



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 a Salesforce record page for Package Documentation PD-00012. The page includes a navigation bar at the top with various tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, and Dashboards. The record details are as follows:

Details		Related	
Package Documentation Name	PD-00012	Category	FAQ
Package	DRTE	Owner	Rahul Jain
		Currency	USD - U.S. Dollar
Package Details			
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			

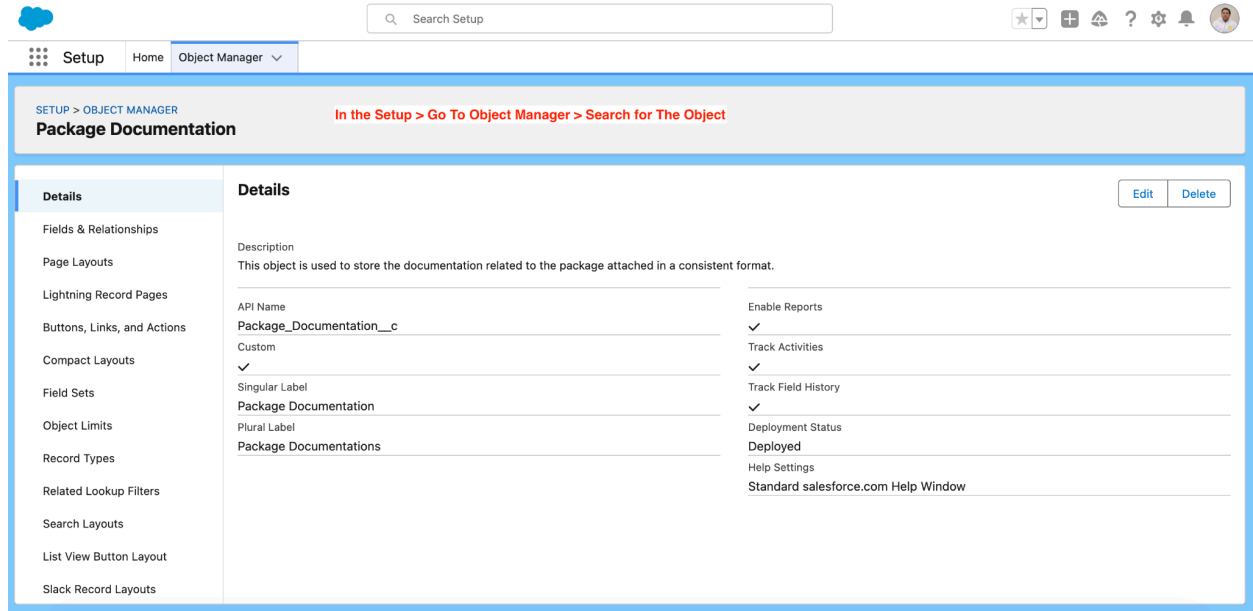
A red text overlay on the page states: "Let say, we have to generate and send an email with the document generated for this record to a contact with a predefined DRTE email template."

Part 1: Administrator Setup

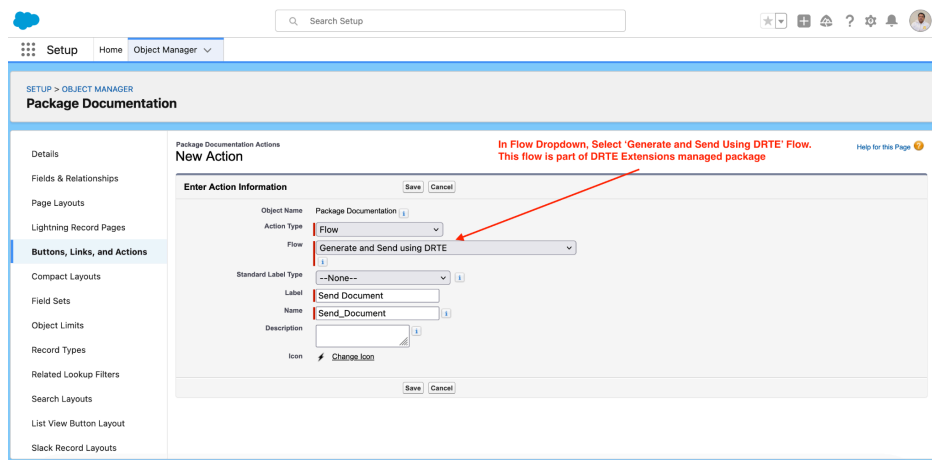
Before users can send documents, an administrator must add the action to the record page.

1. Create the Action

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



- 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).



- **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**.

Lightning App Builder | Pages | Package Documentation Record Page | ? Help

Desktop | Shrink To View

Analyze | Activation... | Save

Components | Fields

Search...

Standard (48)

- Accordion
- Action Launcher
- Actions & Recommendations
- Activities
- Approval Trace
- Assessment List
- CRM Analytics Collection
- CRM Analytics Dashboard
- Dynamic Related List - Single
- Einstein Next Best Action
- Flow
- Highlights Panel
- Invoice Preview
- Launchpad

Get more on AppExchange

Package Documentation PD-00012

Created By: Rahul Jain, 7/21/2024, 11:03 AM | Owner: Rahul Jain | Package: DITE

Details | Related

Package Documentation Name: PD-00012 | Category: FAQ | Owner: Rahul Jain | Currency: USD - U.S. Dollar

Package Details

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:

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1. Introduction

Welcome to the Dynamic Rich Text Editor by Codeylabs, a powerful tool designed to enhance your Salesforce experience by enabling dynamic content creation, seamless integration, and

Page > Highlights Panel

Show as collapsed (desktop only) | Hide Follow/Unfollow button (desktop only)

Visible Action Buttons (desktop only): 3

Actions

- Send Document
- Post
- File
- New Lead
- Edit
- Delete
- Clone

- 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

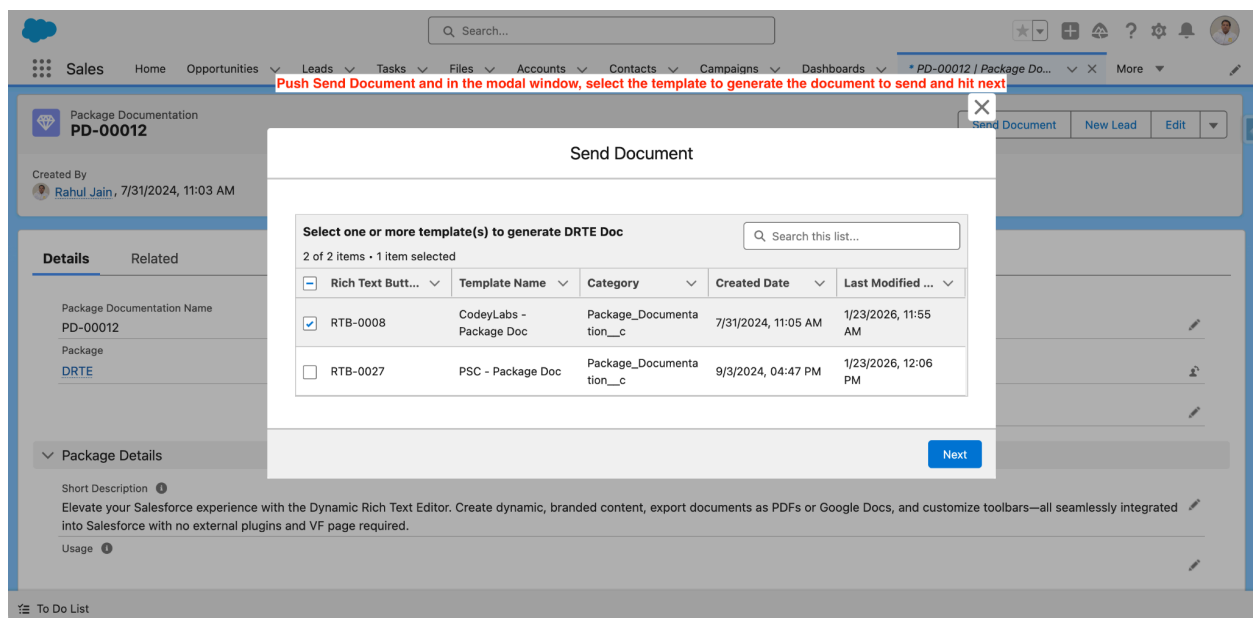
Once the setup is complete, follow these steps to send a document to a contact.

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.

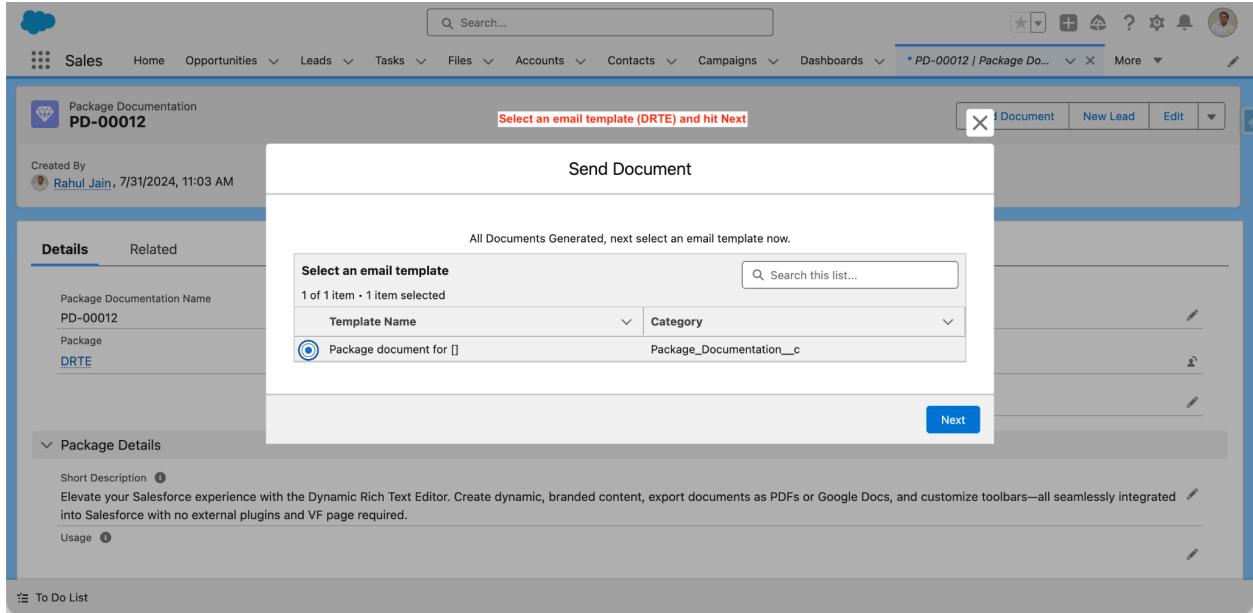
Step 2: Select Document Template

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



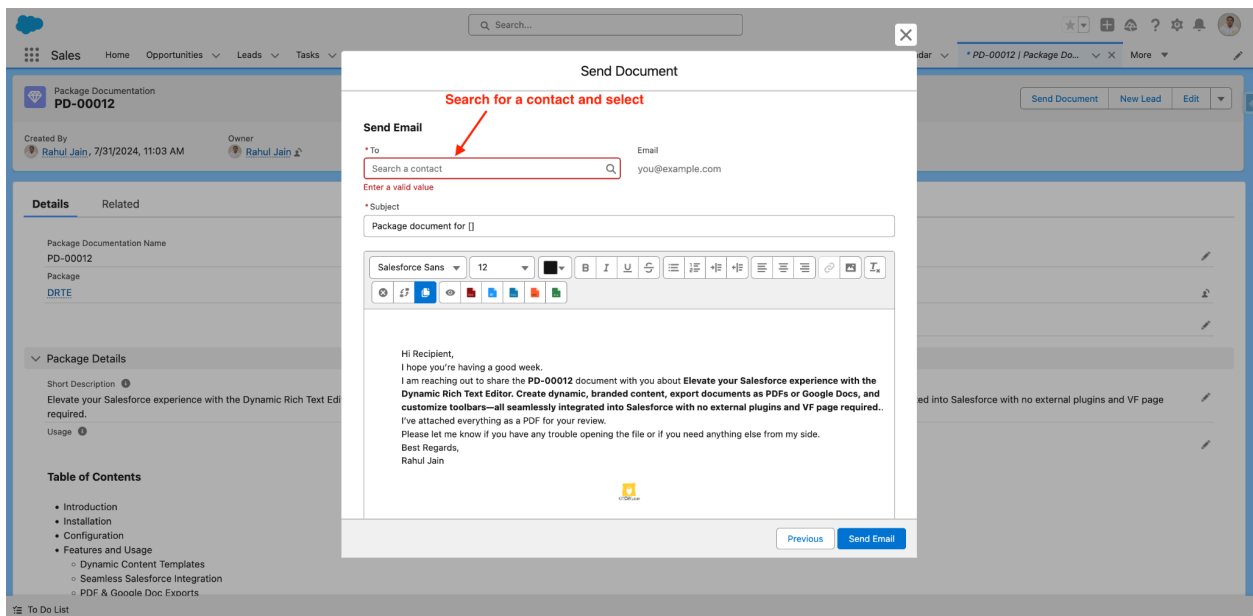
Step 3: Choose Email Template

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

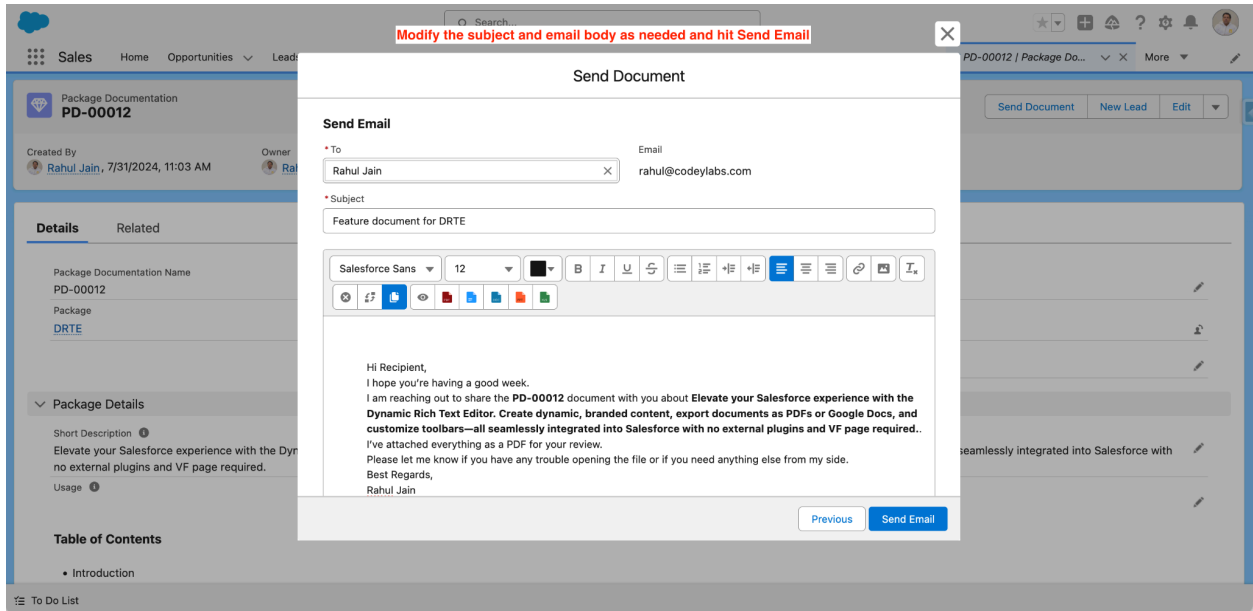


Step 4: Configure Recipient and Review

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

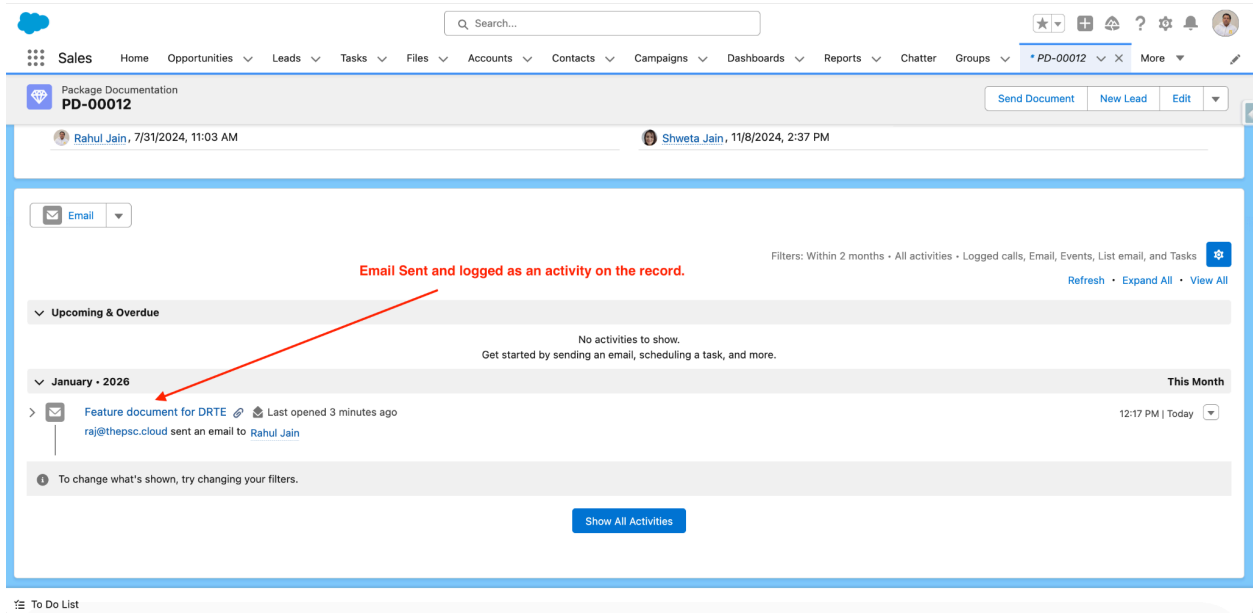


- Click **Send Email**.

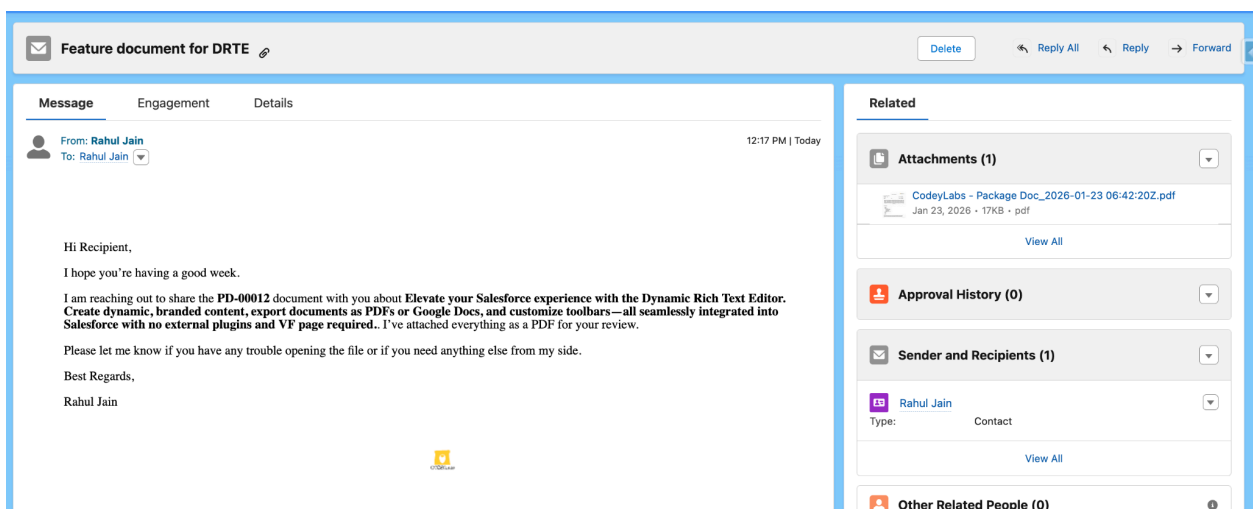
Part 3: Tracking Activities

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 interface for a record titled "Package Documentation PD-00012". The top navigation bar includes tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and a dropdown for "PD-00012". Below the navigation bar, the record details show "Rahul Jain, 7/31/2024, 11:03 AM" and "Shweta Jain, 11/8/2024, 2:37 PM". The main content area displays a list of activities under the "Email" filter. A red arrow points to an activity titled "Feature document for DRTE" with the description "raj@thepsc.cloud sent an email to Rahul Jain" and a timestamp of "12:17 PM | Today". The activity is marked as "Last opened 3 minutes ago". A red text annotation "Email Sent and logged as an activity on the record." points to the activity. The bottom of the screen shows a "To Do List" section.



The screenshot shows the email content for the "Feature document for DRTE" activity. The email is from "Rahul Jain" to "Rahul Jain" and is dated "12:17 PM | Today". The message body contains the following text:

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

The email is displayed in the "Message" tab, with "Engagement" and "Details" tabs also visible. The "Related" section on the right shows "Attachments (1)" with a PDF file named "Codeylabs - Package Doc_2026-01-23 06:42:20Z.pdf" and "Approval History (0)". The "Sender and Recipients (1)" section shows "Rahul Jain" as the sender. The "Other Related People (0)" section is also visible.