



**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.

1. **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.
2. **Bypass Automation:** **DO NOT CLICK "BEGIN WORKFLOW."** Instead, you will manage each signature request (e.g., ESR-0000026) individually from the record level.

The screenshot displays the Document Editor on the left and the E-Signature Workflow component on the right.

Document Editor:

- Font: Salesforce Sans, Size: 12.
- Text: **STATEMENT OF WORK**
- Text: This Statement of Work ("Statement of Work" or "SOW") is governed by the terms of the Technology-Enabled Services Agreement ("Agreement") located at <https://www.simpleinc.com/technology-enabled-services-Agreement.html> and hereby entered into between Simple Inc ("Simple") and the customer indicated above ("Customer"). The services to be provided by Simple to Customer under this SOW are "Services" under the Agreement and are provided subject to the terms and conditions of the Agreement. In the event of any inconsistency between this SOW and the Agreement, the terms of this Agreement shall control.
- PROJECT DESCRIPTION**
- Text: Salesforce Upgrade - Sale Process Refinement - Prep
- SCOPE**

E-Signature Workflow:

- Header: Salesforce Upgrade - Sale Process Refinement - Prep
- Net Fees Summ...: USD 240,643.67
- Primary: ✓
- Text: After Setting E Signature Requests from Editor,
- Text: DO NOT CLICK BEGIN WORKFLOW
- Section: E-Signature Workflow
- Text: Drop here to make item a root level item (no parent)
- Item 1: ESR-0000026 Rahul Jain (Simple Inc)
Status: NEW | Expires: 2026-02-15 | [SIGNATURE1]
Pending Signature
- Item 2: ESR-0000027 Tom Altman (Nexus Global Solutions)
Status: NEW | Expires: 2026-02-15 | [SIGNATURE2]
Pending Signature

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' interface for 'Rahul Jain (Simple Inc)'. The top bar includes 'Send Signature Request', 'Edit', and 'Delete' buttons. Below the header, the 'Details' tab is active, displaying fields for 'E Signature Request Name' (ESR-0000026), 'Document Id' (a0La500000aikilEAQ), 'Token', 'Status' (New), 'Is Signed', 'Is Expired', 'Contact' (Rahul Jain), 'Contact Name' (Rahul Jain (Simple Inc)), 'Request Name' (ESR-0000026), and 'Expiration Date'. A red arrow points from the 'Email (Envelope)' icon in the 'Activity' panel on the right to the 'Hit email in activity on first signature on E Signature Request record.' text. The 'Activity' panel shows 'Signed Document/Logs (0)' and 'Upcoming & Overdue' sections.

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' interface with the 'Email' composition window open. The 'To' field is populated with 'Rahul Jain'. The 'Subject' field is empty. The 'Insert a template...' button is highlighted in the email toolbar. A red arrow points from the 'Contact' field in the 'Details' tab to the 'To' field in the email composition window, with the text 'Populate the e signature request contact'. Another red arrow points from the 'Insert Email Template for requesting e signature,' text to the 'Insert a template...' button. The 'Email' window shows 'From: Codeylabs <info@codeylabs.com>', 'To: Rahul Jain', 'Subject: Enter Subject...', and a list of 'RECENTLY USED TEMPLATES' including 'Welcome to the Team! | Your Appointment Letter & Onboarding ...'.

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

Search templates...

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: YourSelect 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

- 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

Token

8b27ecf0-88af-45dd-93a3-0d78f9e70353

Document Id

a0La50000aikiLEAQ

Contact

Rahul Jain

Contact Name

Rahul Jain (Simple Inc)

Request Name

ESR-0000026

Signature URL

https://qxtestdrive.my.site.com/esign/s/?token=8b27ecf0-88af-45dd-93a3-0d78f9e70353

Owner

Rahul Jain

Status

New

Is Signed

Is Expired

Only After Signing

Expiration Date

2/15/2026

Signature Placeholder

[Signature1]

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

{{recipient.E_Signature_Request__c.expirydate}}

Related To ESR-0000026

Send

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

E Signature Request

Rahul Jain (Simple Inc)

Send Signature Request

Edit

Delete

Information

E Signature Request Name

ESR-0000026

Token

8b27ecf0-88af-45dd-93a3-0d78f9e70353

Document Id

a0La500000aiklEAQ

Contact

Rahul Jain

Contact Name

Rahul Jain (Simple Inc)

Request Name

ESR-0000026

Signature URL

<https://qctestdrive.my.site.com/esign/s/?token=8b27ecf0-88af-45dd-93a3-0d78f9e70353>

Request Sent On

Owner

Rahul Jain

Status

New

Is Signed

Is Expired

Only After Signing

Expiration Date

2/15/2026

Signature Placeholder

[Signature1]

Document Name

quotextestdrive_CustomerAgreement

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.

January • 2026

This Month

Action Required: Please e-Si...

2:51 AM | Today

info@codeylabs.com sent an email to Rahul Jain

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.

Thank you,

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.*

The screenshot shows the 'E Signature Request' form for 'Rahul Jain (Simple Inc)'. The form is divided into several sections:

- Information:** Contains fields for 'E Signature Request Name' (ESR-0000026), 'Token' (8b27ecf0-88af-45dd-93a3-0d78f9e70353), 'Document Id' (a0La500000aikiLEAQ), 'Contact' (Rahul Jain), 'Contact Name' (Rahul Jain (Simple Inc)), and 'Request Name' (ESR-0000026). A red arrow points to the 'Request Name' field with the annotation: "For data point, manually update the field 'Request Sent On' field value accordingly."
- Owner:** Shows 'Rahul Jain' as the owner.
- Status:** A dropdown menu is set to 'Sent For Signature'. A red arrow points to this dropdown with the annotation: "Immediately, after sending email, change the status of e signature request record to 'Sent For Signature'".
- Is Signed:** A checkbox that is currently unchecked.
- Is Expired:** A checkbox that is currently unchecked.
- Only After Signing:** A checkbox that is currently unchecked.
- Expiration Date:** A date field set to 2/15/2026.
- Activity:** A section on the right showing a list of activities. A red arrow points to the 'Activity' section with the annotation: "This is an important step to respect the sharing rule we created in the setup steps after installation DRTE for esign guest user."

At the bottom of the form, there are 'Cancel' and 'Save' buttons. A red arrow points to the 'Save' button.

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**.

Name

Salesforce Upgrade - Sale Process Refinement - Prep

Opportunity

Salesforce Upgrade - Sale Process Refinement - Prep

Currency

USD - U.S. Dollar

Service Commitment Period

Owner

Rahul Jain

Status

Quote Approved

Triggers the Sync To Opportunity

☐

Request Detail

Type

Detailed Level of Effort Estimate (LOE)

Focus Area

Sales Cloud

Description

Salesforce Upgrade - Sale Process Refinement - Prep

Support needed by

1/28/2026

LOE Needed By

1/28/2026

After first signer has signed, repeat same steps for second signer manually sending email with modified content.

Primary

As Sold Margin ... 50.41%

View All

E-Signature Workflow

Begin Workflow

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

ESR-0000026

Rahul Jain (Simple Inc)

Status: **COMPLETED** | Sent on: 2026-01-16 16:20 | Signed on: 2026-01-16 16:23 | [SIGNATURE1]

Signed

ESR-0000027

Tom Altman (Nexus Global Solutions)

Status: **READY TO SEND** | Expires: 2026-02-15 | [SIGNATURE2]

Pending Signature

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."

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.