Manual E-Signature Workflow & Custom Email Delivery

User Guide

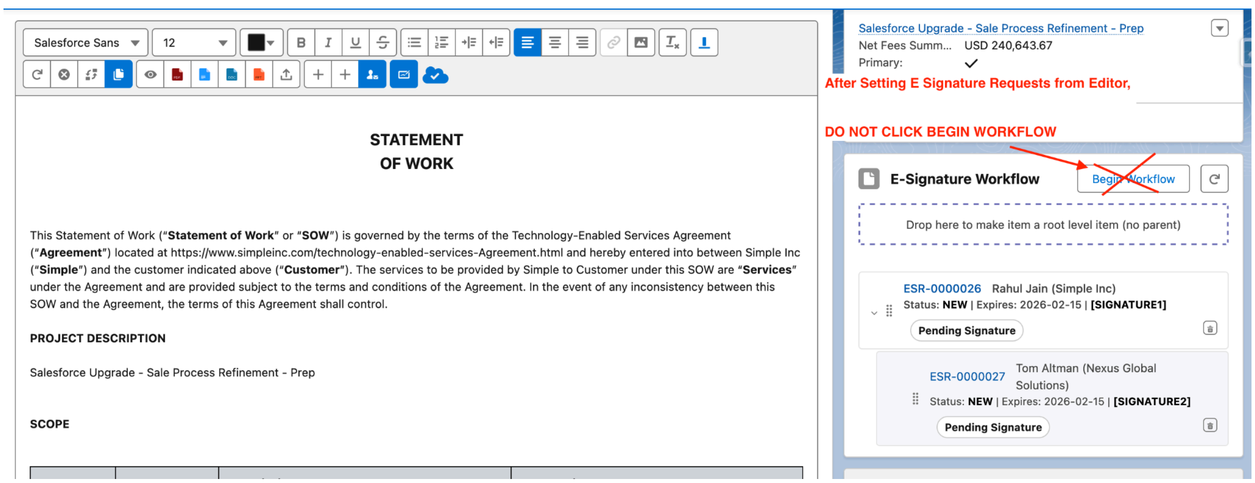
DRTE

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

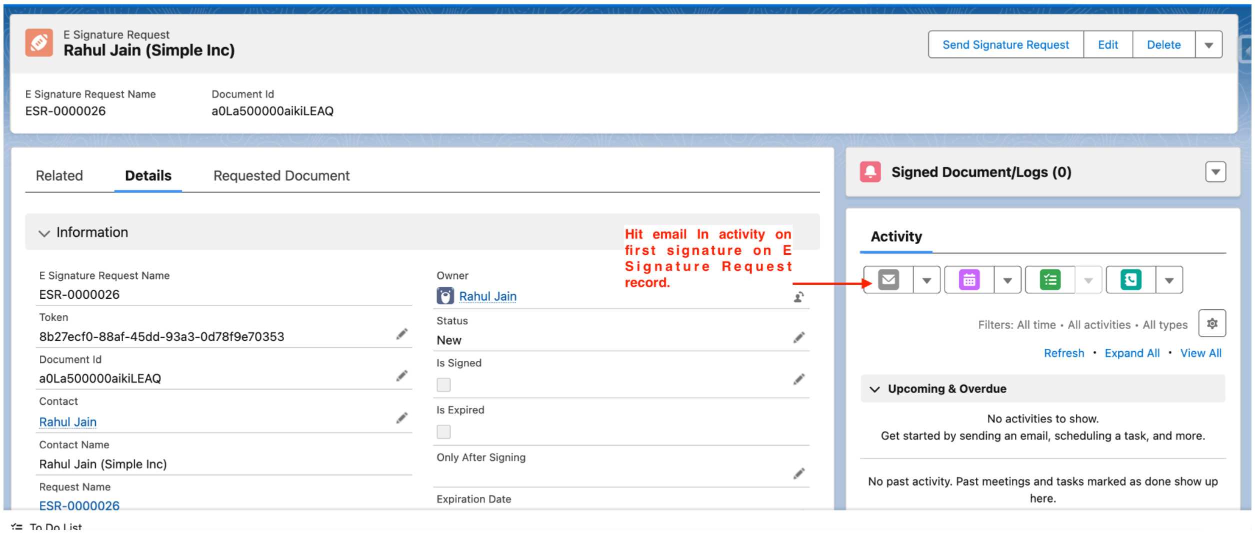
Important: Do not use the automated "Begin Workflow" button if you intend to customize the experience for the signers.

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.

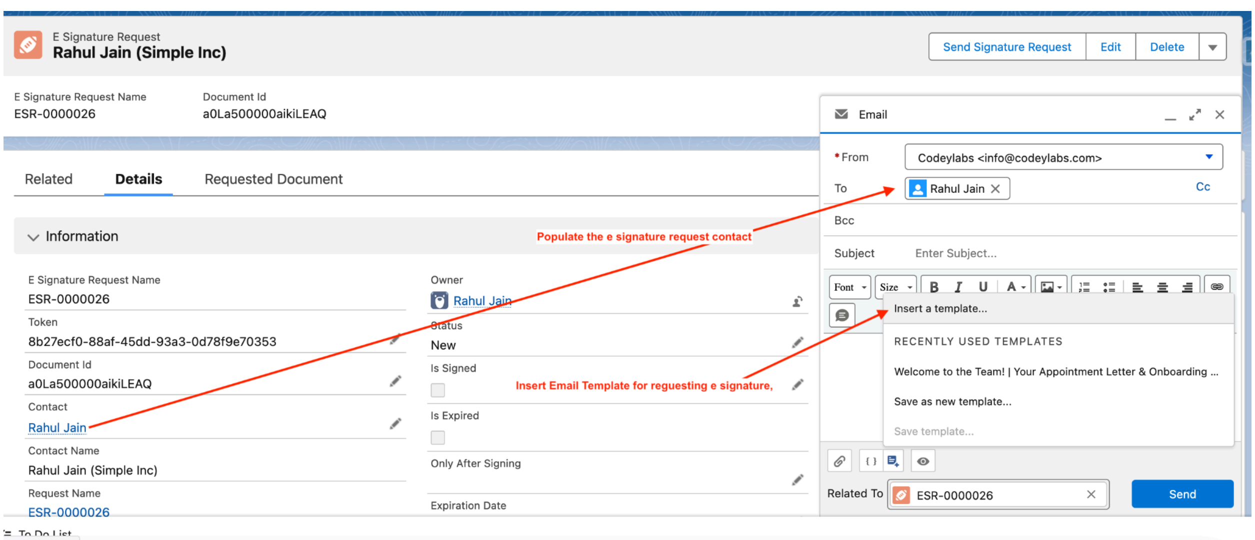


Phase 2: Sending the First Signature Request

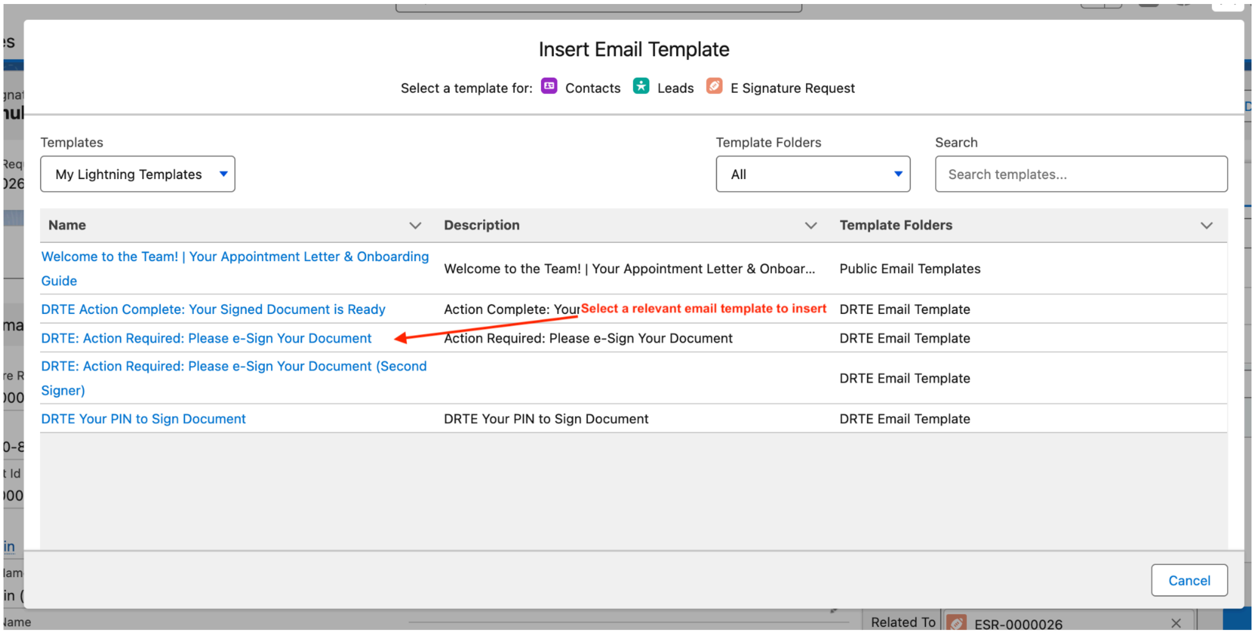
1. **Navigate to the Record:** Click on the E-Signature Request Name (e.g., **ESR-0000026**) to open that specific record.
2. **Open Email Activity:** In the **Activity** panel on the right, click the **Email (Envelope) icon**.



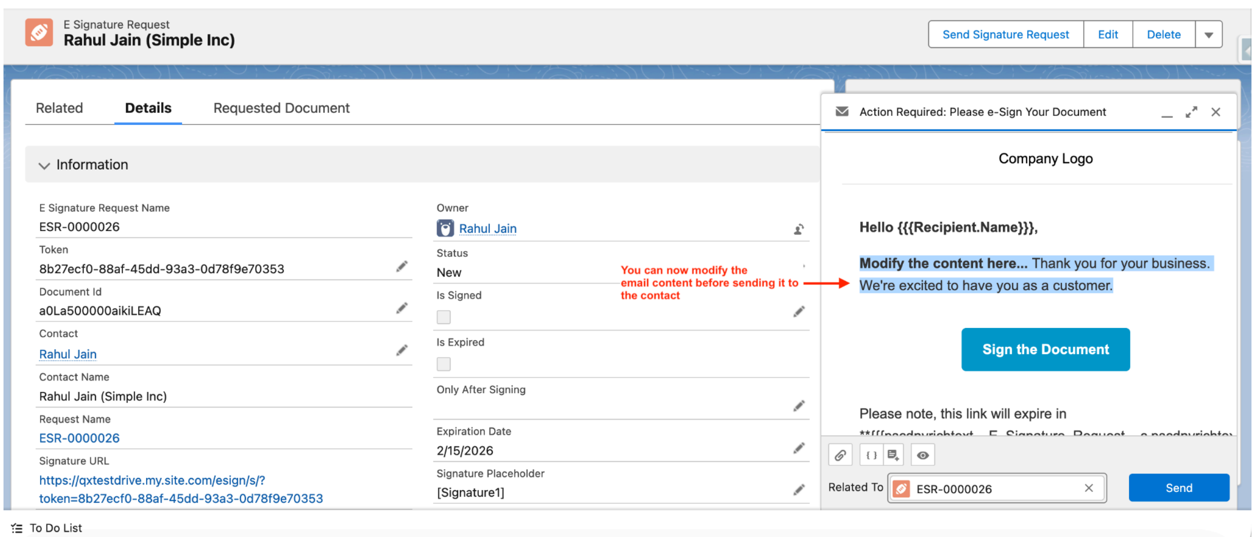
3. **Configure Recipient & Template:** * **To:** Ensure the field is populated with the E-Signature request contact.
   - **Insert Template:** Click the **Insert Template** button in the email toolbar.



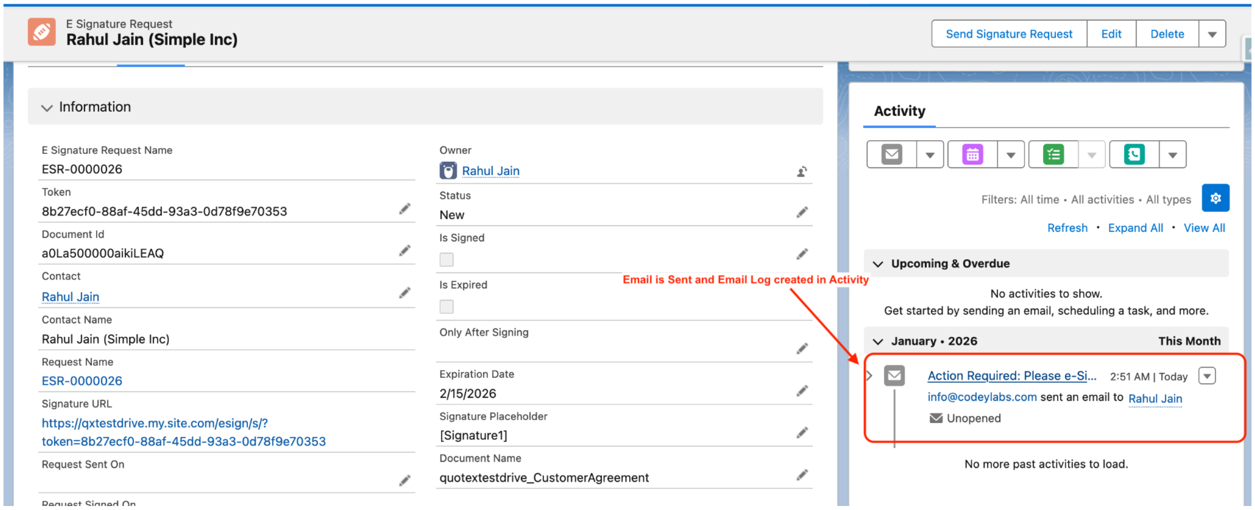
4. **Select the DRTE Template:** Choose the relevant template, such as `DRTE: Action Required: Please e-Sign Your Document`.

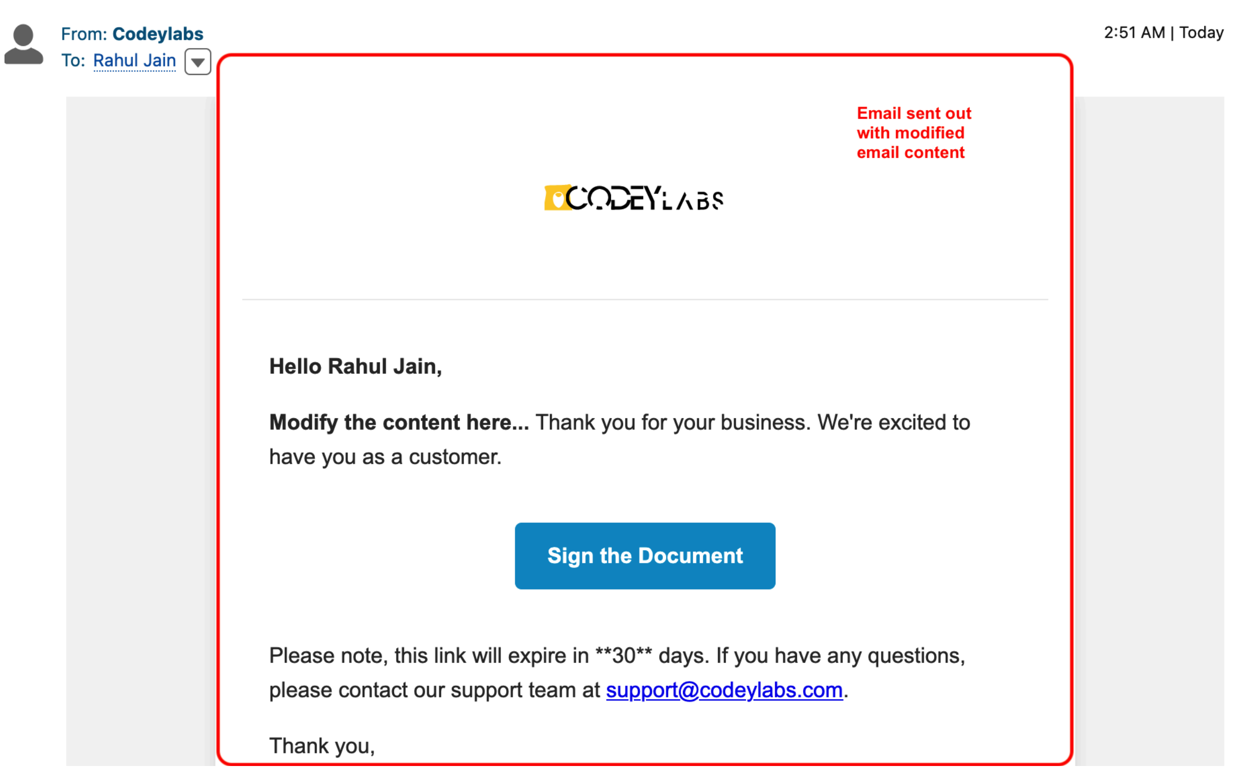


5. **Modify & Send:** You can now edit the email body to include custom notes, remove existing ones. Once finalized, click **Send**.



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

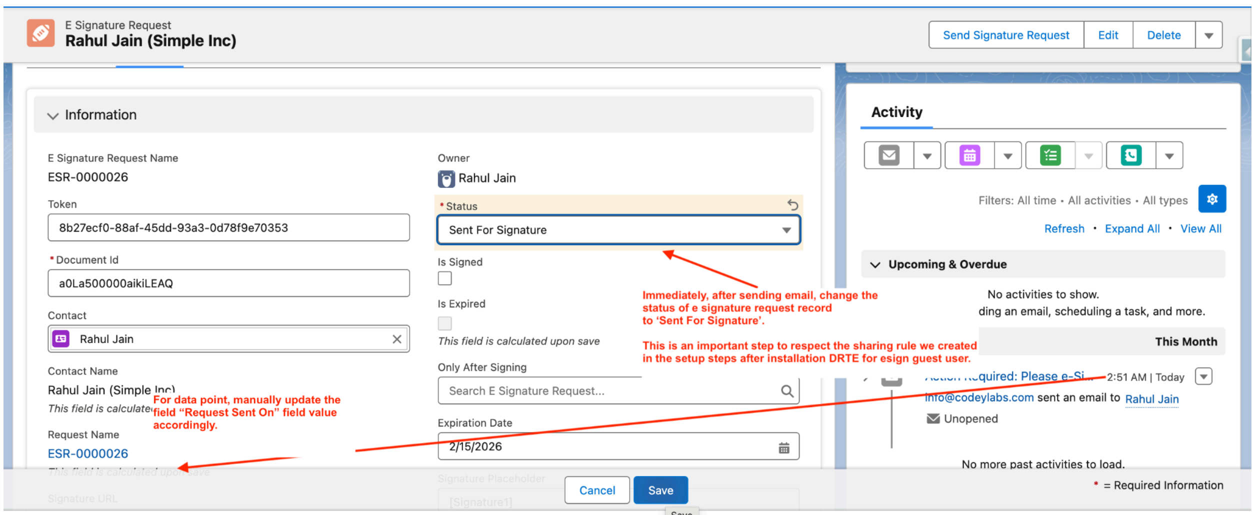

E Signature Request
Rahul Jain (Simple Inc)
Send Signature Request
Edit
Delete
Information
E Signature Request Name
ESR-0000026
Token
8b27ecf0-88af-45dd-93a3-0d78f9e70353
Document Id
a0La500000aikiLEAQ
Contact
Rahul Jain
Contact Name
Rahul Jain (Simple Inc)
Request Name
ESR-0000026
Signature URL
https://qxtestdrive.my.site.com/esign/s/?token=8b27ecf0-88af-45dd-93a3-0d78f9e70353
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
Email is Sent and Email Log created in Activity
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
Email sent out with modified email content
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.

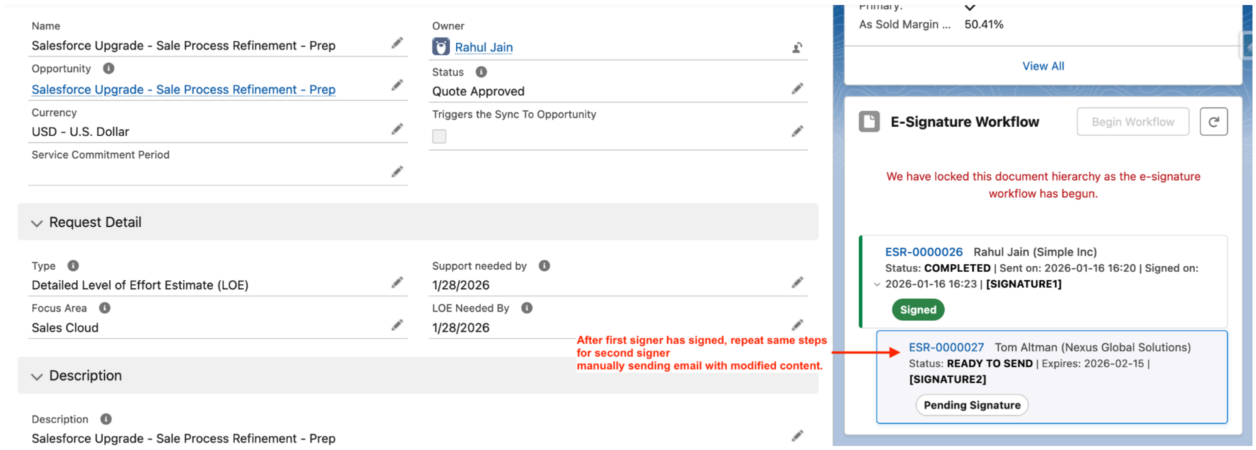
1. **Update Status:** Immediately after sending the email, click **Edit** on the record and change the **Status** to **"Sent For Signature."** * *Note: This is a critical step to respect the sharing rules created for the esign guest user.*



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**.



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.