



CODEYLABS

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.

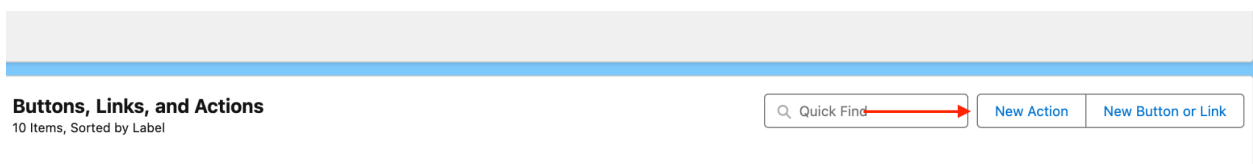
Once the request is generated, it will immediately appear in the **E-Signature Request List** component on the record page for tracking.

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).



The screenshot shows a configuration form for a new action. The fields are as follows:

- Action Type:** Flow (dropdown)
- Flow:** Add Signature Request (dropdown)
- Standard Label Type:** --None-- (dropdown, highlighted with a red arrow)
- Label:** Add Signature Request (text input)
- Name:** Add_Signature_Request (text input)
- Description:** (empty text area)
- Icon:** Change Icon (link with lightning bolt icon)

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

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.