



CODEYLABS

DRTE - ADD ON

**Manually Save Final Signed
Document With Certificate Of
Completion on Document**

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.

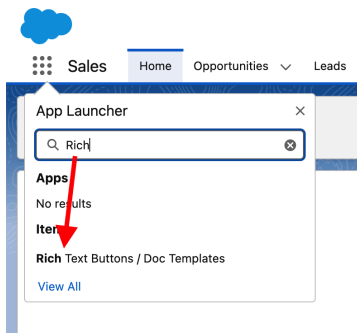
Once all parties have successfully signed a document, the CoC feature allows you to combine the final, executed document with a detailed, legally-compliant **Audit Log** into a single, secure PDF file.

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 fields for 'Rich Text Button Number', 'Owner' (Rahul Jain), 'Category', 'Template Name' (Certificate of Completion), 'SLDS Icon-name', 'In Use' (checked), 'Deactivated' (checked), 'Display Order' (0), and 'Test SFDC Record Id'. The 'System Information' section contains buttons for 'Cancel', 'Save & New', and 'Save'.

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

5. 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

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: {{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

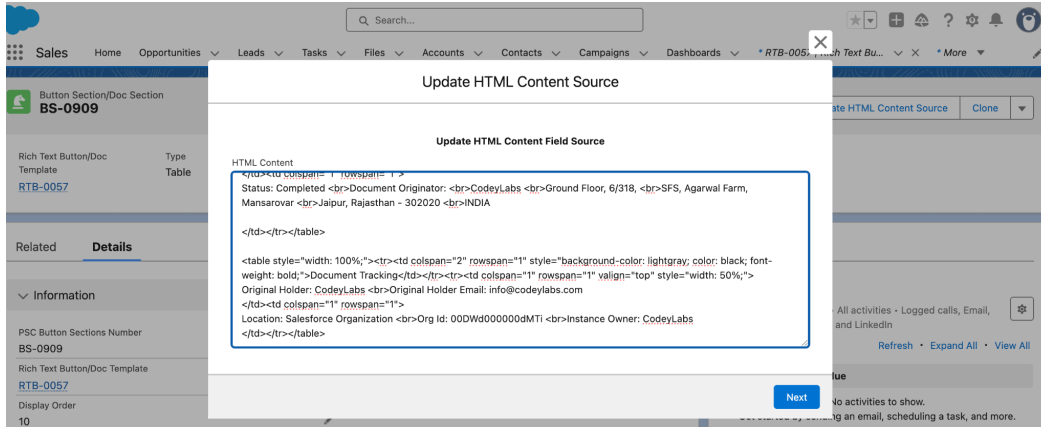
Original Holder Email: [YOUR COMPANY EMAIL ID]

Org Id: [YOUR SFDC ORG ID]

Instance Owner: [YOUR COMPANY NAME]

Iterate HTML for Records(ignore Table)

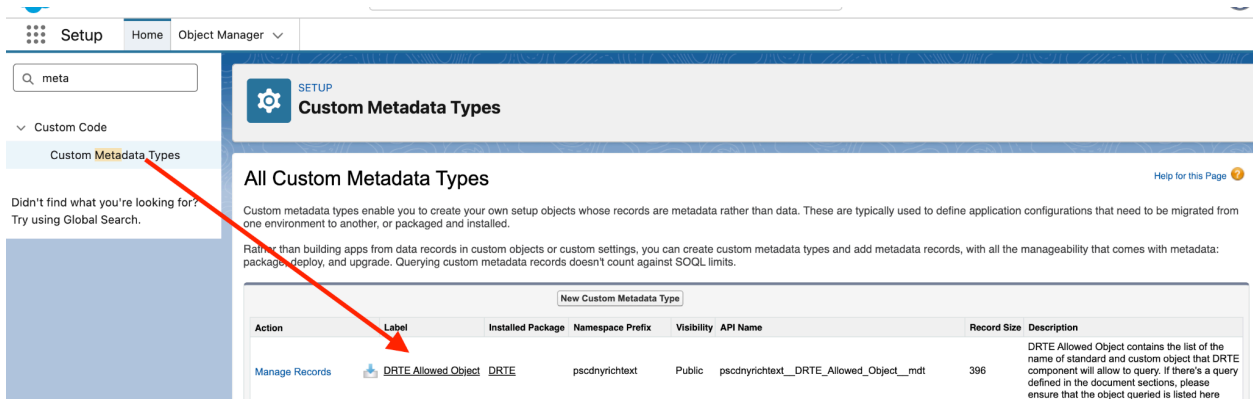
Table



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

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 | | |

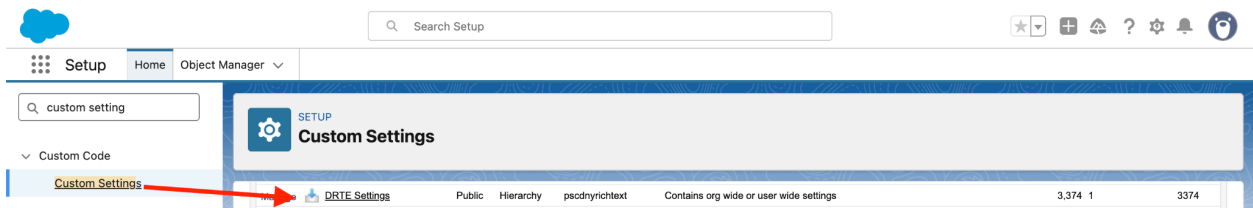
DRTE Allowed Object Help for this Page

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.

Edit

Delete

| ▼ 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 | a1rT10000JMNPhAP | GenericDocId Prefix | DOC- |

View:

All

Create New View

Step 4: Create and Implement the Generation Action

An action is required to trigger the flow that generates the COC document on the relevant record page.

- In **Setup**, go to **Object Manager** and select the object on which your E-Signature workflow is enabled (e.g., Opportunity, Contract).
- Navigate to **Buttons, Links, and Actions**.
- Create a **New Action**:
 - Action Type**: Flow
 - Flow**: Select the packaged flow named **Save Completed Documents To Files**.
 - Label/Name**: Choose a descriptive label, such as **"Save Signed Document To Files"**
- Add Action to Page Layout**:
 - Edit the Page Layout(s) for the target object.
 - Add the newly created Action to the **Salesforce Mobile and Lightning Actions** section of the record's **Highlight Panel**.