DRTE - ADD ON

Button - Generate Signature Requests without Editor

User Guide

DRTE

Add E Signature Requests Action Button

The **Add Signature Request** button provides a streamlined way to initiate signing workflows without requiring users to manually use a document editor. This feature allows users to quickly link contacts, placeholders, and a template to trigger a formal signature request.

Feature Overview

By clicking this button, users can:

- **Search and select** the signatory contacts.
- **Assign** specific signature placeholders.
- **Choose** a document template to be sent for signing.

Once the request is generated, it will immediately appear in the **E-Signature Request List** component on the record page for tracking.

Setup Instructions

Follow these steps to enable the "Add Signature Button" button on any object:

1. **Create the Action:**
   - Navigate to the **Object Manager** and select the desired object.
   - Go to **Buttons, Links, and Actions** and click **New Action**.
   - **Action Type:** Select `Flow`.
   - **Flow:** Select `Add Signature Request`.
   - **Label/Name:** Enter "Add Signature Request" (or your preferred title).
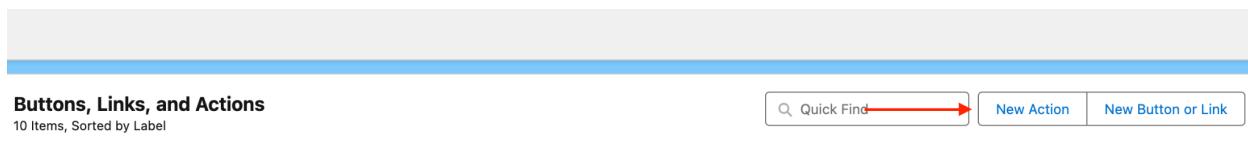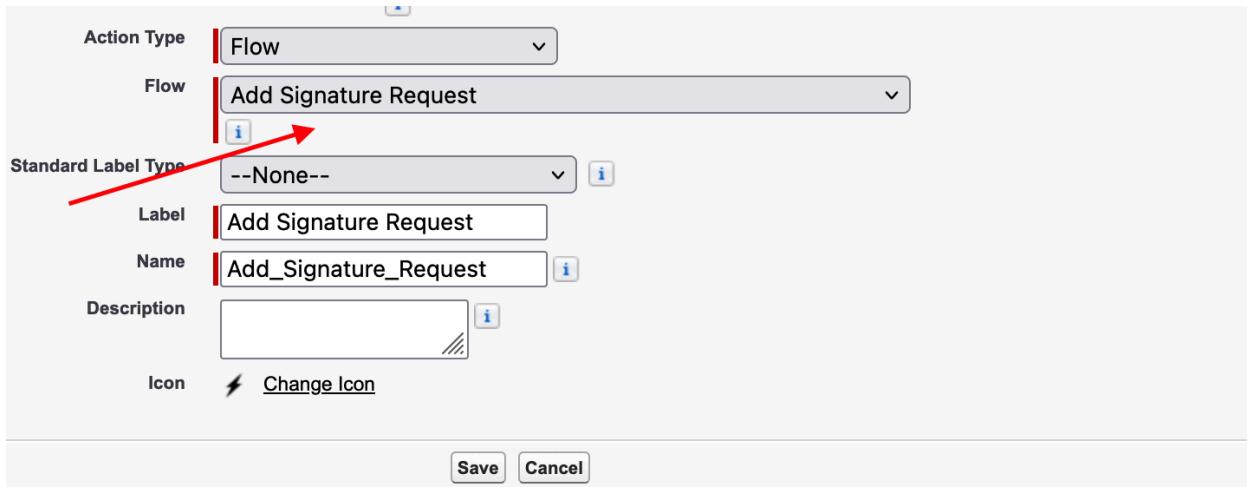
2. **Add to Record Page:**
   - Open the **Page Layout** or **Lightning App Builder** for the object.
   - Drag and drop the new action into the **Mobile & Lightning Actions** section.
   - **Save** and **Activate** the changes.

User Experience

As soon as a user completes the flow and hits "Finish," the new request will automatically populate in the **E-Signature Request List**. This allows for real-time visibility into the status of the document without needing to refresh the page.