



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.

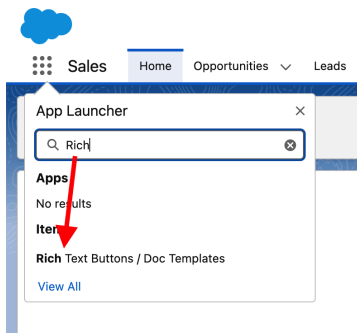
Once all parties have successfully signed a document, the CoC feature allows you to combine the final, executed document with a detailed, legally-compliant **Audit Log** into a single, secure PDF file.

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' form in Salesforce. The form is titled 'New Rich Text Button / Doc Template' and has a subtitle '* = Required Information'. The form is divided into two main sections: 'Information' and 'System Information'. The 'Information' section contains the following fields: 'Rich Text Button Number' (empty), 'Owner' (Rahul Jain), 'Category' (empty), '* Template Name' (Certificate of Completion), 'SLDS Icon-name' (empty), 'In Use' (checked), 'Deactivated' (checked), '* Display Order' (0), and 'Test SFDC Record Id' (empty). The 'System Information' section contains the 'Cancel', 'Save & New', and 'Save' buttons.

3. Save the record.



SETUP


Static Resources

Static Resources

Use static resources to upload content that you want to reference in a Visualforce page, including .zip and .jar files, images, stylesheets, JavaScript, and other files.

View: All [Create New View](#)

<Previous

| Action | Name | Namespace Prefix | Description | MIME Type | Size | Created By Alias | Created Date | Last Modified Date |
|---|--|------------------|--|------------------|--------|------------------------|--------------|---------------------|
|  | CertificateOfCompletionDocumentSections.JSON | drte_ext | Certificate Of Completion - Document Sections JSON | application/json | 11,931 | R.Jain | 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.**

Static Resource

CertificateOfCompletionDocumentSectionsJSON

Help for this Page

Static Resource Detail

Where is this used?

| | |
|------------------|--|
| 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 |

Where is this used?

- 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

Preview Document

Delete

Change Owner

Related

Details

Information

Rich Text Button Number

RTB-0060

Owner

Rahul Jain

Template Name

Certificate of Completion

Category

SLDS icon-name

Deactivated

In Use

Display Order

0

Document Section Export/Import

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

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

Rich Text Button / Doc Template

RTB-0060

Preview Document

Delete

Change Owner

Related

Details

Button Sections/Doc Sections (6+)

New

| PSC Button Sections Number | Display Order | HTML Content | Is Active |
|----------------------------|---------------|-----------------------------------|-----------|
| BS-0942 | 0 | ESIGNATURE CERTIFICATION | ✓ |
| BS-0943 | 10 | Certificate of Completion Docu... | ✓ |
| BS-0944 | 20 | Signer Information | ✓ |
| BS-0945 | 30 | Token: {{pscdryrichtext__Toke... | ✓ |
| BS-0946 | 33 | Signer Logs | ✓ |
| BS-0947 | 35 | | ✓ |

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

- 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: {{(drte_ext__GENERIC_DOC_ID__c)}}

Document Type: {{(drte_ext__Document_Type__c)}}

Document Name: {{(pscdryrichtext__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]

Location: Salesforce Organization

Original Holder Email: [YOUR COMPANY EMAIL ID]

Org Id: [YOUR SFDC ORG ID]

Instance Owner: [YOUR COMPANY NAME]

Iterate HTML for Records(ignore Table)

Table

DRTE Allowed Object Help for this Page

DRTE Allowed Object Detail Edit Delete Clone

| | | | |
|--------------------------|--|---------------------|--------------------------|
| Label | pscdnyrichtext__E_Signature_Request__c | Protected Component | <input type="checkbox"/> |
| DRTE Allowed Object Name | pscdnyrichtext__E_Signature_Request__c | Namespace Prefix | |
| Object API Name | pscdnyrichtext__E_Signature_Request__c | | |

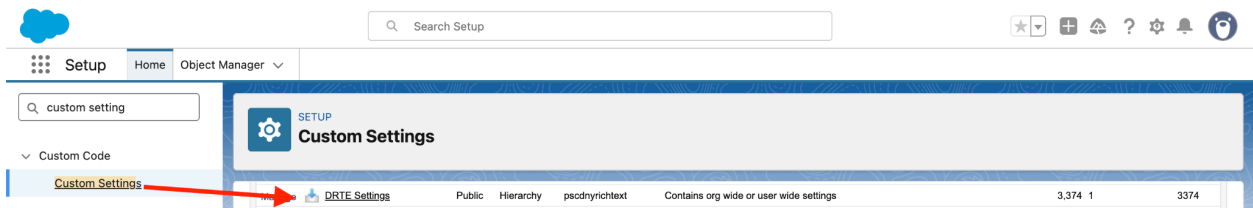
DRTE Allowed Object Help for this Page

DRTE Allowed Object Detail Edit Delete Clone

| | | | |
|--------------------------|-----------------------------------|---------------------|--------------------------|
| Label | pscdnyrichtext__ESignature_Log__c | Protected Component | <input type="checkbox"/> |
| DRTE Allowed Object Name | pscdnyrichtext__ESignature_Log__c | Namespace Prefix | |
| Object API Name | pscdnyrichtext__ESignature_Log__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., **a01XXXXXXXXXXXXXXXXXX**) 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.

EditDelete

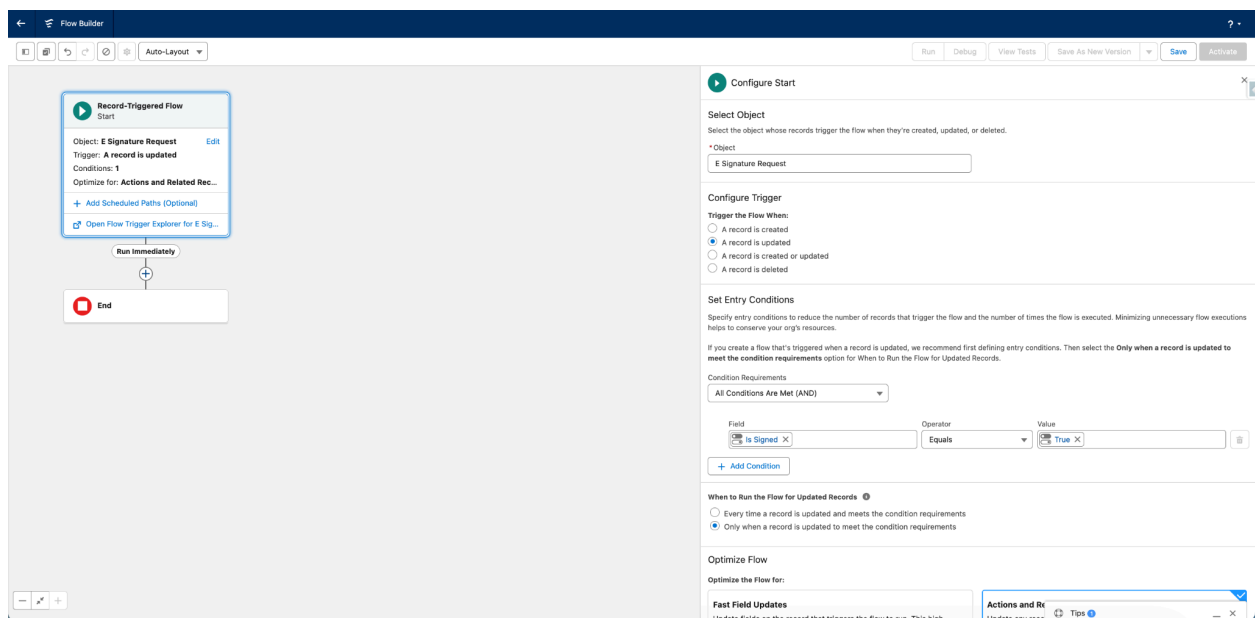
| ▼ Default Organization Level Value | | |
|--|-------------------|---|
| Location | | endpoint (Deprecated) - No Use |
| gptversion (Deprecated) - No Use | | key (Deprecated) - No Use |
| Esign Guest Site URL | | Auto Send eSign ZSigner Email_Template Id |
| Company Footer Text For Email Template | | 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 | a1rT10000JMNPhiAP | 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

The screenshot shows the Salesforce Flow Builder interface. The main canvas displays a 'Record-Triggered Flow' for the object 'E Signature Request'. The flow starts with a 'Run Immediately' trigger, followed by a 'log Get Records' action, and ends with an 'End' node. The right sidebar shows the configuration for the 'log Get Records' action, including fields for Label, API Name, and Description, and options for filtering and sorting records.

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)

The screenshot shows the Salesforce Flow Builder interface for a flow named 'After Update - E Signature Request - Only When Is Signed Is True - V1'. The flow starts with a 'Run Immediately' trigger, followed by a 'log Get Records' action, a 'Log Exists?' decision, and a 'Create Platform Event - Signed Document' action. The right sidebar shows the configuration for the 'Create Records' action, including fields for Label, API Name, and Description, and options for setting field values and checking for matching records.

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)

