

DIGITAL SALES AID (DSA)

CONTENT ADMINISTRATOR GUIDE

VERSION 1.0 for DSA v 4 | OCT 2015



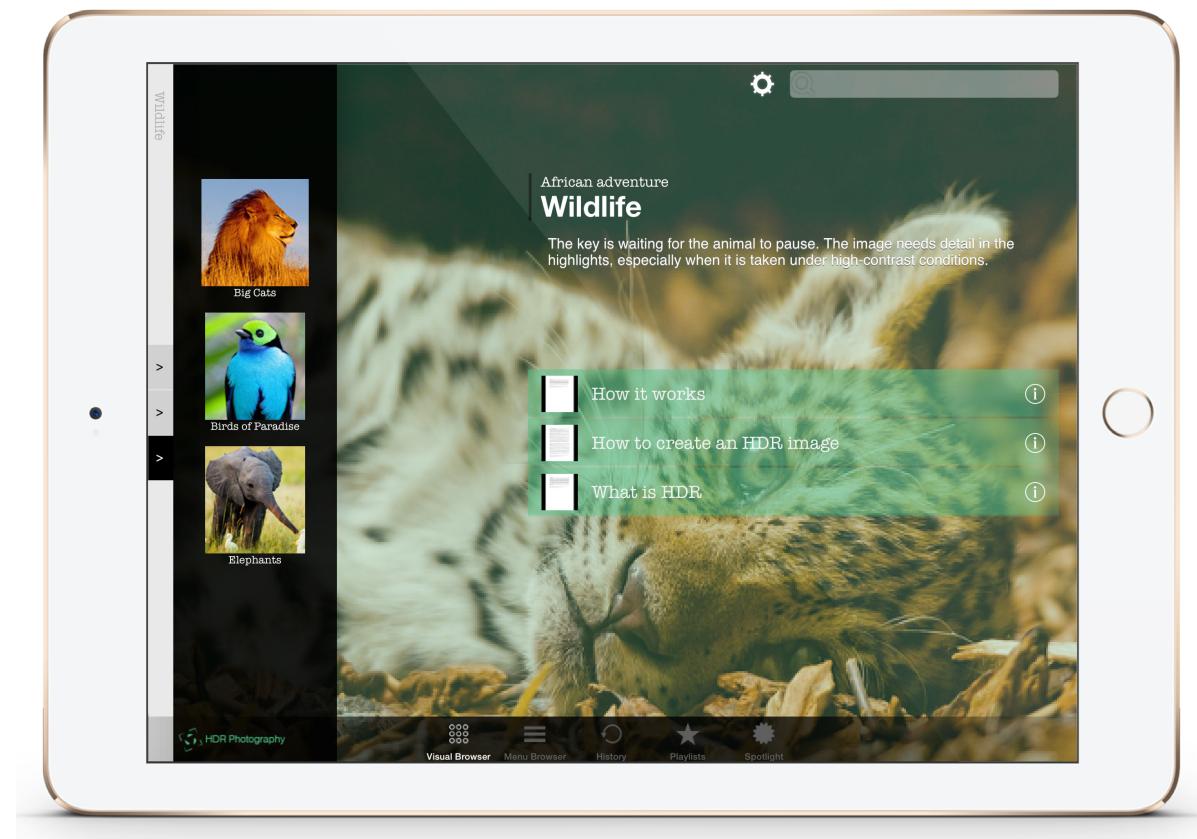
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ABOUT THIS DOCUMENT

This document is designed for content managers who support a group or multiple groups of users using the Digital Sales Aid (DSA) tablet application. It focuses on adding and managing content and customising the look and feel of the tablet app using the Salesforce application.

This document assumes the DSA app is installed and rolled out to users and that the managed package provided by Salesforce is installed in the company's Salesforce org (either sandbox or production).



1.0 INTRODUCTION

1.1 DSA OVERVIEW

What is the DSA?

The Digital Sales Aid (DSA) is a combination of Salesforce org customisations and a native mobile application, available for iOS and Android, that work together to provide a solution that supports field sales users, typically in a customer facing role.

The tablet application can be used to show all sorts of documents and videos to customers, typically in a scenario where the sales rep is with the customer, as well as HTML 5 content. All this content can be made available offline.

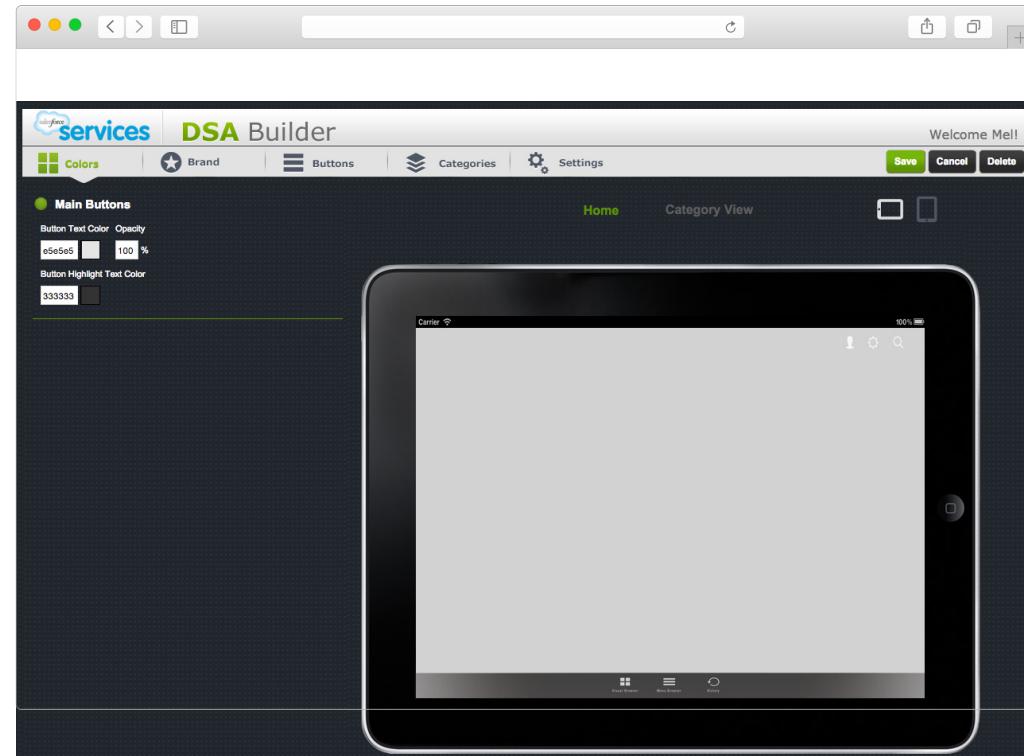
It is also possible to view the DSA content in the Salesforce1 (S1) mobile application. This is mainly intended for quick access to the content and does not provide the graphical look and feel of the full app. It is not recommended for customer facing scenarios.

The application stores all the content and navigation information in Salesforce and the mobile apps on the tablets can synchronise this information and store it for offline usage.

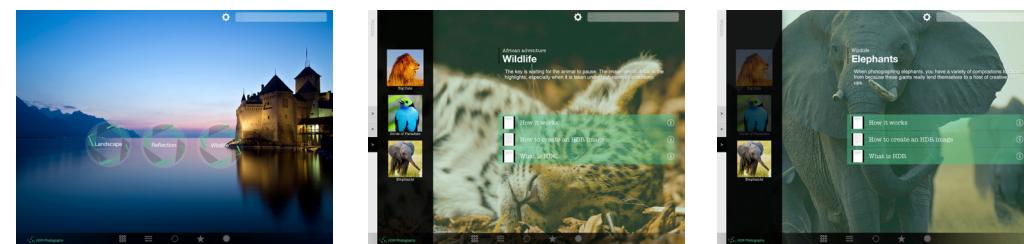
The behaviour and look and feel of the tablet application can be managed from within the Salesforce environment, giving content administrators a lot of control over the look and feel and content of the mobile app.

The tablet application can be made to track what content is displayed to which customer and synchronise this information back to Salesforce, from where it can be reported on.

THE DSA SIMULATOR IN SALESFORCE



THE CONTENT, LOOK AND FEEL OF THE TABLET APPLICATION IS CONTROLLED VIA SALESFORCE



1.2 WHO IS THIS DOCUMENT FOR?

This document is intended for content administrators for a DSA installation.

Typically one or more content administrators will look after the following functions:

- uploading content into Salesforce to add to the DSA
- managing Salesforce libraries and access
- assigning content to categories
- managing categories for navigation
- creating Mobile App Configurations (MACs)
- managing look and feel of MACs
- assigning categories to MACs

If your duties include any of the above this guide should contain instructions for what you need to do.

1.3 PREREQUISITES

To be able to administer content for the DSA application as described in this guide the following needs to be available / done:

- The DSA Salesforce package is installed in the environment you want to work in
- A PC with a Salesforce supported browser and Internet connectivity
- An iOS or Android tablet device available with the DSA installed and the device can access the Internet
- A Salesforce login that will allow you to access the 'Salesforce Services Digital Sales Aid' application from the Salesforce application menu; this must be an environment with the Salesforce DSA package installed

You must have access to all of the above to be able to manage content and look and feel and to be able to test it out on a real device.

If you have access to Salesforce but don't see the 'Salesforce Services Digital Sales Aid' application in the application drop down menu you need to contact your Salesforce administrator to make sure you have correct access levels.

The Salesforce DSA package is typically customised for your organisation and is installed by Salesforce Services or your administrator. It can be available in your production environment and/or related sandboxes. Contact your administrator or Salesforce Services if you are not sure if the package has been installed or is needed in additional environments.

1.4 UNDERSTANDING DSA CONCEPTS

To configure the DSA successfully it is important to understand the following concepts / definitions:

Content Item

A content item is a piece of content (a file) that you want to add to the DSA tablet application for display to clients/prospects.

Any file that can be shown on an iOS or Android tablet can be uploaded, including:

- PDF files
- Images
- Videos
- PowerPoint presentations
- Word documents
- HTML 5 content (see below)

Each content item needs to be uploaded into Salesforce and then assigned to one or more categories to make it available to the DSA application.

Library

A Salesforce Library is required to store Content Items in Salesforce. You can only store content in a library. You can use a single library for all your files or distribute them across multiple libraries.

Content libraries have their own access policies, independent of MACs, and can be used to control access to documents for different groups of users.

Some organisations find it easier to separate content intended for different business units or countries using separate libraries.

Keep in mind that a user will not see content that is stored in a library he/she has no access to.

Category

Categories are used to group Content Items in the DSA application within the navigational hierarchy and to create the navigational hierarchy.

To create the navigational hierarchy each category has a 'parent' which is another category. By giving categories the appropriate parents a tree structure can be set up to model a multi-level hierarchy with multiple branches.

The main or 'root' categories have no parent defined. Only root categories can be displayed on MAC's home screen.

Mobile App Configuration (MAC)

A Mobile App Configuration (MAC) is a set of definitions that determines:

- The look and feel of the DSA, including background images, colours and logo
- Look and placement of navigation buttons on the main screen
- The root categories accessible from the MAC
- Which user profiles have access to the MAC
- Settings for check in / check out functionality
- Other configuration

Your configuration for the DSA can include multiple MACs. This can be useful for organisations that have multiple business units or are using the DSA in multiple countries. Each group of users can be assigned a separate MAC, which can have a totally different look and feel, navigational

structure and content items.

Users can have access to more than one MAC if necessary, in which case they can switch between MACs using the main menu in the app.

Content Reviews

Content reviews are records stored in Salesforce that show a rating for a Content Item that was collected during the 'check out' process on the tablet, where a customer or prospect rated the content items that were shown to him/her. These ratings are synchronised back to Salesforce and can be viewed there.

The location and duration of the content viewing are also available as well as an indicator to show whether the content was emailed to the customer/prospect.

HTML 5 content

HTML 5 content is content that consist of HTML pages and styling and embedded content, including interactive content. Think of it as a mini website that can be shown inside the DSA app, even when offline.

There are some limitations and conditions that must be met to successfully use HTML 5 content. Please refer to the separate chapter.

1.5 UNDERSTANDING THE FILE / NAVIGATION HIERARCHY

Version 4 of the DSA app introduced the ability for documents to be presented in multiple places simultaneously, saving customers from having to upload the same document twice if they want it to show in two places in the navigational hierarchy.

The hierarchy structure is driven by categories. Each category is either a root level category, or has a parent category. In this way a ‘tree’ structure can be built of categories and content items (documents).

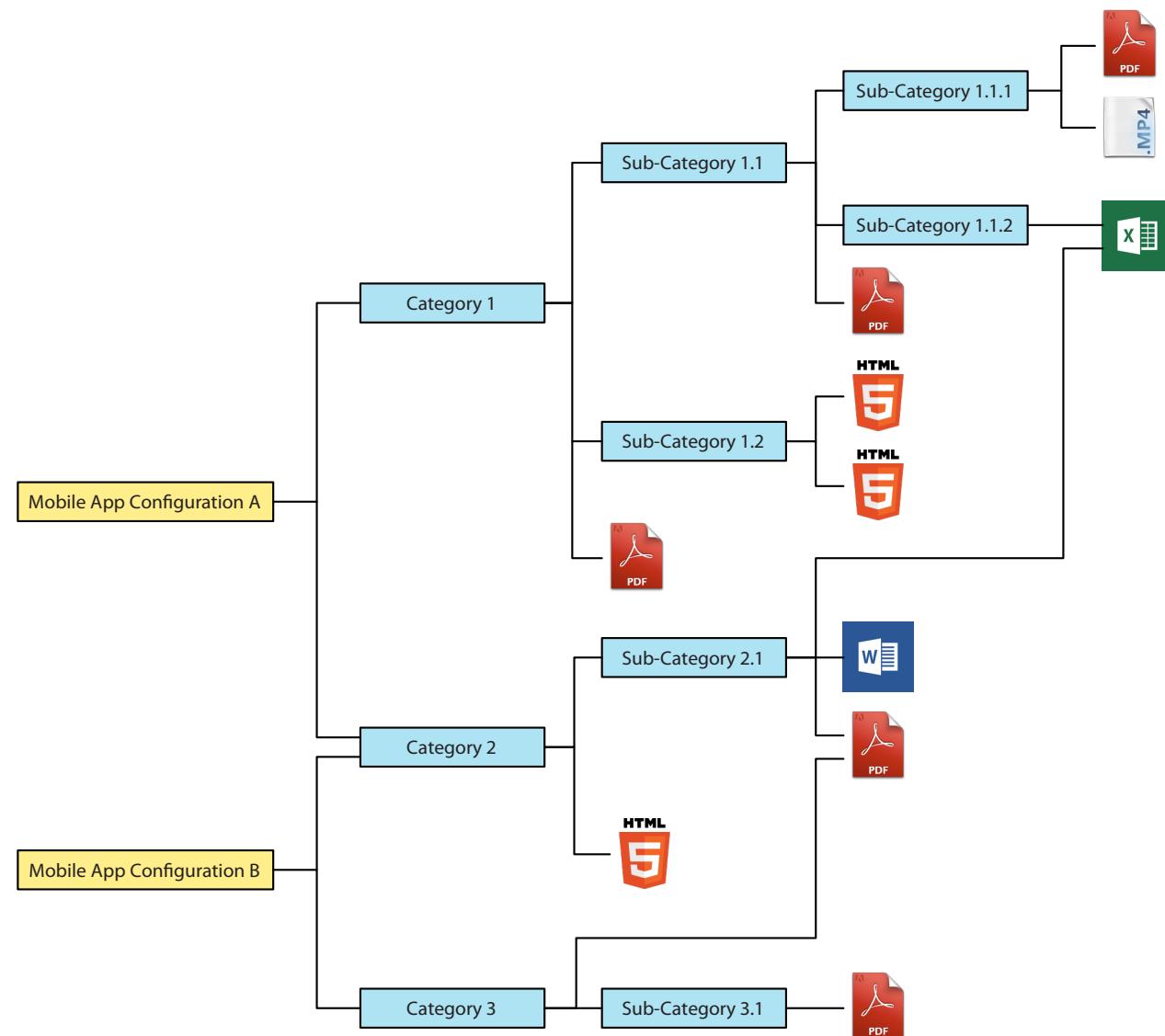
Each content item (document or video) can be shown at multiple locations in the category structure.

Each MAC can consist of multiple ‘root’ categories.

Each ‘root’ category can be assigned to multiple MACs.

Consider the example shown on the right. This navigation structure has two MACs defined, ‘A’ and ‘B’. Category 1, 2 and 3 are ‘root categories’. Category 2 is shared between the two MACs.

Content items can be shown at any level, a PDF document is shown at the highest level, the root level of Category 1. The reuse of content items is shown several times, for example the Excel file is visible in Sub-Category 1.1.2 and Sub-Category 2.1, and is therefore visible in two MACs. This is the same document shown twice, not two copies of the same document.



1.6 WHO SEES WHAT?

It can be a little difficult to figure out which users can see which content items. The below rules together determine the visibility of content items for each user.

File Settings

Make sure the content item is marked as 'available offline', otherwise it will not sync to the mobile app.

Marking a content item as 'internal' will hide it from users if they are not in 'internal mode' on the device.

MAC

The first level of access is controlled by MAC (Mobile App Configuration). Each MAC is mapped to one or more Salesforce profiles.

Each Salesforce user has one profile. If the profile matches one or more MACs the user will have access to these MACs when logged in to the DSA app.

If the user has more than one MAC he/she can switch between them using the main menu.

MACs must be active for users to see them.

Categories

The category hierarchy is mapped to MACs at the root level, i.e. each 'parent' or 'root' category can be mapped to one or more MACs. If the root category is not mapped to a MAC the user has access to the user will not see any content mapped to that entire category structure.

Keep in mind that content items can be mapped to multiple categories, so it may still be visible via another category.

Users do not see categories that do not contain any content items.

Libraries

Each content item is stored in a Salesforce Library. Each library has its own access levels for each user or user group.

If the user does not have at least read-level access to a library he/she will still not see the content items in it, even if the content is mapped to a category the user has access to via a MAC.

Summary

To summarise, these three levels of access control all work together.

A user will only see a content item if:

- it is marked as 'available offline'
- it is in a library he/she has at least read access to;
- it is mapped to at least one category;
- that category has a root category mapped to at least one active MAC;
- one of those MACs is mapped to the user's Salesforce profile.

TIP

Check that the content is not marked 'internal' if you don't see it and all of the above is true.

1.7 NAVIGATING TO THE DIGITAL SALES AID APPLICATION

First, log in with a valid Salesforce login that has access to the Digital Sales Aid application. Please see “1.3 PREREQUISITES” on page 7 if this is your first time accessing the application.

Once logged in please select ‘Salesforce Services Digital Sales Aid’ from the application menu on the top right.

The main tabs in the navigation bar are described below.

Content

This tab shows the Content Items that have been uploaded into Libraries.

Content can be mapped to categories from this tab.

Libraries

Libraries contain the Content Items and determine access levels to content items. Upload new content from this tab.

Categories

Categories are created and managed from this tab to manage the navigational hierarchy.

Mobile App Configurations (MACs)

MACs determine the look and feel and give access to users. This tab contains the simulator view that previews what the app on the tablet will look like. MACs should be edited through the simulator only.

The screenshot shows the Digital Sales Aid application interface. At the top, there is a navigation bar with tabs: Home, Contacts, Content (which is highlighted in blue), Libraries, Categories, Mobile App Configurations, Category Mobile Configurations, Content Reviews, and DSA. To the right of the tabs, there are links for Mel Uzun, Setup, Help, and a dropdown menu labeled "Salesforce Services Digit...". Below the navigation bar, there is a search bar with placeholder text "Search..." and a "Search" button. To the right of the search bar, there are links for "Tell me more!" and "Help for this Page". The main content area is titled "Content Search for Content". It features a search bar with "Search in All Libraries" and a search button. Below the search bar, there is a section titled "Search Results: Showing 1-6 of 6 results". This section includes a "Download" button and a table with the following data:

	Title	Size	Author	Last Modified	Downloads
<input type="checkbox"/>	AgentApp_Asia	15 KB	Mel Uzun	11/05/2015	
<input type="checkbox"/>	Foto 3 (1)	2.7 MB	Mel Uzun	10/03/2015	
<input type="checkbox"/>	How to create an HDR image	124 KB	Mel Uzun	04/02/2015	
<input type="checkbox"/>	HDR Photography content package	-	Mel Uzun	02/02/2015	
<input type="checkbox"/>	What is HDR	68 KB	Mel Uzun	02/02/2015	
<input type="checkbox"/>	How it works	56 KB	Mel Uzun	02/02/2015	

At the bottom of the page, there is a copyright notice: "Copyright © 2000-2015 salesforce.com, Inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance".

Category Mobile Configurations

These objects define the navigational sub categories and their look and feel. They should not be manually edited.

Content Reviews

Ratings from users for Content Items during the check out process can be viewed here.

DSA

This tab gives a preview of what Salesforce1 users will see.

2.0 MANAGING CONTENT

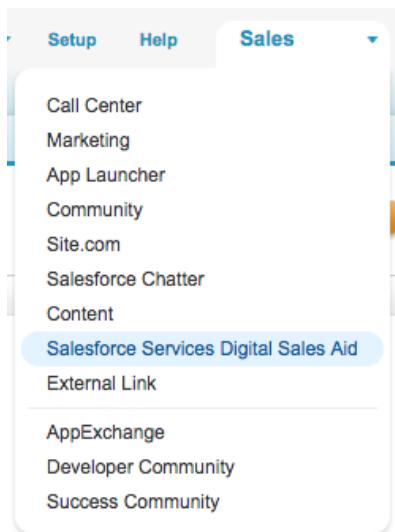
2.1 CREATING A LIBRARY

Please follow these steps to create a new library in Salesforce.

1. Login to Salesforce

Make sure your login has permission to create libraries. Check with your Salesforce administrator when in doubt.

2. Navigate to the 'Salesforce Services Digital Sales Aid' application



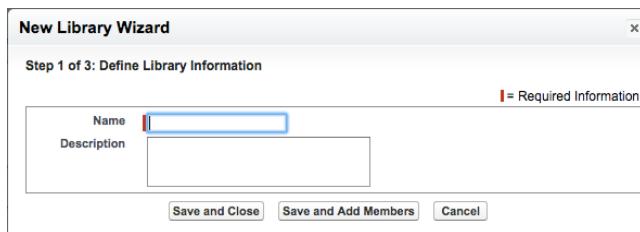
3. Select the 'Libraries' tab



4. Click the 'New' button in the 'My Libraries' section

A dialog will pop up with options to create the new library.

5. Enter a name for the new library in the 'Name' field and optionally a description



Click 'Save and Close' if you want to give access to users later.

Click 'Save and Add Members' if you want to give access to users straight away. Follow steps in the next section to learn more about giving access.

2.2 GIVING ACCESS TO A LIBRARY

To enable DSA app users to see the documents in libraries they must be given read access to the relevant libraries to be able to synchronise and open the documents contained in these libraries.

Follow these steps to add or edit access to a library.

1. Login to Salesforce

Make sure your login has permission to manage access to libraries. Check with your Salesforce administrator when in doubt.

2. Navigate to the 'Salesforce Services Digital Sales Aid' application

Contact your administrator if you do not see this application.

3. Click the 'Libraries' tab

4. In the 'My Libraries' list view, click on the name of the library for which you want to manage access

Do not click 'Browse'

5. In the detail view that appears click the 'Edit Members' link

If you clicked 'Save and Add Members' when creating the library you will end up in the same place.

6. Add library members

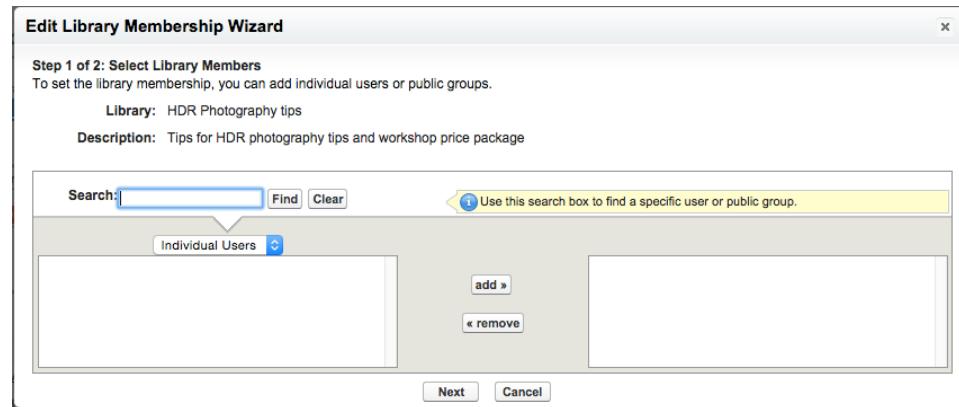
If the member you want to add isn't listed, start to enter their first name in the search box and click Find. Select members from the Available Members box. Members can include individual Salesforce CRM Content users or public groups containing Salesforce CRM Content users.

Tip

If you have a large number of Salesforce CRM Content users, create a public group and add the group to a library rather than adding users to the library individually.

7. Click Add to add the members to the library

8. Click 'Next'



9. Select a library permission for each user or public group and click Save

By default three levels of access are defined:

- **Library Administrator**
This is the highest level of access. The creator of the library has this permission by default. Administrators can manage content in the library and manage the membership of the library.
- **Author**
Authors can add documents to libraries but not manage membership of the library.
- **Viewer**
Viewers have read-only access to the library. They cannot add new documents or change membership.

Additional custom access levels can be defined also if needed. Please ask your Salesforce administrator.

2.3 UPLOADING CONTENT INTO A LIBRARY

You can add content to the system once one or more libraries have been set up.

1. Login to Salesforce

Make sure your login has permission to upload content to libraries. Check with your Salesforce administrator when in doubt.

2. Navigate to the ‘Salesforce Services Digital Sales Aid’ application

3. Go to the Libraries tab

You do not need to select a Library.

4. Click on ‘Contribute’

To upload a file, click ‘Contribute’ and choose a file from your local drive.

5. Enter a title for each file

Optionally, enter descriptions.

6. Choose ‘Publish to a shared library’

You may not have correct permissions if you do not see this option after uploading content.

7. Select a library

This becomes the managing (home) library, meaning that the content can be shared with another library but

only revised by a user with author permissions in the managing library.

8. Tag your content (optional)

You can enter tags in the Tags field. As you type a tag, Salesforce CRM Content auto-suggests tags based on your My Recent Tags list and the Popular Tags section on the Libraries tab. The My Recent Tags list shows the 20 tags you have used most recently. Click a tag to add it to the Tags field automatically. Tags are not visible to DSA app users, but can be used to search for content on the app. All the content matching a tag is then displayed.

9. Select Record Type

Use the default ‘General’ type, unless your organisation has defined additional types.

10. Set DSA options

The following fields are specific to the DSA app and control app behaviour

- You *MUST* check the ‘Available Offline’ box for content to synchronise to the offline versions of DSA (iOS and Android). Content that does not have this box ticked can only be viewed on the Salesforce1 version of DSA.
- **Document Type** can be set to either ‘Shareable’ or ‘Competitive Information’ ‘Shareable’ documents can be sent to customers or

prospects via email by the DSA users.

‘Competitive Information’ files will not be able to be shared via email. Note that this is *not* the same as marking a document as ‘internal’.

‘Internal Document’ should be checked if you don’t want the content to be visible in ‘normal’ mode on the DSA app, but only when the user puts the app in ‘Internal’ mode.

This can be used for sensitive documents like price lists that you don’t want customers to access, but that should still be available to internal users. Note that this is *not* the same as marking the Document Type as ‘Competitive Information’

11. Publish

After completing the DSA fields, click Publish or Save.

Content items can now be made visible to users, but by default documents will not show on the DSA app until they have been associated with at least one category.

2.4 PREPARING HTML-5 CONTENT FOR UPLOADING

HTML-5 content can be used on the DSA app to provide additional interactivity or display features that are not available in other document types.

Typically, HTML-5 content is prepared by an external agency.

Preparation guidelines

There are some additional technical guidelines that need to be followed to make such content work on the DSA app.

Please refer to the separate ‘Dsa Builder UI Configuration And Customisation With Html5 Guidelines’ document provided by Salesforce Services for additional information.

This guide assumes that content has been prepared in accordance with the above guidelines.

Most agencies will provide the content as a folder with different types of files inside, these can be HTML files, images, videos, CSS and/or JavaScript files. You may also receive this content in a ZIP file.

The folder containing all the content is typically referred to as a ‘bundle’.

1. Verify main HTML file

For deployment to the DSA app, the main HTML file should be titled ‘index.html’ or ‘index.htm’ and be located in the top most level of your folder.

The DSA app searches for a file titled ‘index.html’ when the content is displayed. It is good practice to ensure there are no other files in your bundle with this title to avoid confusion.

The DSA app will display an error message if no

‘index.html’ or ‘index.htm’ file can be found in the bundle.

2. Compress the bundle to a ZIP file

Best practice is to compress the contents of the main folder of your bundle, not the folder itself. If done right ‘index.html’ will then be at the ‘root’ level of the ZIP file, not in a folder inside it. This will ensure the correct first page is displayed when this content is launched in the DSA.

3. Upload the ZIP file

For deployment to the DSA application the entire HTML bundle (including CSS, JavaScript, images, fonts, etc.) must be compressed in a ZIP archive.

Upload the ZIP file into a Salesforce library as described in “2.3 UPLOADING CONTENT INTO A LIBRARY” on page 15.

The DSA app will automatically unarchive the content on the device.

When accessed, it is displayed using an embedded version of the Safari iOS browser.

2.5 SETTING UP CATEGORIES

Categories are the ‘leaves’ on the ‘tree’ that forms the navigation structure for your content items.

These tree structures are created by setting up a hierarchy of categories where each category points to its parent category. Only the ‘root’ or highest level categories do not have a parent.

Categories are allowed to have duplicate names, but be careful as this can get confusing when associating content items with categories.

Creating a category

1. Login to Salesforce

Make sure your login has permission to create libraries.

Check with your Salesforce administrator when in doubt.

2. Navigate to the ‘Salesforce Services Digital Sales Aid’ application

3. Go to the Categories tab

4. Press ‘New’

Enter ‘Category Name’ and optionally a description.

The Category Name field will be visible to DSA users in the menu structure

5. Press ‘Save’ or ‘Save & New’

The screenshot shows the 'Category Edit' screen. At the top right are three buttons: 'Save', 'Save & New', and 'Cancel'. Below them is a section titled 'Information' with three fields: 'Category Name' containing 'New Category', 'Parent Category' with a search icon, and 'Description' which is empty. The entire interface has a light purple header bar.

Associating a category with a parent

4. Press ‘Save’

By giving a category a parent you put it ‘under’ the parent in the navigational hierarchy. You must create the parent first.

The order of individual categories underneath a parent is managed in the MAC.

1. Navigate to or create a category

2. Click the search icon next to the ‘Parent Category’

You can also type in the parent category name.

3. Search and select the parent category

2.6 ASSOCIATING CONTENT ITEMS WITH CATEGORIES

1. Login to Salesforce

2. Navigate to the ‘Salesforce Services Digital Sales Aid’ application

3. Navigate to ‘Content’ tab or a Library containing the item

4. Navigate to the content item

Click its title to navigate to the Content Item detail view

Additional Information	
Assign multi category	Click Here
Internal Document	<input type="checkbox"/>
Document Type	Shareable
Available Offline	<input checked="" type="checkbox"/>

5. Click ‘Click Here’ next to ‘Assign Multi Category’

This field is visible in the ‘Additional Information’ section underneath the ‘Content Details’

If the field is missing please contact your administrator

6. Select one or more categories

Select categories from the ‘Available’ list and move them to the ‘Selected’ list by pressing the arrow key. You may select more than one category, the Content Item will show in each category.

When you select a category in the ‘Available’ list you can see the hierarchy it is part of underneath the list. This can be useful when duplicate or similar category names exist.

Categories	
Available Birds of paradise Elephants Landscape	Selected Big Cats Birds of Paradise Reflection Wildlife Wildlife
Category Parent Path(s): Wildlife > Elephants	
Assign	

7. Click ‘Assign’ to save your changes

3.0 MANAGING LOOK AND FEEL

3.1 SETTING UP MACS

What is a MAC?

MACs (Mobile App Configurations) are sets of definitions that together manage the look and feel of the DSA app on the mobile device. They consist of background images, main category mappings, logo and button images and settings that control the display of each category.

A given installation can contain multiple MACs, for instance to accommodate different look and feel for different business units or geographic markets.

Each MAC is completely independent from the others and can therefore define a different look and feel / branding from the others.

MACs can share categories and content items if necessary, but display them differently.

Visibility of MACs

MACs are mapped to individual users using the Salesforce profile of each user. Each Salesforce user has one profile. Any MAC can be mapped to one or more profiles to give visibility to the MAC and the information it contains.

If a Salesforce profile is mapped to more than one MAC the users with that profile will be able to switch between the MACs they have access to via the main menu in the app. If you have different groups of users that you want to have different MACs for it is essential that these users have different Salesforce profiles.

Creating a MAC

1. [Login to Salesforce](#)
2. [Navigate to the 'Salesforce Services Digital Sales Aid' application](#)
3. [Navigate to 'Mobile App Configurations' tab](#)
4. [Click 'New' to create a new MAC](#)
5. [Enter a unique name for the MAC](#)
6. [Click 'Create'](#)

A simulator window will open up to allow you to manage and preview the settings for the MAC.

IMPORTANT

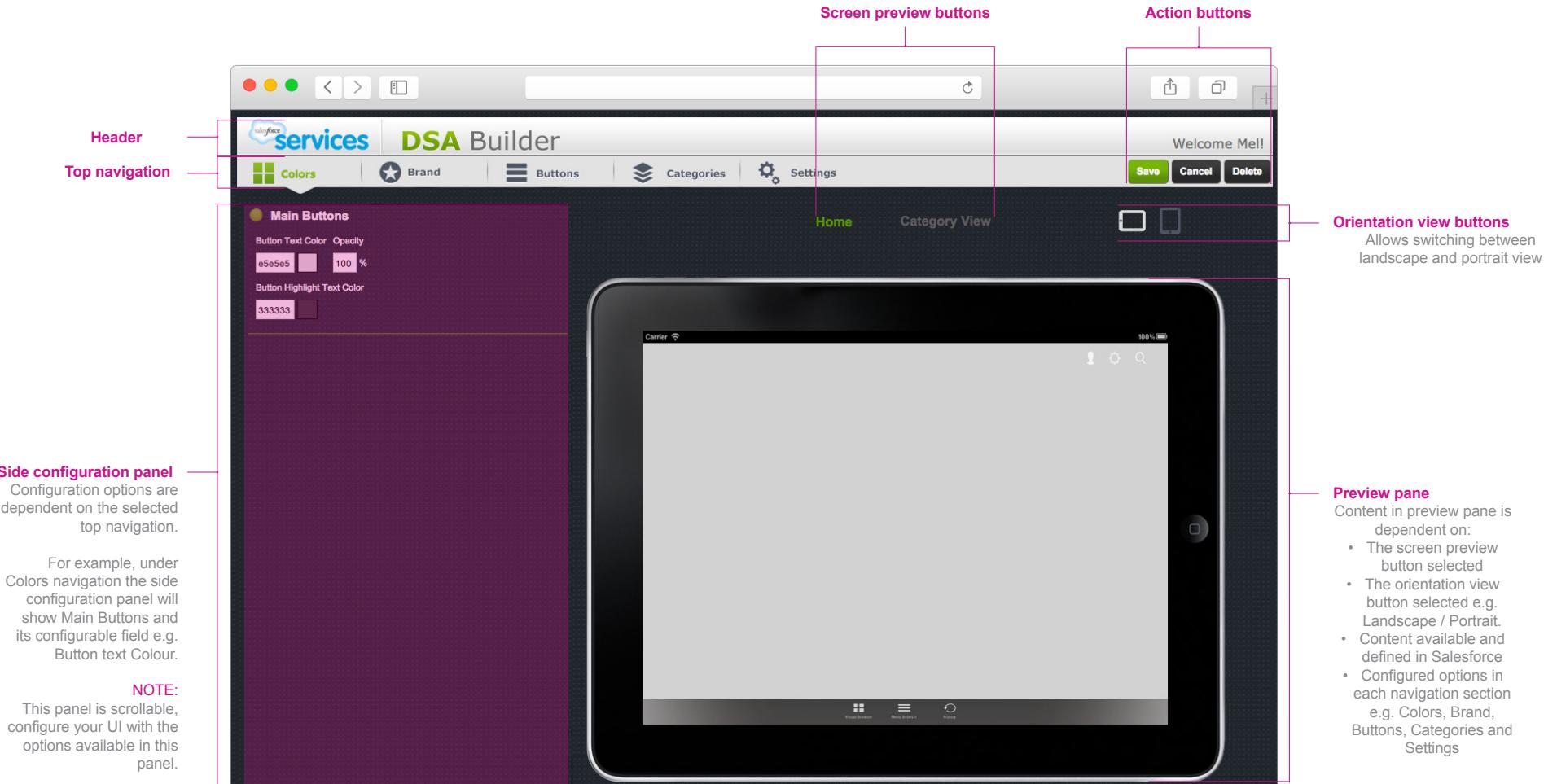
It is important that you always exit the simulator view by pressing the 'Save' or 'Cancel' buttons on the top right. If you fail to do so by closing the window the MAC will remain in edit mode and cannot easily be reopened for editing.

See Troubleshooting for how to resolve this problem.

The features that can be configured through the MAC simulator are described in the following pages.
Create or edit a MAC to open the simulator view.

The screenshot shows a 'Create' dialog box. At the top right are 'Create' and 'Cancel' buttons. Below is a field labeled 'Title Text' with a blue placeholder bar. Another 'Create' and 'Cancel' button pair is at the bottom right.

2.2 DSA SIMULATOR ANATOMY



2.3 DSA SIMULATOR: BRAND

Complete the fields in the DSA Simulator panel.

Title

This is the title of the MAC and is visible to users.

Logo

The preview pane highlights the dimension and the position of the logo.

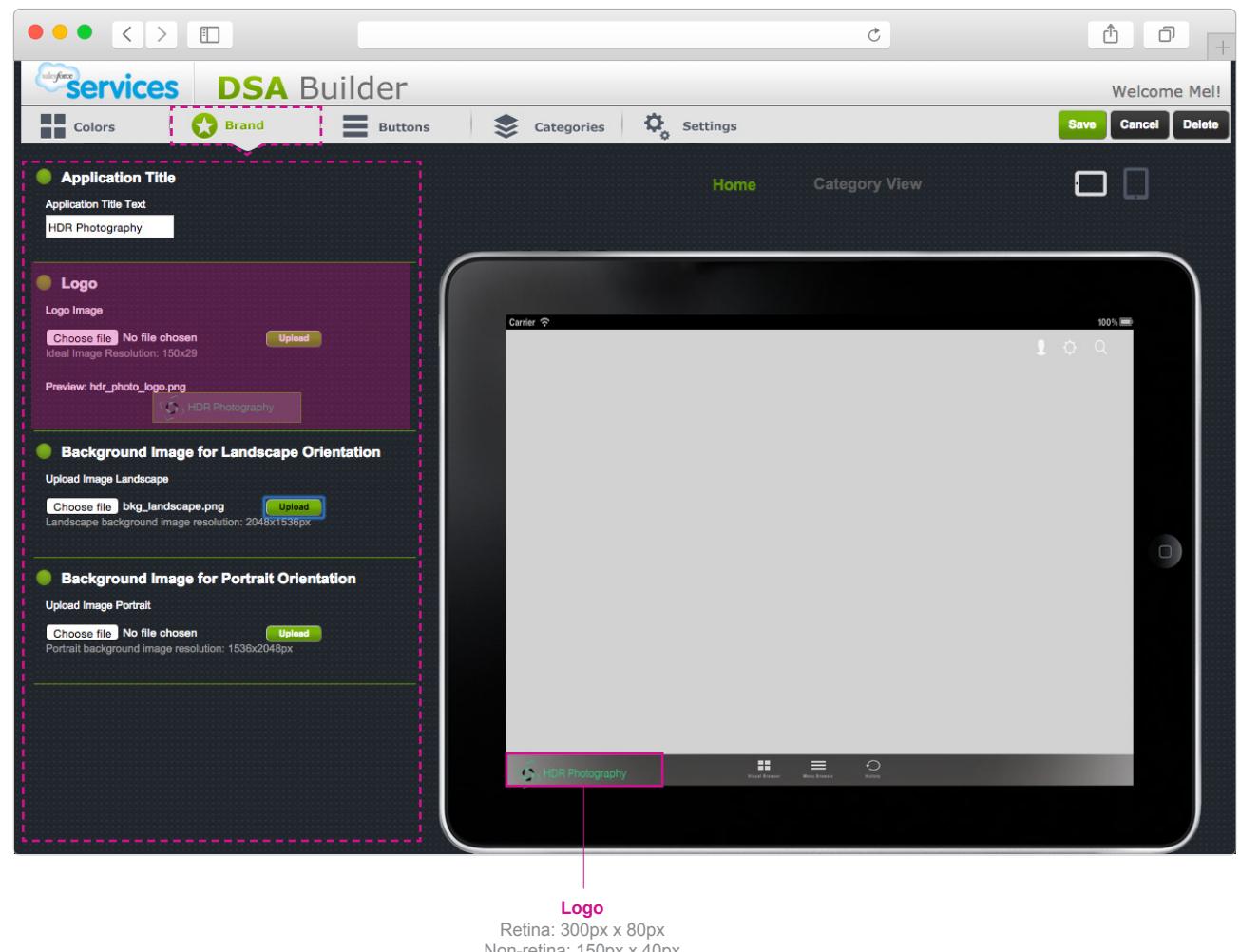
The highlighted area in the configuration panel illustrate the fields relating to the logo.

Choose file > Select from folder > Upload

A preview of your selected file will appear under the buttons in the configuration panel.

HINTS AND TIPS

- Size:
 - Retina: 300px x 80px.
 - Non-retina/Android: 150px x 40px
- Proportionally fit your logo to the measurement provided.
- High quality
- Do NOT distort your logo e.g. stretch, i.e. maintain the logo's aspect ratio
- Use PNG format and remove solid background colour



continues on next page

Background Image

The preview pane highlights the dimensions and the position of the background image for landscape and portrait orientation.

You should use two different cropped images from a larger image for optimal results.

The highlighted area in the configuration panel illustrate the fields relating to the background image.

Choose file > Select file > Upload

HINTS AND TIPS

- Retina / Android*:

Landscape: 2048px x 1536px
Portrait: 1536px 2048px

Non-retina:

Landscape: 1024px x 768px
Portrait: 768px x 1024px

- High quality - find an image bigger than the recommended size and crop accordingly
- Use PNG or JPEG format
- Do NOT distort your image e.g. stretch
- Align with brand style
- Image should be relevant to the content

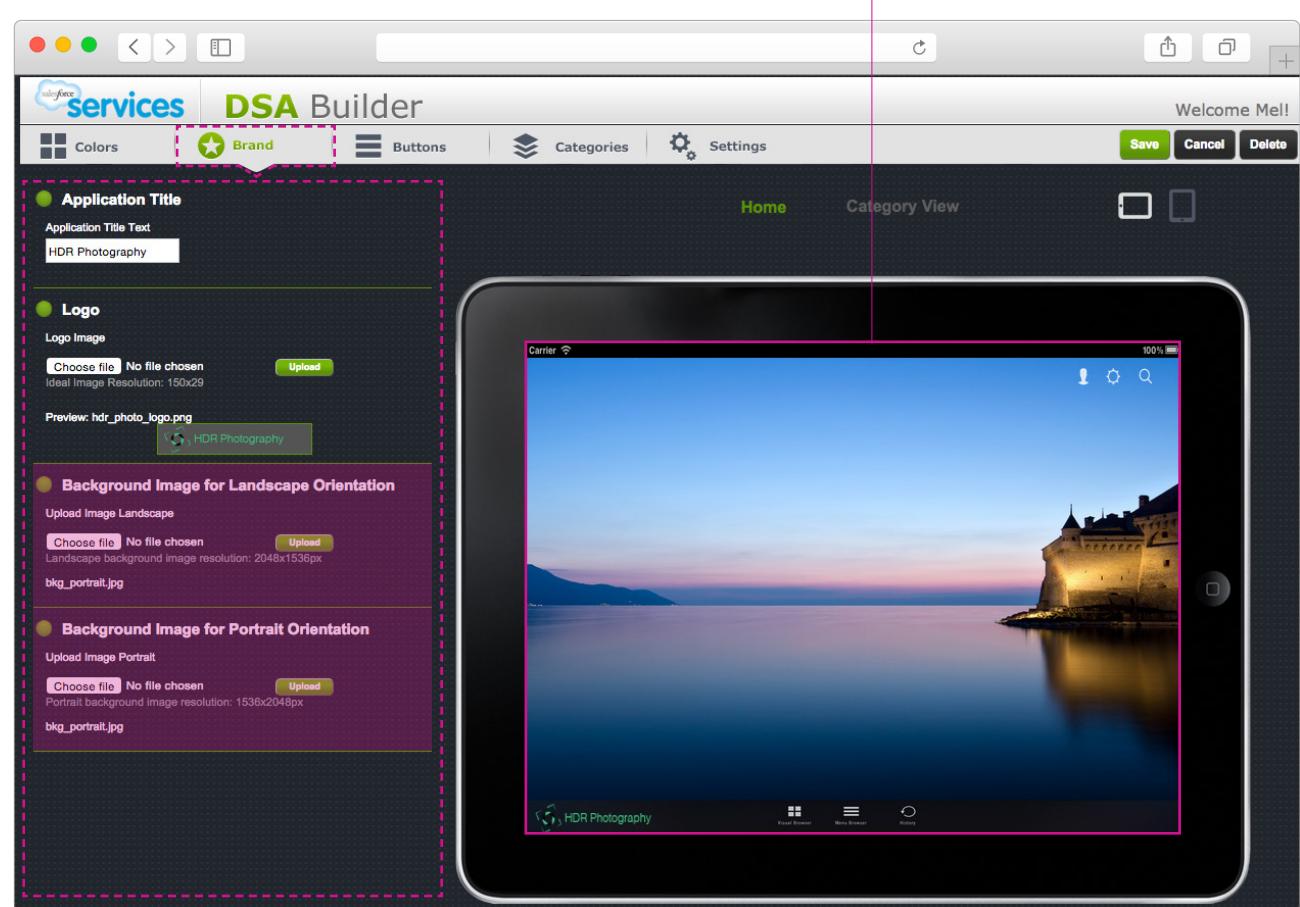
IMPORTANT

You MUST press the 'Save' button on the top right after your changes to make sure they are saved.

Background image

Retina landscape: 2048px x 1536px
Retina portrait: 1536px x 2048px

Non-retina landscape: 1024px x 768px
Non-retina portrait: 768px x 1024px



* Android: due to various screen sizes being available on Android devices the Android DSA app will center the image if the available space is smaller than the image size. This means the edges of the image may get cropped. It is therefore advisable to make sure no important screen elements are near the edges when using Android devices.

2.4 DSA SIMULATOR: ADDING TOP LEVEL CATEGORIES TO A MAC

This section allows you to associate or create the main categories from the content structure with the MAC. Each main category will have a button on the home page, one version for the landscape version and one version for the portrait version.

Main Categories

Associate or create your top level categories in this section. If you have already created your main categories highlight them in the list one by one and a button image will be added to the preview layout. (It may blink for a while).

Move the button to the desired location, make sure you do the same for the other orientation.

You can create a new top level category from this view:

Add New Category > Enter new category name > Save

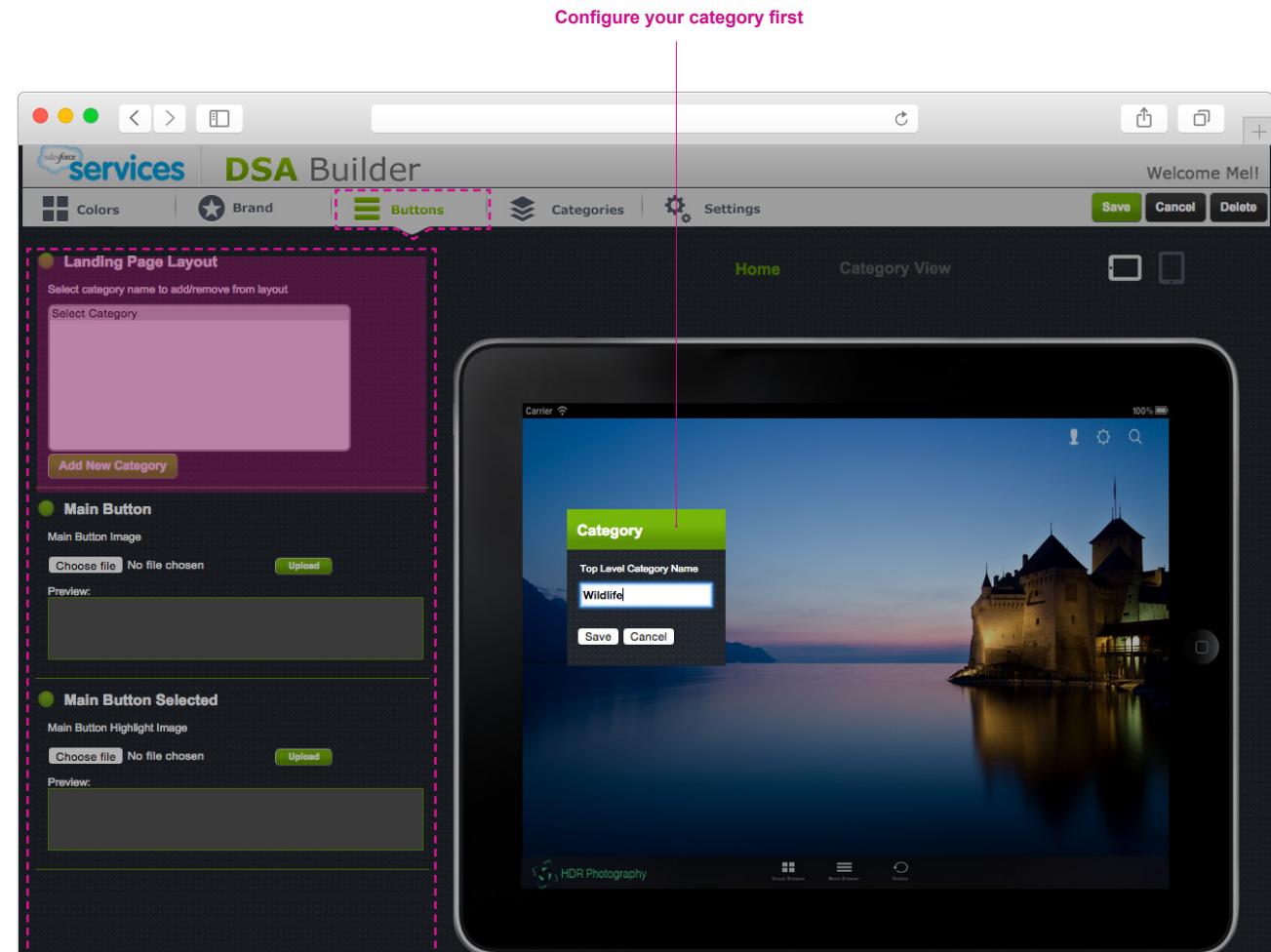
Repeat the above steps for all top level categories.

HINTS AND TIPS

We recommend that you create the category structure before the MAC.

Before configuring your categories in the DSA Builder, have a clear idea of the:

- Top level categories (Parent)
- Sub-categories (Child)
- Lower level categories (Grand child, etc.)



continues on next page

Main & Selected Button

The preview pane highlights the controls used to manage the display of the main button.

You can upload a regular image and a selected (touched) image.

By using two versions you can simulate the button changing its appearance when the user touches it.

You can either use a graphic image for the button or use a transparent image and rely on the underlying image to provide the graphical representation of the button.

The highlighted area in the configuration panel illustrate the fields relating to the button images.

Choose file > Select file > Upload

HINTS AND TIPS

- Size: minimum 60px x 60px
- Width and height could vary and is dependent on design
- Provide an image for Active and Selected state, use same image twice for transparent buttons.
- Use PNG format and remove solid background colour
- Do NOT add text to your image as it is reused
- If you use transparent buttons over buttons in the background set the text of the buttons to transparent (See colours)

Delete category from preview pane only

Main button image

Active state: Min 60px x 60px
Selected state Min 60px x 60px
Width and height could vary

Main button text

Automatically added based on the added category

2.5 DSA SIMULATOR: BUTTON TEXT COLORS

Complete the fields in the configuration panel.

Main Buttons

The highlighted area in the configuration panel illustrate the fields relating to the element that you are configuring.

Text color

Set the colour for the category titles that is shown on top of button images.

Transparency

Sets the transparency level for the button labels.

HINTS AND TIPS

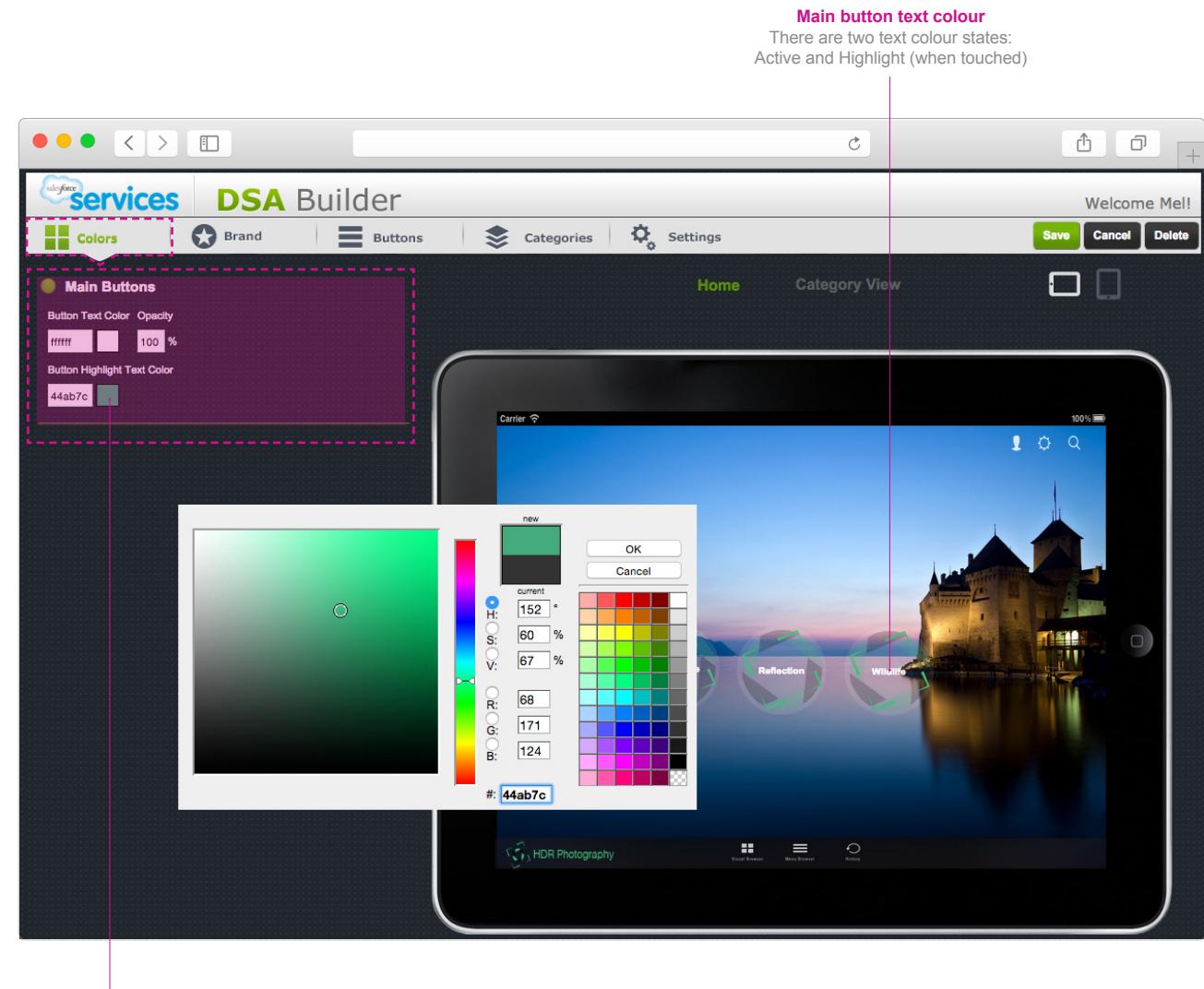
Changing Hex Colour Value

You cannot enter the value into the field manually, you must click on the colour square.

A colour palette picker will appear on your screen, make the changes there and click OK.

For the Opacity (transparency) you can enter a value in the field. Set to completely transparent if you have embedded button images in the background and are using transparent buttons.

It can be useful to set the colour to red and not transparent when placing transparent button images, once in the right place set the text colour back to transparent, this helps position and distinguish the button areas.



2.6 DSA SIMULATOR: CUSTOMISING CATEGORY APPEARANCE

Once you have added main categories on the 'Buttons' tab of the DSA configurator you can use the 'Categories' tab to customise the display of individual categories at any level in the hierarchy.

IMPORTANT

You must first add the root level categories for your MAC on the 'Buttons' tab of the DSA configurator.

Select category to customise

You are able to see the top level categories that you've previously created.

We do not recommend that you create sub-categories here but it is possible using the green button.

You can expand the root categories using the '+' sign in front of it to see the underlying category structure.

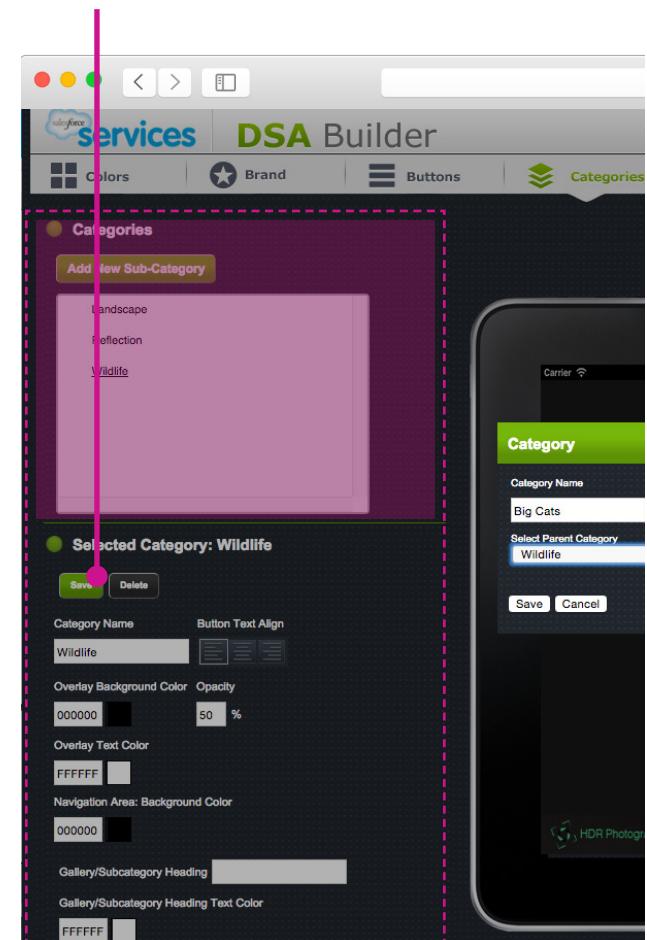
Select the category for which you want to customise look and feel.

Configuration options are listed and explained below

IMPORTANT

You must save all changes to individual category settings using the green 'Save' button **underneath** the 'Selected Category' button. (See highlight on screen shot)

Save button
You must use this save button after any category configuration changes



1. Category Name & Description

This is the title of the category, it can be changed here.

The description field is also available.

2. Overlay background color & Opacity

Color and transparency level for the overlay that is beneath the category text and above the background image. This is used to make the text stand out more clearly.

3. Overlay text color

Text color for the Category Title and Description.

4. Navigation area background color

This is the background color for the navigation pane on the left side that will show sub-categories of this category.

5. Category Order

Use a number in this field if you want to change the display order of this particular category in the navigation pane one level above. Use a higher number to move lower. All categories at the same level should have the category order set if you want to override the default order.

The screenshot shows the DSA Builder application interface. On the left, there's a sidebar titled 'Categories' with a sub-section 'Add New Sub-Category' containing 'Landscape', 'Reflection', and 'Wildlife'. A 'Selected Category: Wildlife' panel is open, showing fields for 'Category Name' (Wildlife), 'Button Text Align' (three icons), 'Overlay Background Color' (hex code 44ab7c, opacity 30%), 'Overlay Text Color' (hex code FFFFFF), 'Navigation Area: Background Color' (hex code 000000), and two 'Gallery/Sub-category Heading' fields ('African adventure' and 'Wildlife'). Below these are 'Save' and 'Delete' buttons. On the right, a large smartphone screen displays a nature photograph of a leopard. Overlaid on the photo are several text elements: 'African adventure' and 'Wildlife' in bold black font, a descriptive paragraph about a key waiting for an animal to pause, and a 'content pdf' button. The top of the phone screen shows a carrier signal, battery level (100%), and a search icon. The bottom of the phone screen shows a navigation bar with icons for 'HDR Photography', 'Vault Browser', 'Browsing', and 'Logout'. Labels with arrows point to specific parts of the interface:

- Category description**: Points to the 'Category description' field in the sidebar.
- Category name**: Points to the 'Category name' field in the sidebar.
- Gallery/Sub-category heading (optional)**: Points to the 'Gallery/Sub-category Heading' field in the sidebar.
- Save your configuration per category first before saving all via the top right hand Save button**: Points to the 'Save' button in the 'Selected Category' panel.
- Navigation Area: Background Color**: Points to the 'Navigation Area: Background Color' field in the sidebar.
- Overlay Background Colour**: Points to the 'Overlay Background Color' field in the sidebar.
- Overlay Text Color**: Points to the 'Overlay Text Color' field in the sidebar.

6. Sub-Category Gallery Image

This image is used in the level above the currently selected category to show a navigation image to this category. It will show on the navigation pane in the parent category.

7. Category Background

The preview pane shows the background image for landscape and portrait orientation. Landscape and Portrait backgrounds must be uploaded separately. Use the switch at the top right to change the preview orientation.

The highlighted area in the configuration panel illustrate the fields relating to the background image.

BACKGROUND INHERITANCE

The latest versions of the DSA v4 automatically inherit background images from the category above, so you would only need to upload images here if they are different from the category above. Contact Salesforce Services if you are not sure if this feature is available in your version.

HINTS AND TIPS

- High quality - find an image bigger than the recommended size and crop accordingly
- Use PNG or JPEG
- Do NOT distort your image e.g. stretch
- Align with brand style
- Image should be relevant to the content

Sub-Category Gallery Image
Retina landscape: 272px x 272px
Non-Retina portrait: 136px x 136px

Background image
Retina landscape: 2048px x 1536px
Retina portrait: 1536px x 2048px

Non-retina landscape: 1024px x 768px
Non-retina portrait: 768px x 1024px

The screenshot displays the DSA Builder interface. At the top, there are tabs for Colors, Brand, Buttons, Categories (which is highlighted with a green box), and Settings. Below the tabs, there are sections for 'Sub-Category Gallery Image' and 'Category Background'. The 'Sub-Category Gallery Image' section contains a placeholder for a gallery image and an 'Upload' button. The 'Category Background' section is divided into 'Landscape' and 'Portrait' sub-sections, each with its own 'Upload' button. To the right of the interface, a mobile device screen shows a navigation bar with a bird icon and a main content area featuring a tiger's face with text overlays like 'African adventure Wildlife' and 'content pdf'.

8. Content List Background Bar

The preview pane highlights the dimensions and the position of the content list background bar image.

This allows you to customise the look of the frame that is underneath the content titles. The image is repeated

There is a version for normal display and highlighted display, i.e. when the content title is touched.

The highlighted area in the configuration panel illustrate the fields relating to the content list background bar image.

Choose file > Select file > Upload

HINTS AND TIPS

- Size:
 - Retina: 110px x 100px
 - Non-retina: 55px x 55px
- Provide an image for Active and Selected state.
- Use PNG
- Do NOT distort your image e.g. stretch
- Align with brand style

Content List Background Bar

Retina: 110px x 110px
Non-retina: 55px x 55px

There are two text colour states:
Active and Highlight (when touched)

2.7 DSA SIMULATOR: SETTINGS

The settings panel of the DSA Simulator allows you to control access to the MAC, activate the 'check in' feature and set a support email address.

Controlling Access

Two things control access to a MAC:

- The Salesforce Profiles allowed to access a MAC
- The 'Active' switch on the MAC

Only a MAC that is set to 'Active Configuration' can be logged in to from the DSA app on the devices. This is useful if you are still preparing the MAC.

Users may have access to multiple MACs.

To map one or more profiles to the MAC click the relevant profiles in the 'Permissions' list on the settings pane. You can select multiple profiles (hold SHIFT or Cmd to select multiple).

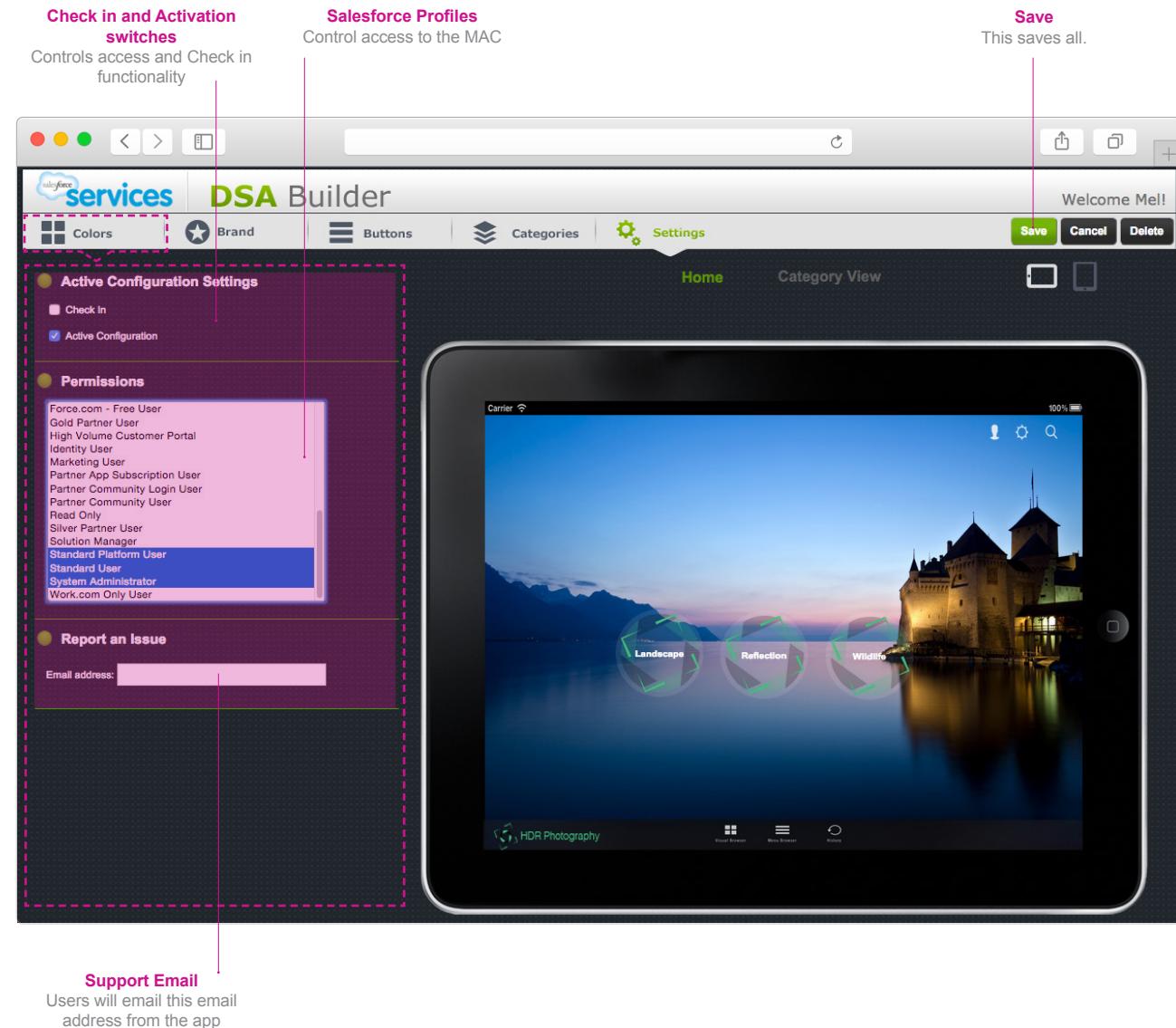
Check in

The 'Check in' check box enables the 'check in' feature on the DSA app for this MAC.

Check in allows users to select the Salesforce Contact they are meeting with and the system will track documents presented to the Contact, as well as time and location. This information is sent back to Salesforce and can be reported on.

Report an Issue email address

You can enter an email address in the 'report an issue' field on the MAC. When users pick 'report an issue' from their main menu in the DSA app their email will be sent to this address.



2.8 IMAGES CHECKLIST

The various image sizes used are repeated here for your convenience.

	Non-Retina/Android*	Retina
SPLASH SCREEN Background: Landscape Background: Portrait	1024 x 768 768 x 1024	2048 x 1536 1536x 2048
HOME SCREEN Logo Main button Background: Landscape Background: Portrait	150 x 40 60 x 60 (minimum) 1024 x 768 768 x 1024	300 x 80 120 x 120 (minimum) 2048 x 1536 1536 x 2048
CATEGORY SCREEN Background: Landscape Background: Portrait Content list background bar	1024 x 768 768 x 1024 55 x 55	2048 x 1536 1536 x 2048 110 x 110
SUB-CATEGORY SCREEN Sub-category image Background: Landscape Background: Portrait	136 x 136 1024 x 768 768 x 1024	272 x 272 2048 x 1536 1536 x 2048

* Android: due to various screen sizes being available on Android devices the Android DSA app will center the image if the available space is smaller than the image size. This means the edges of the image may get cropped. It is therefore advisable to make sure no important screen elements are near the edges when using Android devices.

3.0 TROUBLESHOOTING

3.1 TROUBLESHOOTING

Access

User cannot login

- Verify that the user can login to 'normal' Salesforce with the same username and password via 'login.salesforce.com'
- Check if the app is set to 'sandbox' mode, in which case it can only access Salesforce Sandboxes; check the settings panel for the app on the device

No users can access a MAC

- Verify that the MAC is configured as 'Active'
- Verify that the Salesforce profile(s) that the users have can access the MAC

A particular user cannot access a MAC

- Verify that the Salesforce profile that the users have can access the MAC
- Does the user have access to multiple MACs? Does he/she know how to switch between MACs?

Content

After synchronisation the content does not show in the navigation hierarchy

- Verify that the user logged in on the DSA app has access to the relevant MAC
- Verify that the user has at least read access to the Salesforce Content Library
- Verify that the category you have attached the content to is

associated to the MAC for the signed in user and where it is in the hierarchy. Note that category names can be identical/similar.

- Verify that the content is marked as '**available offline**' in the Salesforce Content record. If not change the setting and synchronise again.
- Check whether the content is marked as '**internal document**' in the Salesforce Content record. If it is marked as internal you should enable 'internal mode' from the main app menu before the content shows.
- Perform a hard-sync (hold the sync option in the menu) to force the device to do a full synchronisation.

A subcategory of a category is not showing

- Verify that there are any Content Items associated with the subcategory. Empty subcategories do not show on the device
- Verify that the subcategory has the correct parent category. Remember that categories can have identical/similar names.

Subcategories are in the wrong order

- Use the 'category order' field on the child-categories of the category that shows the navigation pane with the child-categories out of order. Use ascending numbers to order the sub-categories as you wish.

I changed a document but users still have the previous version after sync

- When replacing a document you should add a new version of the document, instead of deleting and

adding a new document: Navigate to the 'Content Item' and choose 'Upload New Version' from the 'Edit' menu instead. (Otherwise the sync procedures may not recognise that the document has changed as title and version number may be the same)

HTML 5 content: I get a blank screen with a message saying 'Please make sure you have index.html/index.htm file in html bundle.'

- The DSA app is unable to locate a file called 'index.html' or 'index.htm' within the bundle and therefore does not know which page to load. Make sure a valid HTML page titled 'index.html' is in the root of the bundle.
- On older versions of the application this message is not shown, but the same situation may cause a blank screen. (Older versions only search the root of the bundle)

MAC

I get an error saying "The Mobile application you have selected is already open for editing. [...]."

- Check that nobody else is actually editing the MAC
- Go to the MAC list view
- Choose the 'All' view and press 'Go'
- Click the relevant 'Mobile App Config Name' link
- On the detail view double click the 'inEdit' check box
- Untick the check box
- Press 'Save'