



CODEYLABS

DRTE - ADD ON

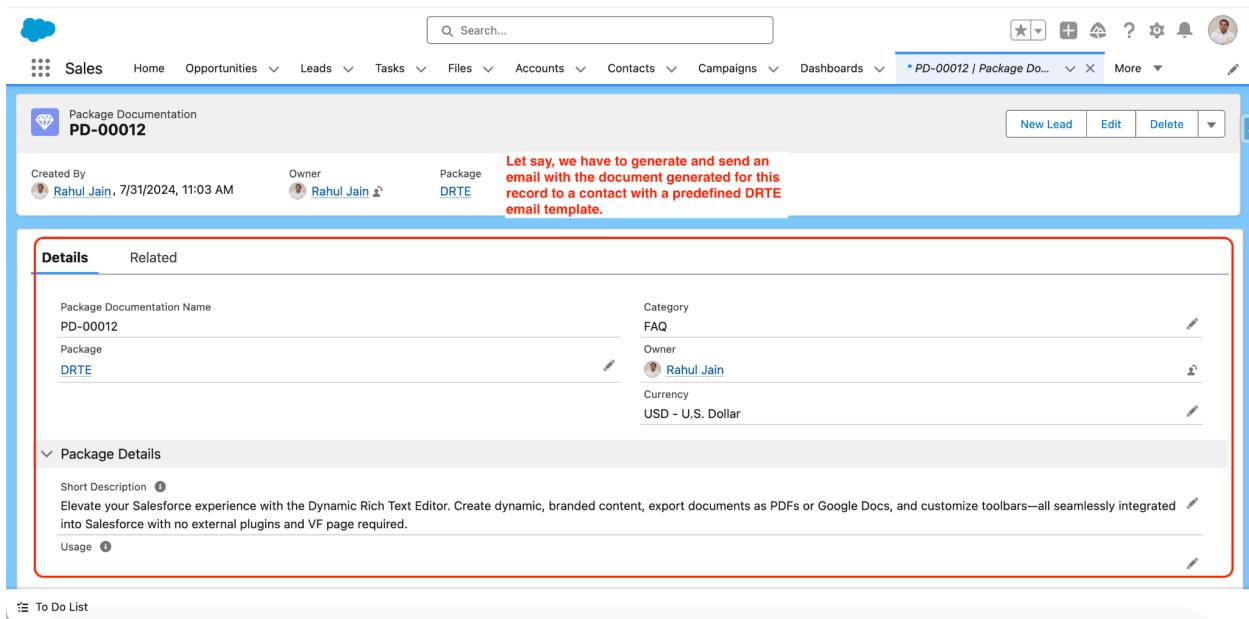
Button - Generate and Send
Document

User Guide



DRTE

This guide explains how to use the "**Generate and Send Document**" feature within the DRTE Extension package. This tool allows you to generate high-quality documents from your Salesforce records and email them immediately using predefined templates.



The screenshot shows the Salesforce Package Documentation page for a record named "PD-00012". The page has a header with a cloud icon, a search bar, and navigation links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and More. The main content area displays the following information:

- Package Documentation**: PD-00012
- Created By**: Rahul Jain, 7/31/2024, 11:03 AM
- Owner**: Rahul Jain
- Package**: DRTE
- Category**: FAQ
- Owner**: Rahul Jain
- Currency**: USD - U.S. Dollar

A red box highlights the "Package Details" section, which contains:

- Short Description**: Elevate your Salesforce experience with the Dynamic Rich Text Editor. Create dynamic, branded content, export documents as PDFs or Google Docs, and customize toolbars—all seamlessly integrated into Salesforce with no external plugins and VF page required.
- Usage**: (link)

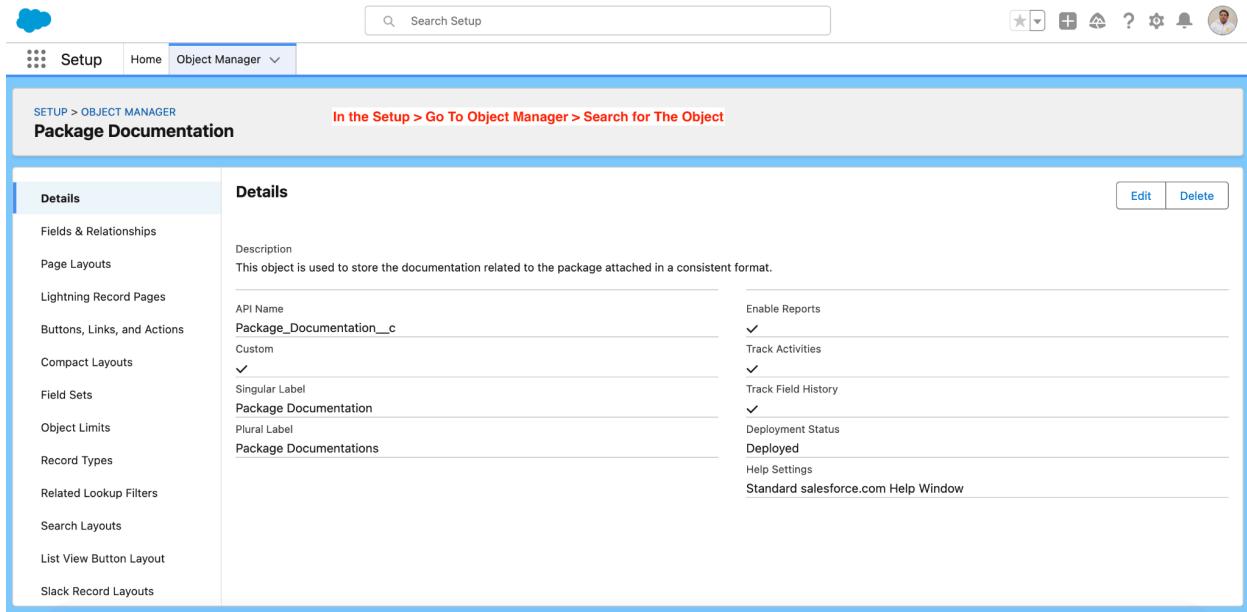
At the bottom of the page, there is a "To Do List" section.

Part 1: Administrator Setup

Before users can send documents, an administrator must add the action to the record page.

1. Create the Action

- Go to **Setup > Object Manager** and select the desired Object (e.g., Package Documentation).

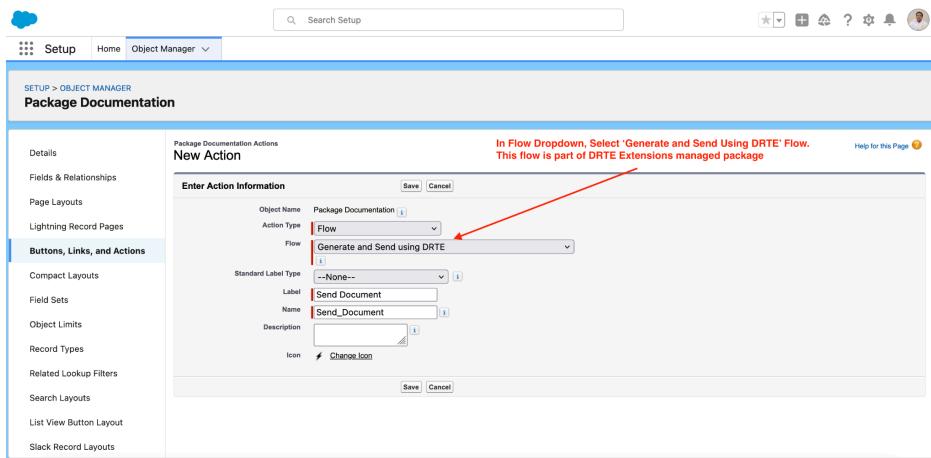


The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER Package Documentation'. A sub-header says 'In the Setup > Go To Object Manager > Search for The Object'. The left sidebar lists various object categories: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Slack Record Layouts. The main 'Details' section for 'Package Documentation' shows the following fields:

- Description:** This object is used to store the documentation related to the package attached in a consistent format.
- API Name:** Package_Documentation__c
- Custom:** ✓
- Singular Label:** Package Documentation
- Plural Label:** Package Documentations

On the right, there are sections for 'Enable Reports', 'Track Activities', 'Track Field History', 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (set to 'Standard salesforce.com Help Window').

- Click on **Buttons, Links, and Actions** and select **New Action**.
- **Action Type:** Flow.
- **Flow:** Select **Generate and Send using DRTE** (provided by the managed package).



The screenshot shows the 'New Action' dialog for 'Package Documentation'. The left sidebar is identical to the previous screenshot. The main dialog is titled 'New Action' and contains the following fields:

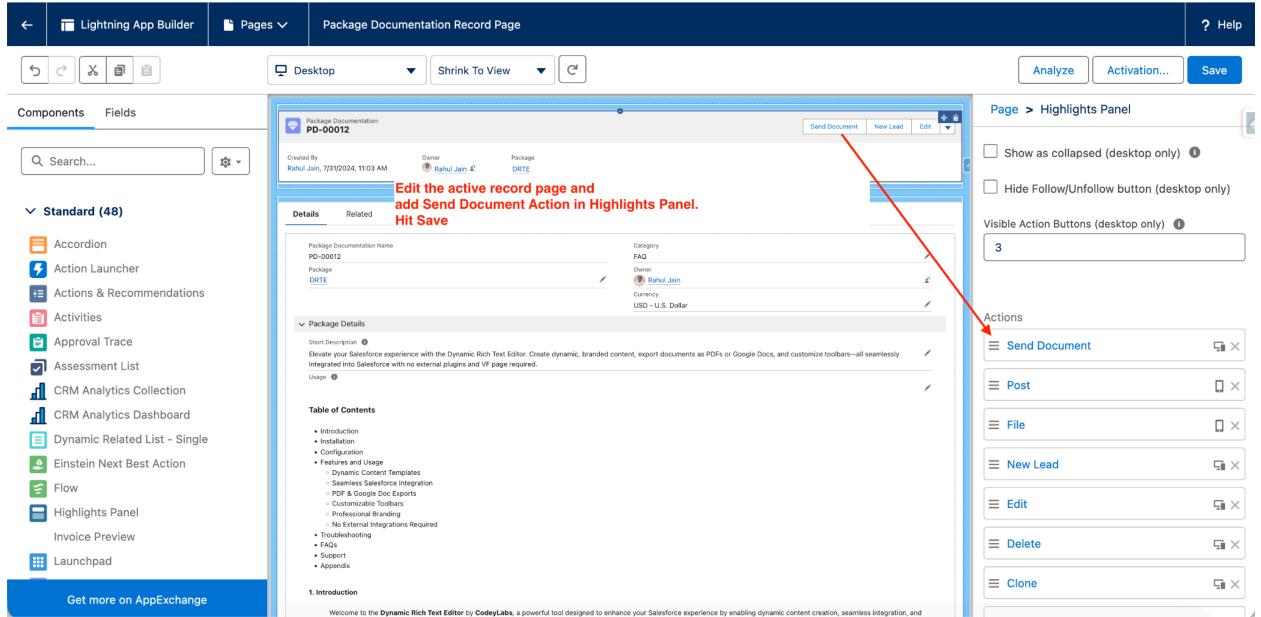
- Object Name:** Package Documentation
- Action Type:** Flow (selected from a dropdown)
- Flow:** Generate and Send using DRTE (selected from a dropdown, with a red arrow pointing to it)
- Standard Label Type:** --None--
- Label:** Send Document
- Name:** Send_Document
- Description:** (empty text area)
- Icon:** (empty icon field)

At the bottom of the dialog are 'Save' and 'Cancel' buttons.

- **Label:** Send Document.
- **Name:** Send_Document.
- Click **Save**.

2. Add to Record Page

- Open a record of that object and click the **Gear Icon > Edit Page**.



- Select the **Highlights Panel** component.
- In the properties pane, click **Add Action** and search for your "Send Document" action.
- Click **Save** and then **Activate**.

Part 2: How to Generate and Send a Document

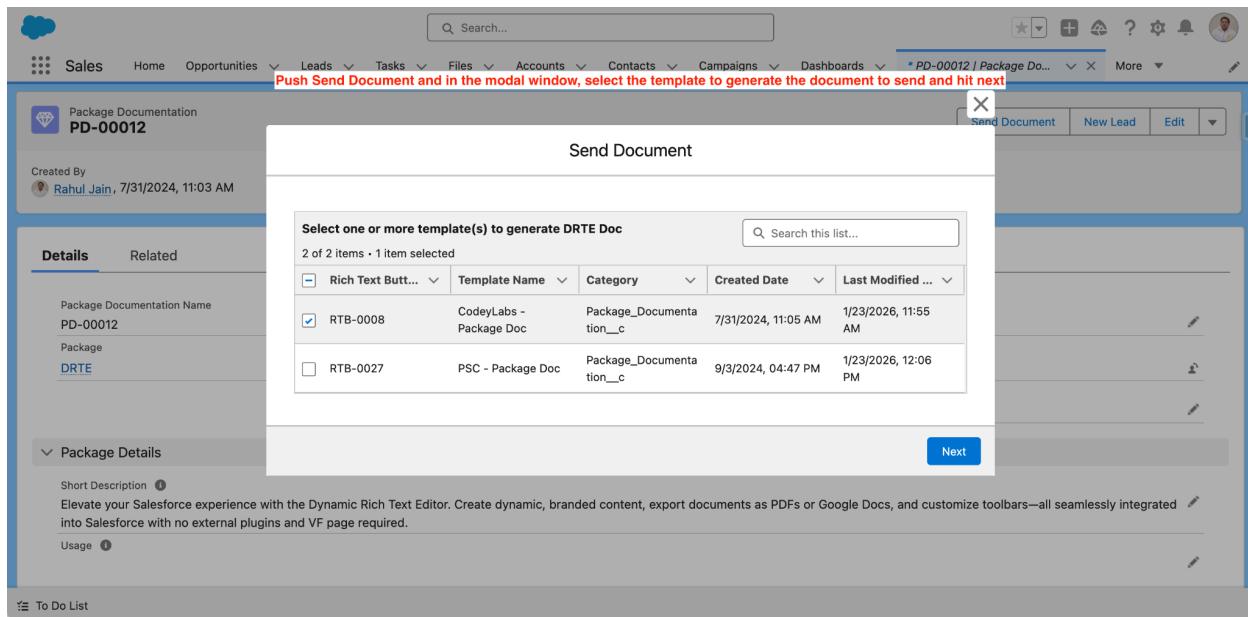
Once the setup is complete, follow these steps to send a document to a contact.

Step 1: Launch the Action

Navigate to the record you wish to share and click the **Send Document** button in the top right highlights panel.

Step 2: Select Document Template

A modal window will appear. Select one or more **DRTE Doc templates** that you want to use to generate the content. Click **Next**.



Step 3: Choose Email Template

Next, select the **Email Template** that defines the body and layout of your outgoing message. Click **Next**.

Package Documentation
PD-00012

Created By
Rahul Jain, 7/31/2024, 11:03 AM

Details Related

Package Documentation Name
PD-00012

Package
DRTE

Short Description
Elevate your Salesforce experience with the Dynamic Rich Text Editor. Create dynamic, branded content, export documents as PDFs or Google Docs, and customize toolbars—all seamlessly integrated into Salesforce with no external plugins and VF page required.

Usage

Send Document

Select an email template (DRTE) and hit Next

1 of 1 item - 1 item selected

Template Name Category

Package document for [] Package_Documentation__c

Next

Step 4: Configure Recipient and Review

- **To:** Search for and select the Contact who should receive the email.

Send Document

Search for a contact and select

Send Email

* To Email
Search a contact you@example.com

Enter a valid value

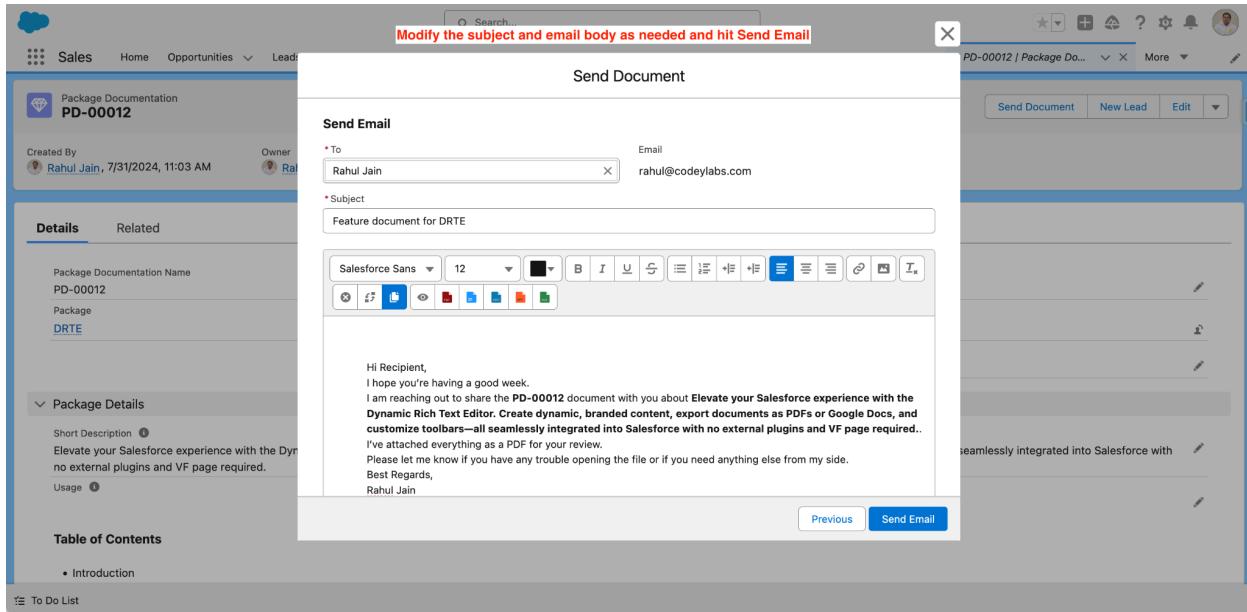
* Subject
Package document for []

Salesforce Sans 12

Hi Recipient,
I hope you're having a good week.
I am reaching out to share the PD-00012 document with you about **Elevate your Salesforce experience with the Dynamic Rich Text Editor. Create dynamic, branded content, export documents as PDFs or Google Docs, and customize toolbars—all seamlessly integrated into Salesforce with no external plugins and VF page required.**
I've attached everything as a PDF for your review.
Please let me know if you have any trouble opening the file or if you need anything else from my side.
Best Regards,
Rahul Jain

Previous Send Email

- **Review:** The email body will automatically populate with record details and the generated document. You can modify the **Subject** or **Body** text here if needed.

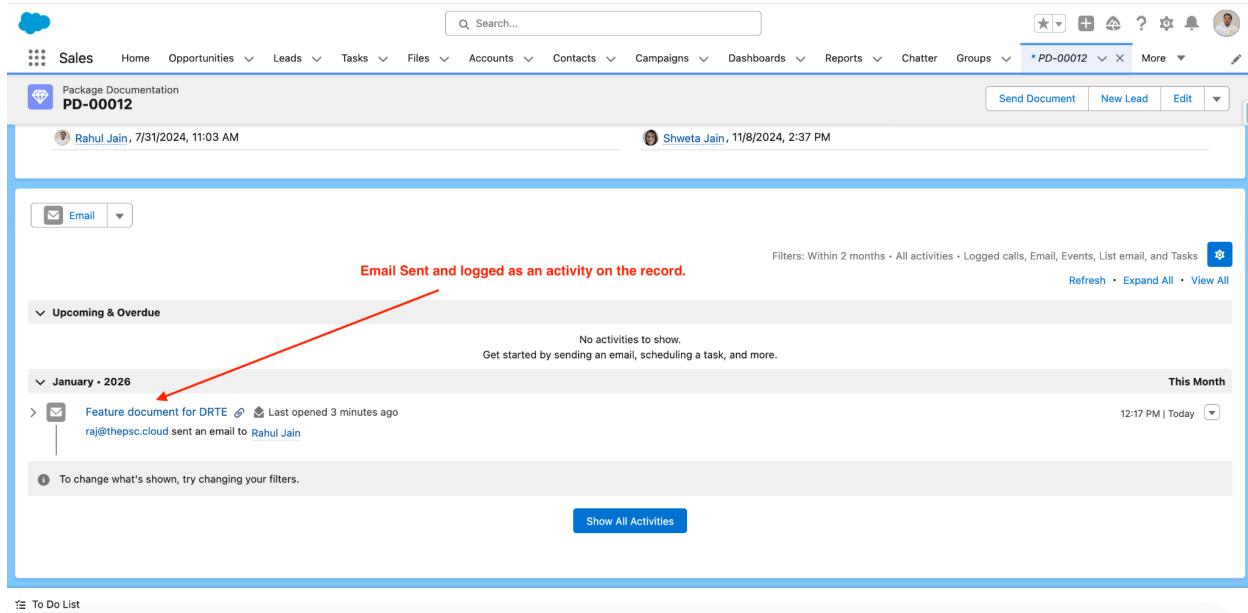


- Click **Send Email**.

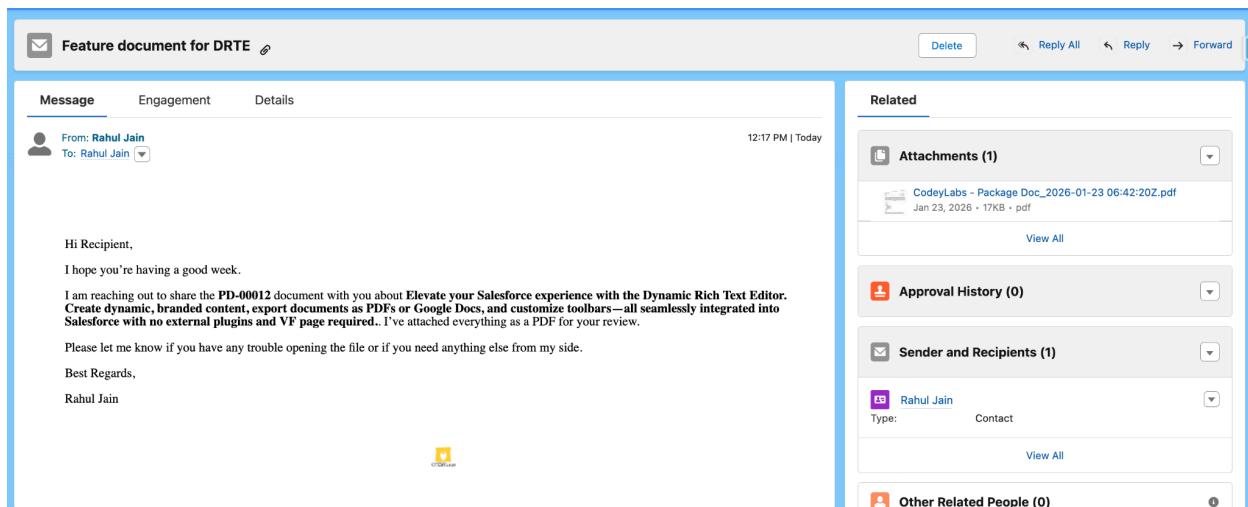
Part 3: Tracking Activities

After sending, the system provides automatic tracking to ensure you have a record of the communication.

- Navigate to the **Activity Tab** on the record.
- You will see a logged email task (e.g., "Feature document for DRTE").
- This log includes the timestamp, recipient details, and a link to the document sent.



The screenshot shows the Salesforce Activity Tab for record PD-00012. The top navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and a specific record ID PD-00012. The main content area displays an email task from Rahul Jain to Shweta Jain. A red arrow points to the task entry in the 'January - 2026' section, which shows 'Feature document for DRTE' was sent and last opened 3 minutes ago. The interface includes a search bar, filters for 'Within 2 months - All activities - Logged calls, Email, Events, List email, and Tasks', and buttons for Refresh, Expand All, and View All.



The screenshot shows the Salesforce Email message for 'Feature document for DRTE'. The message details are: From: Rahul Jain, To: Rahul Jain. The message content includes a greeting, a note about sharing a document, and a closing. The attachments section shows a PDF file named 'CodeyLabs - Package Doc_2026-01-23 06:42:20Z.pdf' attached by Jan 23, 2026, 17KB. The Related section includes Attachments (1), Approval History (0), Sender and Recipients (1), and Other Related People (0).