



**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.

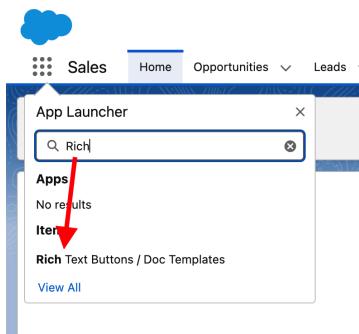
Once all parties have successfully signed a document, the CoC feature allows you to combine the final, executed document with a detailed, legally-compliant **Audit Log** into a single, secure PDF file.

# 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' 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  |
|---------------------|---|------------------|--|------------------|--------|------------|--------------|---------------------|
| <a href="#">New</a> | <a href="#">CertificateOfCompletionDocumentSectionsJSON</a> | 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                                       |
| <a href="#">View file</a> |  |
| 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: In Use

Owner: Rahul Jain  
Category: Deactivated  
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

Related Details

Button Sections/Doc Sections (6+)

| 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: {{pscdynrichtext_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

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: {{date\_ext\_GENERIC\_DOC\_ID\_c}}  
Document Type: {{date\_ext\_Document\_Type\_c}}  
Document Name: {{pscdynrichtext\_Document\_Name\_c}}  
Time Zone: [YOUR TIMEZONE FOR THIS DOCUMENT]

Status: Completed  
Document Originator: [YOUR COMPANY ADDRESS]

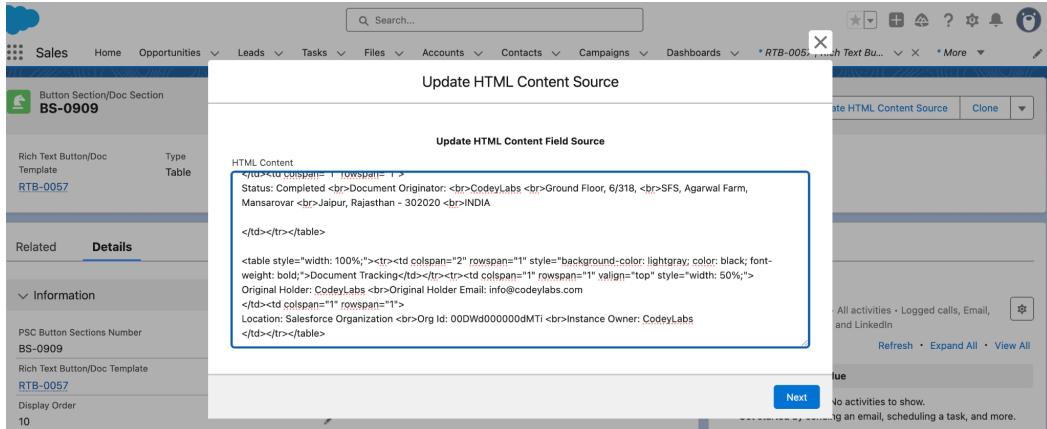
**Document Tracking**

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)

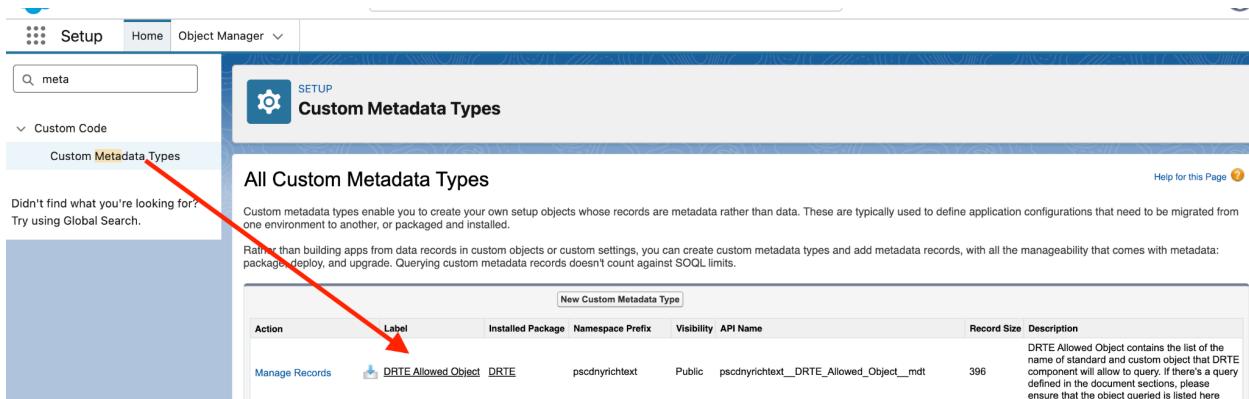
Table



## 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

DRTE Allowed Object Detail

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

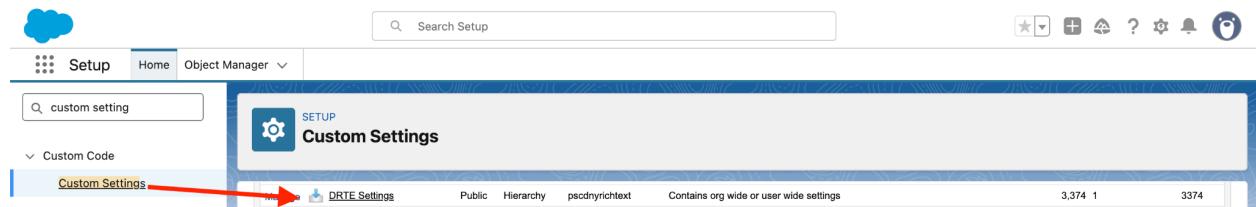
DRTE Allowed Object

DRTE Allowed Object Detail

|                          |                                   |                     |                          |
|--------------------------|-----------------------------------|---------------------|--------------------------|
| 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., `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.

## 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.

1. In **Setup**, go to **Object Manager** and select the object on which your E-Signature workflow is enabled (e.g., Opportunity, Contract).
2. Navigate to **Buttons, Links, and Actions**.
3. 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**"
4. **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**.