



CODEYLABS

DRTE - ADD ON

Automatic Save Final Signed
Document With Certificate Of
Completion on document
record

User Guide



DRTE

CoC feature is an add-on designed to ensure legal compliance and provide irrefutable proof of execution for every document signed using DRTE.

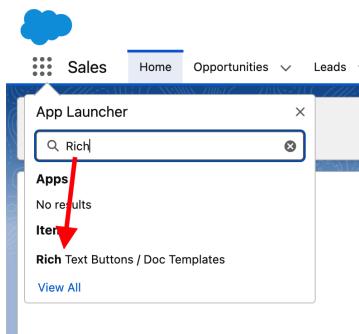
Once all parties have successfully signed a document, the CoC feature allows you to combine the final, executed document with a detailed, legally-compliant **Audit Log** into a single, secure PDF file.

Configuration - Certificate of Completion

Following installation, the module requires specific configuration within DRTE and Salesforce Setup.

Step 1: Create the Certificate of Completion Document Template

1. Navigate to the Rich Text Button/Document Templates Tab.



2. Create a **New** Document Template record and name it "**Certificate of Completion.**"

A screenshot of the 'New Rich Text Button / Doc Template' creation page. The page is titled 'New Rich Text Button / Doc Template' and includes a note '*= Required Information'. The 'Information' section contains the following fields:

- Rich Text Button Number: (Field Name: RichTextButtonNumber)
- Template Name: (Field Name: TemplateName)
- SLDS icon-name: (Field Name: SLDSIconName)
- In Use: (Field Name: InUse)
- Owner: (Field Name: Owner)
- Category: (Field Name: Category)
- Deactivated: (Field Name: Deactivated)
- Display Order: (Field Name: DisplayOrder)
- Test SFDC Record Id: (Field Name: TestSFDCRecordId)

At the bottom of the page are buttons for 'Cancel', 'Save & New', and 'Save'.

3. Save the record.

Action	Name	Namespace Prefix	Description	MIME Type	Size	Created By	Created Date	Last Modified Date
	CertificateOfCompletionDocumentSectionsJSON	drte_ext	Certificate Of Completion - Document Sections JSON	application/json	11,931	RJain	12/10/2025	12/10/2025, 1:50 PM

4. Import the JSON Template:

- Open **Setup** in a new tab, search for **Static Resources**, and locate the **CertificateOfCompletionDocumentSectionsJSON** JSON file (this file is bundled with the managed package). **Download this file.**

Name	CertificateOfCompletionDocumentSectionsJSON
Namespace Prefix	drte_ext
Description	Certificate Of Completion - Document Sections JSON
MIME Type	application/json
Cache Control	Public
Size	11,931 bytes
View file	
Created By	Rahul Jain, 12/10/2025, 1:50 PM
Last Modified By	Rahul Jain, 12/10/2025, 1:50 PM

- Return to the newly created Document Template record.
- Utilize the **Import** functionality to upload the downloaded JSON file.

Rich Text Button / Doc Template
RTB-0060

Related Details

Information

Rich Text Button Number: RTB-0060
Template Name: Certificate of Completion
SLDS Icon-name:

Owner: Rahul Jain
Category:

Deactivated:
Display Order: 0

Activity

Export Sections Import Sections

Current: 0 document sections

Activity

Filters: Within 2 months - All activities - Logged calls, Email, Events, List email, Tasks, and LinkedIn
Refresh • Expand All • View All

5. Upon successful import, refresh the page. The pre-defined document sections will now be visible.

Rich Text Button / Doc Template
RTB-0060

Related Details

Button Sections/Doc Sections (6+)

PSC Button Sections Number	Display Order	HTML Content	Is Active
BS-0942	0	ESIGNATURE CERTIFICATION	<input checked="" type="checkbox"/>
BS-0943	10	Certificate of Completion Docu...	<input checked="" type="checkbox"/>
BS-0944	20	Signer Information	<input checked="" type="checkbox"/>
BS-0945	30	Token: {{scdynrichtext_Toke...}}	<input checked="" type="checkbox"/>
BS-0946	33	Signer Logs	<input checked="" type="checkbox"/>
BS-0947	35		<input checked="" type="checkbox"/>

View All

Document Section Export/Import

Export Sections Import Sections

Current: 8 document sections

Activity

Filters: Within 2 months - All activities - Logged calls, Email, Events, List email, Tasks, and LinkedIn
Refresh • Expand All • View All

Upcoming & Overdue

No activities to show

6. **Customize Placeholders:** Review each section and modify the static text placeholders as necessary to meet organizational branding and requirements.

HTML

Png Image Relative URL:

HTML Content

Certificate of Completion

Document Id: {{!\$e_ext_GENERIC_DOC_ID_c}}
Document Type: {{!\$e_ext_Document_Type_c}}
Document Name: {{!\$scdynrichtext_Document_Name_c}}
Time Zone: [YOUR TIMEZONE FOR THIS DOCUMENT]

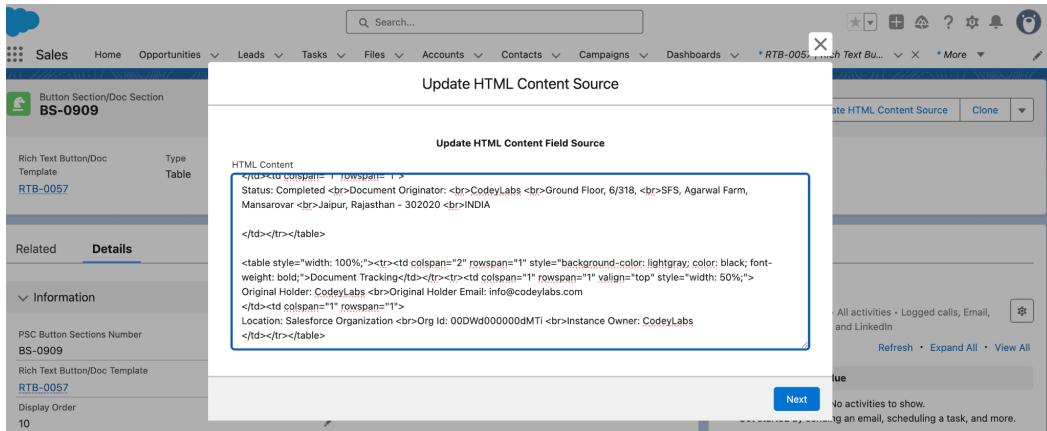
Status: Completed
Document Originator: [YOUR COMPANY ADDRESS]

Document Tracking

Original Holder: [YOUR SALESFORCE ORG NAME]
Original Holder Email: [YOUR COMPANY EMAIL ID]
Location: Salesforce Organization
Org Id: [YOUR SFDC ORG ID]
Instance Owner: [YOUR COMPANY NAME]

Iterate HTML for Records(Ignore Table)

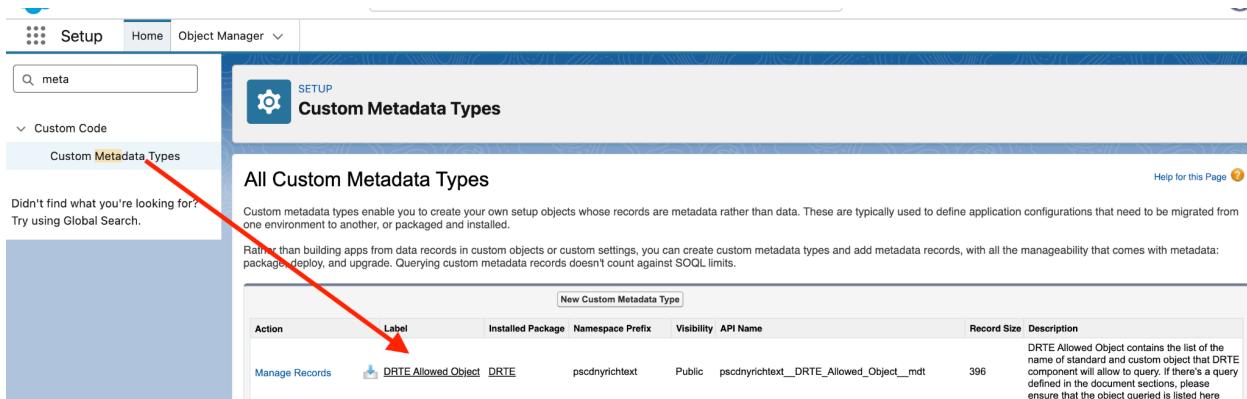
Table



Step 2: Configure DRTE Allowed Objects

This step ensures the DRTE query engine can access the relevant e-signature log data for certificate generation.

1. In **Setup**, search for **Custom Metadata Types**.
2. Locate and manage the records for the **DRTE Allowed Object** custom metadata type.



3. Create two new records to include the following objects:
 - `pscdnryrichtext__ESignature_Log__c`
 - `pscdnryrichtext__ESignature_Request__c`

DRTE Allowed Object

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DRTE Allowed Object Detail

[Edit](#) [Delete](#) [Clone](#)

Label	pscdnyrichtext__E_Signature_Request__c
DRTE Allowed Object Name	pscdnyrichtext_E_Signature_Request_c
Object API Name	pscdnyrichtext__E_Signature_Request__c

Protected Component

Namespace Prefix

DRTE Allowed Object

[Help for this Page](#)

DRTE Allowed Object Detail

[Edit](#) [Delete](#) [Clone](#)

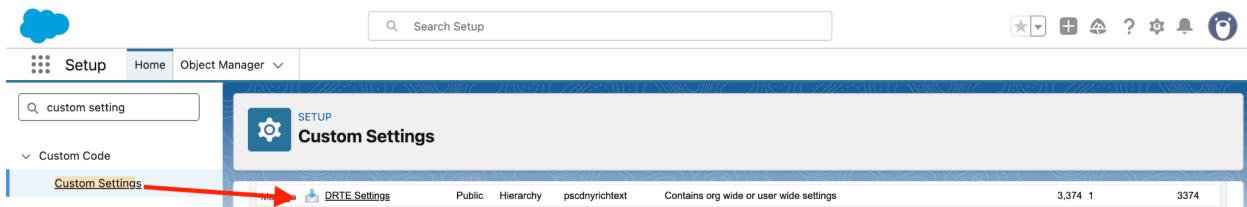
Label	pscdnyrichtext__ESignature_Log__c
DRTE Allowed Object Name	pscdnyrichtext_ESignature_Log_c
Object API Name	pscdnyrichtext__ESignature_Log__c

Protected Component

Namespace Prefix

Step 3: Configure DRTE Settings - Custom Setting

1. Navigate to **Setup**, search for **Custom Settings**, and manage the **DRTE Settings** record.



2. Populate the following fields with the required values:

- **CertificateOfCompletionTemplateId**: Enter the **Salesforce ID** (e.g., `a01XXXXXXXXXXXXXX`) of the "Certificate of Completion" Document Template record created in '**Configuration**'.
- **CertificateOfCompletionDocumentPrefix**: Provide a unique text prefix (e.g., `COC-`) for the generated document's generic ID.

Custom Setting
DRTE Settings

[Help for this Page](#) 

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

[Edit](#) [Delete](#)

▼ Default Organization Level Value

Location
gptversion (Deprecated) - No Use
Esign Guest Site URL
Company Footer Text For Email Template
Company Support Email for Email Template
Send Signature Request Email Template Id
Share PIN Email template Id
doctemplateid_certcompletion
CertificateOfCompletionTemplateId
a1rT100000JMNPhIA

endpoint (Deprecated) - No Use
key (Deprecated) - No Use
Auto Send eSign 2Signer Email_Template_Id
Company Header Image For Email Template
Org Wide Email To Send Signature Request
Send Signed Document Email Template Id
User Story Sign Off Email Template Id
Signature Reminder Email_Template_Id
GenericDocId Prefix

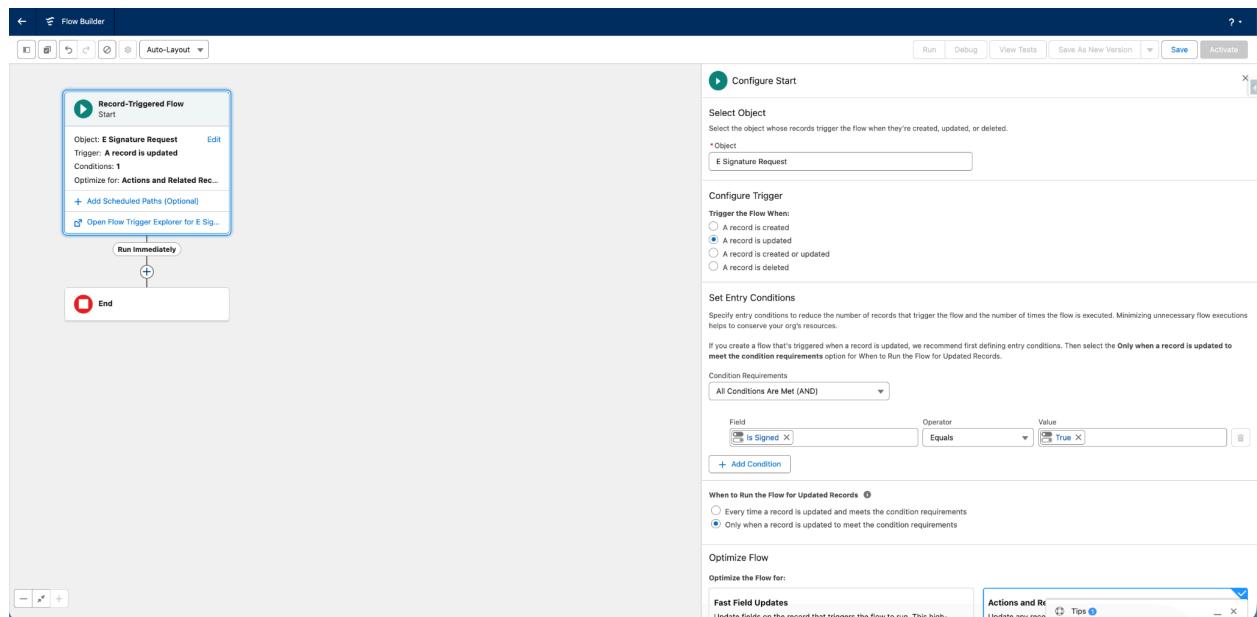
DOC-

[View: All](#) [Create New View](#)

Configuration - Automatic Signed Document (w/CoC) Creation after Signature

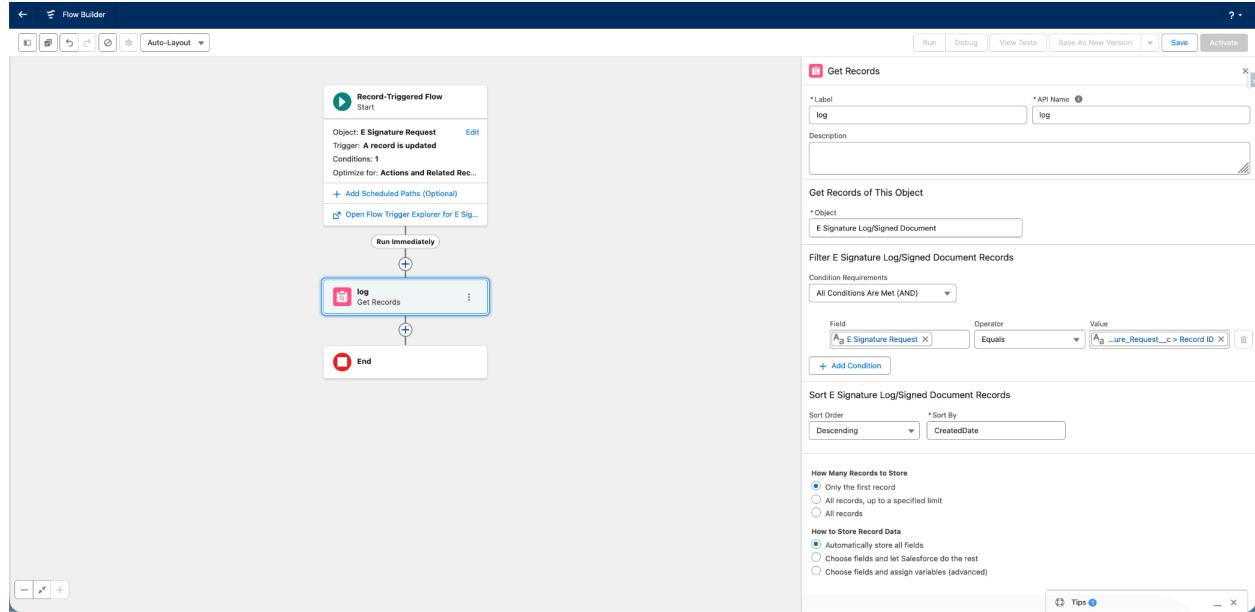
Step 1: Create a new Trigger Flow on E Signature Request Object.

Trigger the Flow when record is updated, Set Entry Condition “isSigned” equal to “TRUE”. Only When Record Is Updated to Meet the conditional requirements



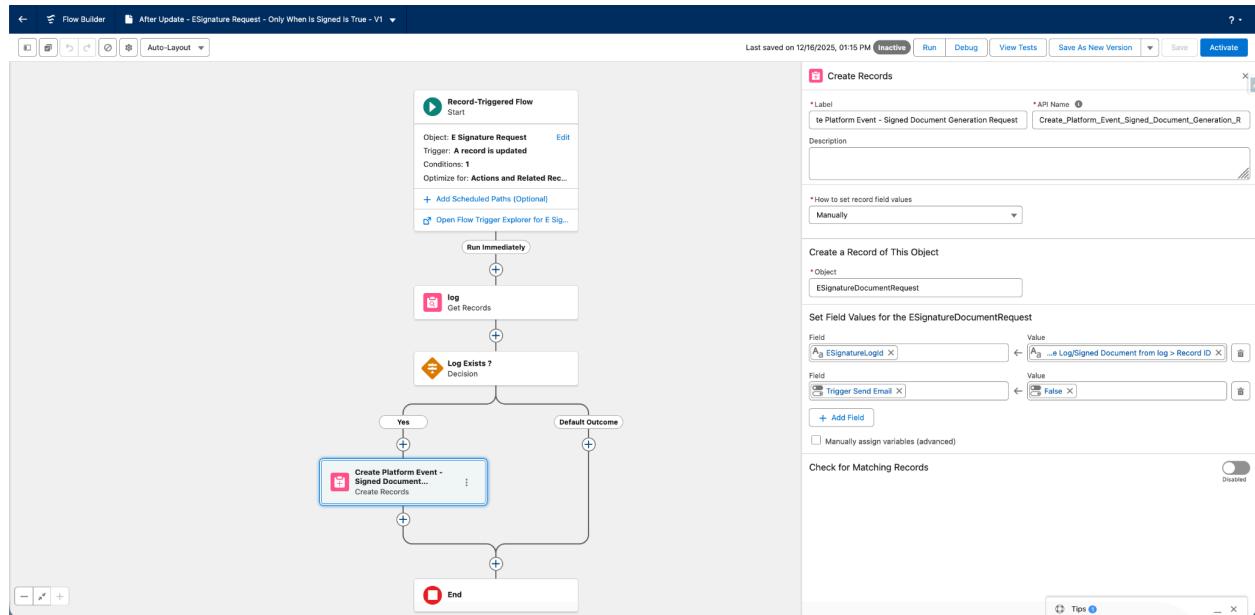
Step 2: Query Related E Signature Log (Child Record)

Use Get Records element and query as shown in the screen shot below



Step 3: Create a packaged platform event record.

To trigger the functionality to generate Signed Document with CoC and attach to related document record. (**Imp:** You may set Trigger Send Email equal to True, to send automatic email to related contacts/signees with signed document)



Step 4: Configure the scheduled path for this functionality.

This object holds critical functionality for e-signature request generation and handling the response after signature. To make sure your custom code doesn't hinder e-signature native functionality, move the logic to Async Processing (as scheduled path shown below)

