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:

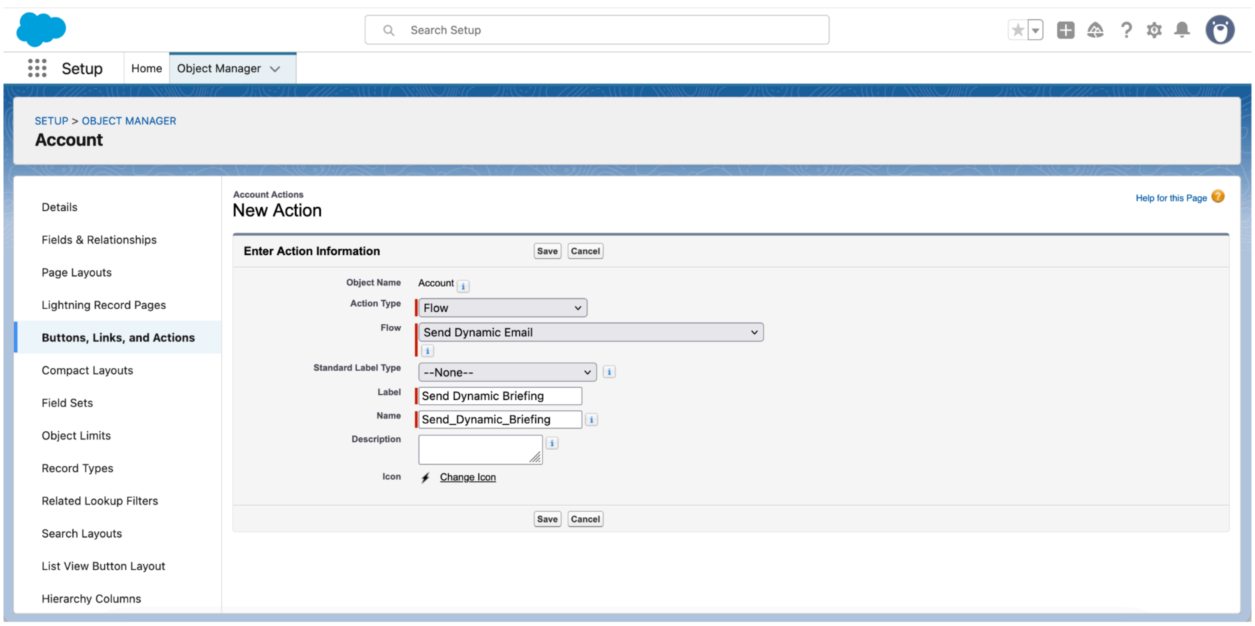
1. **Select** a pre-configured DRTE Rich Text/HTML template.
2. **DRTE Generate** real-time data tables or lists via SOQL queries.
3. **Personalize** the content in a "What You See Is What You Get" (WYSIWYG) editor before sending.
4. **Auto-Log** the communication to the Salesforce Activity Timeline.

Configuration Guide (Admin)

1. The Object Action

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

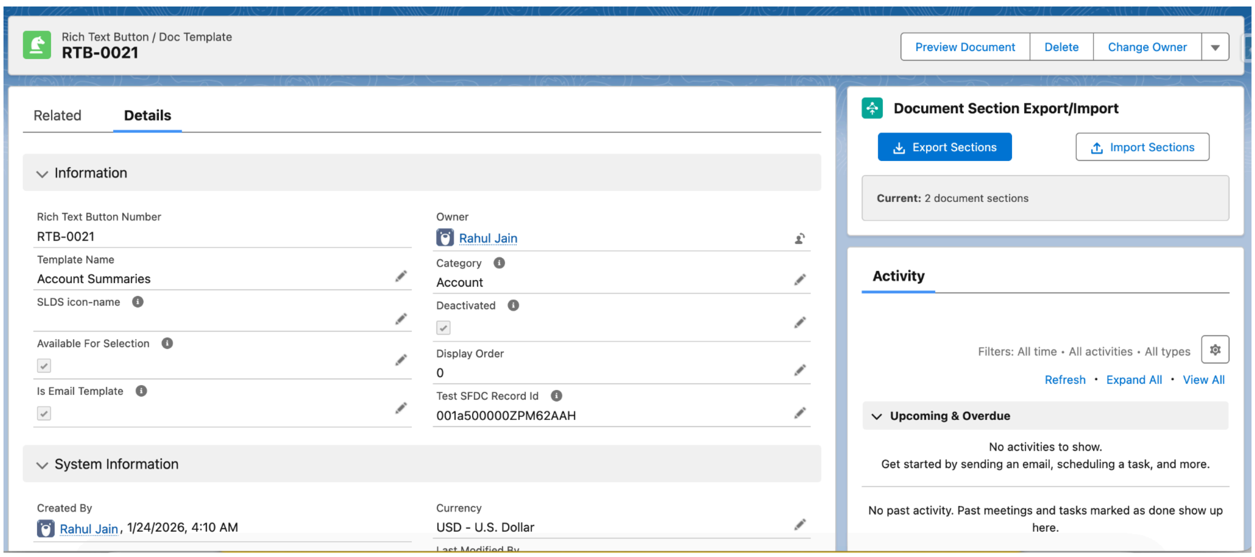
- **Location:** Object Manager > [Your Object] > Buttons, Links, and Actions.
- **Action Type:** Flow.
- **Flow Name:** Send_Dynamic_Email (provided by the extension).
- **Label:** Custom (e.g., *Send Report*, *Email Briefing*, *Client Update*).



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

The core of the logic lives in the Template record.

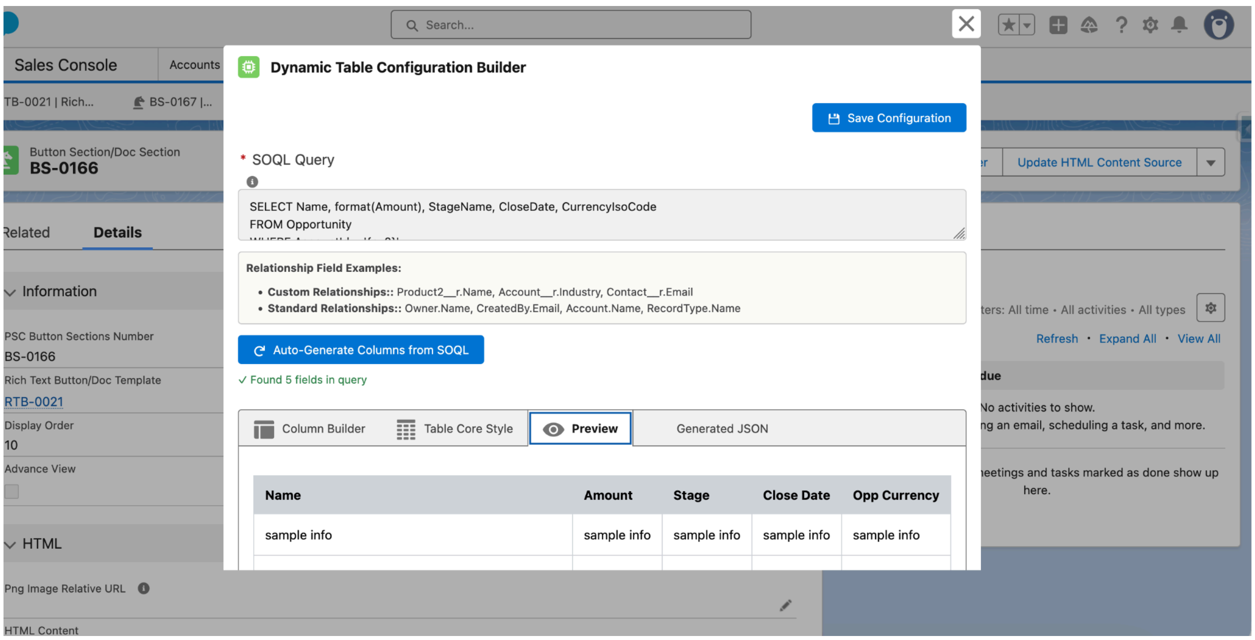
- **Category:** Map this to the Object API Name (e.g., Account, Lead, Custom_Object__c).
- **Is Email Template:** Must be checked to appear in the email flow.
- **Test SFDC Record Id:** Use a valid ID to preview data during configuration.



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.



Use Case Gallery

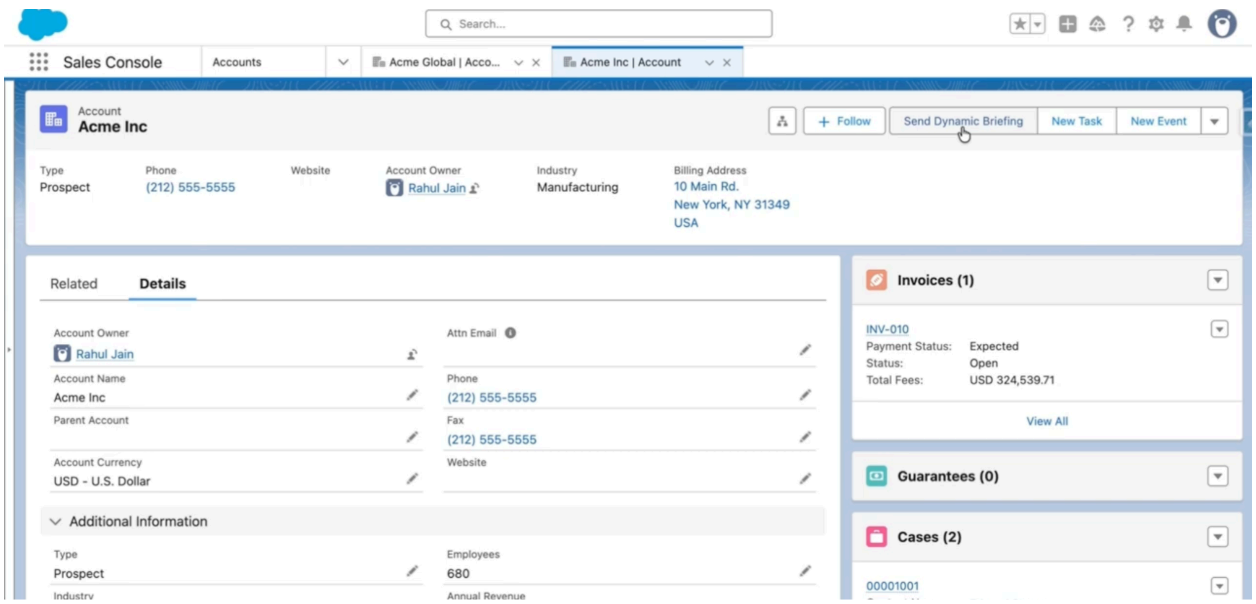
The flexibility of the DRTE extension allows for various applications beyond simple briefings:

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

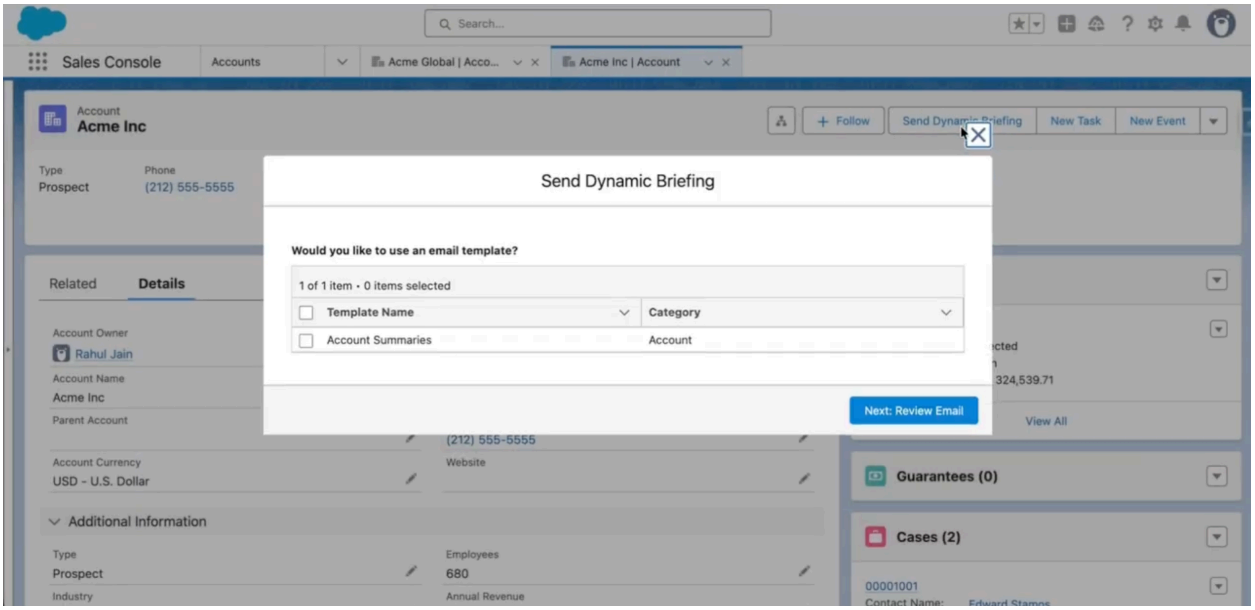
Step 1: Initialize

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

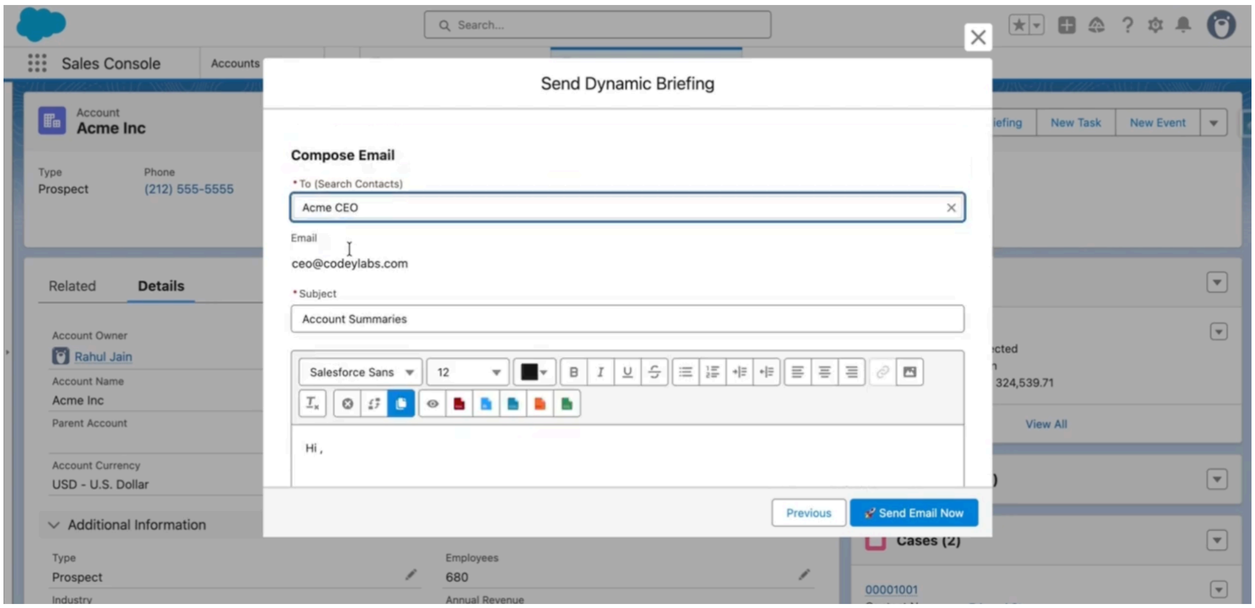
The user chooses from a list of templates filtered by the current object. This ensures the user only sees relevant email formats.

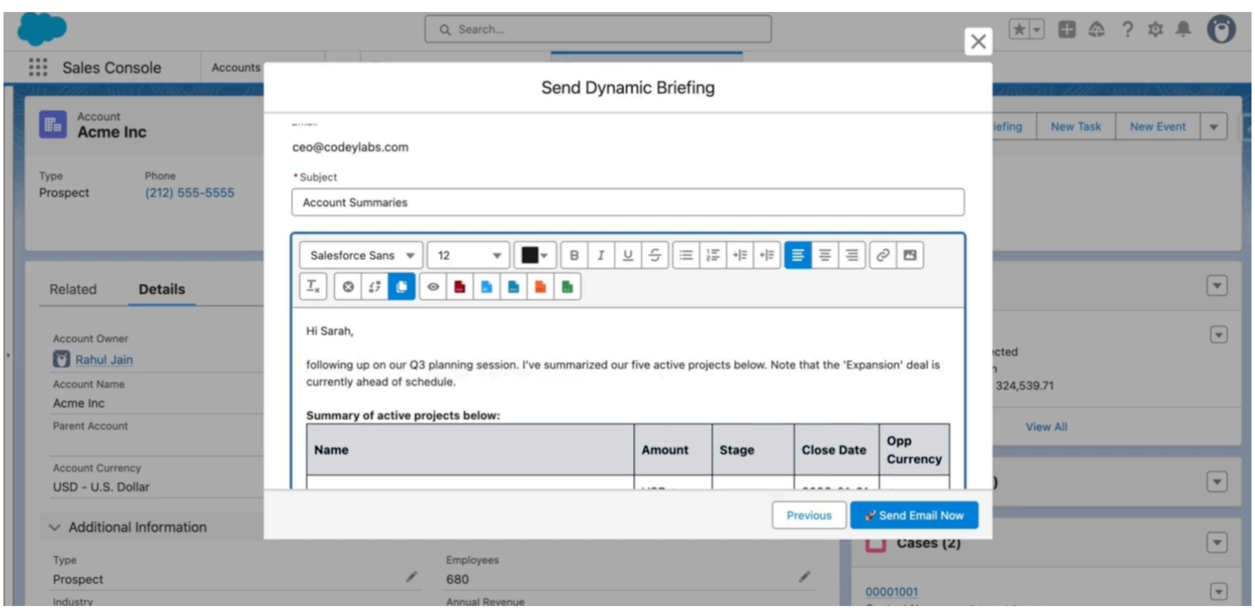


Step 3: Real-Time Preview & Edit

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).

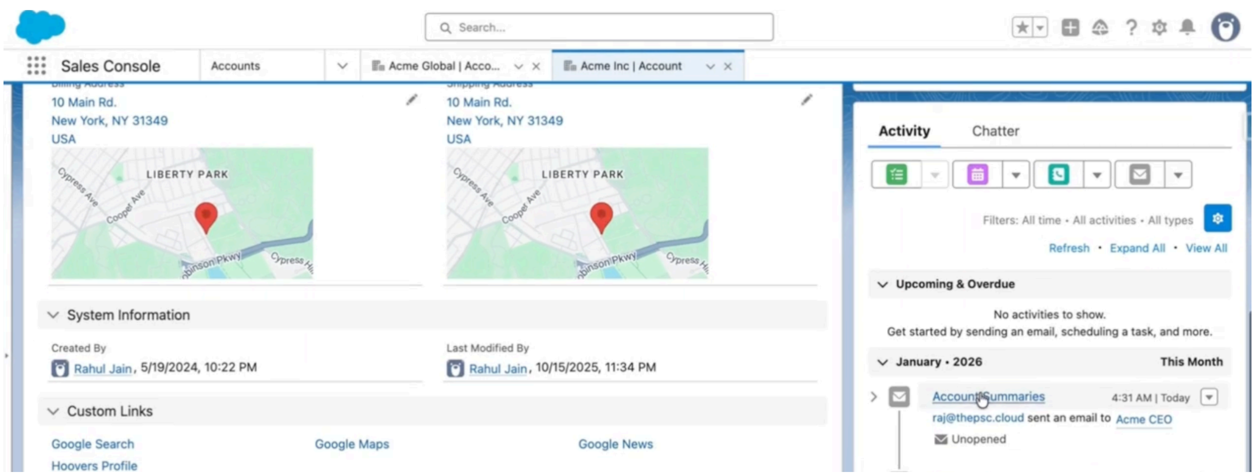


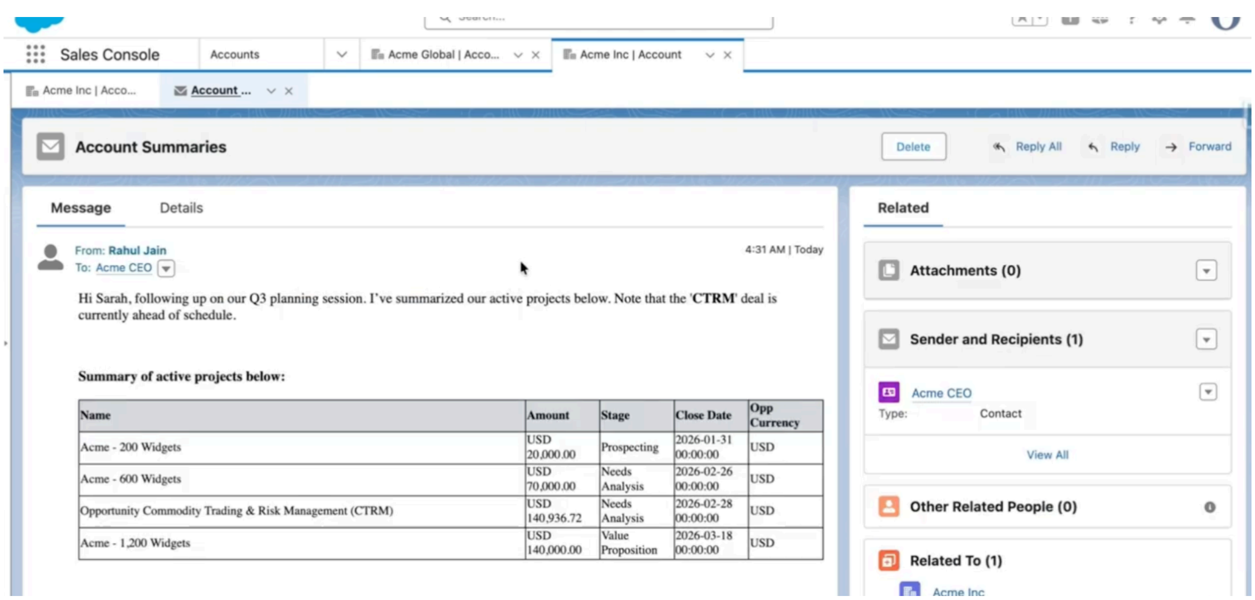


Step 4: Dispatch & Log

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.





💡 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.