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.

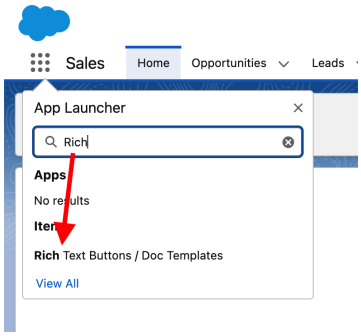
Once all parties have successfully signed a document, the CoC feature allows you to combine the final, executed document with a detailed, legally-compliant **Audit Log** into a single, secure PDF file.

Configuration - Certificate of Completion

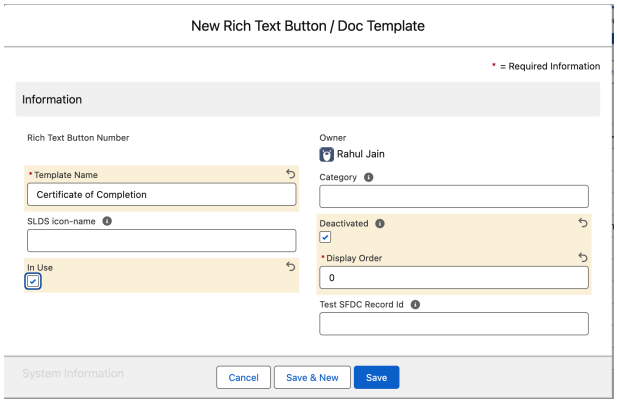
Following installation, the module requires specific configuration within DRTE and Salesforce Setup.

Step 1: Create the Certificate of Completion Document Template

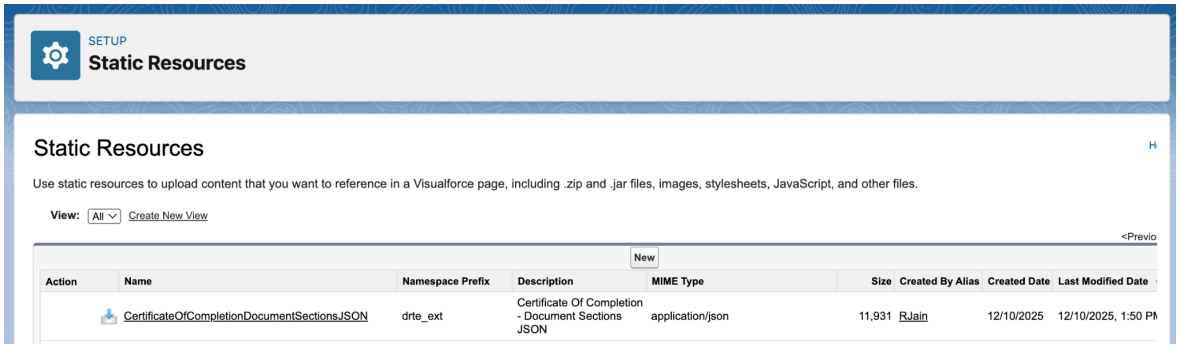
1. Navigate to the Rich Text Button/**Document Templates Tab**.



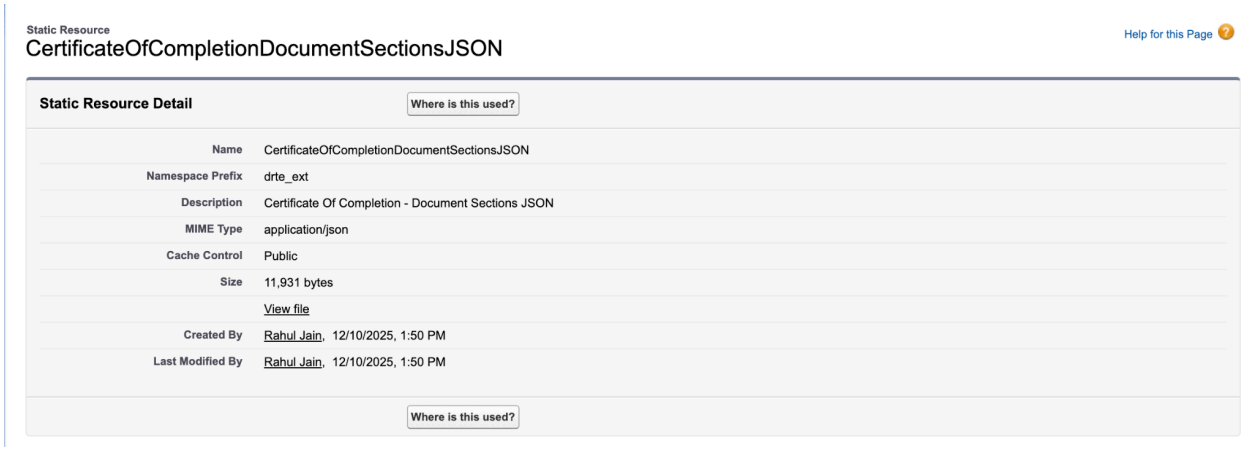
2. Create a **New** Document Template record and name it **"Certificate of Completion."**



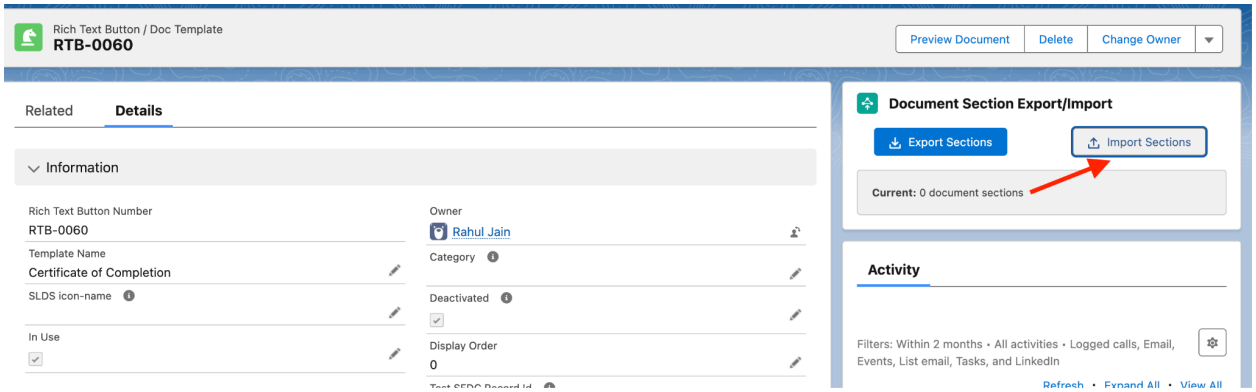
3. Save the record.



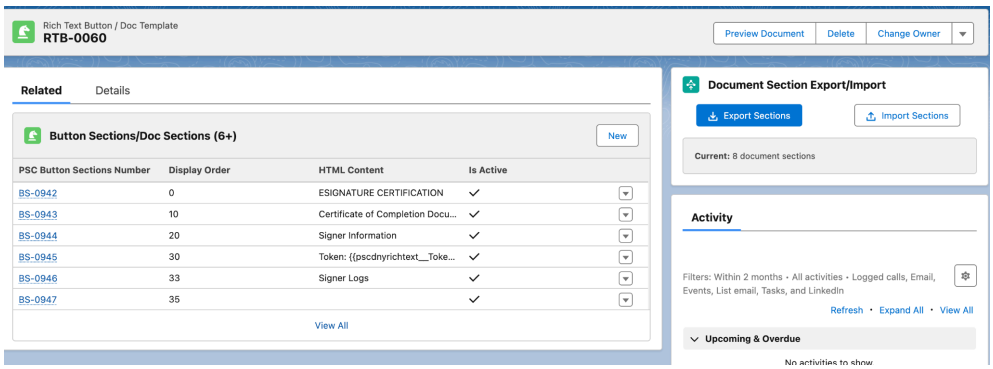
4. **Import the JSON Template:**
    - Open **Setup** in a new tab, search for **Static Resources**, and locate the `CertificateOfCompletionDocumentSectionsJSON` JSON file (this file is bundled with the managed package). **Download this file.**



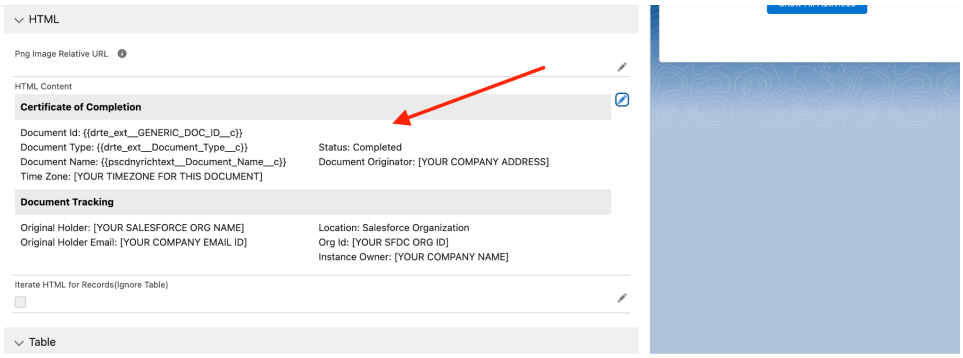
    - Return to the newly created Document Template record.
    - Utilize the **Import** functionality to upload the downloaded JSON file.

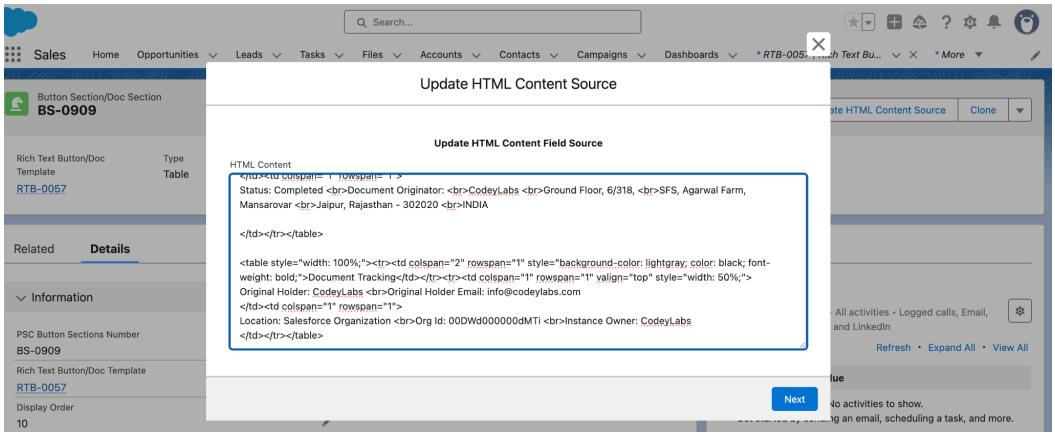


5. Upon successful import, refresh the page. The pre-defined document sections will now be visible.



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

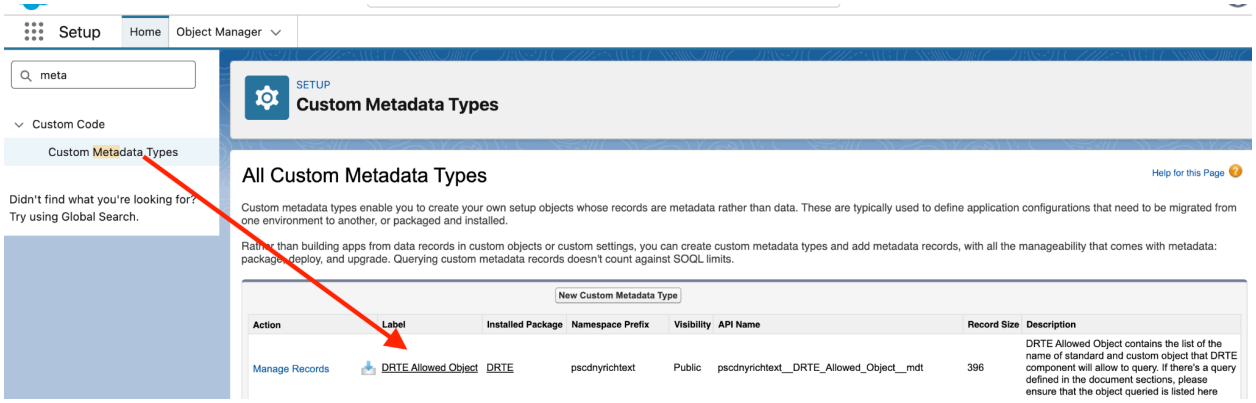




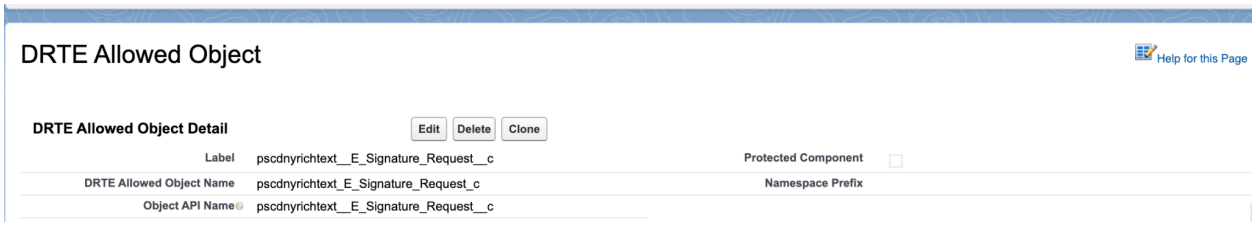
Step 2: Configure DRTE Allowed Objects

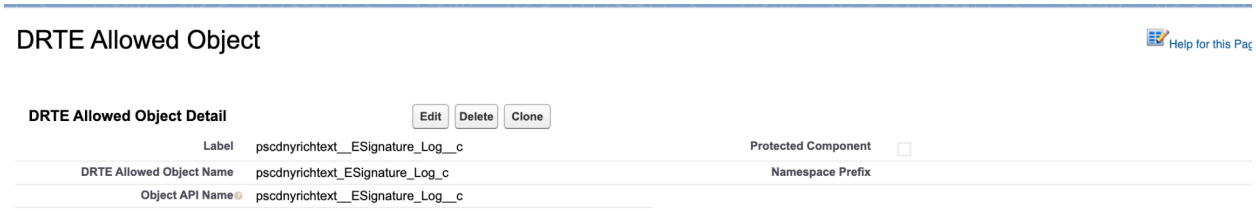
This step ensures the DRTE query engine can access the relevant e-signature log data for certificate generation.

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



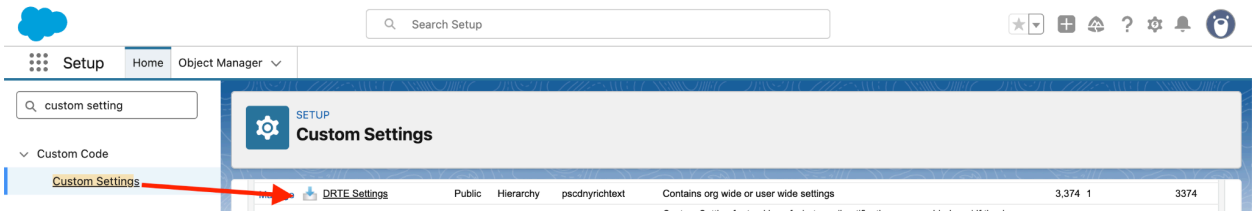
3. Create two new records to include the following objects:
    - `pscdnyrichtext__ESignature_Log__c`
    - `pscdnyrichtext__ESignature_Request__c`





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

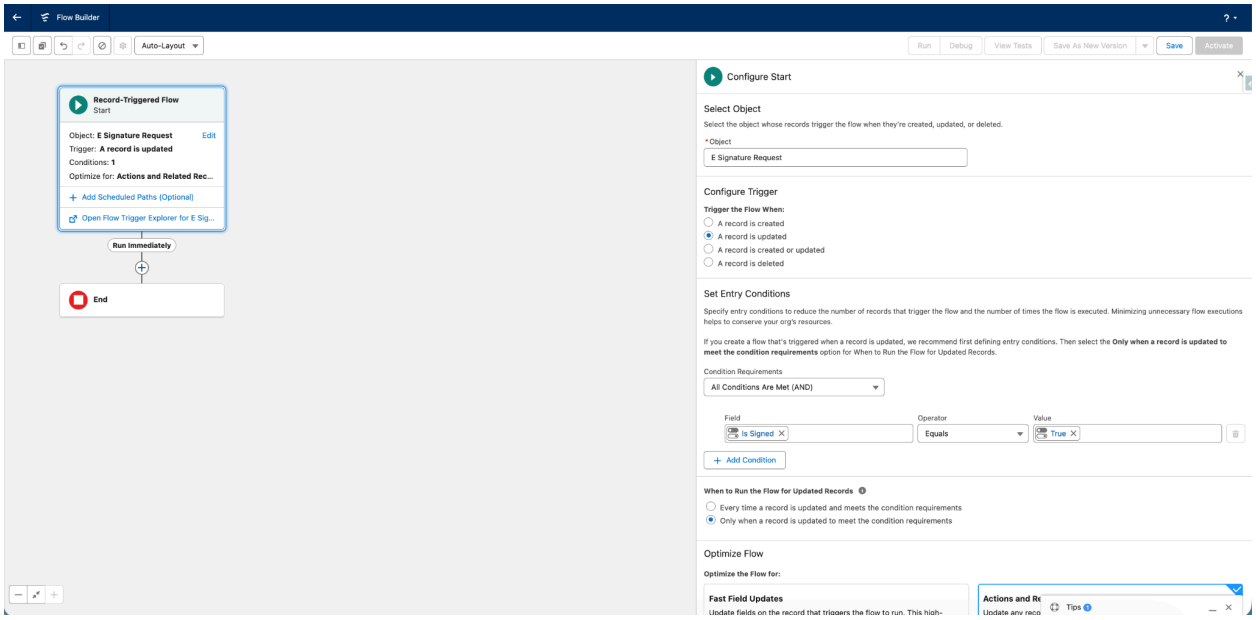
Location	[redacted]	endpoint (Deprecated) - No Use	[redacted]
gptversion (Deprecated) - No Use		key (Deprecated) - No Use	
Esign Guest Site URL		Auto Send eSign 2Signer Email_Templ Id	
Company Footer Text For Email Template		Company Header Image For Email Template	
Company Support Email for Email Template		Org Wide Email To Send Signature Request	
Send Signature Request Email Template Id		Send Signed Document Email Template Id	
Share PIN Email template Id		User Story Sign Off Email Template Id	
doctemplateid_certcompletion		Signature Reminder Email_Template_Id	
CertificateOfCompletionTemplateId	a1rT100000JMNPhIAP	GenericDocId Prefix	DOC-

View: All | Create New View

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

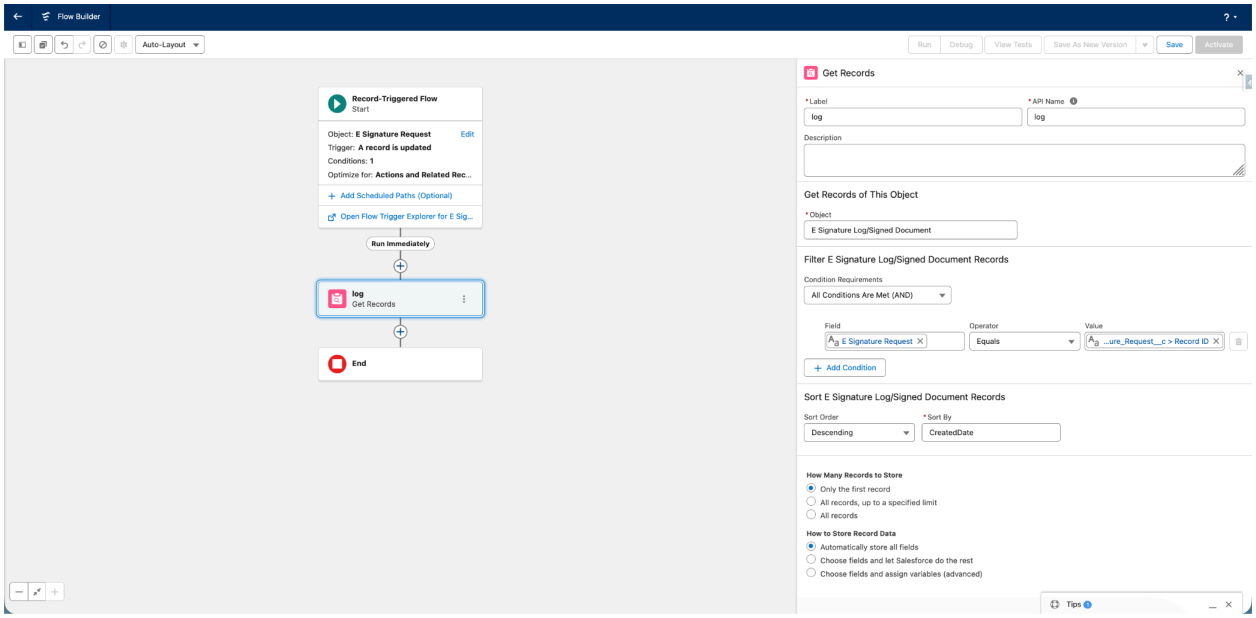
Step 1: Create a new Trigger Flow on E Signature Request Object.

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



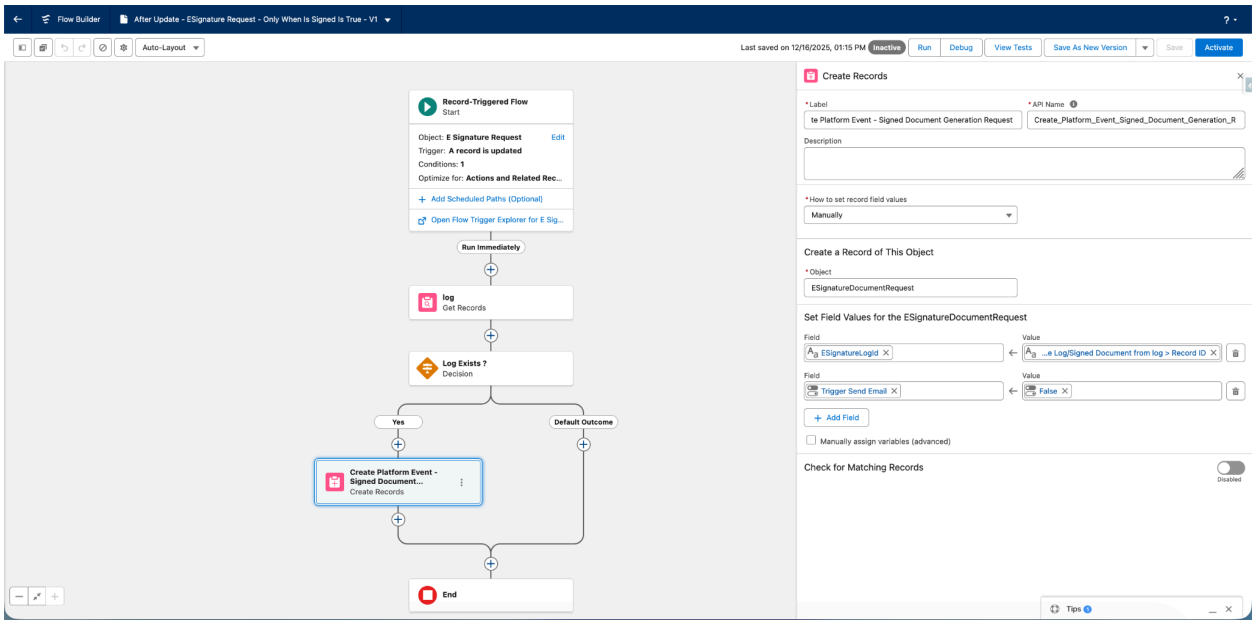
Step 2: Query Related E Signature Log (Child Record)

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)