



CODEYLABS

DRTE - ADD ON

**Button - Send Dynamic
Email**

User Guide



DRTE

This documentation provides a generic framework for the **DRTE (Dynamic Rich Text Editor) "Send Dynamic Email"** feature.

This tool allows admins to bridge the gap between static email templates and complex Salesforce data by injecting dynamic SOQL-driven content into a flexible editor.

Feature Overview: Send Dynamic Email

The **Send Dynamic Email** feature is a Flow-based extension that enables users to:

1. **Select** a pre-configured DRTE Rich Text/HTML template.
2. **DRTE Generate** real-time data tables or lists via SOQL queries.
3. **Personalize** the content in a "What You See Is What You Get" (WYSIWYG) editor before sending.
4. **Auto-Log** the communication to the Salesforce Activity Timeline.

Configuration Guide (Admin)

1. The Object Action

To make the feature accessible, create a record-level action:

- **Location:** Object Manager > [Your Object] > Buttons, Links, and Actions.
- **Action Type:** Flow.
- **Flow Name:** `Send_Dynamic_Email` (provided by the extension).
- **Label:** Custom (e.g., *Send Report*, *Email Briefing*, *Client Update*).

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and several utility icons. Below the navigation bar, the 'Setup' menu is open, showing 'Object Manager' as the selected option. The main content area is titled 'SETUP > OBJECT MANAGER' and 'Account'. On the left sidebar, the 'Buttons, Links, and Actions' section is highlighted. The main panel displays the 'New Action' form for the 'Account' object. The form is titled 'Enter Action Information' and includes fields for 'Object Name' (Account), 'Action Type' (Flow), 'Flow' (Send Dynamic Email), 'Standard Label Type' (--None--), 'Label' (Send Dynamic Briefing), 'Name' (Send_Dynamic_Briefing), 'Description' (empty), and 'Icon' (Change Icon). The form has 'Save' and 'Cancel' buttons at the bottom.

2. Template Definition (Rich Text Button / Doc Template)

The core of the logic lives in the Template record.

- **Category:** Map this to the Object API Name (e.g., [Account](#), [Lead](#), [Custom_Object__c](#)).
- **Is Email Template:** Must be checked to appear in the email flow.
- **Test SFDC Record Id:** Use a valid ID to preview data during configuration.

Rich Text Button / Doc Template
RTB-0021

[Preview Document](#) [Delete](#) [Change Owner](#)

Related

Details

Information

Rich Text Button Number
RTB-0021

Owner
[Rahul Jain](#)

Template Name
Account Summaries

Category
Account

SLDS icon-name

Deactivated

Available For Selection

Display Order
0

Is Email Template

Test SFDC Record Id
001a500000ZPM62AAH

System Information

Created By
[Rahul Jain](#), 1/24/2026, 4:10 AM

Currency
USD - U.S. Dollar

Document Section Export/Import

[Export Sections](#) [Import Sections](#)

Current: 2 document sections

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.

No past activity. Past meetings and tasks marked as done show up here.

3. Data Integration (Dynamic Tables)

Create a document section of Table type with SOQL Query. Instead of manual entry, use the **Dynamic Table Configuration Builder**:

- **SOQL Query:** Define which child records or related data to pull.
 - *Example:* `SELECT Name, Amount, StageName FROM Opportunity WHERE AccountId = :recordId`
- **Column Builder:** Assign labels and formatting (Currency, Date, etc.) to the query results.
- **JSON Integration:** The builder generates the logic required to render this table inside the email body automatically.

The screenshot shows the 'Dynamic Table Configuration Builder' modal in a Salesforce email template editor. The modal is titled 'Dynamic Table Configuration Builder' and has a 'Save Configuration' button. It contains the following sections:

- SOQL Query:** A text area with the query: `SELECT Name, format(Amount), StageName, CloseDate, CurrencyIsoCode FROM Opportunity WHERE AccountId = :recordId`. Below the query is a 'Relationship Field Examples' section with two bullet points:
 - Custom Relationships: Product2__r.Name, Account__r.Industry, Contact__r.Email
 - Standard Relationships: Owner.Name, CreatedBy.Email, Account.Name, RecordType.Name
- Auto-Generate Columns from SOQL:** A button with a refresh icon.
- Found 5 fields in query:** A green checkmark indicating the query is valid.
- Column Builder:** A section with three tabs: 'Column Builder', 'Table Core Style', and 'Preview'. The 'Preview' tab is selected, showing a table with the following structure:

Name	Amount	Stage	Close Date	Opp Currency
sample info	sample info	sample info	sample info	sample info

The background shows a 'Sales Console' with a 'Details' view of a record 'BS-0166'. The 'Details' view includes sections for 'Information' and 'HTML'. The 'HTML' section is currently empty.

Use Case Gallery

The flexibility of the DRTE extension allows for various applications beyond simple briefings:

Use Case	Data Source (SOQL)	Target Audience
Project Status	Milestones__c & Tasks__c	Stakeholders / Clients
Collections/Invoicing	Invoices__c where Status = 'Overdue'	Finance Contacts
Onboarding Checklist	Requirements__c where Completed = False	New Customers
Case Summary	Cases related to an Account	Success Managers

User Workflow

Step 1: Initialize

The user clicks the custom button (e.g., **Send Dynamic Briefing**) on any record. This passes the `recordId` into the engine.

The screenshot displays a CRM interface for a 'Sales Console'. The main focus is on the 'Acme Inc' account record. The interface includes a top navigation bar with a search bar and various utility icons. Below the navigation bar, the account details are shown in a card format. The card includes fields for Type (Prospect), Phone ((212) 555-5555), Website, Account Owner (Rahul Jain), Industry (Manufacturing), and Billing Address (10 Main Rd., New York, NY 31349 USA). A 'Send Dynamic Briefing' button is highlighted with a mouse cursor. Below the card, there are two main sections: 'Related' and 'Details'. The 'Details' section is expanded, showing fields for Account Owner, Attn Email, Account Name, Phone, Parent Account, Fax, Account Currency, Website, Type, Employees, and Annual Revenue. To the right of the details section, there are three summary cards: 'Invoices (1)' showing details for invoice INV-010, 'Guarantees (0)', and 'Cases (2)'.

Search...

Sales Console Accounts Acme Global | Account Acme Inc | Account

Account Acme Inc

+ Follow Send Dynamic Briefing New Task New Event

Type Prospect Phone (212) 555-5555 Website Account Owner Rahul Jain Industry Manufacturing Billing Address 10 Main Rd. New York, NY 31349 USA

Related Details

Account Owner Rahul Jain Attn Email

Account Name Acme Inc Phone (212) 555-5555

Parent Account Fax (212) 555-5555 Website

Account Currency USD - U.S. Dollar

Additional Information

Type Prospect Employees 680

Industry Annual Revenue

Invoices (1)

INV-010

Payment Status: Expected

Status: Open

Total Fees: USD 324,539.71

View All

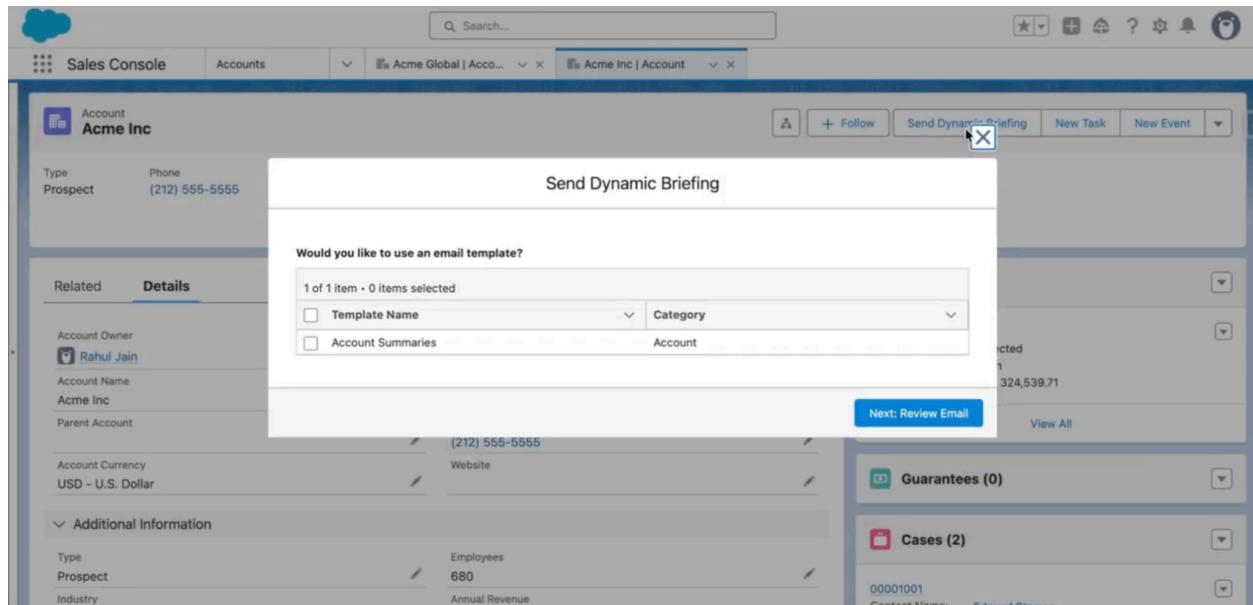
Guarantees (0)

Cases (2)

00001001

Step 2: Template Selection

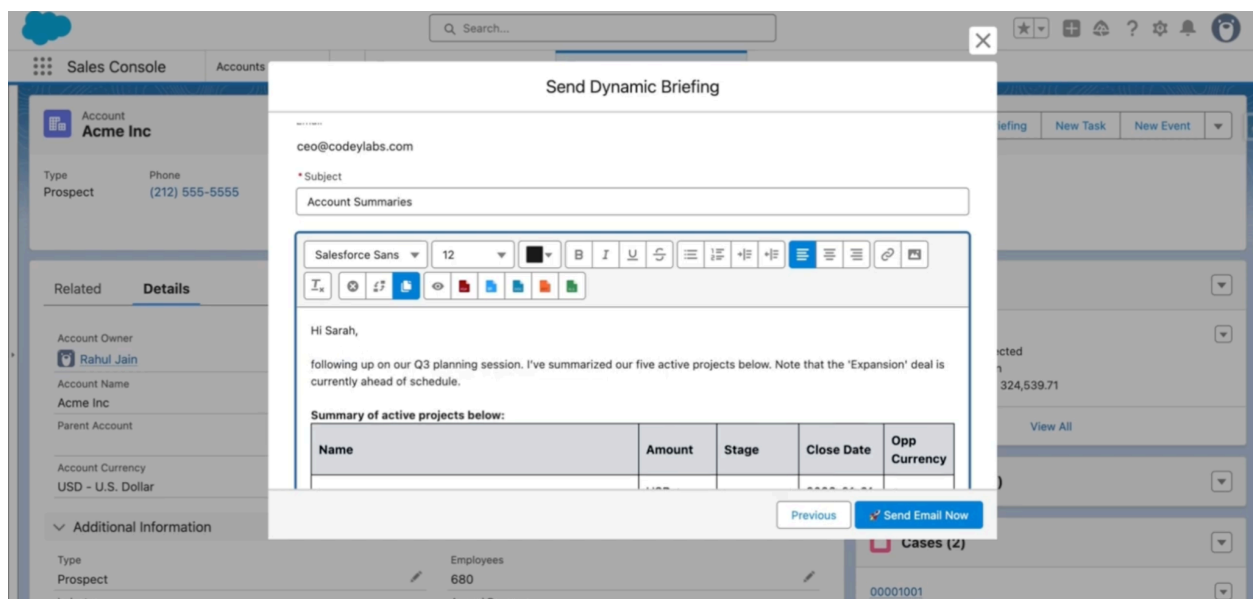
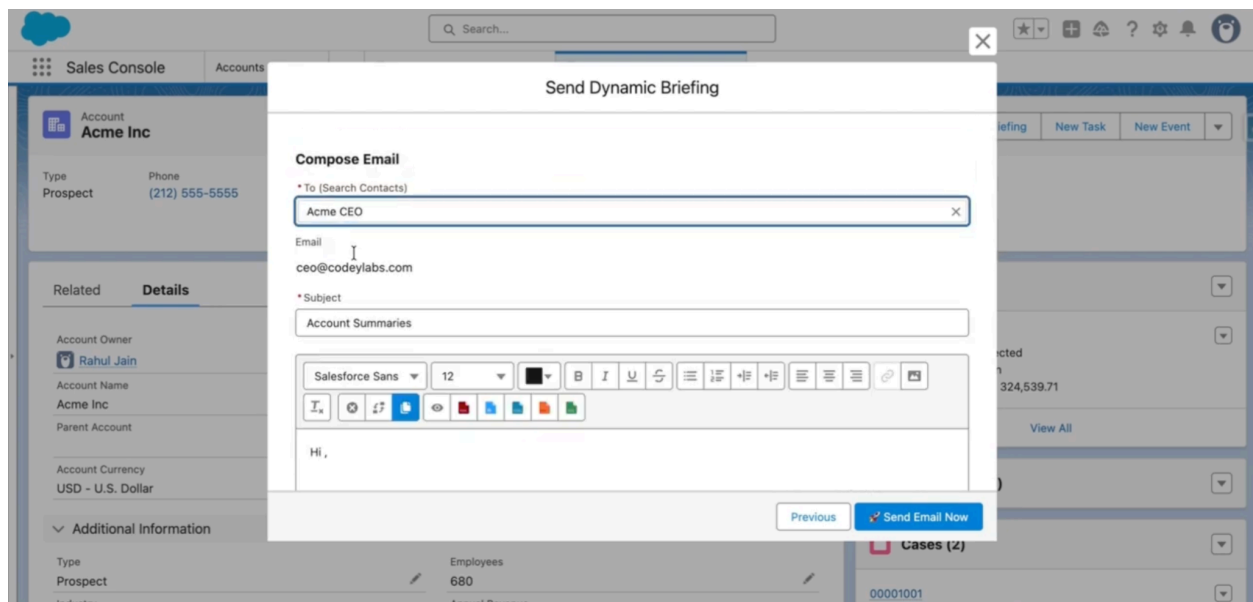
The user chooses from a list of templates filtered by the current object. This ensures the user only sees relevant email formats.



Step 3: Real-Time Preview & Edit

The engine executes the SOQL queries and renders the document sections dynamically. The user can:

- Search and select a contact from the system to send email to.
- Add a personalized introduction.
- Format text using the rich text toolbar (Bold, Colors, Links).



Step 4: Dispatch & Log

Upon clicking **Send Email Now**, the extension:

1. Sends the email via the Salesforce platform.
2. Creates an **Email Message** and **Task** record.
3. Attaches the final HTML content to the record's **Activity History** for future reference and compliance.

This screenshot shows the Salesforce 'Acme Inc | Account' page. The left sidebar contains 'System Information' (Created By: Rahul Jain, 5/19/2024, 10:22 PM; Last Modified By: Rahul Jain, 10/15/2025, 11:34 PM) and 'Custom Links' (Google Search, Google Maps, Google News, Hoovers Profile). The main content area displays the account address (10 Main Rd., New York, NY 31349, USA) with a map of Liberty Park. The right sidebar shows the 'Activity' tab with filters (All time, All activities, All types) and a list of activities under 'January - 2026', including an email summary sent at 4:31 AM.

This screenshot shows the Salesforce email interface for an email titled 'Account Summaries'. The email is from 'Rahul Jain' to 'Acme CEO' and was sent at 4:31 AM. The message body contains a summary of active projects below:

Name	Amount	Stage	Close Date	Opp Currency
Acme - 200 Widgets	USD 20,000.00	Prospecting	2026-01-31 00:00:00	USD
Acme - 600 Widgets	USD 70,000.00	Needs Analysis	2026-02-26 00:00:00	USD
Opportunity Commodity Trading & Risk Management (CTRM)	USD 140,936.72	Needs Analysis	2026-02-28 00:00:00	USD
Acme - 1,200 Widgets	USD 140,000.00	Value Proposition	2026-03-18 00:00:00	USD

The right sidebar shows the 'Related' section with 'Attachments (0)', 'Sender and Recipients (1)' (Acme CEO, Contact), 'Other Related People (0)', and 'Related To (1)' (Acme Inc).



Best Practices

- **Dynamic Filters:** Always use `:recordId` in your SOQL queries within the Template Builder to ensure data is context-specific.
- **Branding:** Use the HTML section of the template to include company logos and standard signatures.
- **Testing:** Use the **Test SFDC Record Id** field on the Template record to verify that your SOQL query returns the expected data before deploying to users.