



Migrating Document Templates from Sandbox To Production using DRTE

User Guide



DRTE

The Document Section Export/Import feature is designed to eliminate the need for manual copy-pasting when moving **Rich Text Button / Doc Template** records across different system environments. By exporting a template as a **.json** file, you can preserve all individual document sections and their specific HTML content.

Key Benefits

- **Consistency:** Ensures the template in Production is a 1:1 match with the version tested in Sandbox.
- **Efficiency:** Migrates multiple document sections simultaneously rather than one by one.
- **Safety:** Allows for local backups of complex document structures.

Setup: Adding the Migration Utility

If the migration tool is not visible on your template record page, follow these steps:

1. **Edit Page:** Click the Gear icon and select "Edit Page" to open the Lightning App Builder.
2. **Add Component:** Locate the **Document Section Export/Import** component in the left-hand sidebar.
3. **Placement:** Drag and drop the component onto the record page (typically in the right-hand sidebar).
4. **Save:** Save and Activate the page.

The screenshot displays the Lightning App Builder interface for editing a record page titled "Rich Text Button / Doc Template Record Page". The left sidebar shows a list of components, with "Document Sections Export/Import" highlighted. A red arrow points from this component to the right-hand sidebar, where it is being added to the page layout. The right-hand sidebar shows the "Document Sections Export/Import" component being placed in the "Page > Document Sections Export/..." section. The main content area shows the details of the "Rich Text Button / Doc Template" record, including fields like "Rich Text Button Number", "Template Name", and "SLDS icon name".

When Document Section Export/Import is not already there on the record page, simply edit the Rich Text Button/Doc Template object record page.

Then drag and drop Document Section Export/Import.

Step-by-Step Migration Process

Phase A: Exporting from Sandbox

1. **Login:** Access your **Sandbox** environment.
2. **Select Template:** Navigate to the specific **Doc Template** record you wish to migrate.
3. **Export:** In the migration utility, click **Export Sections**.
4. **Download:** The system will generate and download a **.json** file containing all document sections to your local system.

The screenshot displays the Salesforce interface for a document template record. At the top, a navigation bar includes links for Home, Accounts, Opportunities, and various quote-related sections. A search bar is present on the left. The main content area shows the details of a document template named 'RTB-0008'. A green success message at the top indicates that 22 sections were exported. On the right, a sidebar titled 'Document Section Export/Import' contains buttons for 'Export Sections' and 'Import Sections'. A red arrow points from the 'Export Sections' button to the success message. Below the main content area, there is an 'Information' section with fields for 'Text Button Number', 'Category', 'Deactivated', 'Display Order', and 'Test SFDC Record Id'. The 'Deactivated' field is checked. The 'Activity' section at the bottom shows filters for 'All time', 'All activities', and 'All types', along with 'Refresh', 'Expand All', and 'View All' options.

Search...

ozAAB_1/6/8/4634101.json
38.8 KB - Done

Pre Sales Cloud Home Accounts Opportunities PSC Quote Requests PSC Quotes Collection Forecast Dashboard RTB-0008 | Rich Text B... More

Rich Text Button / Doc Template
RTB-0008

Success
Exported 22 section(s)

Preview Document Delete Change Owner

ated Details

Information

h Text Button Number
B-0008

Owner
Rahul Jain

Category

W (USD) ON Quote Request

Deactivated

Display Order
1

Test SFDC Record Id

Document Section Export/Import

Export Sections Import Sections

Current: 22 document sections

Activity

Filters: All time - All activities - All types

Refresh Expand All View All

- Login in Sandbox.
- Go To Doc Template record you want to migrate to Production.
- Hit Export Sections.
- A document sections json file gets downloaded.

Phase B: Preparing Production

1. **Login:** Access your **Production** environment.
2. **New Record:** Create a new **Doc Template** record.
3. **Name & Save:** Give the template the appropriate Name and Category, then click **Save**.
 - *Note: The new record will initially show "0 document sections".*

The screenshot shows the 'New Rich Text Button / Doc Template' form. At the top, there are instructions: 'Login in Production', 'Create a new Doc Template Record for the same purpose, the sections json was downloaded earlier.', and 'Save the record.' A legend indicates that a red asterisk (*) denotes required information. The form fields include: 'Rich Text Button Number' (empty), 'Owner' (Rahul Jain), 'Category' (empty), 'Deactivated' (checkbox), 'Display Order' (0), and 'Test SFDC Record Id' (empty). The 'Template Name' field is highlighted with a yellow background and contains the text 'Import Demo: SOW USD on Quote Request'. The 'SLDS icon-name' field is also highlighted with a yellow background. At the bottom, there are buttons for 'Cancel', 'Save & New', and 'Save'.

Phase C: Importing to Production

1. **Initiate Import:** Click **Import Sections** on the new Production record.

The screenshot shows the 'Rich Text Button / Doc Template' record page for 'RTB-0020'. The page has a header with 'Preview Document', 'Delete', and 'Change Owner' buttons. The main content area is divided into two sections: 'Details' and 'Document Section Export/Import'. The 'Details' section shows the record information, including 'Rich Text Button Number' (RTB-0020), 'Owner' (Rahul Jain), 'Category' (empty), 'Deactivated' (checkbox), 'Display Order' (0), and 'Test SFDC Record Id' (empty). The 'Document Section Export/Import' section has buttons for 'Export Sections' and 'Import Sections'. A red arrow points to the 'Import Sections' button. Below the buttons, it says 'Current: 0 document sections'. There is a red text overlay that says 'Use Import Sections, to import sections from the json file downloaded from sandbox'. The 'Activity' section shows 'No activities to show.' and 'Get started by sending an email, scheduling a task, and more.'

2. **Select File:** Choose the **.json** file you previously exported from the Sandbox.

3. **Monitor Progress:** The utility will display the import progress (e.g., "Importing section 9 of 22...").

The screenshot shows the 'Document Section Export/Import' utility. At the top, there are buttons for 'Preview Document', 'Delete', and 'Change Owner'. Below these, the utility title is displayed. There are two main buttons: 'Export Sections' and 'Import Sections'. A status bar indicates 'Current: 0 document sections'. A progress indicator shows 'Importing section 9 of 22...'. A red arrow points from the text 'View the import progress' to the progress indicator. Below the utility, there is an 'Activity' section.

4. **Verify:** Once complete, navigate to the **Related Tab** to confirm that all sections have been successfully migrated with their original HTML content and display order.

The screenshot shows the 'Related' tab of the utility. A red arrow points from the 'Details' link to the 'Related' tab. A red text box at the top right says 'After import is complete, go to Related Tab and notice that all sections from json file are migrated successfully'. The utility title is 'Document Section Export/Import'. There are two main buttons: 'Export Sections' and 'Import Sections'. A status bar indicates 'Current: 22 document sections'. Below the utility, there is an 'Activity' section. The 'Related' tab shows a table of 'Button Sections/Doc Sections (6+)'. The table has columns: 'PSC Button Sections Number', 'Display Order', 'HTML Content', and 'Is Active'. The table lists 6 sections, all of which are active. A 'View All' link is at the bottom of the table.

PSC Button Sections Number	Display Order	HTML Content	Is Active
BS-0144	0	{{img}}	✓
BS-0145	1	STATEMENT OF WORK	✓
BS-0146	2	Customer: {{psce_Presales_R...	✓
BS-0147	3	SOW Effective Date: {Fill Date ...	✓
BS-0148	4	This Statement of Work (*Stat...	✓
BS-0149	5	PROJECT DESCRIPTION{{psce...	✓

Troubleshooting & Best Practices

- **Active Status:** After importing, verify the **Is Active** checkbox for each section in the Related list to ensure they are ready for use.
- **Display Order:** The migration utility preserves the **Display Order** (starting from 0), ensuring your document structure remains intact.