



Configuring Alternative Template Buttons in DRTE

User Guide



DRTE

The File Import feature allows users to seamlessly bring externally drafted documents (.docx and .pdf) directly into the DRTE. Instead of manually re-typing or copy-pasting, which often breaks complex layouts, this tool converts your local files into editable content within the record.

Key Use Case

A Sales Rep drafts a detailed **10-page Statement of Work (SOW)** or **Quote** in Microsoft Word using a corporate template. By using the Import tool, they can bring that entire document into the system record in seconds, preserving tables, images, and brand formatting.

How to Import a Document

Follow these steps to import your local file:

1. Open the DRTE Editor

The screenshot shows the top section of the DRTE Editor. At the top left, there's a header with a logo and the text "PSC Quote Request" and "Salesforce Upgrade - Sale Process Refinement - Demo". To the right of this header are two buttons: "Change Primary Quote" and "Create Milestones (Outcome based)". Below the header is a table with the following data:

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

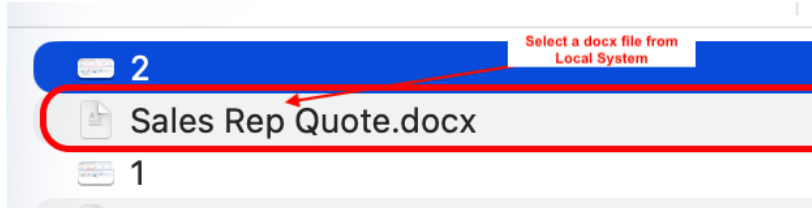
Below the table is a navigation bar with tabs: "Details", "Summary (Primary Quote)", "Document (Primary Quote)", and "DRTE". The "DRTE" tab is selected. Below the navigation bar is a toolbar with various icons. A red arrow points to the "Import" icon (a blue square with a white document icon and an upward arrow) in the toolbar. A red text box with an arrow pointing to the "Import" icon contains the text: "Allows Importing PDF or DOCx from your local system."

2. Locate the Import Button: On the editor toolbar, click the **Import Icon** (the "Upload" arrow icon).

The screenshot shows the same interface as the previous one, but with a red arrow pointing to the "Upload Files" button in the toolbar. A red text box with an arrow pointing to the "Upload Files" button contains the text: "User Clicks on Upload Files, To Select a docx file a sales rep has created locally". Below the toolbar, a modal dialog box is open, showing a button labeled "Upload Files" and the text "Or drop files".

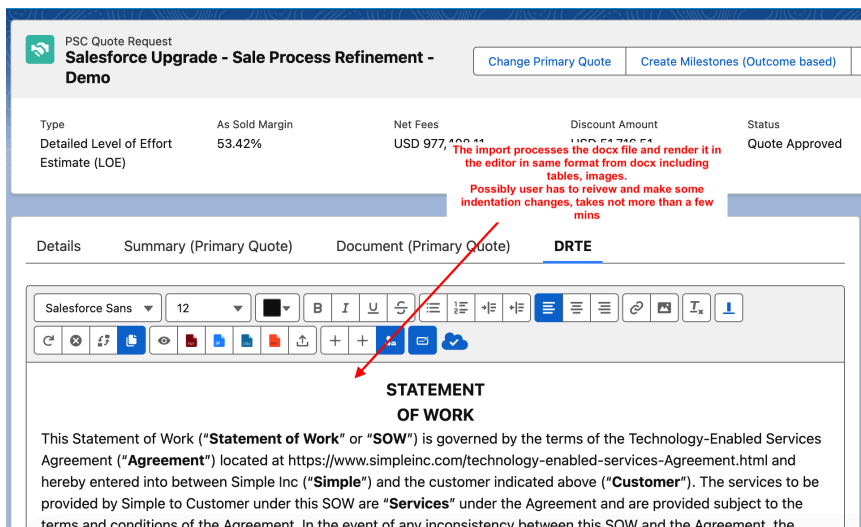
3. Select Your File:

- **Drag & Drop:** You can drag your file directly onto the upload zone.
- **File Browser:** Click to browse your local system and select your **.docx** or **.pdf** file.



4. Process and Review:

The system will process the file and render the content directly inside the editor window.



3. Supported File Types & Behavior

While the process is identical for both file types, the editor handles them differently based on the source formatting:

Microsoft Word (.docx)

- **Best For:** Complex text, multi-page proposals, and collaborative drafting.
- **Result:** High-fidelity rendering. Most tables, bullet points, bold/italic styling, and embedded images are preserved and remain **fully editable** within the DRTE.

Adobe PDF (.pdf)

- **Best For:** Simple documents or documents that are primarily image-based.
- **Minimalist Rendering:** PDF conversion is more restrictive.
 - **Images:** Typically render clearly within the editor.
 - **Tables/Complex Elements:** May require manual adjustment after import. Users should review the alignment and spacing to ensure the document looks correct before saving.

4. Best Practices for Sales Teams

- **Final Review:** Always scroll through the document after import to ensure page breaks and table widths align with your system's display settings.
- **Image Optimization:** If your .docx contains very high-resolution images, try to compress them before importing to ensure the editor remains fast and responsive.

5. Frequently Asked Questions (FAQ)

Q: Can I edit the text after I import a PDF? *A: Yes, once the content is rendered in the DRTE, it becomes standard HTML text. However, for heavily formatted PDFs, some text may import as an image or require re-spacing.*

Q: Will the "Track Changes" from my Word document show up? *A: No.*

Q: Is there a file size limit? *A: 5MB is recommended for optimal performance.*