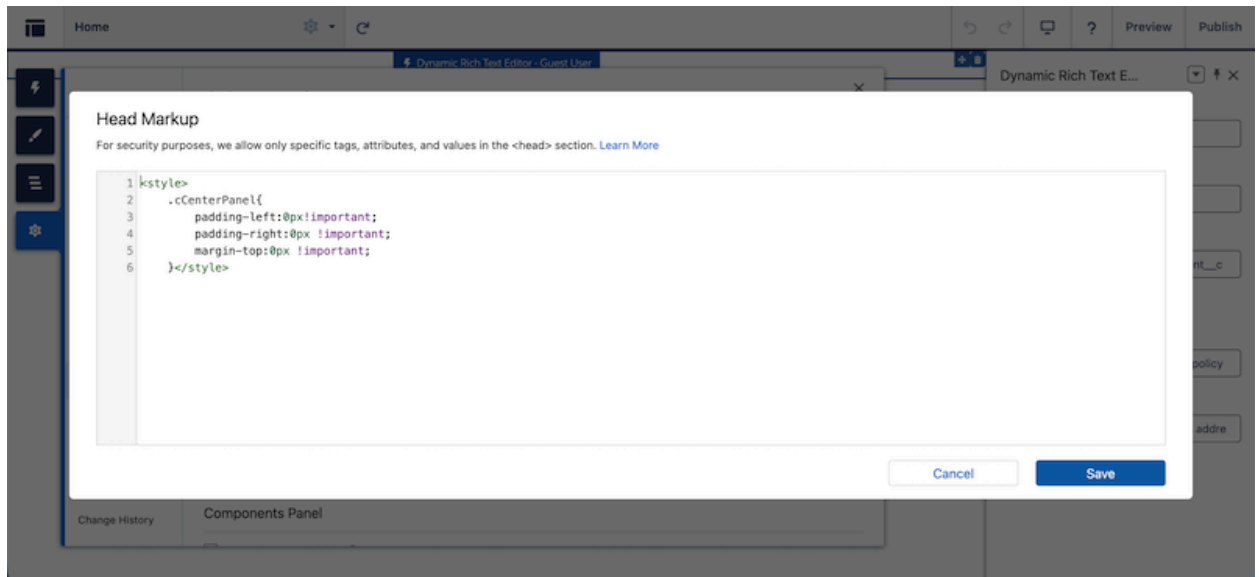
☐ Override the default theme layout for this page.

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.



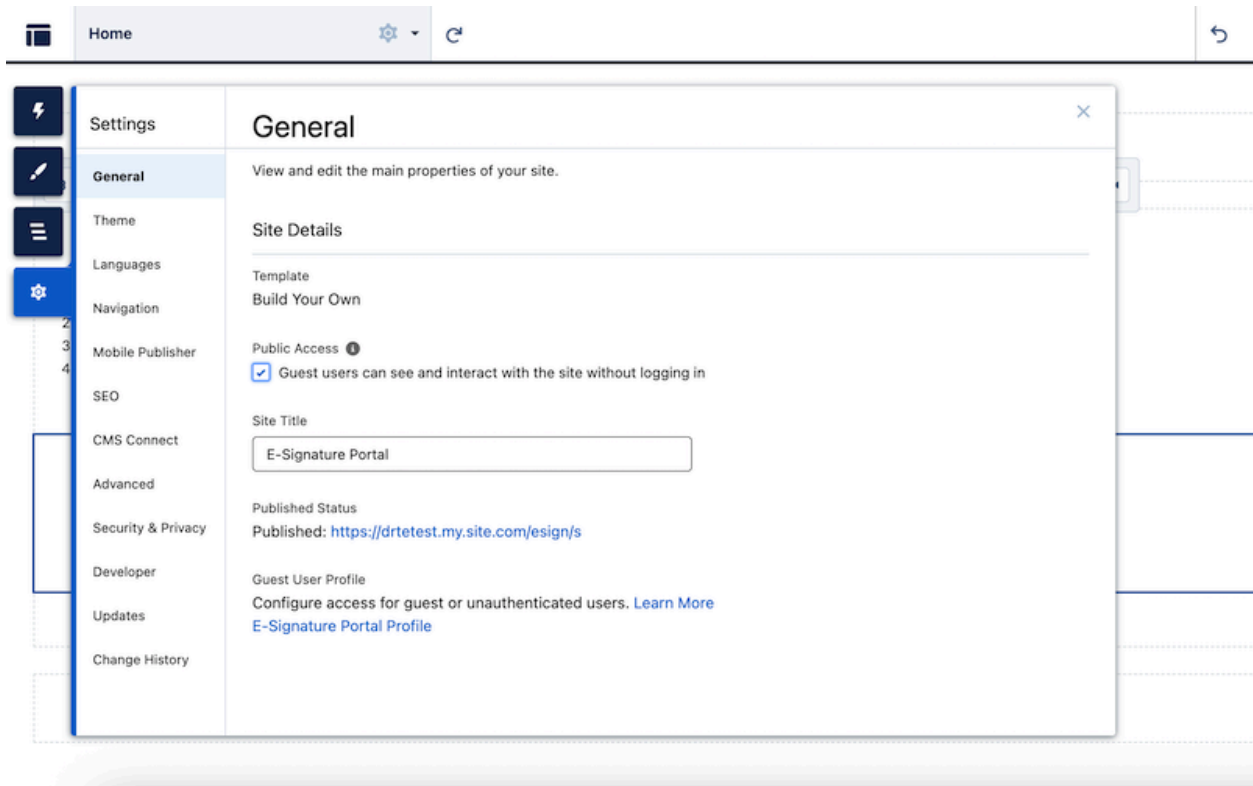


**<style>**

```
.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.

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (16) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Custom Permissions (0)

Profile Detail

EditView Users

Name	E-Signature Portal Profile	View Users
User License	Guest User License	Custom Profile
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

SaveCancel

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

AddRemove

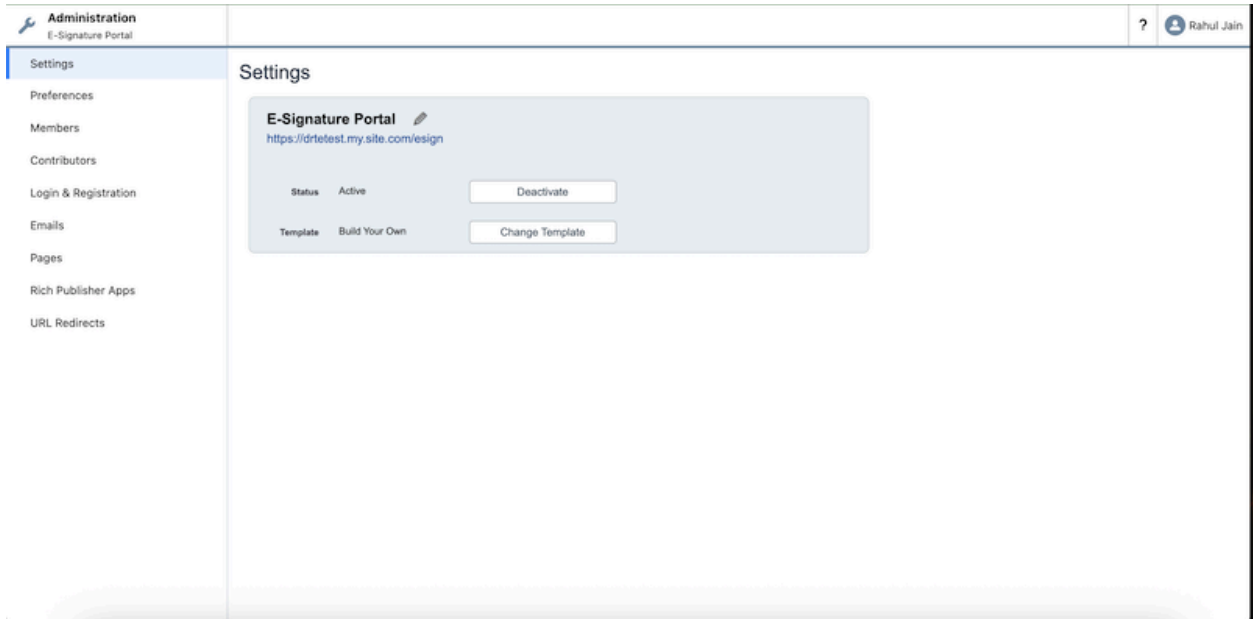
Enabled Permission Sets

DRTE Esign Guest User Permission Set

SaveCancel

## 3. Activate the site



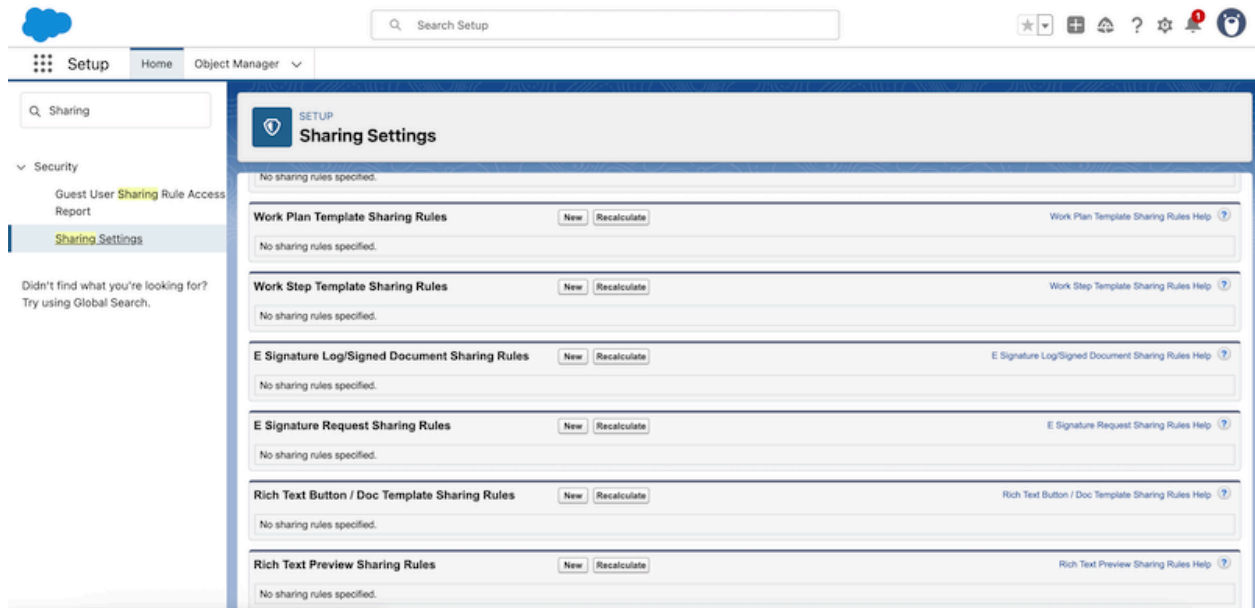


## Step 9: Configure Sharing Rules

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

**To create sharing rules:**

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

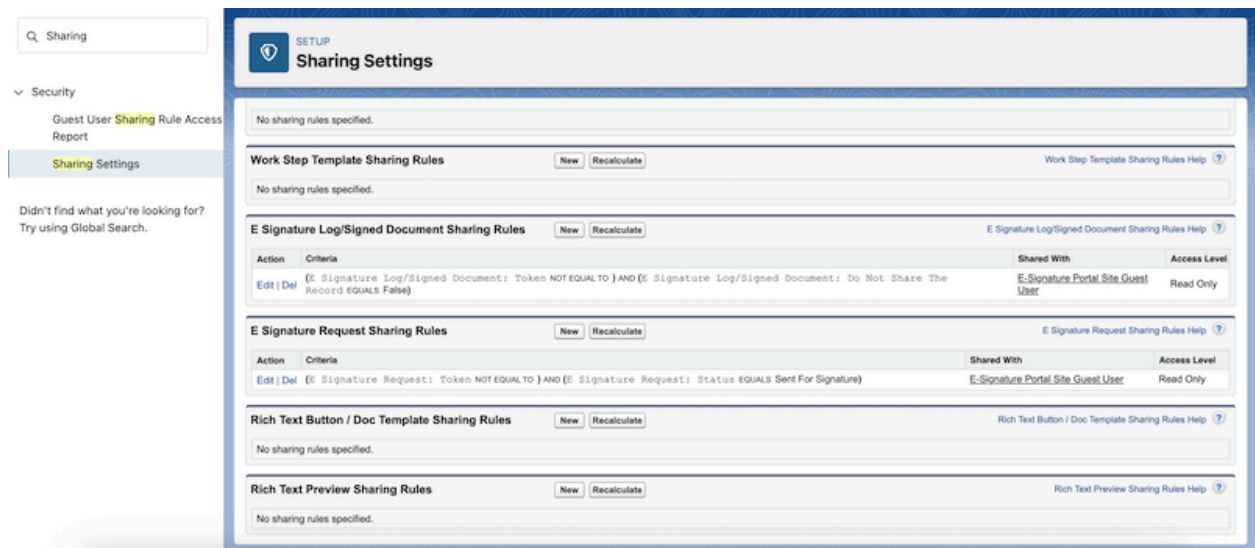


2. Create sharing rules for both:

- **E Signature Log/Signed Document**
- **E Signature Request**

3. For each object:

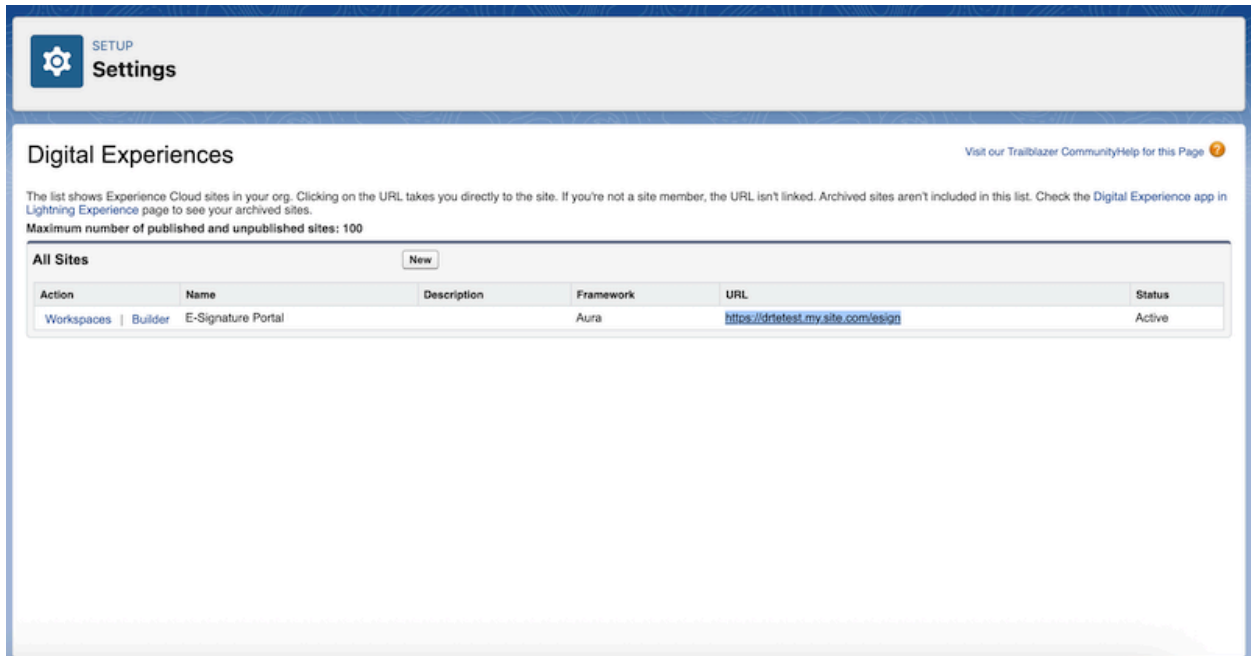
- Click **New**
- Set **Rule Type** to **"Guest User Access"**
- Define criteria (e.g., token not null and status is sent) **exactly shown in the screen shot below.**



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

### To configure the site URL:

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



**SETUP Settings**

### Digital Experiences

Visit our Trailblazer CommunityHelp for this Page

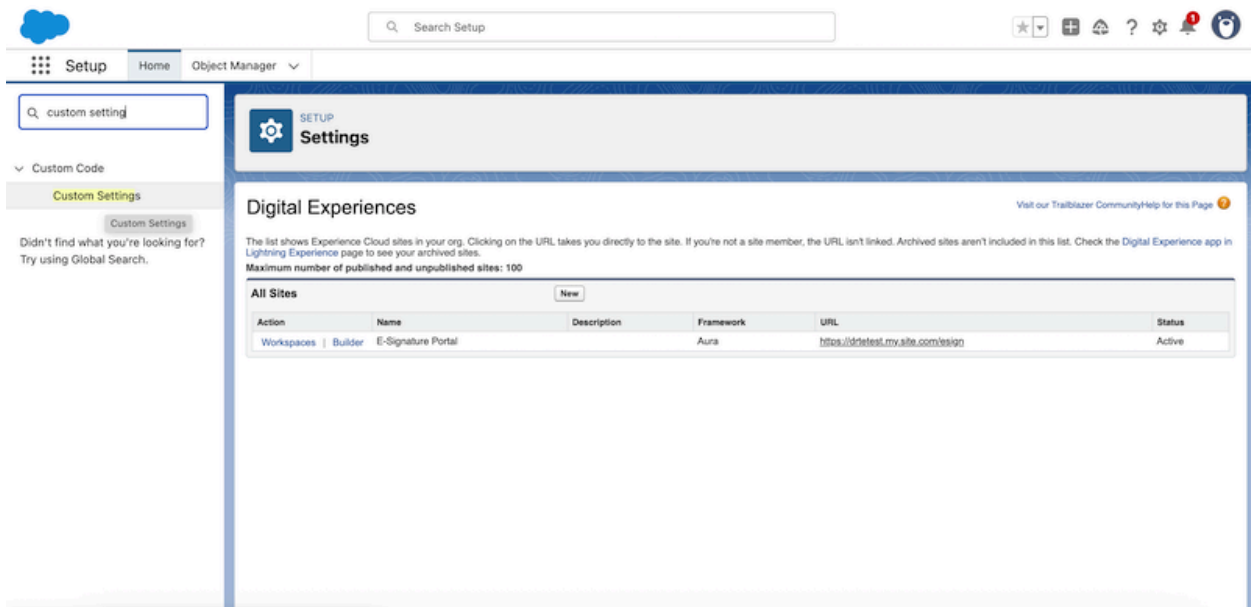
The list shows Experience Cloud sites in your org. Clicking on the URL takes you directly to the site. If you're not a site member, the URL isn't linked. Archived sites aren't included in this list. Check the Digital Experience app in Lightning Experience page to see your archived sites.

Maximum number of published and unpublished sites: 100

**All Sites** [New](#)

Action	Name	Description	Framework	URL	Status
<a href="#">Workspaces</a>   <a href="#">Builder</a>	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**



**Setup** Home Object Manager

Search Setup

custom setting

Custom Code

**Custom Settings**

Custom Settings

Didn't find what you're looking for?  
Try using Global Search.

**SETUP Settings**

### Digital Experiences

Visit our Trailblazer CommunityHelp for this Page

The list shows Experience Cloud sites in your org. Clicking on the URL takes you directly to the site. If you're not a site member, the URL isn't linked. Archived sites aren't included in this list. Check the Digital Experience app in Lightning Experience page to see your archived sites.

Maximum number of published and unpublished sites: 100

**All Sites** [New](#)

Action	Name	Description	Framework	URL	Status
<a href="#">Workspaces</a>   <a href="#">Builder</a>	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

The screenshot shows the 'Custom Settings' page in Salesforce Setup. The main heading is 'DRTE Settings Edit'. Below it, a note states: 'Provide values for the fields you created. This data is cached with the application.' There is a 'Help for this Page' link with a question mark icon. The form is titled 'Edit DRTE Settings' and includes 'Save' and 'Cancel' buttons. The 'DRTE Settings Information' section contains a table with the following fields:

Location	
Esign Guest Site URL	<input type="text" value="test.my.site.com/esign/s/"/>
endpoint (Deprecated) - No Use	<input type="text"/>
gptversion (Deprecated) - No Use	<input type="text"/>
key (Deprecated) - No Use	<input type="text"/>

A red exclamation mark icon and the text 'Required Information' are visible in the top right corner of the settings table.

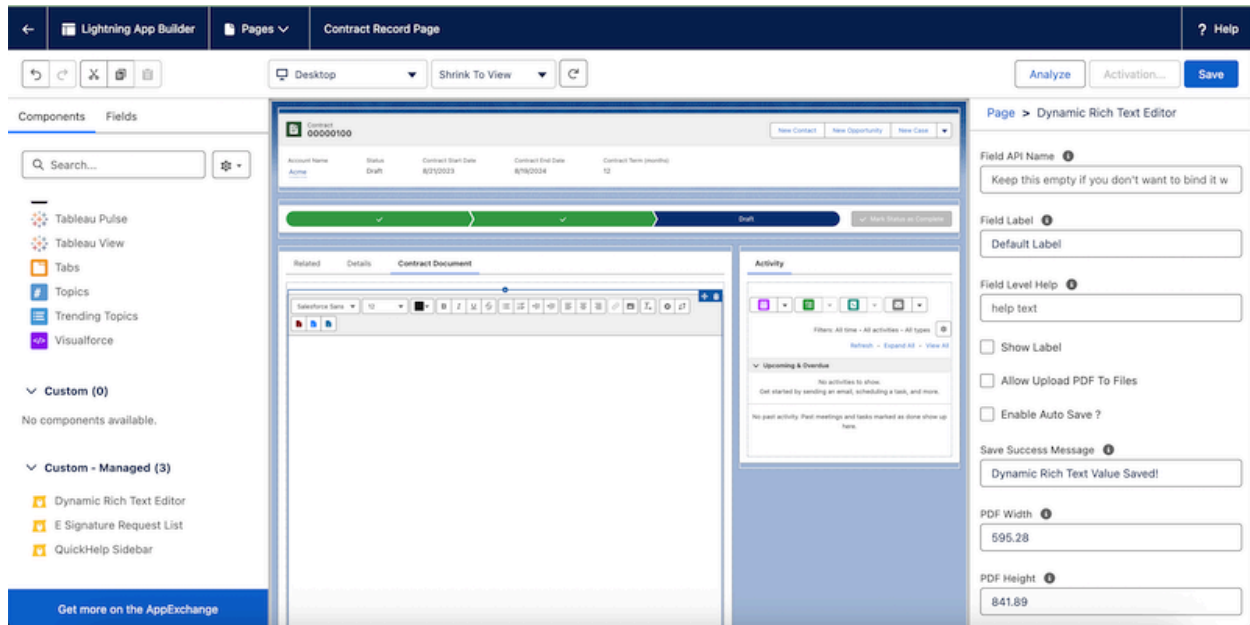
---

## Step 11: Add DRTE to Record Pages

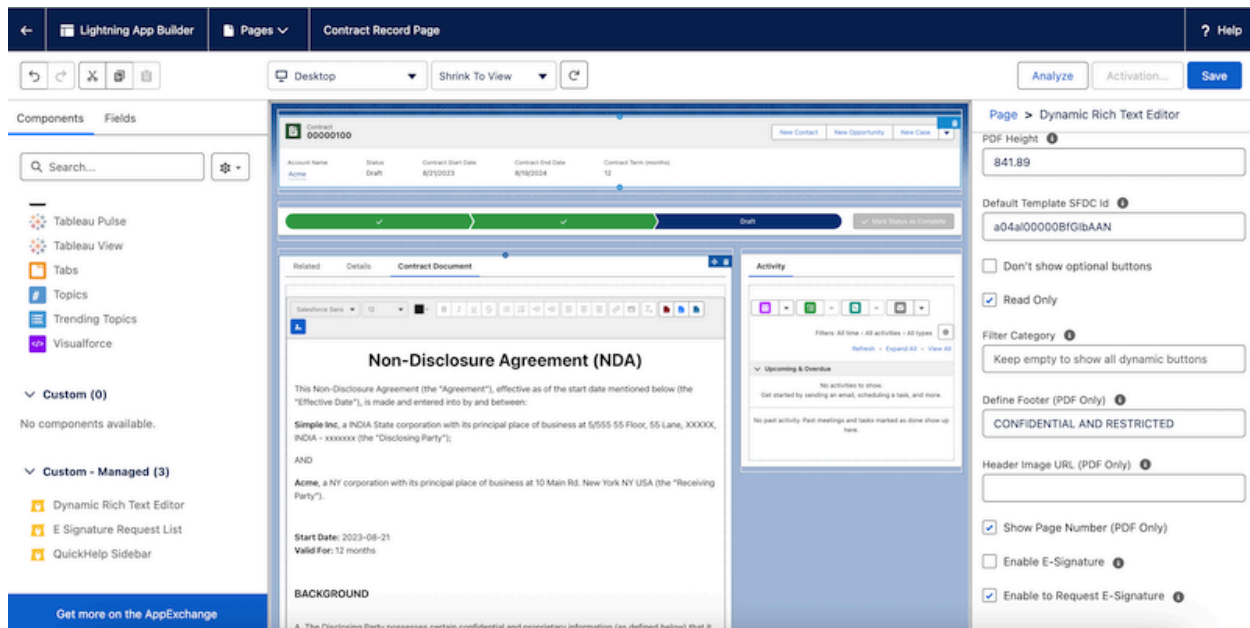
Configure the DRTE component on your object record pages (e.g., Contract or any SFDC object).

### To add DRTE components:

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

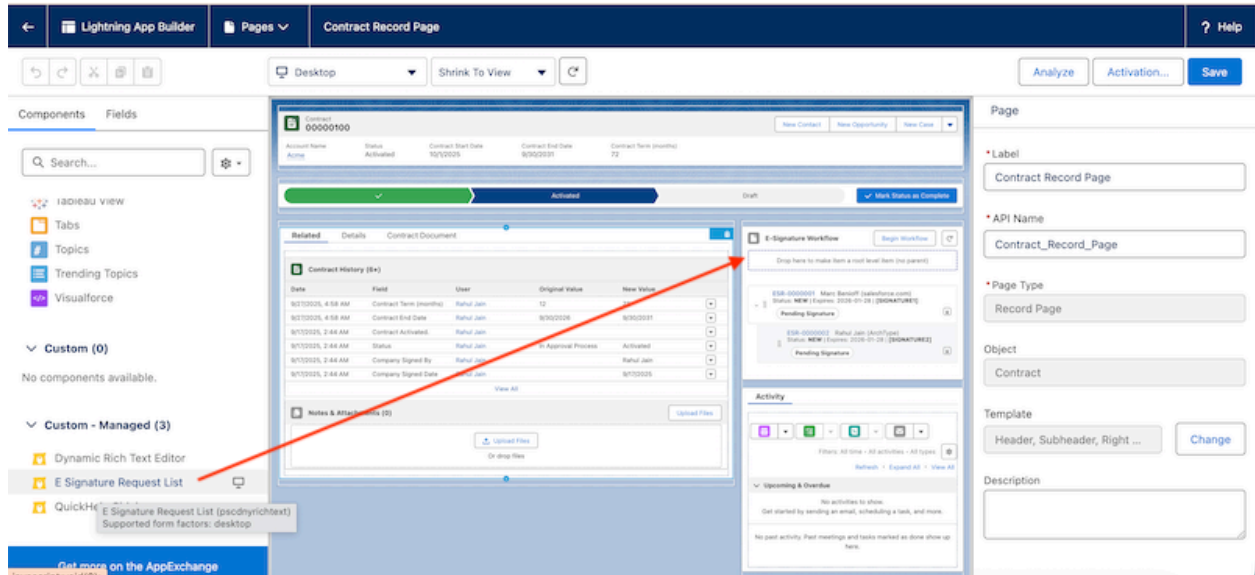


2. Add a new tab named **"Contract Document"**
3. Add the following components:
  - **Dynamic Rich Text Editor** (main area)
  - **E-Signature Request List** (right panel)

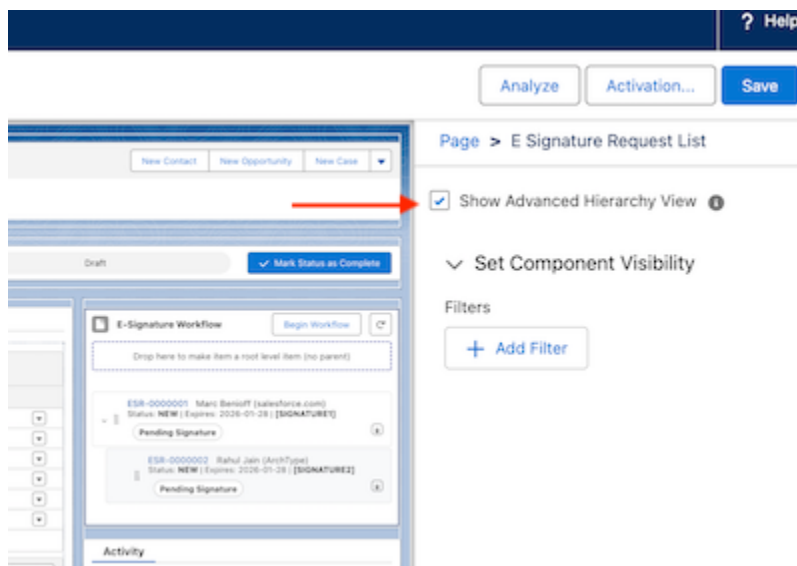


4. Configure component properties:
  - **Default Template SFDC Id:** Enter your template record ID
  - **Footer:** Optional footer text

- **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"

The screenshot shows the 'Details' tab of an email template configuration. The 'Information' section contains the following fields:

Field	Value
Email Template Name	DRTE (Cloned) Your PIN to Sign Document
Description	DRTE Your PIN to Sign Document
Made in Email Template Builder	<input type="checkbox"/>
Related Entity Type	E Signature Request Pin
	<small>older</small> DRTE Email Template

A red arrow points to the 'Related Entity Type' field, specifically to the 'older' text next to 'DRTE Email Template'.

The 'Message Content' section shows the subject 'Your PIN to Sign Document', HTML value, company logo, and a message body starting with 'Hello {{Recipient.Name}}', followed by a paragraph about receiving a document and a PIN, and a placeholder for the PIN: `{{pscdnyrichtext\_\_E\_Signature\_Request\_Pin\_\_c.pscdnyrichtext\_\_Pin\_\_c}}`.

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

The screenshot shows the 'Custom Settings' page with the 'DRTE Settings' section expanded. It contains a table of settings with the following data:

Setting	Value
Location	quotextestdrive
gptversion (Deprecated) - No Use	key (Deprecated) - No Use
Esign Guest Site URL	https://qxtestdrive.my.site.com/esign/s/
Company Footer Text For Email Template	Codeylabs.com, All Rights Reserved.
Company Support Email for Email Template	support@codeylabs.com
Send Signature Request Email Template Id	00Xa50000092fbOEAQ
Share PIN Email template Id	00Xa50000093ijBEAU
Auto Send eSign 2Signer Email_Template Id	00Xa50000092fbPEAQ
Company Header Image For Email Template	https://www.codeylabs.com/assets/img/codeylabs_logo.svg
Org Wide Email To Send Signature Request	info@codeylabs.com
Send Signed Document Email Template Id	00Xa50000092fbNEAQ

A red arrow points to the 'Share PIN Email template Id' field, which has the value '00Xa50000093ijBEAU'.

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)	
<a href="#">Howard Jones</a>	Is Expired <input type="checkbox"/>
Contact Name Howard Jones (Acme Inc)	Only After Signing <a href="#">ESR-0000003</a>
Request Name <a href="#">ESR-0000004</a>	Expiration Date 11/15/2025
Signature URL <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 [Signature2]
Request Sent On 10/16/2025, 12:44 AM	Document Name quotextestdrive_CustomerAgreement
Request Signed On 10/16/2025, 12:46 AM	
Require PIN <input type="checkbox"/>	
Auto Send To Next Signer (If Available) <input type="checkbox"/>	
Acknowledged and Viewed? 0	
First View Date and Time	
Last View Date and Time	

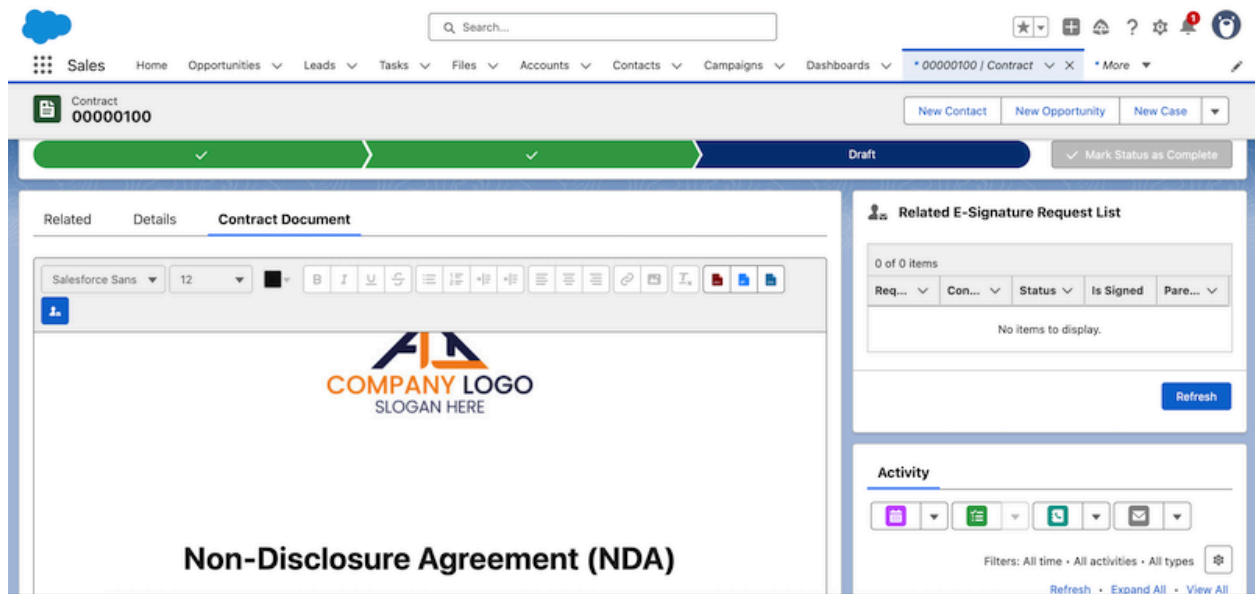


# End-User Workflow


## 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

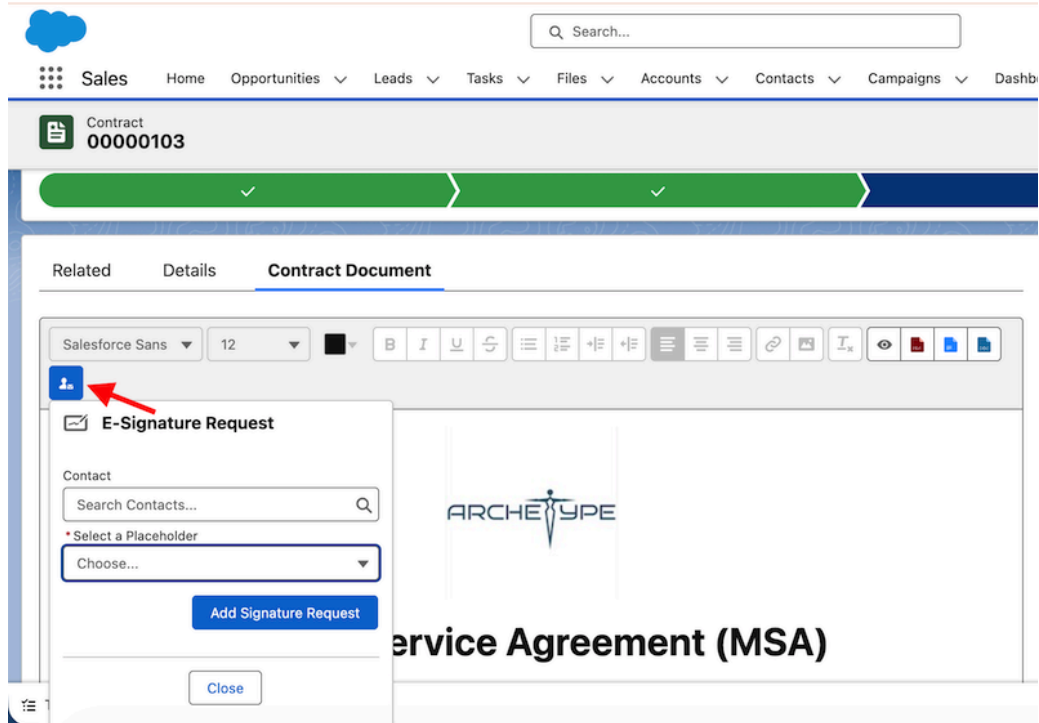
Contract Document

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

Contract 00000103

Related Details **Contract Document**

Salesforce Sans 12 B I U [Icons]

**E-Signature Request**

Contact: Fake Butler

Select a Placeholder: [Signature1]

Add Signature Request

Close

ARCHETYPE

Service Agreement (MSA)

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

Related Details **Contract Document**

Salesforce Sans 12 B I U [Icons]

ARCHETYPE

**E-Signature Workflow**

Drop here to make item a root level item (no parent)

ESR-0000001 Marc Benioff (salesforce.com)  
Status: NEW | Expires: 2026-01-28 | [SIGNATURE1]  
Pending Signature

ESR-0000002 Rahul Jain (ArchType)  
Status: NEW | Expires: 2026-01-28 | [SIGNATURE2]  
Pending Signature

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)

The screenshot displays the Salesforce Pre Sales Cloud interface. The main content area shows a 'Document (Primary Quote)' with a 'STATEMENT OF WORK' section. The sidebar on the right, titled 'PSC Quotes (1)', contains a section for 'E-Signature Workflow'. This section includes a 'Begin Workflow' button and a message: 'We have locked this document hierarchy as the e-signature workflow has begun.' Below this, there are two signer records:

ESR-0000003	Rahul Jain (Simple Inc)
Status: <b>COMPLETED</b>   Sent on: 2025-10-16 13:13   Signed on: 2025-10-16 13:14   [SIGNATURE1]	<b>Signed</b>

ESR-0000004	Howard Jones (Acme Inc)
Status: <b>COMPLETED</b>   Sent on: 2025-10-16 13:14   Signed on: 2025-10-16 13:16   [SIGNATURE2]	<b>Signed</b>

## Step 15: Configure Signing Order

### To set up sequential signing (Manually):

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

The screenshot shows the 'E Signature Request' form for 'Howard Jones (Acme)'. The form has several input fields: Token (c5d78b7b-7513-4bce-863b-89999730739a), Document Id (800a00000fVNckAAG), Contact (Howard Jones), Contact Name (Howard Jones (Acme)), Request Name (ESR-0000002), and Signature URL (https://drtettest.my.site.com/esign/s/?token=c5d78b7b-7513-4bce-863b-89999730739a). A dropdown menu for 'Only After Signing' is open, displaying a search bar and a list of recent E Signature Requests. The right sidebar shows filters and activity sections.

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.

Acknowledgement

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.

I acknowledge, please proceed

Just 4 sections to complete before signing

Please complete all required sections to proceed

You are signing as Marc Benioff (salesforce.com)

Progress

0% Complete

Documents

1 of 4 93c5d1e8-23e0-430f-b37d3-9ee36ed7f38b

Non-Disclosure Agreement (NDA)

Agreement to maintain confidentiality of information disclosed by the Company to the Recipient.

1/1/2020

2 of 4

Consent to the Collection of IP Address

I consent to the collection of my IP address for security purposes.

1/1/2020

3 of 4

Signature

Signature of Marc Benioff

1/1/2020

COMPANY LOGO

SLOGAN HERE

Non-Disclosure Agreement (NDA)

This Non-Disclosure Agreement (the "Agreement"), effective as of the start date mentioned below (the "Effective Date"),

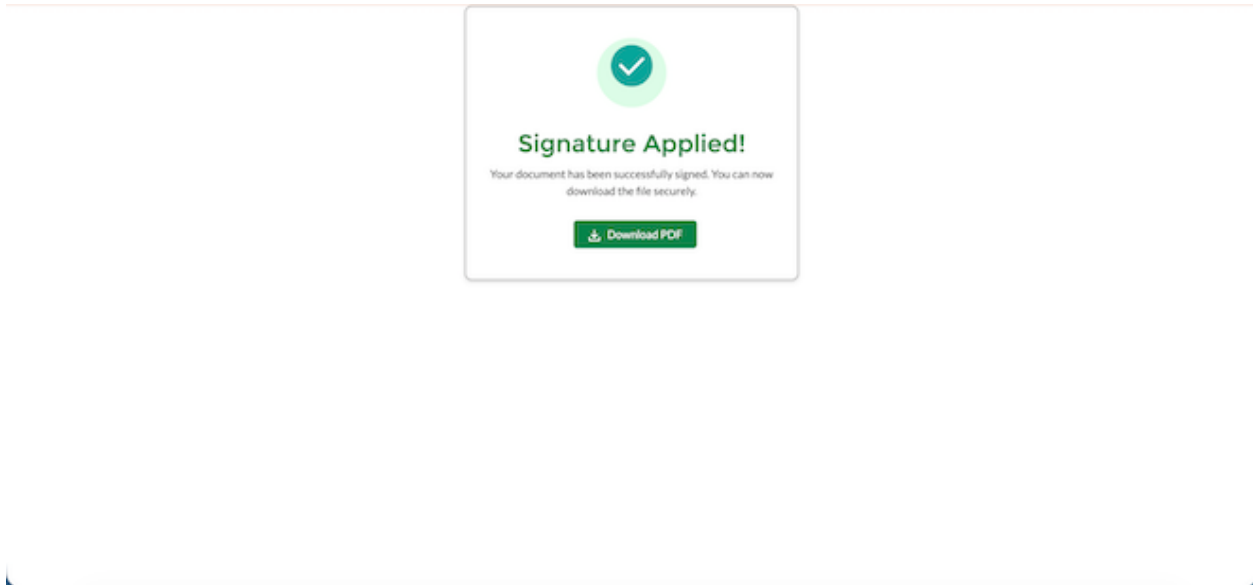
Estimated completion time: 4 minutes

☐ I consent to the collection of my IP address for security purposes. Read more. [Privacy Policy](#)

Confirm Signature







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

The screenshot displays the Salesforce interface for a contract document. The top navigation bar includes a search bar and various menu items like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, and Dashboards. The main content area is titled 'Contract Document' and shows a progress bar with 'Activated' status. Below this, there's a table of related records in the 'E-Signature Workflow' section.

Contract ID	Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
00000100	Acme	Activated	10/1/2025	9/30/2031	72

The 'E-Signature Workflow' section shows a list of signature requests:

- ESR-0000001** Marc Benioff (salesforce.com)  
Status: **COMPLETED** | Signed on: 2025-11-13 17:38 | [SIGNATURE1]  
**Signed**
- ESR-0000002** Rahul Jain (ArchType)  
Status: **READY TO SEND** | Expires: 2026-01-28 | [SIGNATURE2]  
**Pending Signature**

**Contract 00000100**

Account Name: Acme | Status: In Approval Process | Contract Start Date: 10/1/2025 | Contract End Date: 9/30/2026 | Contract Term (months): 12

Progress: In Approval Process (selected) | Activated | Draft | [Mark Status as Complete](#)

**Contract History (4)**

Date	Field	User	Original Value	New Value
9/17/2025, 1:53 AM	Contract Start Date	Rahul Jain	8/21/2023	10/1/2025
9/17/2025, 1:53 AM	Contract End Date	Rahul Jain	8/19/2024	9/30/2026
9/17/2025, 1:52 AM	Contract in Approval	Rahul Jain		
9/17/2025, 1:52 AM	Status	Rahul Jain	Draft	In Approval Process

[View All](#)

**Related E-Signature Request List**

2 of 2 items

Req...	Con...	Status	Is Signed	Pare...
ESR-0000001	Marc Benioff (salesforce.com)	Completed	✓	
ESR-0000002	Howard Jones (Acme)	Ready To Send		ESR-0000001

[Refresh](#)

5. Repeat for subsequent signers (manually)

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

Related | **Details** | Requested Document

**Information**

E Signature Request Name: ESR-0000002

Token: c5d78b7b-7513-4bce-863b-89999730739a

\*Document ID: 800a00000fVnckAAG

Contact: Howard Jones

Contact Name: Howard Jones (Acme)

*This field is calculated upon save*

Owner: Rahul Jain

\*Status: Ready To Send (selected)

Options: --None--, New, Ready To Send, Sent For Signature, Completed, Cancelled

[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.

## Step 17: Mobile Signing Experience

### Mobile signing workflow:

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



 You are signing as Rahul Jain (ArchType)

Progress  
75%  
Complete


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

RECEIVING PARTY:  
**Acme**

Signature Pad

Signature Drawing

Name Signing

Draw signature here:  


By: \_\_\_\_\_  
Name: \_\_\_\_\_  
Title: \_\_\_\_\_

Apply Signature

Clear

Close

2025-11-14

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

Estimated completion time: 4 minutes

Confirm Signature

☐ I consent to the collection of my IP address for security purposes. [Read more.](#) [Privacy Policy](#)

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

 You are signing as **Rahul Jain (ArchType)**

Progress  
100%  
Complete

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

RECEIVING PARTY:

Acme

DATE Signed By: \_\_\_\_\_



2025-11-13 12:19 GMT

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

Name:

Title:

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

 Estimated completion time: 4 minutes

 Confirm Signature

☒ I consent to the collection of my IP address for security purposes. [Read more.](#)

[Privacy Policy](#)

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

Progress 100% Complete

You are signing as Rahul Jain (ArchType)

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

RECEIVING PARTY:

Acme

2025 Signed By: \_\_\_\_\_

**Confirm and Sign Document**

Once you save this signature, it will be permanently applied to this document and cannot be changed. Are you sure you want to proceed?

Cancel OK

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

Name: \_\_\_\_\_

Title: \_\_\_\_\_


2025-11-14

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

Estimated completion time: 4 minutes

Confirm Signature

☒ I consent to the collection of my IP address for security purposes. [Read more.](#) [Privacy Policy](#)





**Signature Applied!**

Your document has been successfully signed. You can now download the file securely.

[Download PDF](#)

---

## Step 18: Finalize and Store Documents

 **E-Signature Workflow** [Begin Workflow](#) 

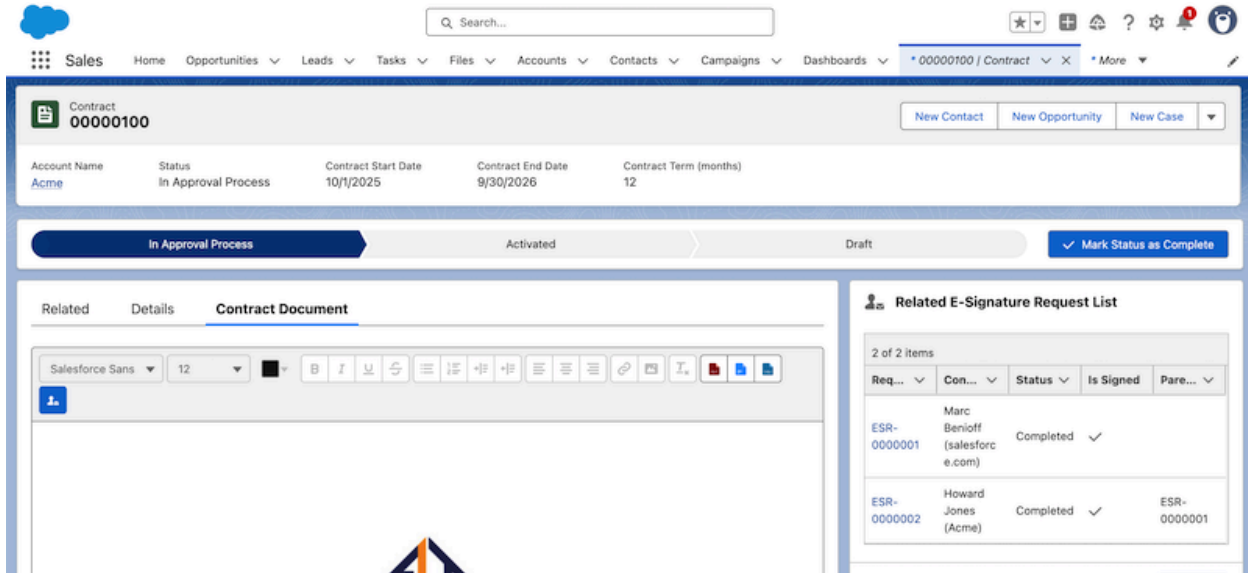
We have locked this document hierarchy as the e-signature workflow has begun.

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

**ESR-0000002** Rahul Jain (ArchType)  
Status: **COMPLETED** | Signed on: 2025-11-13 17:50 |  
[SIGNATURE2]  
**Signed**

## To complete the process:

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

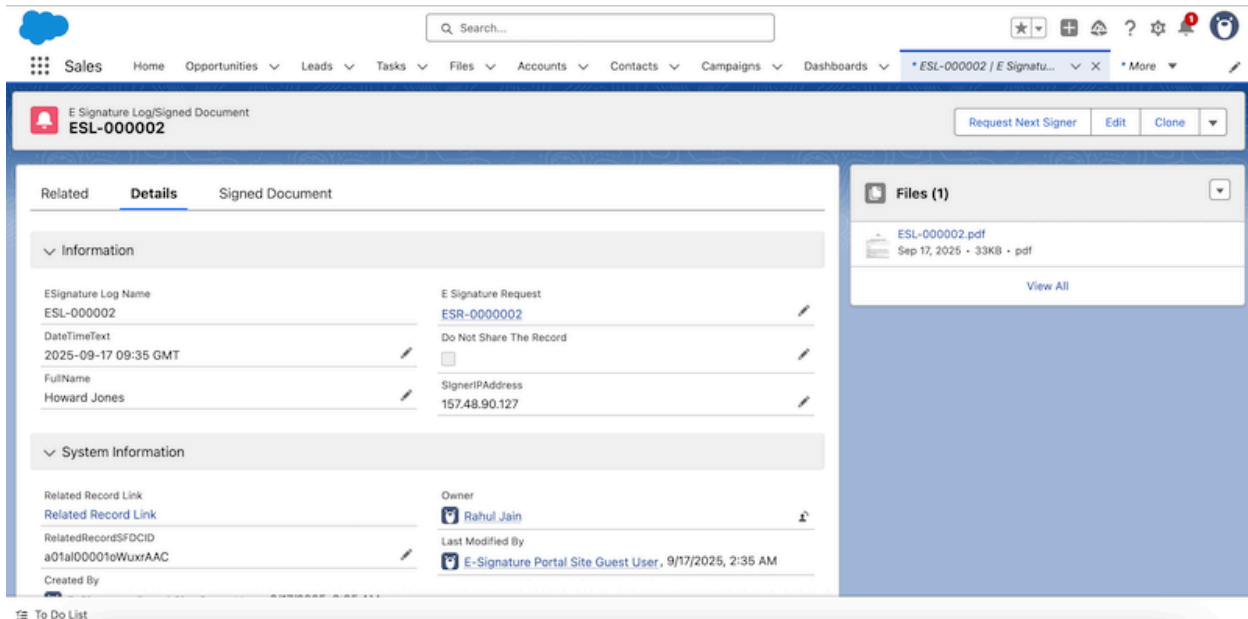


The screenshot shows the Salesforce interface for a Contract record with ID 00000100. The top navigation bar includes a search bar and various tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, and Dashboards. The contract details section shows the Account Name as 'Acme', Status as 'In Approval Process', Contract Start Date as '10/1/2025', Contract End Date as '9/30/2026', and Contract Term (months) as '12'. Below this, there are tabs for 'In Approval Process', 'Activated', and 'Draft', with a 'Mark Status as Complete' button. The main content area is divided into 'Related' and 'Details' sections. The 'Contract Document' tab is active, showing a document viewer with a toolbar. To the right, the 'Related E-Signature Request List' is displayed, showing 2 of 2 items:

Req...	Con...	Status	Is Signed	Parent...
ESR-0000001	Marc Benioff (salesforce.com)	Completed	✓	
ESR-0000002	Howard Jones (Acme)	Completed	✓	ESR-0000001

2. Verify all signature details:

- Date and time
- IP address
- Full name



The screenshot shows the Salesforce interface for an E-Signature Log record with ID ESL-000002. The top navigation bar is similar to the previous screenshot. The record details section shows the E-Signature Log Name as 'ESL-000002'. Below this, there are tabs for 'Related', 'Details', and 'Signed Document'. The 'Details' tab is active, showing a table with signature details:

Information	E-Signature Request
ESignature Log Name ESL-000002	E-Signature Request <a href="#">ESR-0000002</a>
Date/Time Text 2025-09-17 09:35 GMT	Do Not Share The Record <input type="checkbox"/>
Full Name Howard Jones	Signer IP Address 157.48.90.127

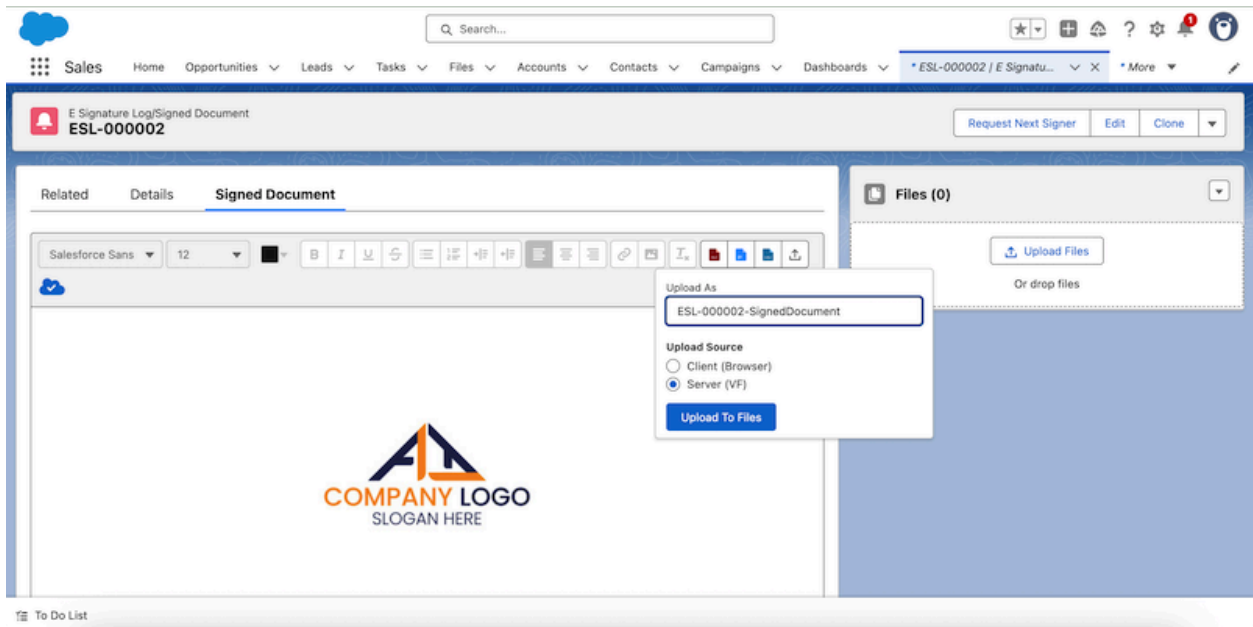
Below the signature details, there is a 'System Information' section with the following details:

System Information	Owner
Related Record Link <a href="#">Related Record Link</a>	<a href="#">Rahul Jain</a>
Related Record SFDC ID a01a00001wuxAAC	Last Modified By <a href="#">E-Signature Portal Site Guest User</a> , 9/17/2025, 2:35 AM
Created By	

On the right side, the 'Files (1)' section shows a file named 'ESL-000002.pdf' with a size of 33KB, dated Sep 17, 2025. A 'View All' link is provided below the file list.

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



**E-Signature Log/Signed Document**  
**ESL-000015**

Send Signed Document Request Next Signer Edit

**Related Details Signed Document**

**Information**

E-Signature Log Name	ESL-000015	E-Signature Request	ESR-0000002
Date/Time/Text	2025-11-13 12:19 GMT	Do Not Share The Record	<input checked="" type="checkbox"/>
Full Name		Signer IP Address	42.105.237.149
Status	New		

**System Information**

Related Record Link	Related Record Link	Owner	Rahul Jain
Related Record ID	a01a000010WuxAAC	Last Modified By	Rahul Jain, 11/13/2025, 4:31 AM
Created By	E-Signature Portal Site Guest User, 11/13/2025, 4:20 AM		

**Files (1)**

c5d78b7b-7513-4bce-863b-89999730739a.pdf  
Nov 13, 2025 • 36KB • pdf

View All


To Do List

**ESL-000002.pdf**

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

**DISCLOSING PARTY:** Download Share Public Link

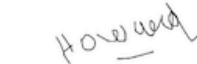
**Simple Inc**

  
Mark Benioff 2025-09-17 09:21 GMT

By: \_\_\_\_\_  
Name: Mark  
Title: CEO, Salesforce.com  
Date: 2025-09-17

**RECEIVING PARTY:**

**Acme**

  
Howard Jones 2025-09-17 09:35 GMT

By: \_\_\_\_\_  
Name: Howard  
Title: CEO and Founder

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:

The screenshot displays the 'E Signature Request' record for 'Rahul Jain (ArchType)'. The record is divided into several sections: 'DOCUMENT INFO', 'DETAILS', 'SYSTEM INFORMATION', and 'ACTIVITIES'. In the 'DETAILS' section, the 'Auto Send To Next Signer (if Available)' checkbox is checked, indicated by a red arrow. Other details include 'Request Name: ESR-0000002', 'Signature URL: https://drtettest.my.site.com/esign/s/?token=c5d78b7b-7513-4bce-863b-89999730739a', 'Request Signed On: 11/13/2025, 4:20 AM', and 'Document Name: Order Document Signed By Rahul Jain'. The 'SYSTEM INFORMATION' section shows 'Related Record Link' and 'Created By: Rahul Jain, 9/17/2025, 2:03 AM'. The 'ACTIVITIES' section on the right shows a list of actions, including 'Action Complete: Your Signed ...' and 'Action Required: Please e-Sign Yo...'. The 'Upcoming & Overdue' section shows 'No activities to show.'

## 2. Enhanced Security with PIN

Add PIN-based authentication for additional security:

The screenshot displays the 'E Signature Request' record for 'Rahul Jain (ArchType)'. The record is divided into several sections: 'DOCUMENT INFO', 'DETAILS', 'SYSTEM INFORMATION', and 'ACTIVITIES'. In the 'DETAILS' section, the 'Require PIN' checkbox is checked, indicated by a red arrow. Other details include 'Request Name: ESR-0000002', 'Signature URL: https://drtettest.my.site.com/esign/s/?token=c5d78b7b-7513-4bce-863b-89999730739a', 'Request Signed On: 11/13/2025, 4:20 AM', and 'Document Name: Order Document Signed By Rahul Jain'. The 'SYSTEM INFORMATION' section shows 'Related Record Link' and 'Created By: Rahul Jain, 9/17/2025, 2:03 AM'. The 'ACTIVITIES' section on the right shows a list of actions, including 'Action Complete: Your Signed ...' and 'Action Required: Please e-Sign Yo...'. The 'Upcoming & Overdue' section shows 'No activities to show.'

### 3. Document View Tracking

Track when signers view the document:

The screenshot displays the E Signature Request interface for Rahul Jain (ArchType). The interface includes a navigation bar with options like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, and Dashboards. The main content area shows document details, system information, and a list of activities. A red circle highlights the 'First View Date and Time' and 'Last View Date and Time' fields, which are 11/13/2025, 3:31 AM and 11/13/2025, 4:18 AM respectively. A red arrow points to the 'Acknowledged and Viewed?' field, which shows a value of 2.

Field	Value
Document ID	800a100000fVNckAAG
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	
Auto Send To Next Signer (If Available)	<input checked="" type="checkbox"/>
Require PIN	<input checked="" type="checkbox"/>
Acknowledged and Viewed?	2
First View Date and Time	11/13/2025, 3:31 AM
Last View Date and Time	11/13/2025, 4:18 AM

### 4. Custom File Names

Apply custom file names to signed documents:

The screenshot displays the E Signature Request interface for Rahul Jain (ArchType). The interface includes a navigation bar with options like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, and Dashboard. The main content area shows document details, system information, and a list of activities. A red circle highlights the 'Document Name' field, which is 'Order Document Signed By Rahul Jain'. A red arrow points to the 'Acknowledged and Viewed?' field, which shows a value of 2.

Field	Value
Document Id	800a100000fVNckAAG
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	
Auto Send To Next Signer (If Available)	<input checked="" type="checkbox"/>
Require PIN	<input checked="" type="checkbox"/>
Acknowledged and Viewed?	2
Document Name	Order Document Signed By Rahul Jain



# 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.

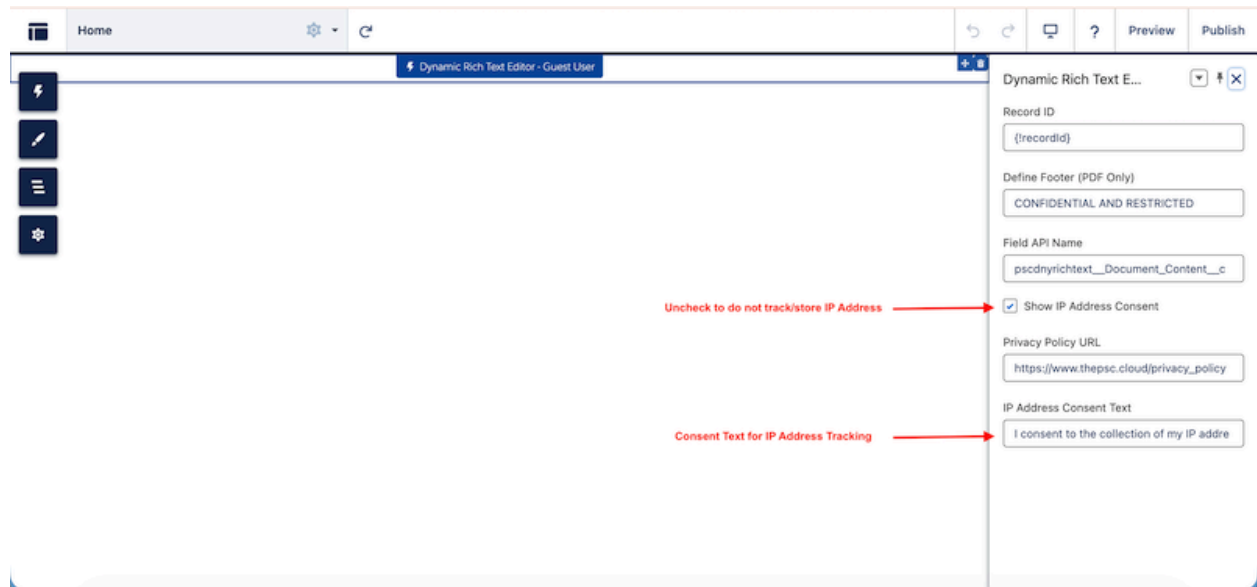
**Solution:** Verify that the object API name is listed in **DRTE Allowed Objects** records. Only objects in this list can be queried.

---

## 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: `pscdnyrichtext__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: `pscdnyrichtext__GenerateDocumentAction`
  - Generates PDF and saves to Files without editor

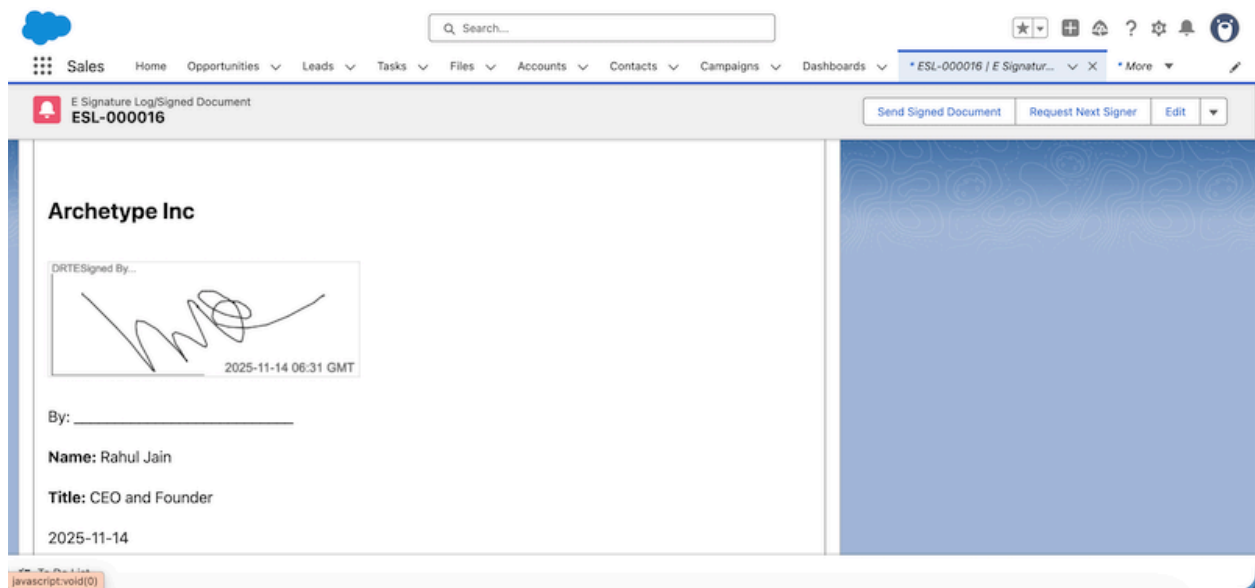
### 3. Upload Signed Document from E-Signature Log

- Apex: `pscdnyrichtext__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.

The screenshot shows the 'E Signature Log/Signed Document' interface for document 'ESL-000016'. The document content includes the following placeholders:

- [Signature2]
- By: \_\_\_\_\_
- Name:** [text[Authorized Signatory Name]:[Signature2]]
- Title:** [text[Authorized Signatory Title]:[Signature2]]
- [date[Signed Date]:[Signature2]]
- Date:** \_\_\_\_\_

Navigation buttons at the top right include 'Send Signed Document', 'Request Next Signer', and 'Edit'. A 'To Do List' icon is visible at the bottom left.

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.

The screenshot shows the same interface as above, but with the 'Request Next Signer' modal open. The modal contains the following fields:

- Contact:** A dropdown menu showing 'Fake Butler'.
- \* Select a Placeholder:** A dropdown menu showing '[Signature2]'.
- Add Signature Request:** A blue button at the bottom right of the modal.

The background document content is partially visible behind the modal.

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

The screenshot shows the 'E Signature Request' form for 'Fake Butler (Fake Account)'. The form is divided into two main sections: 'Request Details' on the left and 'Signatures' on the right. The 'Request Details' section includes fields for 'E Signature Request Name' (ESR-0000014), 'Token' (1f1fc61b-7813-4484-9744-02ba3e187055), 'Document Id' (800a100000fivPBAAY), 'Contact' (Fake Butler), 'Contact Name' (Fake Butler (Fake Account)), 'Request Name' (ESR-0000014), and 'Signature URL'. The 'Signatures' section includes 'Owner' (Rahul Jain), 'Status' (New), 'Is Signed' (checkbox), 'Is Expired' (checkbox), 'Only After Signing' (checkbox), 'Expiration Date' (12/13/2025), and 'Signature Placeholder' ([Signature2]). A 'Send Signature Request' button is located at the top right of the form. Below the form, there is a 'To Do List' section.

Notice the correct linking now on the document record page.

The screenshot shows the 'Contract Document' record page for 'Contract 00000102'. The page has a header with 'Contract 00000102' and a 'New Case' button. The main content area is divided into two sections: 'Contract Document' on the left and 'E-Signature Workflow' on the right. The 'Contract Document' section shows a document titled 'Master Service Agreement (MSA)' with the 'ARCHE TYPE' logo. The 'E-Signature Workflow' section shows a list of signatories: 'Rahul Jain (ArchType)' with status 'COMPLETED' and 'Fake Butler (Fake Account)' with status 'COMPLETED'. The 'Activity' section is also visible at the bottom.

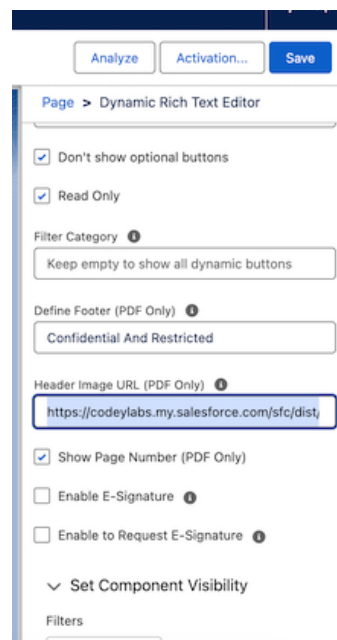
**Question:** For Invoices or any other financial transactional objects, can we use a custom company header template on the generated PDF within DRTE (Dynamic Rich Text Engine)?

**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.



The screenshot shows the 'Dynamic Rich Text Editor' configuration page in Salesforce. At the top, there are three buttons: 'Analyze', 'Activation...', and 'Save'. Below the buttons, the page title is 'Page > Dynamic Rich Text Editor'. The configuration options include:

- ☒ Don't show optional buttons
- ☒ Read Only
- Filter Category ⓘ  
Keep empty to show all dynamic buttons
- Define Footer (PDF Only) ⓘ  
Confidential And Restricted
- Header Image URL (PDF Only) ⓘ  
<https://codeylabs.my.salesforce.com/sfc/dist/>
- ☒ Show Page Number (PDF Only)
- ☐ Enable E-Signature ⓘ
- ☐ Enable to Request E-Signature ⓘ
- Set Component Visibility
- Filters

## 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*