



# Digital Sales Aid v3

## Implementation Guide

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# Chapter 1: Overview

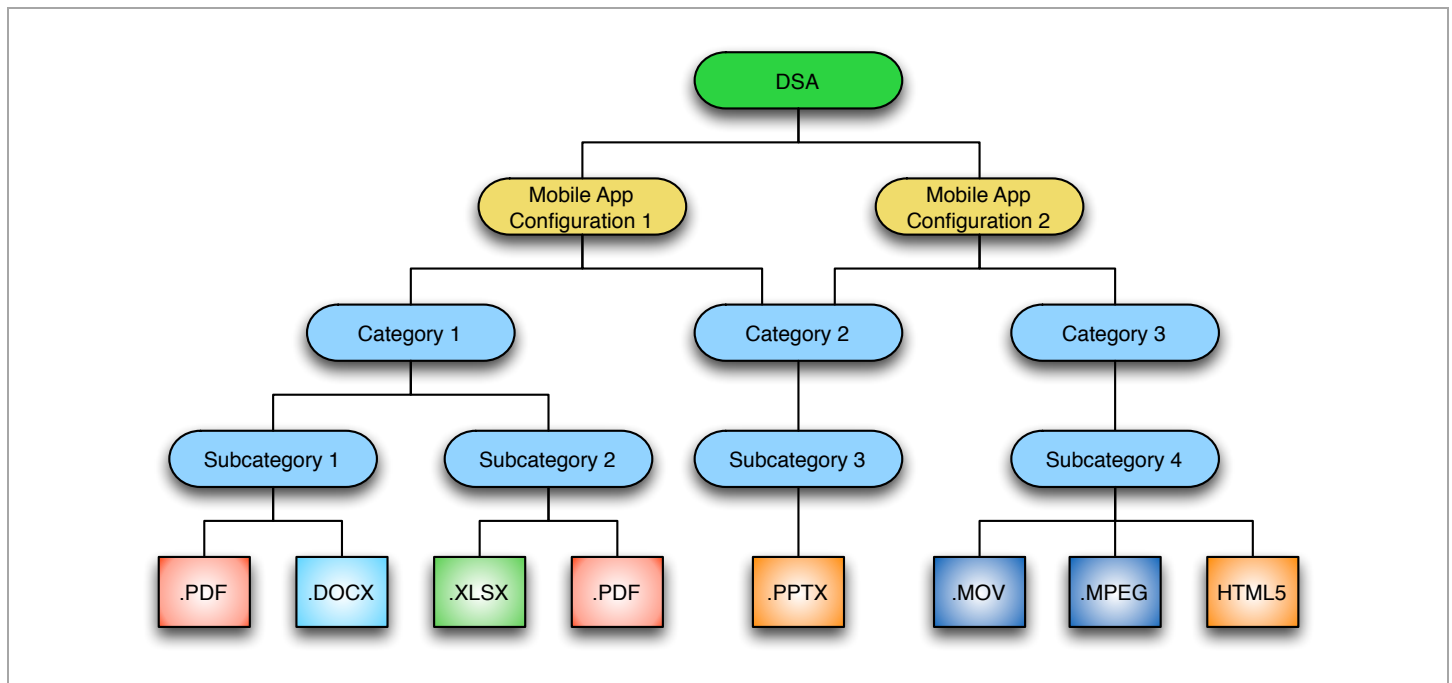
Digital Sales Aid (DSA) is an accelerator, or base platform, which allows users to download Content files from a SFDC org to their iPads, so they can easily have access to these files from anywhere, anytime. It is mainly directed to sales reps, giving them the ability to have marketing and sales collateral readily available while they are on the road.

DSA offers many out-of-the-box features that make organizing and viewing Content files on an iPad a very easy task. However, given its accelerator nature, DSA can also be extended or modified with custom development in order to meet additional client's requirements.

A DSA implementation is composed of three main parts: SFDC Content, which serves as the back end for files; the DSA managed package, which helps you define category structures to organize Content files; and the DSA iPad app, which enables users to download and work with these Content files.

SFDC Content stores the files that will be displayed on the iPad app, and these files can be organized in any way your client considers appropriate. This is because the DSA category structure is independent from SFDC Content. Thus, if your client already uses SFDC Content for other purposes, it is not mandatory to create any additional Content libraries or reorganize existing Content files. Nevertheless, for maintenance purposes, it is recommended to keep DSA Content files easily accessible and organized within SFDC Content.

The DSA managed package organizes Content files in a two-level, hierarchical structure: *top-level categories* and *subcategories*. Content files are associated to subcategories, and subcategories are associated to top-level categories. In turn, categories are included in *mobile app configurations*, which are structures that define a set of visual and permission settings for displaying and organizing Content files on the iPad app. Any given subcategory can only be related to one category. However, any given category can be included in many mobile app configurations at the same time.



A conceptual example of the DSA categories structure

The DSA iPad app is the final piece of a DSA implementation. It is a lightweight, customizable iOS app, capable of downloading Content files, and displaying them according to a group of visual settings and permissions defined in one or many mobile app configurations.

This implementation guide serves as an installation and configuration walkthrough for a basic DSA implementation. In addition, you will also find a section with some tips and things to consider when working on a DSA implementation. Finally, you will find a basic troubleshooting section for the DSA iPad app.

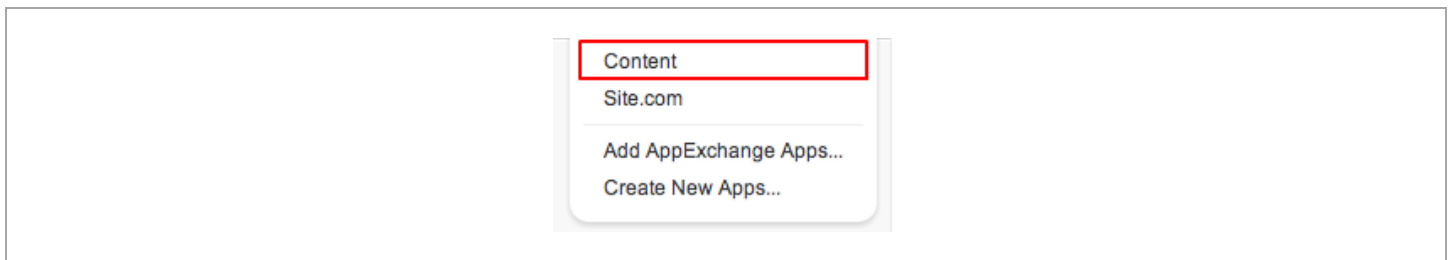
For questions and more information about DSA, you can also visit the Model Metrics Digital Sales Aid Chatter group in Org62:

[https://na1.salesforce.com/\\_ui/core/chatter/groups/GroupProfilePage?g=0F9300000008eJK](https://na1.salesforce.com/_ui/core/chatter/groups/GroupProfilePage?g=0F9300000008eJK)

## Chapter 2: Installing DSA

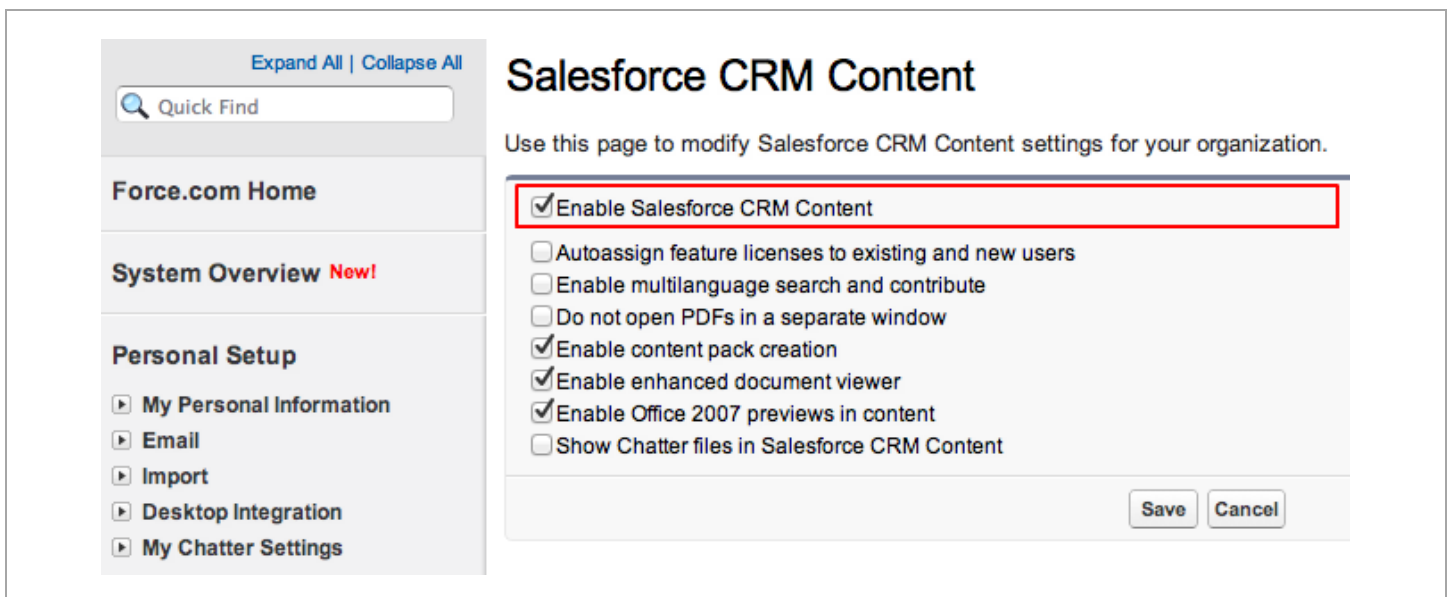
### 2.1 Enabling Salesforce Content

The first thing you need to do is make sure Content is enabled in your target org. Log into your Salesforce org and look for the applications menu on the top-right corner. If Content is enabled, you should be able to see it on the applications menu:



*The Content Application as seen on the applications menu*

If Content is not enabled, navigate to **Setup > App Setup > Customize > Salesforce CRM Content > Settings**. Click on the **Edit** button and check the **Enable Salesforce CRM Content** option. Then click on **Save**.



*Enabling Salesforce CRM Content from the Setup menu*

Once enabled, Content will serve as the back-end for DSA.

## 2.2 Installing the DSA Managed Package

First you need to obtain the DSA package installation URL. There are different package versions that support different features (i.e. multiple configurations, DSA Premium, etc.). According to your client's requirements, find out what package version you will need for your DSA implementation.

If you have access to the DSA development org, you can find the package installation URLs following these steps:

1. Go to **Setup > App Setup > Create > Packages**
2. Look for the desired package on the list and click on the Package Name link
3. On the Package Details screen, click on the Versions tab
4. Click on the version number you need
5. On the Package Version screen, copy the value of the Installation URL field

If you do not have access to the DSA development org, check out the **Model Metrics Digital Sales Aid** Chatter Group in Org62, or ask somebody from the DSA development team to provide you the package installation URL you need.

Once you have the appropriate installation URL, login to your client's SFDC org. Then paste the URL on the browser's address bar and go. If you are installing the package in a sandbox environment, remember to replace the URL's **login** word with the **test** word:

- Production: <https://login.salesforce.com/packaging/installPackage.apexp?.....>
- Sandbox: <https://test.salesforce.com/packaging/installPackage.apexp?.....>

You will now see the Package Installation Details page. Click on **Continue**.

**Package Installation Details** Help for this Page

Package Name	DSAv2 Managed App Package
Version Name	DSAv3 with Ordering
Version Number	2.10
Publisher	Model Metrics Inc
Description	DSAv3 with Ordering with out Geolocation

**Continue** Cancel

**Package Components**

▼ Tabs (6)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Category		Tab	This is a brand new component.
Create	Getting Started with DSA		Tab	This is a brand new component.
Create	Run After Install		Tab	This is a brand new component.
Create	Run Right After Install		Tab	This is a brand new component.
Create	Content Review		Tab	This is a brand new component.
Create	Mobile App Configuration		Tab	This is a brand new component.

▼ Pages (4)

*The package installer Details page*

Next, the installation wizard will show you the Package API access page. Click on **Next**.

Package Installer  
DSAv2 Managed App Package Help for this Page ?

**Step 1. Approve Package API Access** Step 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

**Package Custom Objects**  
This Package will have the user's access (via the API) to all Custom Objects in your Organization.

**Extended Object Permissions**

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Products	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Push Topics	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Quotes	✓	✓	✓	✓
Documents	✓	✓	✓	✓	Solutions	✓	✓	✓	✓
Ideas	✓	✓	✓	✓					

**General User Permissions**  
This Package will be able to use all of the General User Permissions from the user's Profile.

**Administrative Permissions**  
This Package will be able to use all of the Administrative Privileges from the user's Profile.

Next Cancel

*The package installer API Access page*

Now you need to decide which user profiles will have access to the package objects and object fields. Grant access to every user profile that will be using DSA on their iPads. If later on you need to give access to other user profiles, you can manually do so as described in Chapter 4.

You can either:

- Grant access to system administrators only
- Grant access to all SFDC users
- Grant access to specific SFD user profiles

If you select granting access by profile (Select security settings option), you need to specify either **No Access** or **Full Access** for each one of them.

Users with an associated profile that has no access permissions on the package objects will get an error when trying to log into SFDC from the app.

Once you are done, click on **Next**.



Package Installer  
DSAv2 Managed App Package Help for this Page ?

**Step 2. Choose security level** Step 2 of 3

Select security settings:

- ☐ Grant access to admins only Users with your profile get full access (best for limited deployments)
- ☐ Grant access to all users All internal custom profiles get full access
- ☒ Select security settings User access set by profile (recommended for most packages)

**Customize security**

These security settings determine access to the custom objects and components installed in the package. It doesn't affect permissions for existing objects.

**Standard profiles (including the Read-Only profile) don't receive access to any installed custom objects. Because permissions are not editable for standard profiles, you must clone your profile to grant access. [Tell me more!](#)**

Action	Access Level	Description
Set All	No Access	No access to any features in this package.
Set All	Full Access	Full access to all features and fields in this package

Please select a level of access to the features in this package for each of your organization's custom profiles.

Profile	Access Level
System Administrator	Full Access (Your profile must have full access to the package)
Customer Portal Manager	<input type="button" value="No Access"/>
Authenticated Website	<input type="button" value="No Access"/>
High Volume Customer Portal	<input type="button" value="No Access"/>

The package installer Security Level page

Next, the installer will ask you to confirm your choices. Click on **Install**. Then Salesforce will show an installation summary page.

Package Installer  
DSAv2 Managed App Package Help for this Page ?

**Step 3. Install Package** Step 3 of 3

The package is ready to be installed. Click Install to continue.

The package installer Confirmation page

Package Details  
DSAv2 Managed App Package (Managed)

[« Back to List: Installed Package](#)

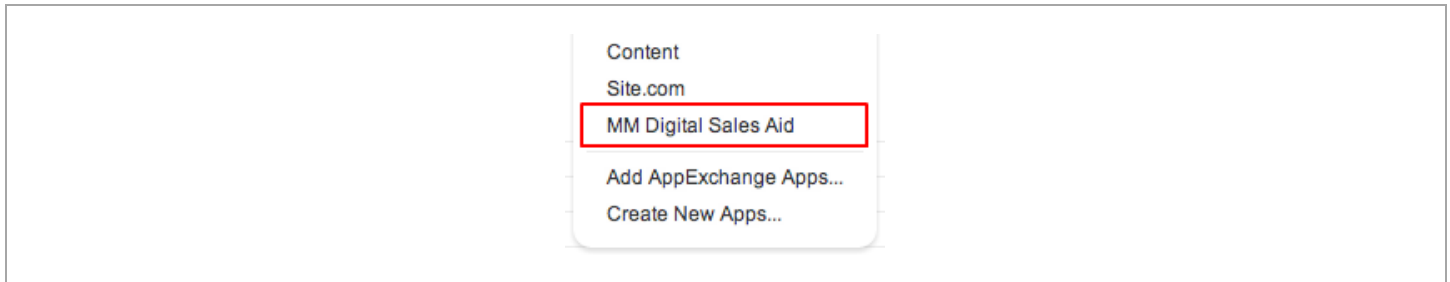
**Install Complete**  
Follow any remaining steps in the app install guide to complete deployment.

**Installed Package Detail**

Package Name	DSAv2 Managed App Package	Version Number	2.10
Language	English	First Installed Version Number	2.10
Version Name	DSAv3 with Ordering	Package Type	Managed
Namespace Prefix	ModelM	Allowed Licenses	Unlimited
Publisher	Model Metrics Inc	Used Licenses	0
Status	Trial	API Access	Unrestricted <a href="#">[Enable Restrictions]</a>
Expiration Date	11/15/2012	Modified By	
Description			
Installed By			

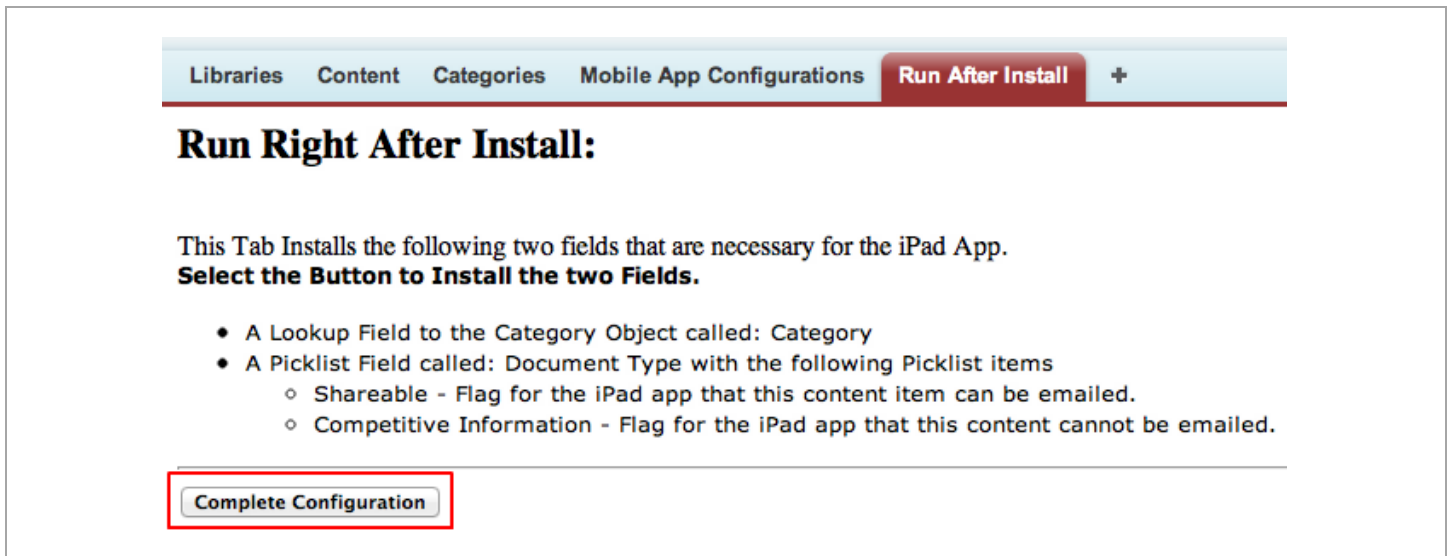
The package installer Summary page

Although the package is already installed, there is one **very** important final step to finish the installation process. The package creates a new SFDC application called **MM Digital Sales Aid**, which is available on the applications menu on the top-right corner.



*The MM Digital Sales Aid application as seen on the applications menu*

Click on **MM Digital Sales Aid** and go to the **Run After Install** tab. Once there, click on the **Complete Configuration** button.



*Completing the package configuration*

This action creates two custom fields on the Content object: a lookup field to the Category object called **Category**, and a picklist field called **Document Type**. The **Category** field links Content records to the DSA categories structure; the **Document Type** field indicates whether a document can be emailed from the iPad app.

**Failure to complete this final step will prevent the iPad app from working!**

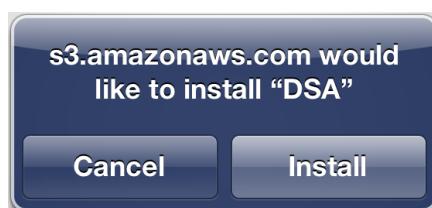
## 2.3 Installing the iPad App

### 2.3.1 Installing the DSA Base App

From your iPad, go to the AppStore and look for "Digital Sales Aid". You can also open Safari and go to: <https://itunes.apple.com/us/app/digital-sales-aid/id509612020?mt=8>. Download and install DSA's latest version. This will install a **base** (non-customized) DSA app build on your iPad.

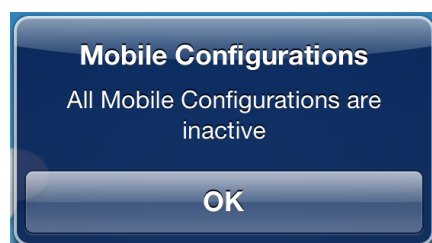
### 2.3.2 Installing a Custom DSA App Build

As you work on a DSA project, you will most likely use a customized iPad app build for your client. Ask your development team to provide you the appropriate URL to download the iPad app build you will be working with. Once you navigate to the custom app build download page and tap on the download URL, iOS will ask confirmation to install DSA on your iPad. Tap on **Install** and wait for the DSA app to appear on your apps list.



*Confirm DSA installation on the iPad*

At this point there are no mobile application configurations created in Salesforce yet, so if you try logging in from the iPad app you will get the following message:



*Logging into DSA from with no mobile app configurations created*

Before you can log into DSA from your iPad and see content, you first need to create at least one mobile app configuration, setup at least one category and one subcategory, and relate at least one content file to this subcategory. This process is covered in the next chapter.

## Chapter 3: Configuring DSA

### 3.1 Setting Up Salesforce Content

Make sure the two Content custom fields are created and visible:

1. Log into your SFDC org
2. Go to **Setup > App Setup > Customize > Salesforce CRM Content > Content Types**
3. Edit the **General** Content Type (assuming this is the content type you are using in your org). If you have other content types, edit those your content managers will be using to publish content available for the iPad app
4. Make sure the **Document Type** and **Category** fields are included in the **Fields** section as show below. If not, drag and drop these two fields into the **Fields** section so they become available

The screenshot shows the 'Content Type Properties' page for a 'General' content type. The left sidebar contains 'System Overview' and 'App Setup' sections. The main area has three sections: 'Button Section' (Detail Page Buttons), 'Fields' (Title, Description, Tags, Language, Owner, Document Type, Category), and 'Custom Links'. The 'Fields' section is highlighted with a red box. A legend on the right explains field types. The 'Content Fields' list at the bottom right shows the fields in the 'General' content type.

*Include the "Document Type" and "Category" fields in the "Fields" section*

If you don't see these two fields in either the **Fields** or **Content Fields** list, you probably did not perform the last step on the installation process. Click on **MM Digital Sales Aid** application on SFDC's applications list (top-right corner) and go to the **Run After Install** tab. Once there, click on the **Complete Configuration** button. Then go back and check if the custom fields are available.

Typically, your client will configure and organize all Content libraries and files that will be available on the iPad app. The way Content files and libraries are organized is not relevant to DSA. However, it is a good practice to keep files and libraries well organized to avoid confusion, and also make maintenance an easy task.

DSA leverages the Salesforce security model, including Content security settings. Make sure DSA users have access to all relevant Content libraries. Also, note that DSA does not download any files located in the **My Personal Content** library.

## 3.2 Creating your first Mobile App Configuration

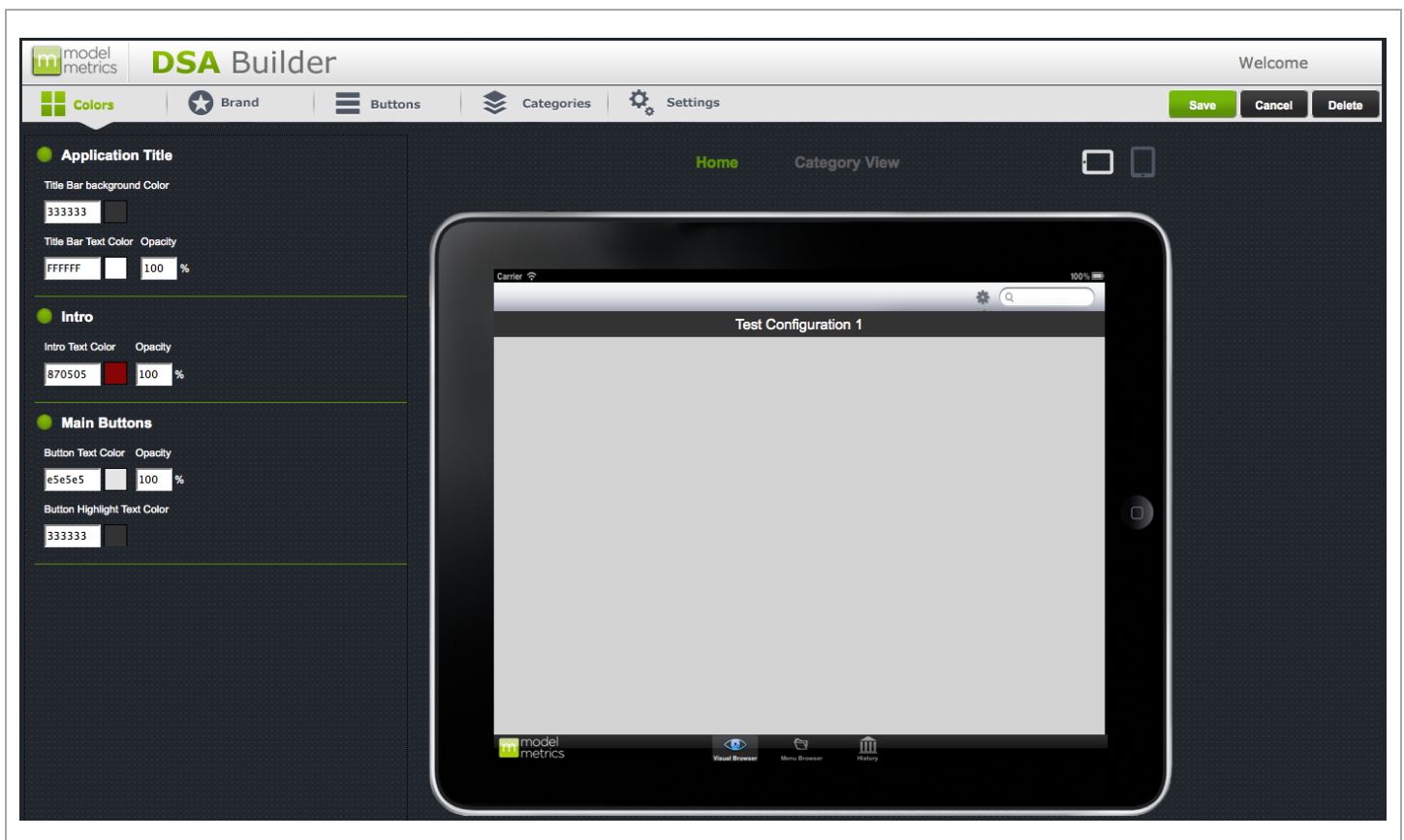
A *mobile app configuration* is a group of settings that define (1) a category structure for content files and (2) some of the look and feel features of the DSA iPad app. You need to setup at least one mobile app configuration in SFDC so DSA can work properly. Depending on the managed package version you have installed, DSA will be able to support multiple mobile app configurations at the same time.

To setup a new mobile app configuration, click on **MM Digital Sales Aid** app and go to the **Mobile App Configurations** tab. Then click on **New**, enter a title for the configuration, and finally click on **Create**. DSA will show the configuration page, or **DSA Builder**. From here you can customize some of the look and feel features of the iPad app, and also build the categories structure for a particular mobile app configuration.

Important note: a mobile app configuration is a custom object in SFDC that can be accessed using the standard SFDC interface. Try to avoid editing mobile app configuration records using the standard SFDC interface unless you know exactly what you are doing. Instead, use the DSA Builder for this purpose.

### 3.2.1 DSA Builder Overview

The DSA Builder is divided in five sections: Colors, Brand, Buttons, Categories, and Settings. Each section allows you to configure different settings, and also includes a real-time preview screen that shows how your changes will be reflected on the iPad app, for both the home screen and the category view. You can also switch between landscape and portrait mode when previewing the configuration by clicking on the small iPad icons above the iPad's top-right corner.



*The DSA Builder screen*

If you hover over many of the settings, the preview screen will highlight the part of the iPad app interface will be changed. In the same way, hovering over some parts of the preview screen will highlight the settings you need to edit, so that part of the iPad app interface is changed.

### 3.2.2 Colors

This section allows you to configure the color features of the home screen. Pick colors by clicking on the colored square beside the hexadecimal color code, and set the opacity value by clicking on the **Opacity** textbox and typing a number between 0 and 100, or by using the slider.

#### Application Title

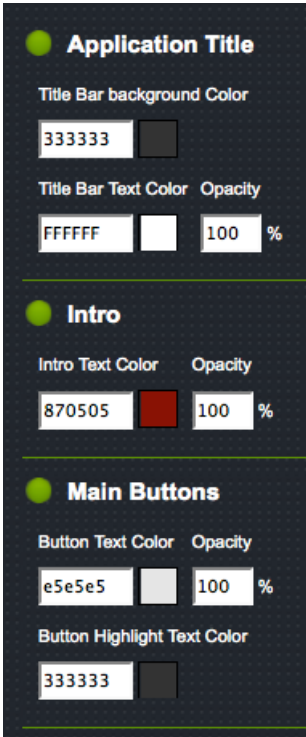
Sets the title bar background color, the title bar text color, and the transparency (alpha %) for the title bar text.

#### Intro

Sets the intro text color and its transparency (alpha %).

#### Main Buttons

Sets the main buttons text color, the transparency (alpha %) for the main buttons text color, and the main buttons highlight text color.



The screenshot displays the 'Colors' configuration section of the DSA Builder. It is organized into three main categories, each with a green circular icon and a title:

- Application Title:**
  - Title Bar background Color: A color picker showing a dark grey square.
  - Title Bar Text Color: A color picker showing a white square with the hex code 'FFFFFF'.
  - Opacity: A slider and input field set to '100 %'.
- Intro:**
  - Intro Text Color: A color picker showing a red square with the hex code '870505'.
  - Opacity: A slider and input field set to '100 %'.
- Main Buttons:**
  - Button Text Color: A color picker showing a light grey square with the hex code 'e5e5e5'.
  - Opacity: A slider and input field set to '100 %'.
  - Button Highlight Text Color: A color picker showing a dark grey square with the hex code '333333'.

*The DSA Builder Colors section*

### 3.2.3 Brand

This section allows you to configure the branding features on the home screen. Pick files from your hard drive by clicking on the **Browse** button, selecting a file, and then clicking on the **Upload** button.

**Application Title**

Sets the title bar text.

**Logo**

Sets a corporate logo image, which will appear on the top-left corner of the home screen.

**Intro**

Sets an intro text that will be displayed on the iPad app home screen, below the title bar. You can enter up to 255 characters.

**Background Image for Landscape Orientation**

Sets a background image for the home screen in landscape mode.

**Background Image for Portrait Orientation**

Sets a background image for the home screen in portrait mode.

The screenshot displays a configuration interface for the DSA Builder Brand section. It features five distinct sections, each with a green circular icon and a title:

- Application Title:** Includes a text field labeled "Application Title Text" containing "Test Configuration 1".
- Logo:** Includes a text field labeled "Logo Image", a "Browse..." button, and an "Upload" button. Below the field, it specifies "Ideal Image Resolution: 150x29". A "Preview:" label is followed by a gray rectangular placeholder.
- Intro:** Includes a text field labeled "Intro Text".
- Background Image for Landscape Orientation:** Includes a text field labeled "Upload Image Landscape", a "Browse..." button, and an "Upload" button. Below the field, it specifies "Landscape background image resolution: 1024x612px at 132dpi". A sample image "Sample Background Landscape.png" is shown.
- Background Image for Portrait Orientation:** Includes a text field labeled "Upload Image Portrait", a "Browse..." button, and an "Upload" button. Below the field, it specifies "Portrait background image resolution: 768x868px at 132dpi". A sample image "Sample Background Portrait.png" is shown.

*The DSA Builder Brand section*

## 3.2.4 Buttons

This section allows you to configure the home screen buttons look and feel, and also their visibility. Each button corresponds to a *top-level category* in the DSA category structure. Pick files from your hard drive by clicking on the **Browse** button, selecting a file, and the clicking on the **Upload** button.

### Landing Page Layout

Creating top-level categories is the first step in building your category structure for the current configuration. The multi-select picklist displays the available top-level categories. To create one, click on the **Add** button, type in a name and click on **Save**. You will see the new category available on the list.

After you have created all the top-level categories you need, select those you want to be displayed on the home screen. Everytime you select a category from the list, you will see its name changing color, and a new button appearing on the preview screen.

To hide a category from the app home screen, click on its name on the categories list. The category button will disappear from the preview screen, indicating the category is no longer visible on the home screen. You can also click on the **X** located on the top-right corner of a button, and the result will be the same.

*Categories (top-level and subcategories) are available across all Mobile App Configurations. That is, all the categories you create for a particular configuration will appear on the categories list when you create another mobile app configuration. It is your choice to select which categories will be available for a particular configuration.*

### Main Button

This option allows you to upload an image for the home screen buttons. Once you upload an image, you will see a preview of it on the **Preview** box.

### Main Button Selected

This option allows you to upload a “highlight” image for the home screen buttons, which will be shown when while you tap on any of them. Once you upload an image, you will see a preview of it on the **Preview** box.

Once you have setup the button background images, you will notice that buttons are piled up on the top-left corner of the preview screen. Drag and drop every button to the desired position for the landscape mode, and do the same for the portrait mode. Button positioning for landscape mode is independent from button positioning for portrait mode.



**Landing Page Layout**

Select category name to add/remove from layout

Select Category

- Category 1
- Category 2
- Category 3
- Category 4

Add

---

**Main Button**

Main Button Image

Browse... Upload

Preview: Sample Button.png

---

**Main Button Selected**

Main Button Highlight Image

Browse... Upload

Preview: Sample Button highlighted.png

*The DSA Builder Buttons section*

### 3.2.5 Categories

This section allows you to configure the category structure (top-level categories and subcategories) for the current mobile app configuration. Pick colors by clicking on the colored square beside the hexadecimal color code, and set the opacity value by clicking on the **Opacity** textbox and typing a number between 0 and 100, or by using the slider. Pick files from your hard drive by clicking on the **Browse** button, selecting a file, and the clicking on the **Upload** button.

#### Categories

The hierarchy between top-level categories and subcategories is represented in a tree view. On the first level you will see visible top-level categories (refer to the previous section – 3.2.4 Buttons – for more information about top-level categories visibility). Clicking on the **+** sign beside any of these top-level categories will expand it and show all its related subcategories. Clicking on the **–** sign will collapse it and hide its related subcategories.

To add a new top-level category or subcategory, click on the **Add New Category** button, type in a name and select a parent, and then click on **Save**. The new category will be automatically displayed in the tree view. To delete a subcategory, click on the red **X** button beside its name.

Clicking on any of the top-level *category* names will show the following sections:

### Selected Category

In this section you can edit the following settings for the selected category:

- Button text align: text alignment for the category button on the home screen
- Overlay background color: background color for the list of content files shown when a subcategory is selected
- Opacity: transparency for the overlay background color
- Overlay text color: text color for the list of content files shown when a subcategory is selected
- Navigation area background color: background color for the subcategory navigation area (icon gallery on the right-hand side)
- Gallery/subcategory heading: heading text for the subcategory navigation area

There are three buttons at the bottom of this section: after you have made any changes to a category, click on the green **Save** button at the bottom of this section; to cancel any changes, click on **Cancel**; to reset a category to its default settings, click on **Delete**.

Important notice: save any changes for a given category by using the **Save** button on this section, rather than using the **Save function** on the top-right corner of the screen. Changes on category settings will not be saved if you don't use this function, even if you save the configuration using the **Save function** on the top-right corner on the screen.

### Category Background: Landscape

Sets a background image for the category view in landscape mode.

### Category Background: Portrait

Sets a background image for the category view in portrait mode.

### Content List Background Bar

Sets a background image for the each of the content file names listed under a subcategory.

### Content List Background Bar Selected

Sets a "highlight" image for the each of the content file names listed under a subcategory. The image will be shown when you tap on any of them.

Clicking on any of the *subcategory* names will show the following sections:

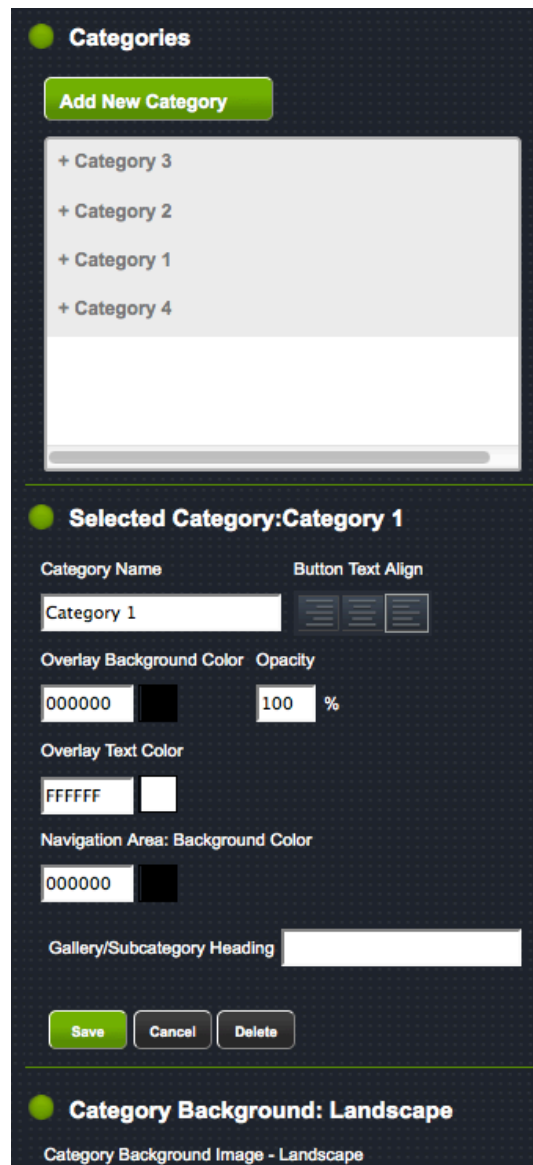
### Selected Category

In this section you can edit the following settings for the selected subcategory:

- Category Name: subcategory name
- Category Order: numeric order in which the subcategory will appear on the subcategory navigation area
- Today's Special: places the subcategory at the top of the subcategory navigation area
- Category Description: text shown below the subcategory title
- Select Parent Category: parent (top-level) category for the selected subcategory

### Sub-Category Gallery Image

Sets an image (icon) for the subcategory listed on the subcategory navigation area.



**Categories**

[Add New Category](#)

- + Category 3
- + Category 2
- + Category 1
- + Category 4

---

**Selected Category: Category 1**

Category Name:  Button Text Align:

Overlay Background Color:  Opacity:  %

Overlay Text Color:

Navigation Area: Background Color:

Gallery/Subcategory Heading:

[Save](#) [Cancel](#) [Delete](#)

---

**Category Background: Landscape**

Category Background Image - Landscape

*The DSA Builder Categories section*

### 3.2.6 Settings

This section allows you to configure general permissions and functionality settings.

#### Check-In

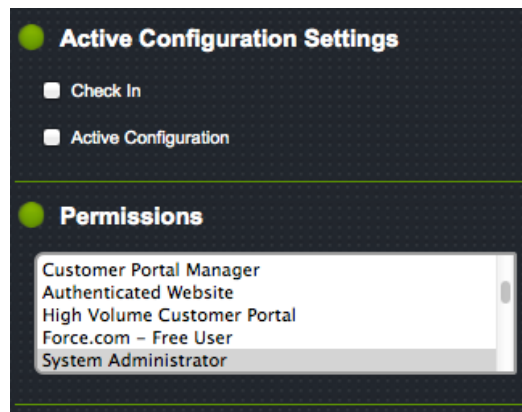
Indicates whether the Check-in feature is enabled. This functionality allows users to track, rate and email content files shown to contacts during their client visits.

#### Active Configuration

Indicates whether the current configuration is available on the iPad app.

#### Permissions

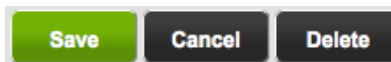
The multi-select picklist shows the available user profiles on the current SFDC org. With this feature you can grant specific user profile access to a given configuration on the iPad app. You need to select at least one user profile from the list.



*The DSA Builder Settings section*

### 3.2.7 Functions

On the top-right corner of the DSA Builder you'll find the **Save**, **Cancel**, and **Delete** functions. These are self-explanatory and refer to the mobile app configuration you are working on.



*The DSA Builder functions*

**Important notice:** everytime you exit the configuration page, please do so by using the **Save** or **Cancel** functions (or **Delete** in case you need to delete the current configuration). Do not exit the configuration page by closing the browser window, or closing the browser tab, or navigating to another web page.

When you open the configuration page and work on it, DSA creates temporary records to keep track of the changes you made to a mobile app configuration, and when you exit the DSA Builder, DSA cleans up those temporary records and commits (or cancels) those changes. If you don't exit the configuration page properly (by using the functions described above), you might leave those temporary records stored and cause data inconsistency. A typical consequence is getting duplicated category records on the iPad app.

If for some reason you did not exit the DSA Builder properly, just open it up again and click on **Save** or **Cancel**. This action should clean up all the temporary records and hopefully make your data consistent again.

### 3.3 Editing a Mobile App Configuration

To edit any mobile app configuration, click on **MM Digital Sales Aid** app and go to the **Mobile App Configurations** tab. From the available mobile app configurations, select the one you want to edit by clicking on the **Mobile App Configuration Name** link (not the **Mobile App Config Name** link). This link will open the DSA Builder instead of opening the standard Salesforce record page.

Mobile App Config Name	Mobile App Configuration Name	Title Text	Active Config	Check In Enabled
MAC-00000003	MAC-00000003	Test Configuration	✓	✓
MAC-00000004	MAC-00000004	Test Configuration 2	✓	<input type="checkbox"/>

*The Mobile App Configurations list*

Once you have finished editing the configuration, remember to always exit the configuration page by using the top-right functions (**Save**, **Cancel** or **Delete**). **Do not** exit the configuration page by closing the browser window, closing the browser tab, or navigating to another page.

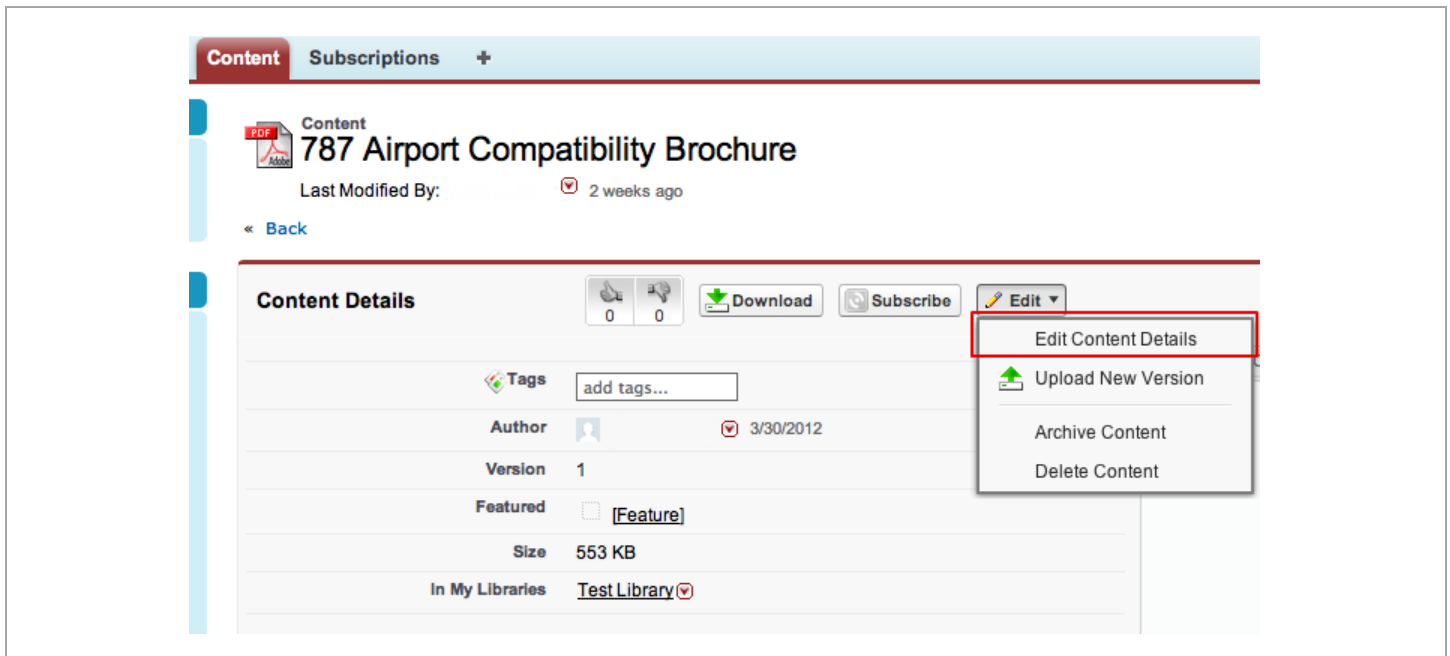
### 3.4 Adding content to DSA

The last piece to configure before you can see any files on the iPad app is adding Content to DSA. This means that every Content file you want to show on the app needs to be related to an existing **subcategory** record. At this point, there are no Content files related to any of the subcategories that you have created. Therefore, if you log into the app, you will not see any top-level category buttons displayed on the app's home screen. Go to the **Content** app using the applications list menu in Salesforce. Click on the **Libraries** tab and locate a file that you want to show on the app.

Title	Author	Publication Date
787 First Flight		3/30/2012
787 Unmatched Economics		3/30/2012
787 Airport Compatibility Brochure		3/30/2012
747-8 Brochure		3/30/2012

*Selecting a Content file*

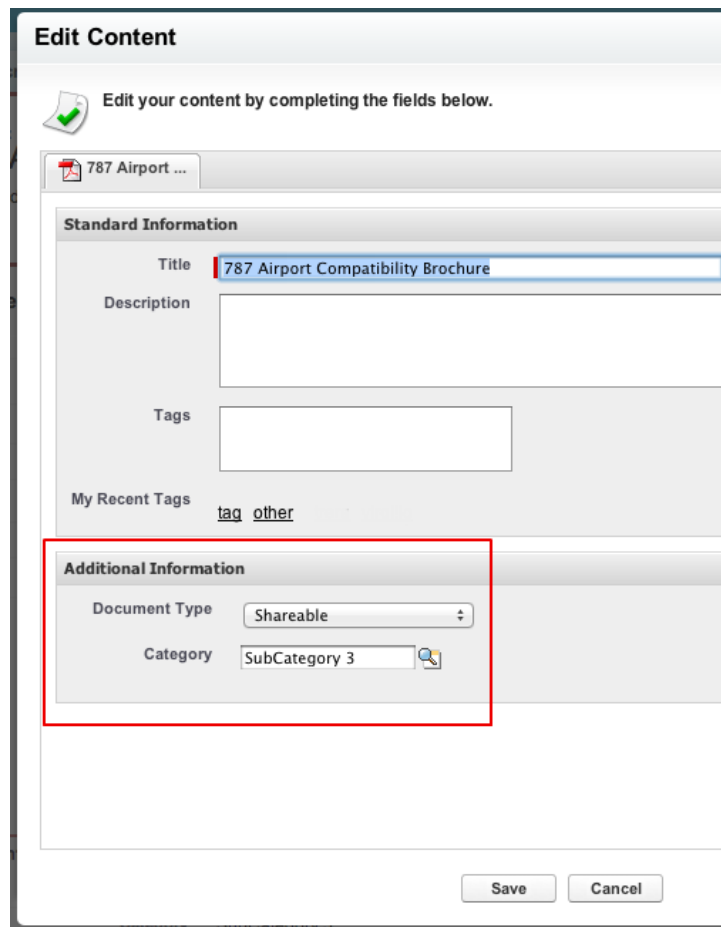
Click on the file title, and once you are in the file details page, click on the **Edit** button and select the **Edit Content Details** option.




*Selecting the Edit Content Details option*

Once the Edit Content window opens, go to the bottom of it and you will see the two custom fields for DSA:

- **Document Type:** this field is optional and its values are "Shareable", which means the Content file can be sent by email from the app, and "Competitive Information" which means the content file cannot be sent by email from the app. If no value is selected, the content file can be emailed from the app. Make sure you select the appropriate value for each Content file you want to show on the app
- **Category:** this field is mandatory (for DSA, not for SFDC Content) and indicates which **subcategory** the file is related to. Make sure you select a **subcategory** rather than a top-level category. If you don't select a value for this field, or if you select a top-level category, you will not be able to show the file on the app by using the **visual browser**.



**Edit Content**

 Edit your content by completing the fields below.

787 Airport ...

**Standard Information**

Title


Description

Tags

My Recent Tags [tag](#) [other](#)

**Additional Information**

Document Type

Category  

*Selecting the Document Type and Category on the Edit Content window*

Once you have finished, click on **Save**. Repeat the above steps for every Content file you want to show on the app.

## Chapter 4: Implementation Considerations

Following are a few implementation guidelines, tips, and other relevant details to consider during your DSA implementation.

### 4.1 Model Metrics/Salesforce References

The base client app may contain Model Metrics/Salesforce references (logos, images, etc.) for demo purposes. Make sure you eliminate all these references in your custom build for your client. Ask your team's developer to help you out with this.

### 4.2 Home Screen Options Menu

Ask your team's developer to clean up the options menu: remove the **HTML5 Example** option, and customize (or remove) the **Report a Problem** option according to your client's requirements. With custom development you can add more options to this menu if necessary.

### 4.3 Home Screen Buttons

There are two options for adding home screen buttons on the DSA Builder:

- **Images as Buttons:** use an image file (.png, .jpg) for the buttons. Note that with this option all buttons will have the same size, shape, color, etc. You can easily add, remove, or position buttons as needed
- **Transparent Buttons + Background Image:** the second option is having the buttons as part of the background image. You would then add transparent buttons and place them over each of the background image "buttons" (areas). This option gives you more flexibility, as every button can be different in shape, size, color, etc. However, you will need to update the app's home screen background image everytime you add, remove a button, or change its position

### 4.4 Search Function

The search function looks for keywords on the Content file titles. It also searches by Content file tags, one tag at a time (no multiple tag search).

### 4.5 Background Images Format

If your background images are not correctly displayed on the iPad app (incorrect colors, shape, etc.), replace them with .png files. This fix solves image display issues in almost all the cases.

### 4.6 Contacts and Accounts

DSA downloads all contact and account records that are visible for the logged user, taking into account the Salesforce security model. The iPad app performance will suffer when logging in for the first time (or when



the iPad app's local database is reset) if the logged user has visibility into a large number of contacts and/or accounts in Salesforce.

A rule of thumb is keeping your downloaded contacts and accounts around or under 50K each. We know that client orgs may be very different in size and complexity. In some cases you might find users with access to more than 200K contacts, for example.

Let your client know that downloading more than 50K contacts or accounts might have an impact on the client app performance. In this case, the iPad app can be modified to filter the number of contacts and/or accounts downloaded. A possible solution would be creating a custom field on the Account/Contact object and marking those records that will be downloaded. Then, new logic would need to be included on the iPad app so it filters contacts/accounts using this field.

Account information is not used out-of-the-box, however DSA downloads account records in case they are needed for any customized feature. If your client does not need account information, the iPad app can be modified so it does not download any account records.

## 4.7 Granting Access to Additional User Profiles

If you need to grant DSA access to an additional user profile, go to the profile object permissions in SFDC and set them up as follows:

- **Category:** Users must have at least read-only access to all fields
- **Mobile App Configuration:** Users must have at least read only access to all configurations and fields
- **Category Mobile Configuration:** Users must have at least read only access to all configurations and fields
- **Content Review:** Users must have Write Access to this Object

## 4.8 User Configuration

Make sure all DSA users have the appropriate access to Content files and libraries. Otherwise they will not be able to see any Content material on the iPad app.

Users will also need the **View Setup and Configuration** profile permission enabled. If, for security reasons, your client cannot grant this permission to DSA users, you will need to let the iPad app have access to the user's profile ID information as follows:

- Create a custom formula text field on the User object. For example, Custom\_Profile\_ID\_\_c
- Make the formula field return the user's profile record ID
- On the iPad app code, your team's developer will need to change the Profile ID logic by using the formula field you created above

## 4.9 Content Libraries and Files

Typically, your client will manage Content libraries and files. Note that the client app displays the Content file title. Make sure your client uses a naming convention that is easy to read so files can be quickly identified on the client app.

## 4.10 DSA Package Activation

The DSA Managed Package expires 30 days after it is installed. When you are ready to deploy your DSA implementation, make sure you activate the package so it does not expire. Ask your project manager or the DSA development team to activate your package once you are ready to go live.

## 4.11 SFDC Portal Users

DSA works out-of-the-box for regular (non-portal) SFDC users. However, if your client needs to give DSA access to portal users, the iPad app can be modified to support this requirement. Ask your team's developer to provide an iPad app build that supports this feature.

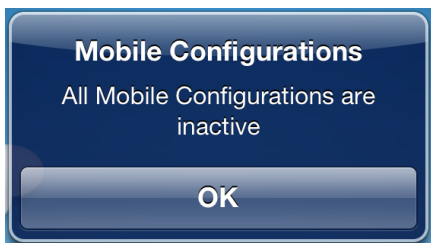
## 4.12 Mobile App Configurations and the Two-Level Category Structure


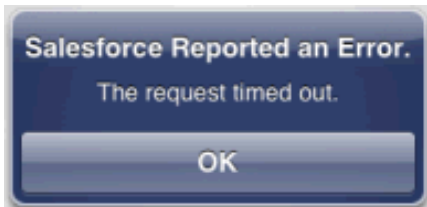
As you already know, DSA supports a two-level structure for organizing Content files. However, if your client needs a third level to categorize these files, you can leverage mobile app configurations for this purpose. Make sure the installed DSA package supports multiple mobile app configurations. Then, create and configure mobile app configurations as the first level of your categories structure. For the second level, use top-level categories under each of the mobile app configurations you have created. And for the third level, use subcategories under each of the top-level categories created.

From the home screen menu (gear icon) on the iPad app, you can switch between mobile app configurations by using the **Select Application** option. This option will automatically appear on the home screen menu when you have more than one active mobile app configuration. You don't need to log out and log in again to switch between configurations. Make sure all the mobile app configurations you need are marked as **Active**.

## Chapter 5: iPad App Basic Troubleshooting

Following is a list of common errors that you might encounter on the iPad app when configuring/deploying DSA, with suggested solutions for each of them:

5.1 Logging In / Synchronizing		
Scenario	Possible Cause(s)	Suggested Solution(s)
<p>When I try logging in or synchronizing the iPad app, I get the following error message:</p>  <p>The dialog box is titled 'Mobile Configurations' and contains the text 'All Mobile Configurations are inactive'. There is an 'OK' button at the bottom.</p>	<ul style="list-style-type: none"> <li>There are no mobile application configurations created</li> </ul>	<ul style="list-style-type: none"> <li>Create at least one mobile application configuration in the DSA Builder and activate it: go to the <b>Settings</b> section, and check the <b>Active Configuration</b> checkbox</li> </ul>
	<ul style="list-style-type: none"> <li>There are no active mobile application configurations</li> </ul>	<ul style="list-style-type: none"> <li>Activate at least one mobile application configuration: go to the <b>Settings</b> section, and check the <b>Active Configuration</b> checkbox</li> </ul>
	<ul style="list-style-type: none"> <li>Object permissions are not properly configured for the current user profile</li> </ul>	<ul style="list-style-type: none"> <li>Make sure the object permissions for the current profile are configured as follows:               <ul style="list-style-type: none"> <li>✓ <b>Category:</b> profile must have at least read-only access to all fields</li> <li>✓ <b>Mobile App Configuration:</b> profile must have at least read only access to all configurations and fields</li> <li>✓ <b>Category Mobile Configuration:</b> profile must have at least read only access to all configurations and fields</li> <li>✓ <b>Content Review:</b> profile must have Write Access to this Object</li> </ul> </li> </ul>
	<ul style="list-style-type: none"> <li>The current user profile has no access to the mobile app configuration</li> </ul>	<ul style="list-style-type: none"> <li>Make sure the current profile has permission to see the mobile app configuration: go to the DSA Builder, <b>Settings</b> section. On the multi-select profiles picklist, select all the user profiles that will have access to the mobile app configuration</li> </ul>

<p>When I try logging in or synchronizing the iPad app, I get the following error message:</p> 	<ul style="list-style-type: none"> <li>The current user profile does not have the <b>View Setup and Configuration</b> permission enabled</li> </ul>	<ul style="list-style-type: none"> <li>Enable the <b>View Setup and Configuration</b> permission for the user's related profile</li> <li>If it's not possible to enable that permission because of security reasons, create a new formula field on the User object that returns its associated profile ID. Then ask your developer to modify the iPad app code so it uses this field instead of using the ProfileId field</li> </ul>
<p>When I try logging in for the first time, I get the following error message:</p> 	<p>The number of contacts and/or accounts downloaded might be too high</p>	<p>Restrict the number of contacts and/or accounts downloaded to the client app (custom development). If possible, try not exceed around 50K contacts and 50K accounts for best performance on the first login (subsequent logins/synchronizations are incremental)</p>
<p>I cannot login with my portal user credentials</p>	<p>The client app does not support portal user credentials</p>	<p>Ask your team's developer to provide a different app build that supports logging in with portal user credentials</p>

## 5.2 Home Screen

Scenario	Possible Cause(s)	Suggested Solution(s)
When I log in or synchronize the iPad app, I don't see any of the configuration settings I have just setup	<ul style="list-style-type: none"> <li>The mobile app configuration you are trying to load is not active</li> </ul>	<ul style="list-style-type: none"> <li>Check the current mobile app configuration is active: go to the <b>Settings</b> section, and check the <b>Active Configuration</b> checkbox</li> </ul>
I have setup some categories and subcategories using the DSA Builder, but one of the categories is missing on the iPad app's home screen	<ul style="list-style-type: none"> <li>There are no Content files related to any of the subcategories under that missing category</li> </ul>	<ul style="list-style-type: none"> <li>Make sure that at least one of the subcategories related to the category you cannot see has at least one Content file related to it</li> </ul>
	<ul style="list-style-type: none"> <li>You have not activated the category on the DSA Builder</li> </ul>	<ul style="list-style-type: none"> <li>Go to the DSA Builder and look for the <b>Buttons</b> section. Check the missing category name is grayed out on the list and its correspondent button appears on the preview screen</li> </ul>

## 5.3 Subcategory View

Scenario	Possible Cause(s)	Suggested Solution(s)
I assigned a content file to one of the available subcategories, but I don't see it when I navigate into that subcategory	<ul style="list-style-type: none"> <li>The Content file is probably related to a top-level category, instead of being related to a subcategory</li> </ul>	<ul style="list-style-type: none"> <li>On the iPad app, go to the home screen and tap on <b>Menu Browser</b>. Tap on the correspondent category and check if the file appears on the center column (subcategory level). If so, go to the Content file record in SFDC and assign it to the correct <u>subcategory</u></li> <li>Go to the Content file record in SFDC and check that it is related to the correct <u>subcategory</u></li> </ul>

## 5.4 Emailing Content Files

Scenario	Possible Cause(s)	Suggested Solution(s)
I want to email a content file to a contact that is not registered in my SFDC org	N/A	<ul style="list-style-type: none"> <li>Select any contact from the contacts list and tap on <b>Email Selected</b>. When the iPad email app opens, remove the sender (the contact you selected on the list) and type any email address</li> </ul>