



**CODEY LABS**

**Manual E-Signature Workflow & Custom Email  
Delivery**

**User Guide**



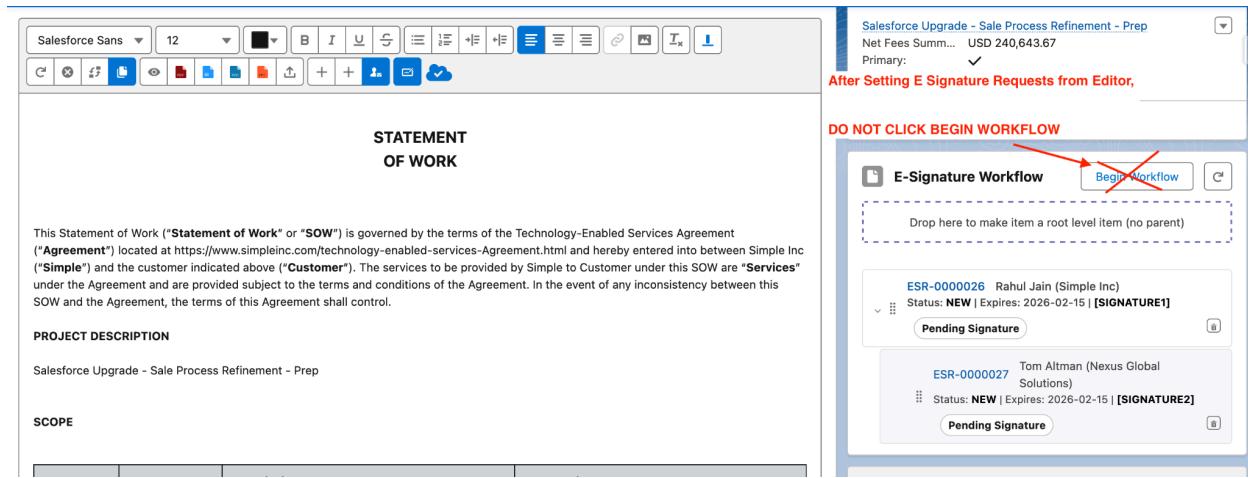
**DRTE**

This guide provides step-by-step instructions on how to manually execute an e-signature workflow in **DRTE**. By following this process, you can bypass the automated "Begin Workflow" button, allowing you to **modify email content** and maintain specific **sharing rules** for guest users.

## Phase 1: Initiating the Manual Process

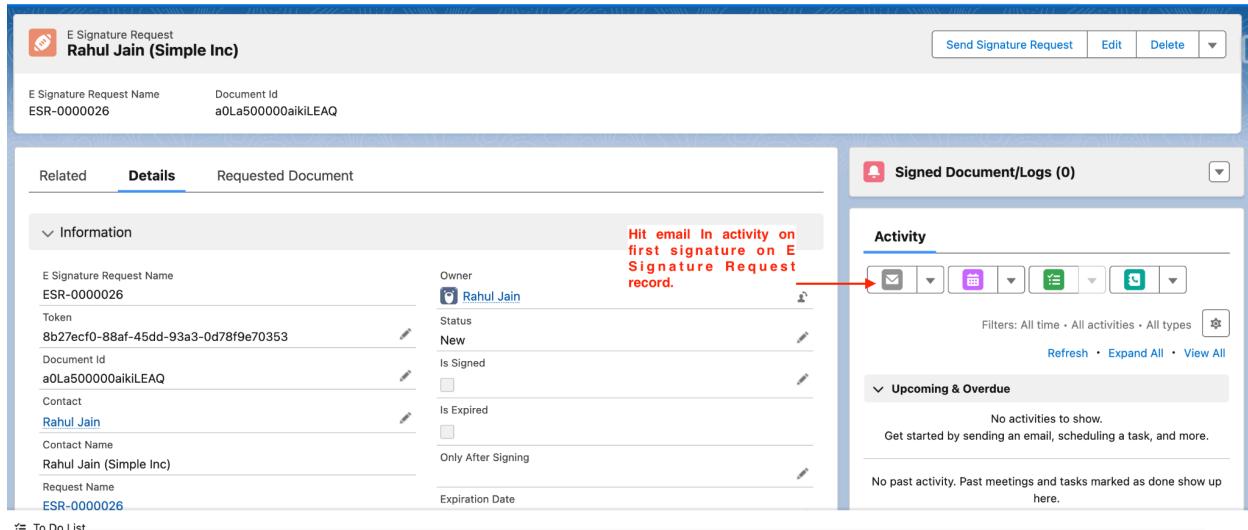
**Important:** Do not use the automated "Begin Workflow" button if you intend to customize the experience for the signers.

- Prepare the Document:** Open the Document Editor. After setting up your E-Signature Requests (ESRs) in the editor, navigate to the **E-Signature Workflow** component.
- Bypass Automation: DO NOT CLICK "BEGIN WORKFLOW."** Instead, you will manage each signature request (e.g., ESR-0000026) individually from the record level.



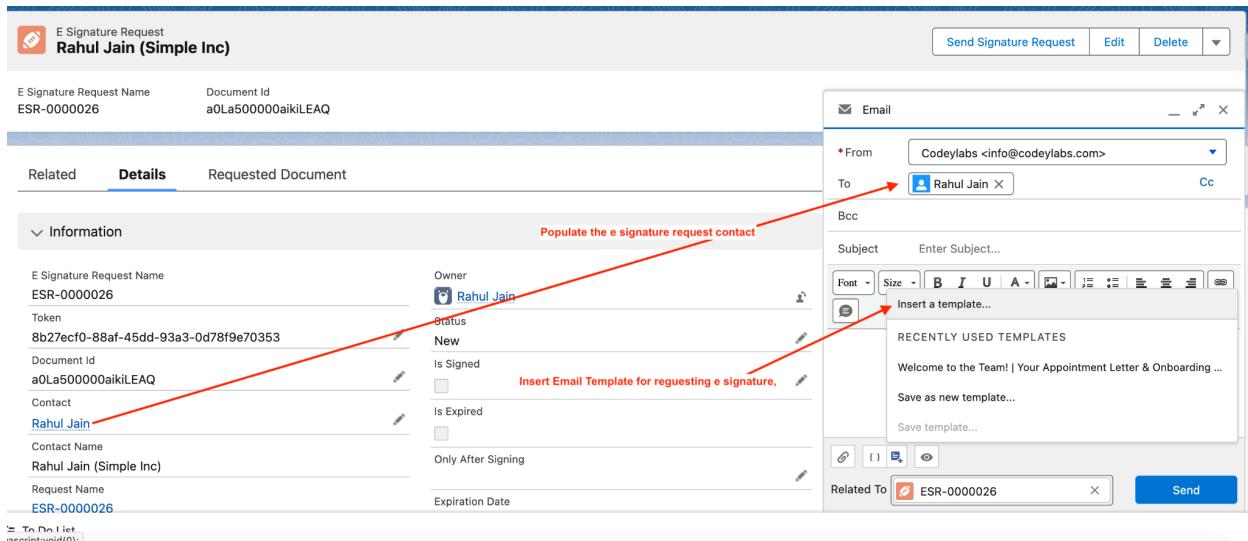
## Phase 2: Sending the First Signature Request

- 1. Navigate to the Record:** Click on the E-Signature Request Name (e.g., **ESR-0000026**) to open that specific record.
- 2. Open Email Activity:** In the **Activity** panel on the right, click the **Email (Envelope)** icon.



The screenshot shows the 'E Signature Request' record for 'Rahul Jain (Simple Inc)'. The 'Details' tab is selected. In the 'Activity' panel on the right, the 'Email (Envelope)' icon is highlighted with a red arrow. A red annotation text 'Hit email in activity on first signature on E Signature Request record.' is placed near the 'Email' icon. The 'Activity' panel also shows a list of activities with a 'Filters' dropdown and buttons for 'Refresh', 'Expand All', and 'View All'.

- 3. Configure Recipient & Template:** \* **To:** Ensure the field is populated with the E-Signature request contact.
  - Insert Template:** Click the **Insert Template** button in the email toolbar.



The screenshot shows the 'E Signature Request' record for 'Rahul Jain (Simple Inc)'. The 'Details' tab is selected. The 'Email' toolbar is open, showing the 'From' field populated with 'Codeylabs <info@codeylabs.com>'. The 'To' field has 'Rahul Jain' selected. A red annotation text 'Populate the e signature request contact' is placed near the 'To' field. Another red annotation text 'Insert Email Template for requesting e signature,' is placed near the 'Insert Template' button in the toolbar. The 'Email' toolbar also includes 'Subject', 'Font', 'Size', and 'RECENTLY USED TEMPLATES' sections.

- 4. Select the DRTE Template:** Choose the relevant template, such as **DRTE: Action Required: Please e-Sign Your Document.**

Insert Email Template

Select a template for:  Contacts  Leads  E Signature Request

Templates

My Lightning Templates

Template Folders

All

Search

Name Description Template Folders

Welcome to the Team! | Your Appointment Letter & Onboarding Guide Welcome to the Team! | Your Appointment Letter & Onboar... Public Email Templates

DRTE Action Complete: Your Signed Document is Ready Action Complete: Your **Select a relevant email template to insert** DRTE Email Template

DRTE: Action Required: Please e-Sign Your Document Action Required: Please e-Sign Your Document DRTE Email Template

DRTE: Action Required: Please e-Sign Your Document (Second Signer) DRTE Email Template

DRTE Your PIN to Sign Document DRTE Your PIN to Sign Document DRTE Email Template

Cancel

Related To ESR-0000026

**5. Modify & Send:** You can now edit the email body to include custom notes, remove existing ones. Once finalized, click **Send**.

E Signature Request

Rahul Jain (Simple Inc)

Send Signature Request Edit Delete

Related Details Requested Document

Information

E Signature Request Name: ESR-0000026

Owner: Rahul Jain

Status: New

Is Signed:

Is Expired:

Only After Signing:

Expiration Date: 2/15/2026

Signature Placeholder: [Signature1]

Action Required: Please e-Sign Your Document

You can now modify the email content before sending it to the contact

Company Logo

Hello {{Recipient.Name}},

Modify the content here... Thank you for your business.

We're excited to have you as a customer.

Sign the Document

Please note, this link will expire in 2026-02-15T18:00:00Z

Related To ESR-0000026

Send

**6. Verify Activity:** Confirm the email log appears in the **Activity** timeline to ensure the request was dispatched.

**E Signature Request**  
**Rahul Jain (Simple Inc)**

**Information**

E Signature Request Name	Owner
ESR-0000026	Rahul Jain
Token	Status
8b27ecf0-88af-45dd-93a3-0d78f9e70353	New
Document Id	Is Signed
a0La500000aikiLEAQ	<input type="checkbox"/>
Contact	Is Expired
Rahul Jain	Email is Sent and Email Log created in Activity
Contact Name	<input type="checkbox"/>
Rahul Jain (Simple Inc)	Only After Signing
Request Name	Expiration Date
ESR-0000026	2/15/2026
Signature URL	Signature Placeholder
<a href="https://qxttestdrive.my.site.com/esign/s/7?token=8b27ecf0-88af-45dd-93a3-0d78f9e70353">https://qxttestdrive.my.site.com/esign/s/7?token=8b27ecf0-88af-45dd-93a3-0d78f9e70353</a>	[Signature1]
Request Sent On	Document Name
	quotetestdrive_CustomerAgreement

Request Signed On

**Activity**

Filters: All time • All activities • All types

**Upcoming & Overdue**

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

**January • 2026**

**Action Required: Please e-Sign** 2:51 AM | Today

**Unopened**

No more past activities to load.

**From: Codeylabs**  
**To: Rahul Jain**

2:51 AM | Today

**CODEYLABS**

**Hello Rahul Jain,**

**Modify the content here...** Thank you for your business. We're excited to have you as a customer.

**Sign the Document**

Please note, this link will expire in **\*\*30\*\*** days. If you have any questions, please contact our support team at [support@codeylabs.com](mailto:support@codeylabs.com).

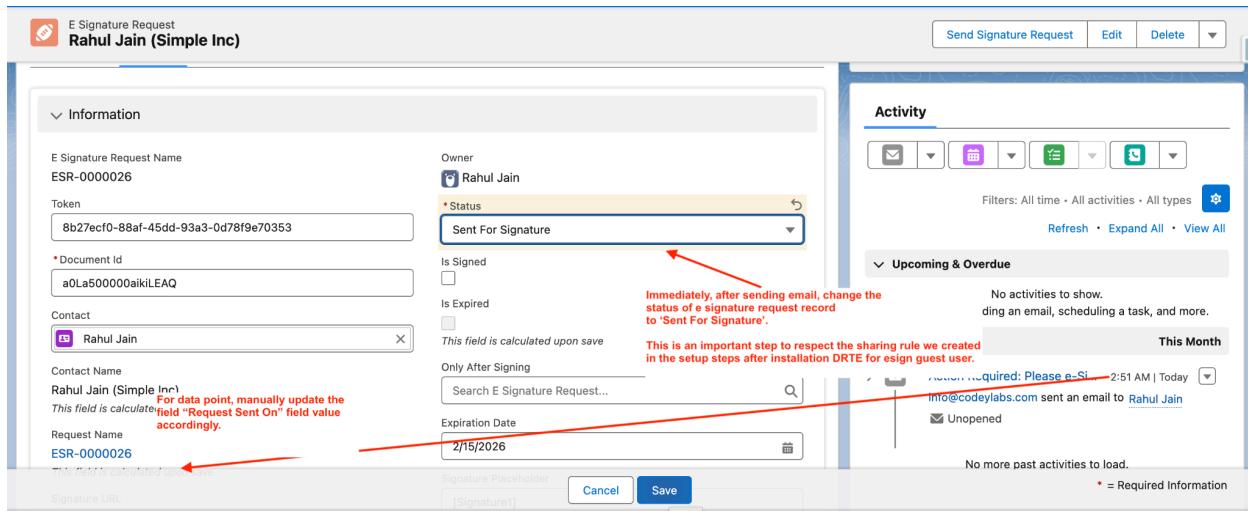
Thank you,

Email sent out with modified email content

## Phase 3: Synchronizing System Data

To ensure the signer can access the document via the guest user portal, you must manually update the record status.

1. **Update Status:** Immediately after sending the email, click **Edit** on the record and change the **Status** to **"Sent For Signature."** \* Note: *This is a critical step to respect the sharing rules created for the esign guest user.*



2. **Timestamp the Request:** Manually update the **"Request Sent On"** field to reflect the current date and time.
3. **Save:** Click **Save** to apply the changes.

## Phase 4: Handling Subsequent Signers

1. **Monitor Progress:** Once the first signer completes their task, the E-Signature Workflow component will show the first record as **COMPLETED** and the next record (e.g., ESR-0000027) as **READY TO SEND**.

The screenshot shows the Salesforce interface for managing a document hierarchy. The top part displays the document's basic information: Name (Salesforce Upgrade - Sale Process Refinement - Prep), Owner (Rahul Jain), Status (Quote Approved), and Triggers the Sync To Opportunity. Below this, the Request Detail and Description sections are visible. A red arrow points from a note in the Request Detail section to the E-Signature Workflow status for the second signer. The note reads: "After first signer has signed, repeat same steps for second signer manually sending email with modified content." The E-Signature Workflow status for the second signer is shown as "READY TO SEND".

2. **Repeat the Process:** For the second signer, repeat the steps in **Phase 2 and Phase 3**. Open the new ESR record, manually send the email with any needed modifications, and update the status to "Sent For Signature."

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**Pro-Tip:** Always verify that the "Status" is updated immediately after sending the email. If the status remains "New," the signer may encounter access errors when clicking the "Sign the Document" link.