



CODEYLABS

Managing E-Signature Placeholders in DRTE

User Guide



DRTE

The E-Signature feature streamlines the contract finalization process by allowing users to insert "Signature Blocks" with a single click. These blocks act as placeholders that the system recognizes to collect electronic signatures once the document is sent to a client.

1. Key Benefits

- **Accuracy:** Eliminates manual typing errors in signature tags.
- **Efficiency:** Standard templates for "Name" and "Date" are automatically included.
- **Consistency:** Ensures every Quote or SOW has the same professional signature layout.

2. Enabling the Feature

The signature buttons are context-aware. They will only appear in your DRTE toolbar if the following property is set in the component configuration:

- **Requirement:** The 'Enable to Request E-Signature' property must be checked in the editor settings.
- Once enabled, you will see two "Double Plus" (+, +) icon buttons added to your toolbar.

The screenshot shows the PSC Quote Request page within the Dynamic Rich Text Editor (DRTE). The toolbar includes standard text and image editing tools, plus two blue 'Double Plus' (+, +) icons. A red callout box highlights these icons with the text: "A user need not to remember/edit the document by typing when default signatures placeholder need to apply". The configuration sidebar on the right is titled "Page > Dynamic Rich Text Editor" and contains the following settings:

- Read Only
- Filter Category: QuoteRequestSOW
- Define Footer (PDF Only): Confidential and Restricted
- Header Image URL (PDF Only): (empty)
- Show Page Number (PDF Only)
- Enable E-Signature
- Enable to Request E-Signature** (this checkbox is highlighted with a red box)

Below these are sections for "Set Component Visibility" and "Filters".

3. How to Insert Signature Blocks

Follow these steps to place signature templates for both the Client and the Vendor:

Step 1: Insert Signature 1 (e.g., Client)

1. Navigate to the DRTE Editor on your record.
2. Place your cursor in the document where you want the first signature to appear.
3. Click the **first "plus" (+) icon** (labeled "insert signature1 template" on hover).

Detailed Level of Effort 55.42% USD 977,408.11 USD 51,710.51 Quote Approved

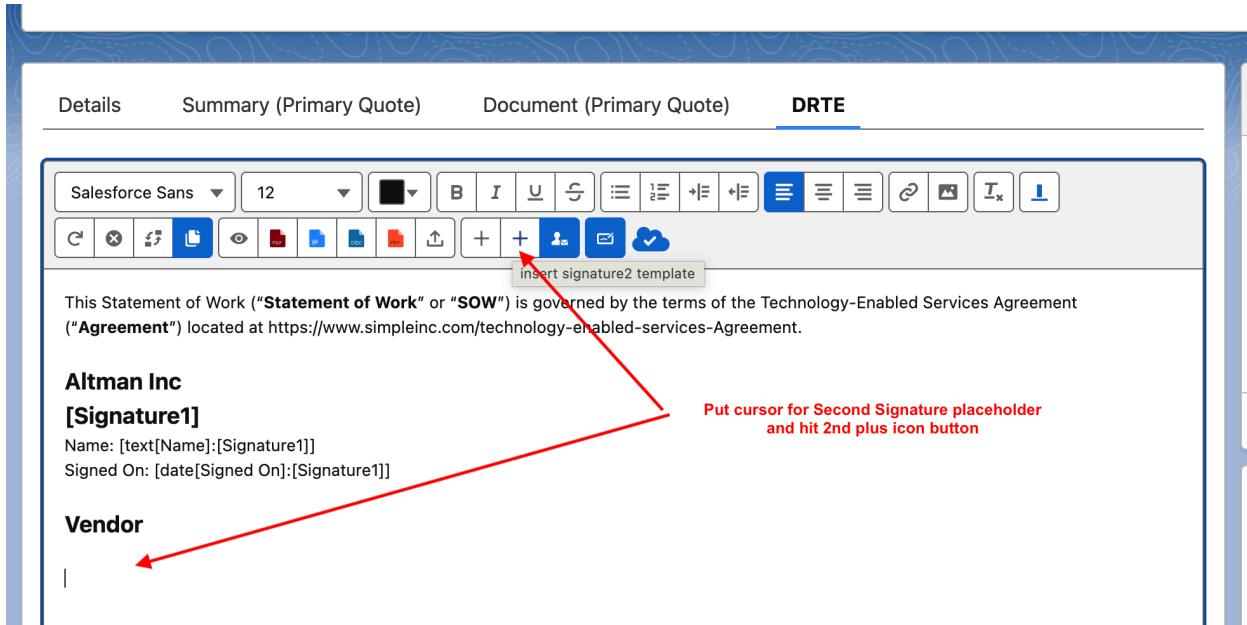
Estimate (LOE)

Place your cursor in the editor document, and hit first plus icon button to generate signature1 default template

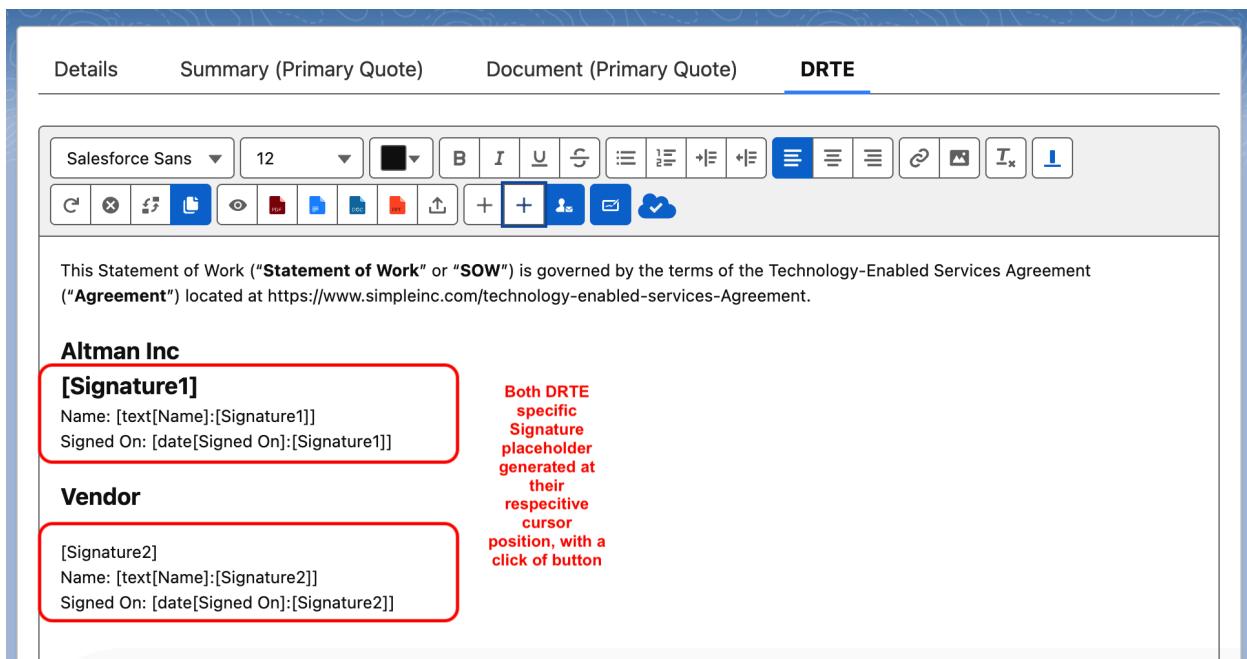
Details Summary (Primary Quote) Document (Primary Quote) DRTE

Salesforce Sans 18 B I U  +                             <img alt

1. Move your cursor to the next desired signature location (e.g., under the "Vendor" section).
2. Click the **second "plus" (+) icon** (labeled "insert signature2 template").



3. A second independent block, **[Signature2]**, will be generated at the cursor position.



4. Understanding the Rendered Content

When a button is clicked, the DRTE automatically places the following template at your cursor:

[SignatureX]

Name: [text[Name]:[SignatureX]]

Signed On: [date[Signed On]:[SignatureX]]

- **[SignatureX]:** The primary anchor for the e-signature software.
- **Name/Date Tags:** Dynamic fields that the signer will fill out digitally.

5. Pro-Tips for Sales Teams

- **Cursor Placement:** Always ensure your cursor is on a new line before clicking the signature buttons to prevent the block from merging with existing paragraph text.
- **Manual Edits:** While these are generated automatically, they remain editable. You can adjust the bolding or spacing around the placeholders to match the document's aesthetic. But make sure the text is all together in a single html tag.
- **Verification:** Before submitting for approval, scroll to the bottom of your DRTE document to verify that both [Signature1] and [Signature2] are present and correctly placed.