



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:

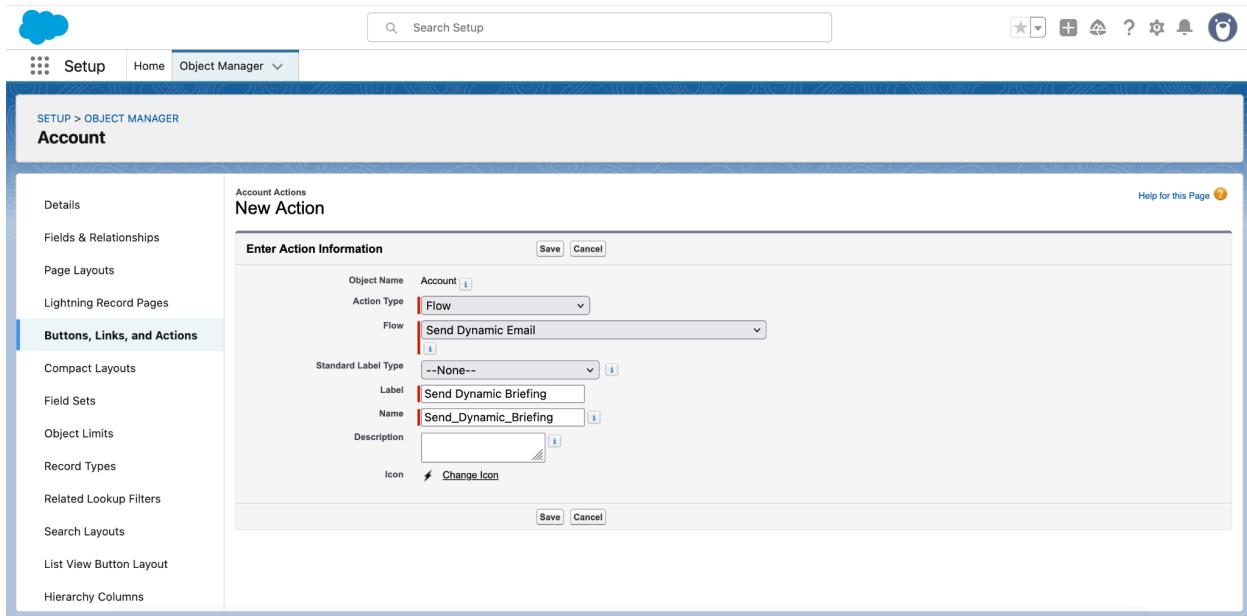
1. **Select** a pre-configured DRTE Rich Text/HTML template.
2. **DRTE Generate** real-time data tables or lists via SOQL queries.
3. **Personalize** the content in a "What You See Is What You Get" (WYSIWYG) editor before sending.
4. **Auto-Log** the communication to the Salesforce Activity Timeline.

Configuration Guide (Admin)

1. The Object Action

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

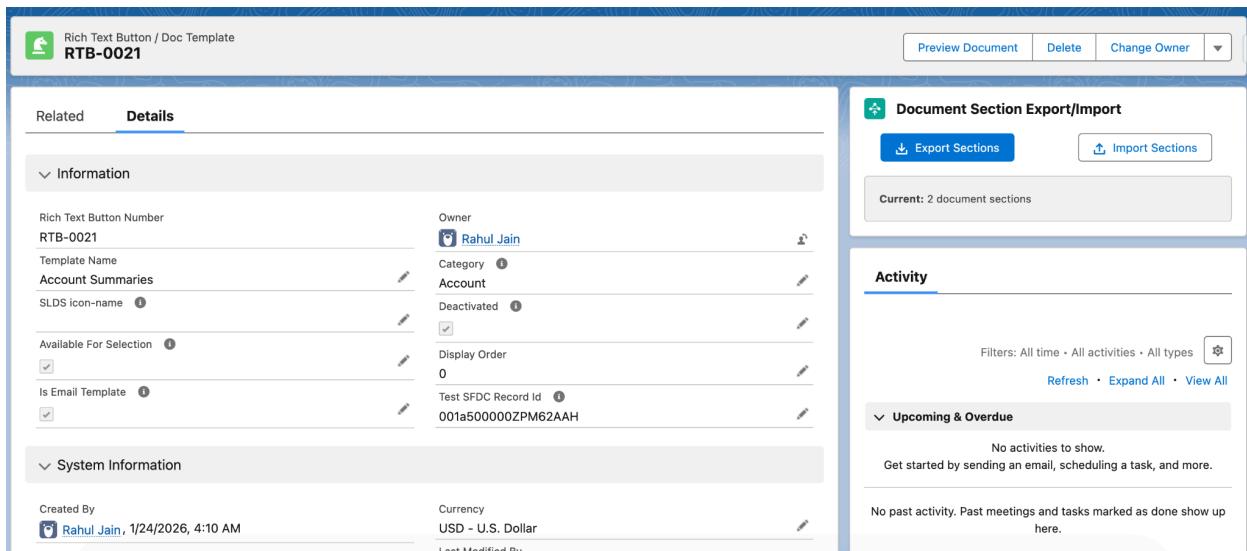
- **Location:** Object Manager > [Your Object] > Buttons, Links, and Actions.
- **Action Type:** Flow.
- **Flow Name:** `Send_Dynamic_Email` (provided by the extension).
- **Label:** Custom (e.g., *Send Report*, *Email Briefing*, *Client Update*).



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.



The screenshot shows the 'Rich Text Button / Doc Template' record for 'RTB-0021'. The 'Details' tab is selected. The 'Information' section contains the following fields:

Rich Text Button Number	RTB-0021	Owner	Rahul Jain
Template Name	Account Summaries	Category	Account
SLDS Icon-name		Deactivated	<input checked="" type="checkbox"/>
Available For Selection	<input checked="" type="checkbox"/>	Display Order	0
Is Email Template	<input checked="" type="checkbox"/>	Test SFDC Record Id	001a500000ZPM62AAH

The 'System Information' section shows:

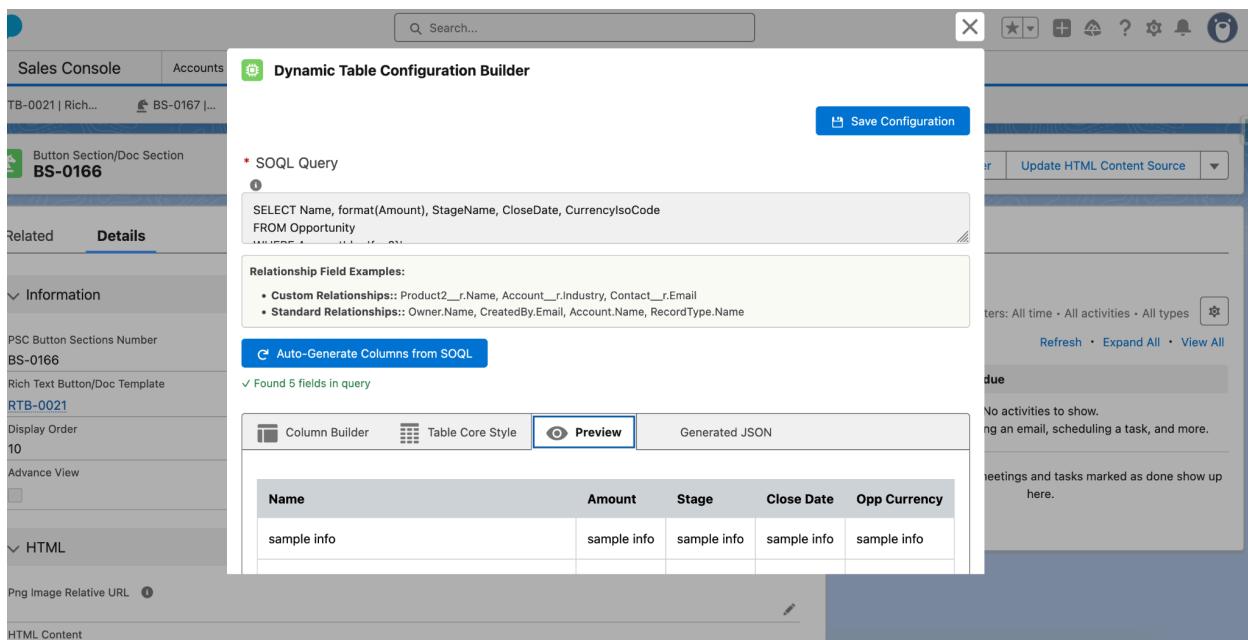
Created By	Rahul Jain, 1/24/2026, 4:10 AM	Currency	USD - U.S. Dollar
------------	--------------------------------	----------	-------------------

The right panel shows the 'Document Section Export/Import' and 'Activity' sections. The 'Activity' section is currently empty.

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' window within a Sales Console interface. The window is titled 'Dynamic Table Configuration Builder' and contains the following sections:

- SOQL Query:** A text input field containing the SOQL query: `SELECT Name, format(Amount), StageName, CloseDate, CurrencyIsoCode FROM Opportunity`.
- Relationship Field Examples:** A list of examples:
 - 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 the text 'Auto-Generate Columns from SOQL' and a note 'Found 5 fields in query'.
- Preview:** A preview section showing a table with the following data:

Name	Amount	Stage	Close Date	Opp Currency
sample info				

The 'Generated JSON' section shows the generated JSON representation of the table data.

Use Case Gallery

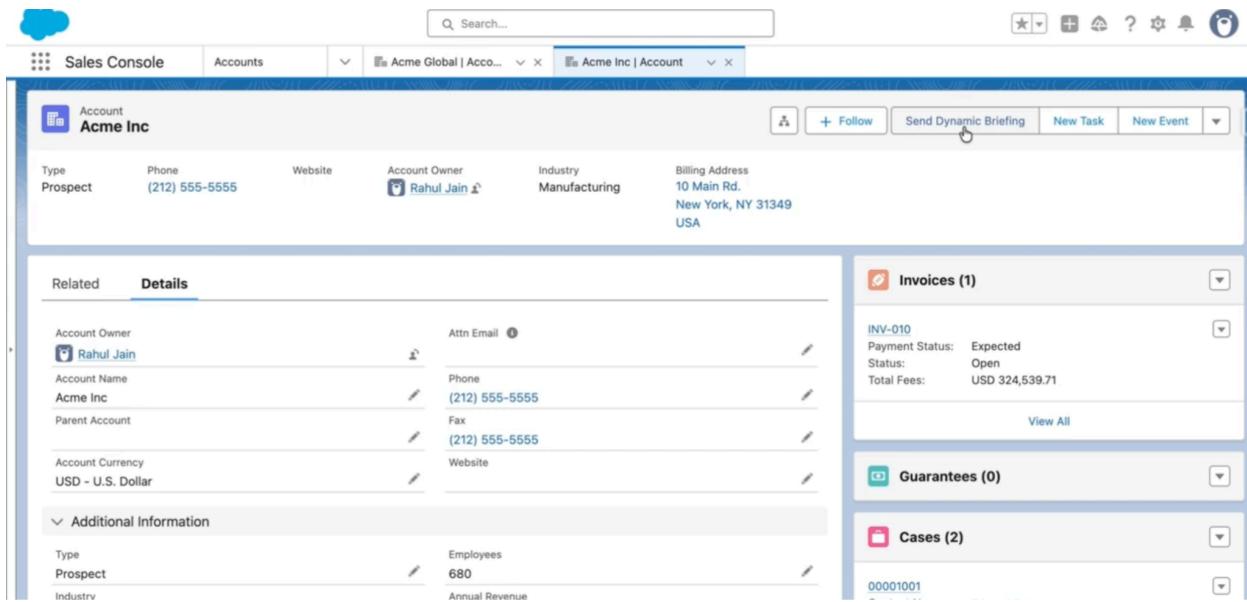
The flexibility of the DRTE extension allows for various applications beyond simple briefings:

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

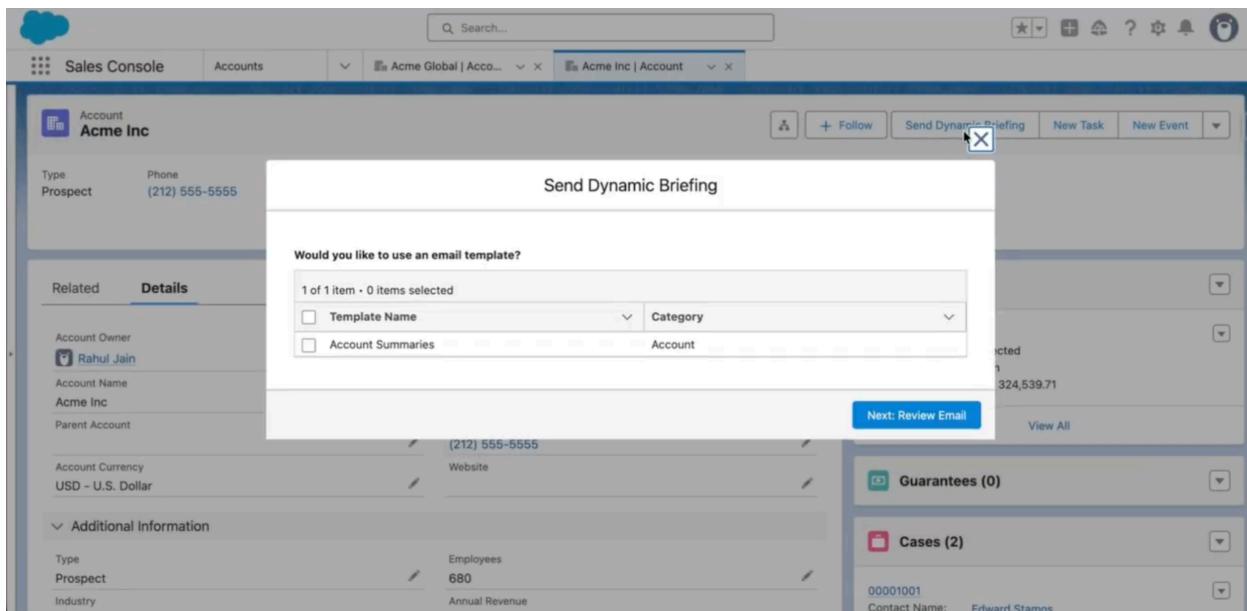
Step 1: Initialize

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



Step 2: Template Selection

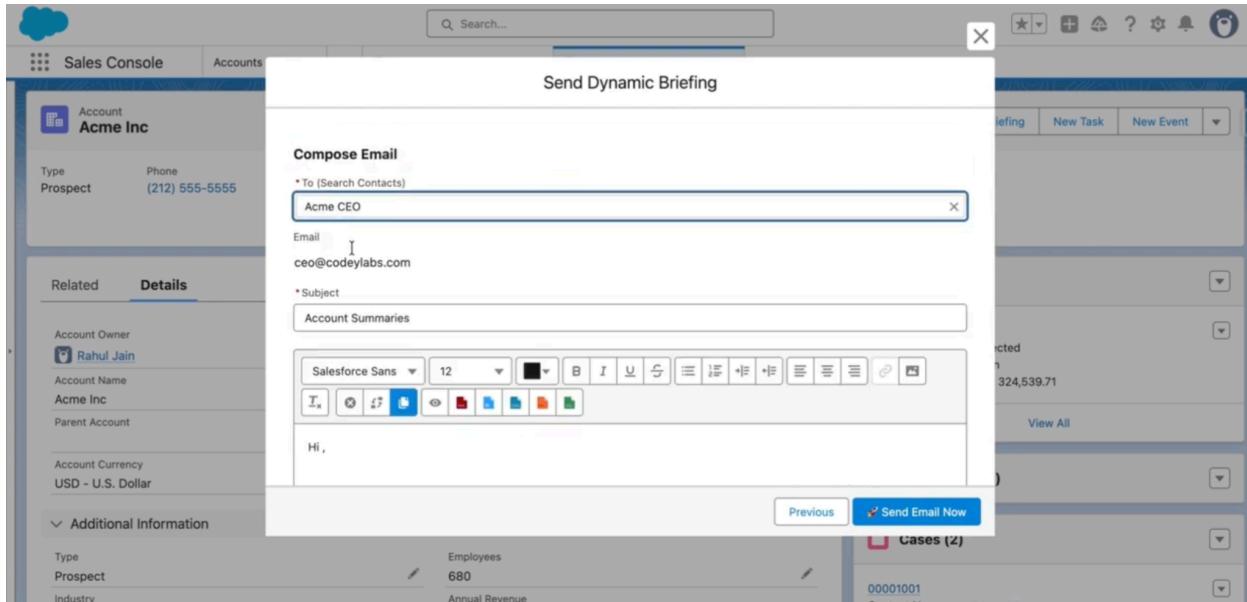
The user chooses from a list of templates filtered by the current object. This ensures the user only sees relevant email formats.



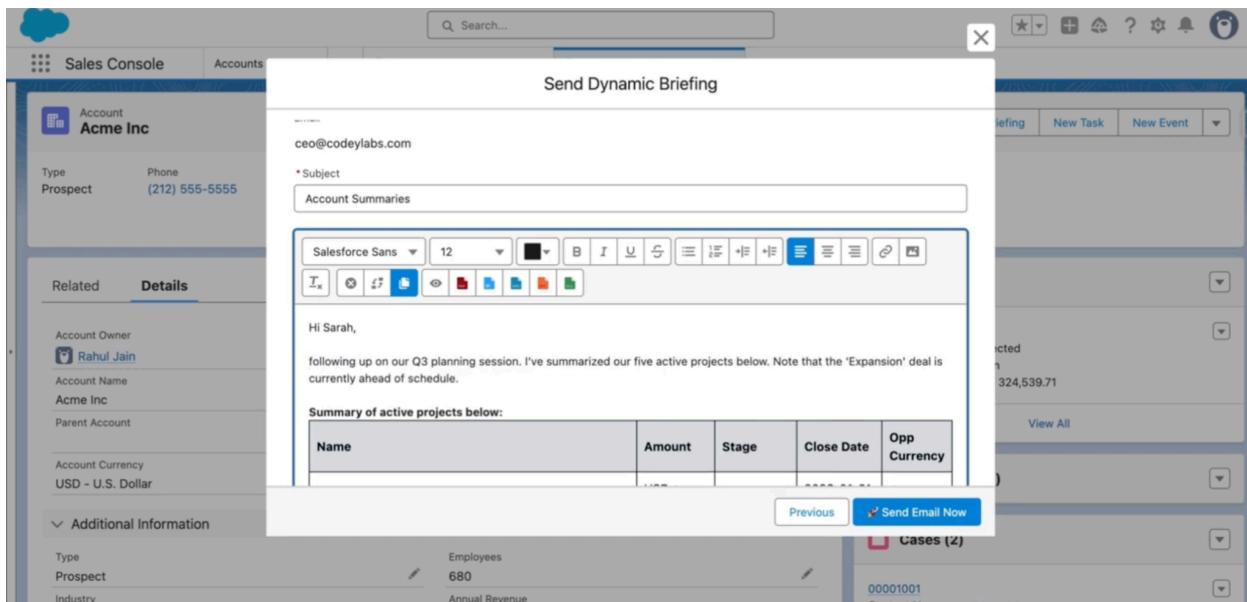
Step 3: Real-Time Preview & Edit

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).



The screenshot shows the Salesforce Sales Console interface. A modal window titled "Send Dynamic Briefing" is open, showing a "Compose Email" form. The "To" field is populated with "Acme CEO". The "Email" field contains "ceo@codeylabs.com". The "Subject" field is "Account Summaries". The rich text editor toolbar is visible above the message body. The message body starts with "Hi,". In the background, the account details for "Acme Inc" are visible, including the owner "Rahul Jain" and basic account information. The sidebar shows a list of cases.

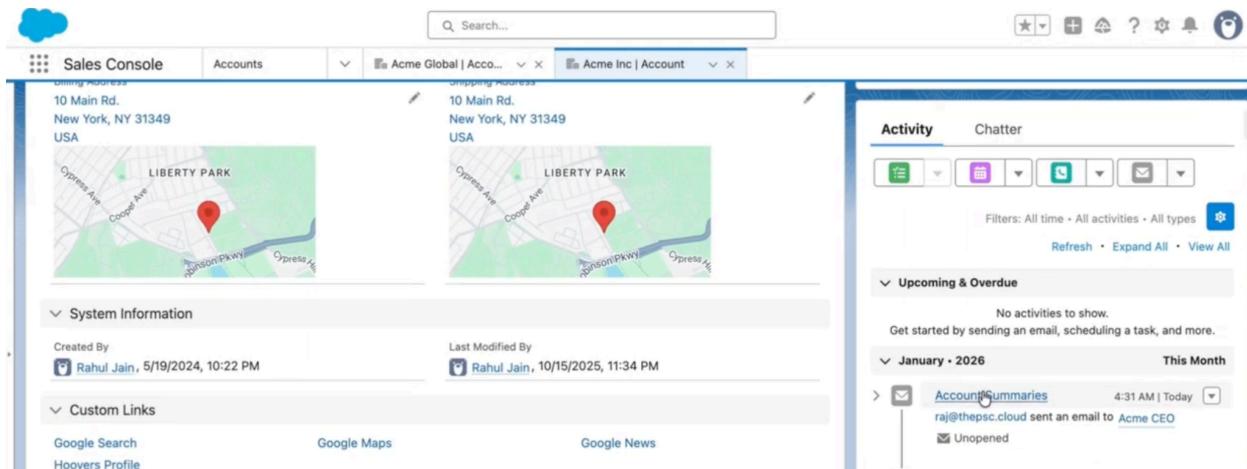


The screenshot shows the Salesforce Sales Console interface. A modal window titled "Send Dynamic Briefing" is open, showing a "Compose Email" form. The "To" field is populated with "ceo@codeylabs.com". The "Subject" field is "Account Summaries". The rich text editor toolbar is visible above the message body. The message body starts with "Hi Sarah," and continues with a summary of active projects: "following up on our Q3 planning session. I've summarized our five active projects below. Note that the 'Expansion' deal is currently ahead of schedule." Below this, a table titled "Summary of active projects below:" is shown with columns: Name, Amount, Stage, Close Date, and Opp Currency. The table is empty. The background shows the account details for "Acme Inc" and the sidebar with a list of cases.

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.



Sales Console

Acme Global | Account

Acme Inc | Account

Activity

Chatter

Filters: All time • All activities • All types

Upcoming & Overdue

No activities to show.

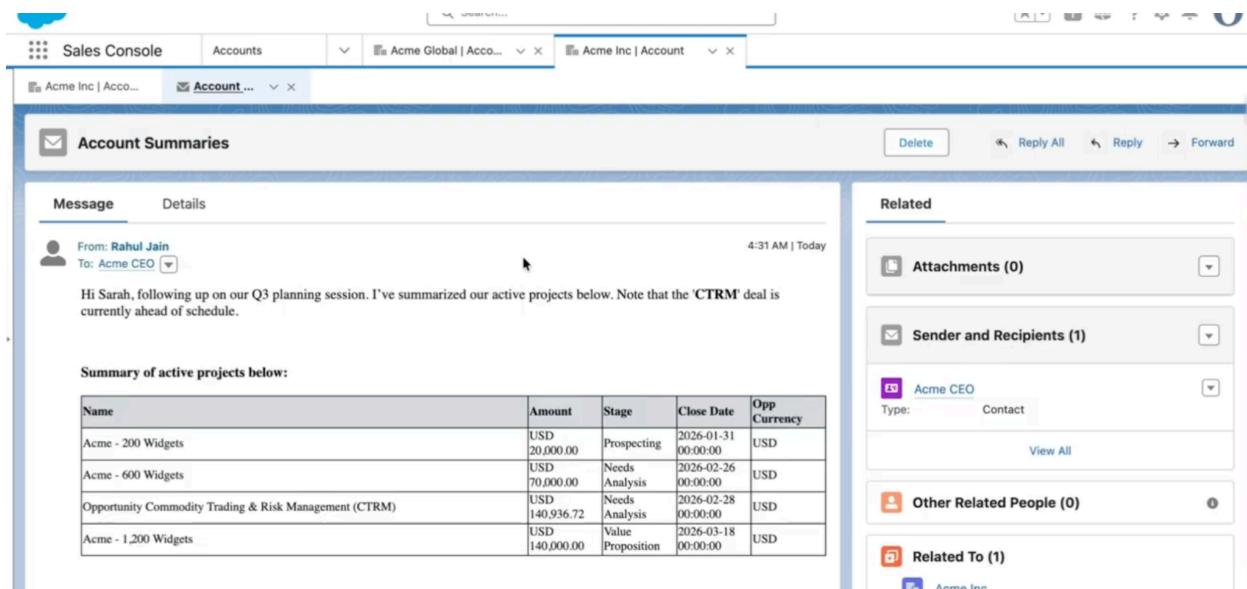
Get started by sending an email, scheduling a task, and more.

January • 2026 This Month

Account Summaries 4:31 AM | Today

raj@thepsc.cloud sent an email to Acme CEO

Unopened



Sales Console

Accounts

Acme Global | Account

Acme Inc | Account

Account Summaries

Message

Details

From: Rahul Jain
To: Acme CEO

4:31 AM | Today

Hi Sarah, following up on our Q3 planning session. I've summarized our active projects below. Note that the 'CTRM' deal is currently ahead of schedule.

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

Related

Attachments (0)

Sender and Recipients (1)

Acme CEO

Type: Contact

View All

Other Related People (0)

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.