



**CODEYLABS**

**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.

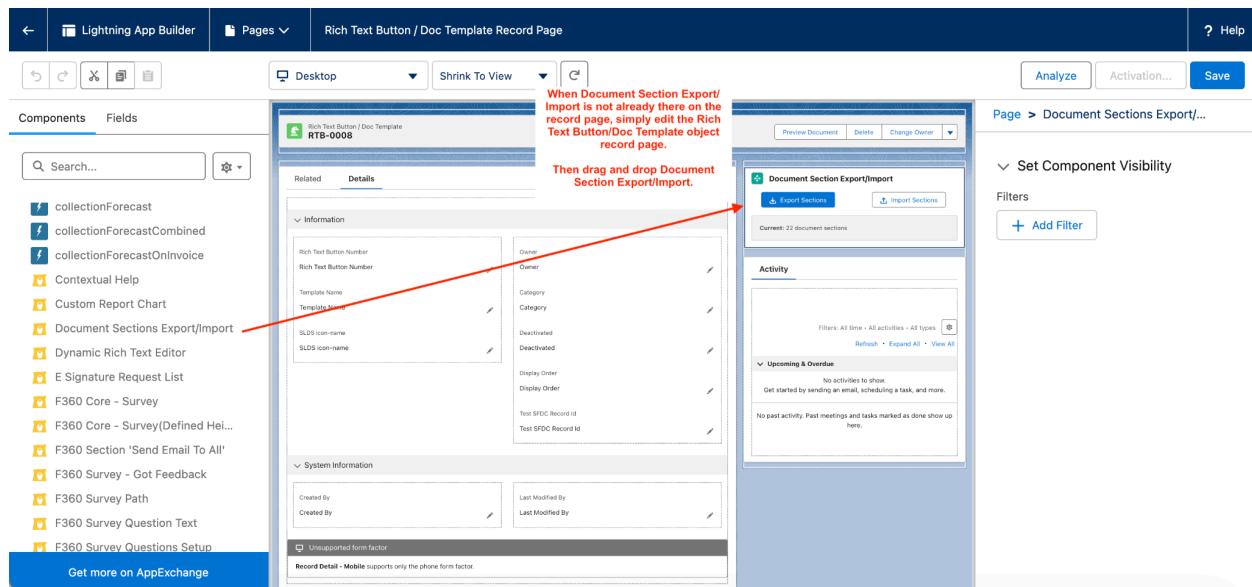
## Key Benefits

- **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.



# Step-by-Step Migration Process

## Phase A: Exporting from Sandbox

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

The screenshot shows the Salesforce interface for a Doc Template record named 'RTB-0008'. A success message box indicates 'Exported 22 section(s)'. The 'Details' tab is selected, showing fields like Rich Text Button Number (B-0008), Name (W (USD) ON Quote Request), and Category. The 'Activity' tab shows a 'Document Section Export/Import' section with a red arrow pointing to the 'Export Sections' button. A download progress bar at the top right shows '02AAB\_1/6/8/4634101.json 38.8 KB - Done'.

## 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".*

New Rich Text Button / Doc Template

Login in Production

Create a new Doc Template Record for the same purpose, the sections json was downloaded earlier.

\* = Required Information

Information

Save the record.

Rich Text Button Number

Template Name: Import Demo: SOW USD on Quote Request

Owner: Rahul Jain

Category: (empty)

SLDS icon-name: (empty)

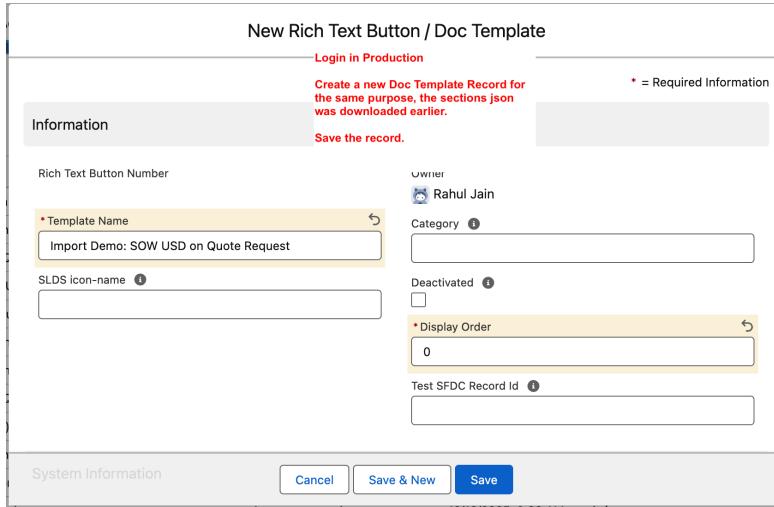
Deactivated: (unchecked)

Display Order: 0

Test SFDC Record Id: (empty)

System Information

Cancel Save & New Save



## Phase C: Importing to Production

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

Rich Text Button / Doc Template RTB-0020

Preview Document Delete Change Owner

Related Details

Information

Rich Text Button Number: RTB-0020

Template Name: Import Demo: SOW USD on Quote Request

Owner: Rahul Jain

Category: (empty)

Deactivated: (unchecked)

Display Order: 0

Test SFDC Record Id: (empty)

System Information

Upcoming & Overdue

No activities to show.

Use Import Sections, to import sections from the json file downloaded from sandbox

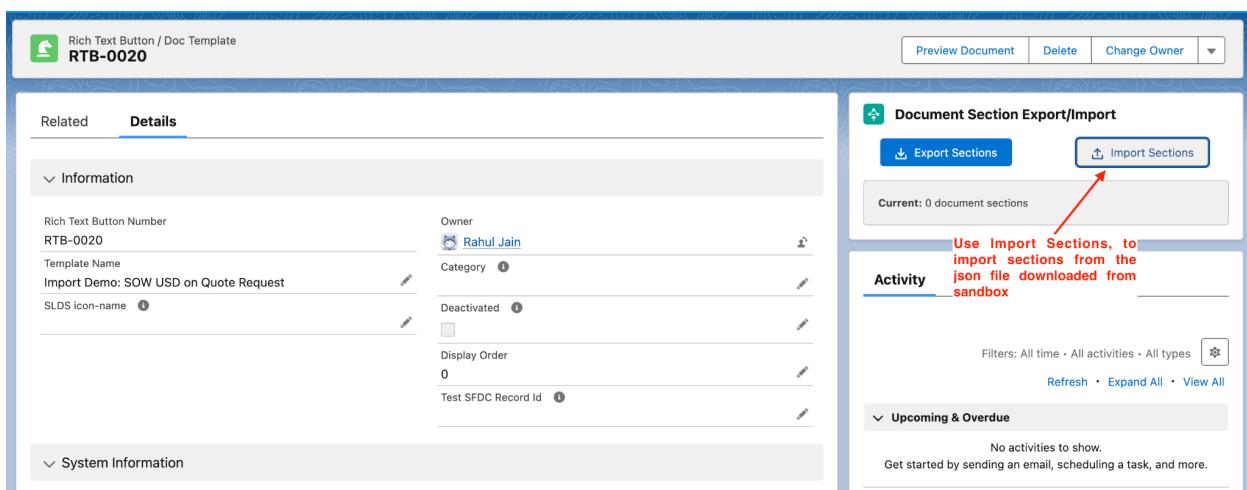
Activity

Export Sections Import Sections

Current: 0 document sections

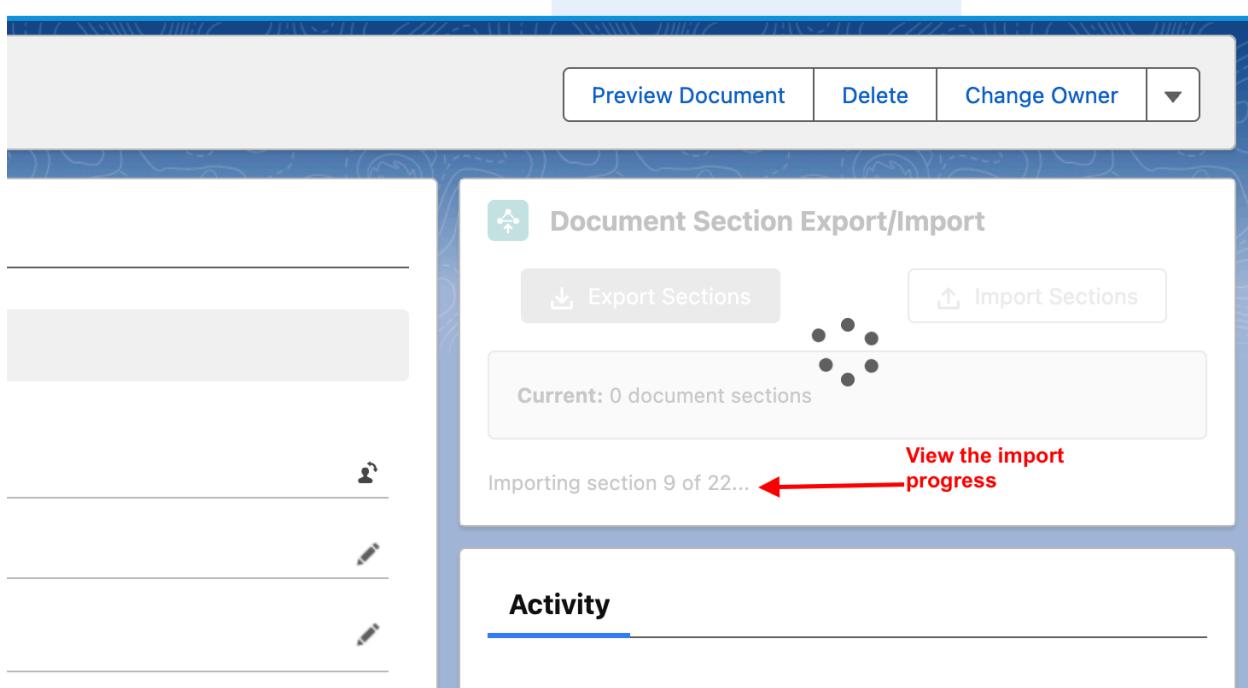
Filters: All time • All activities • All types

Refresh • Expand All • View All



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...").



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 for a document template named 'Rich Text Button / Doc Template RTB-0020'. A red arrow points to the 'Related' tab header. A message 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 'Button Sections/Doc Sections (6+)' table lists six sections with columns for 'PSC Button Sections Number', 'Display Order', 'HTML Content', and 'Is Active'. The 'Activity' section shows a message 'No activities to show. Get started by sending an email, scheduling a task, and more.' with buttons for 'Refresh', 'Expand All', and 'View All'.

PSC Button Sections Number	Display Order	HTML Content	Is Active
BS-0144	0	{{img}}	✓
BS-0145	1	STATEMENTOF 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.