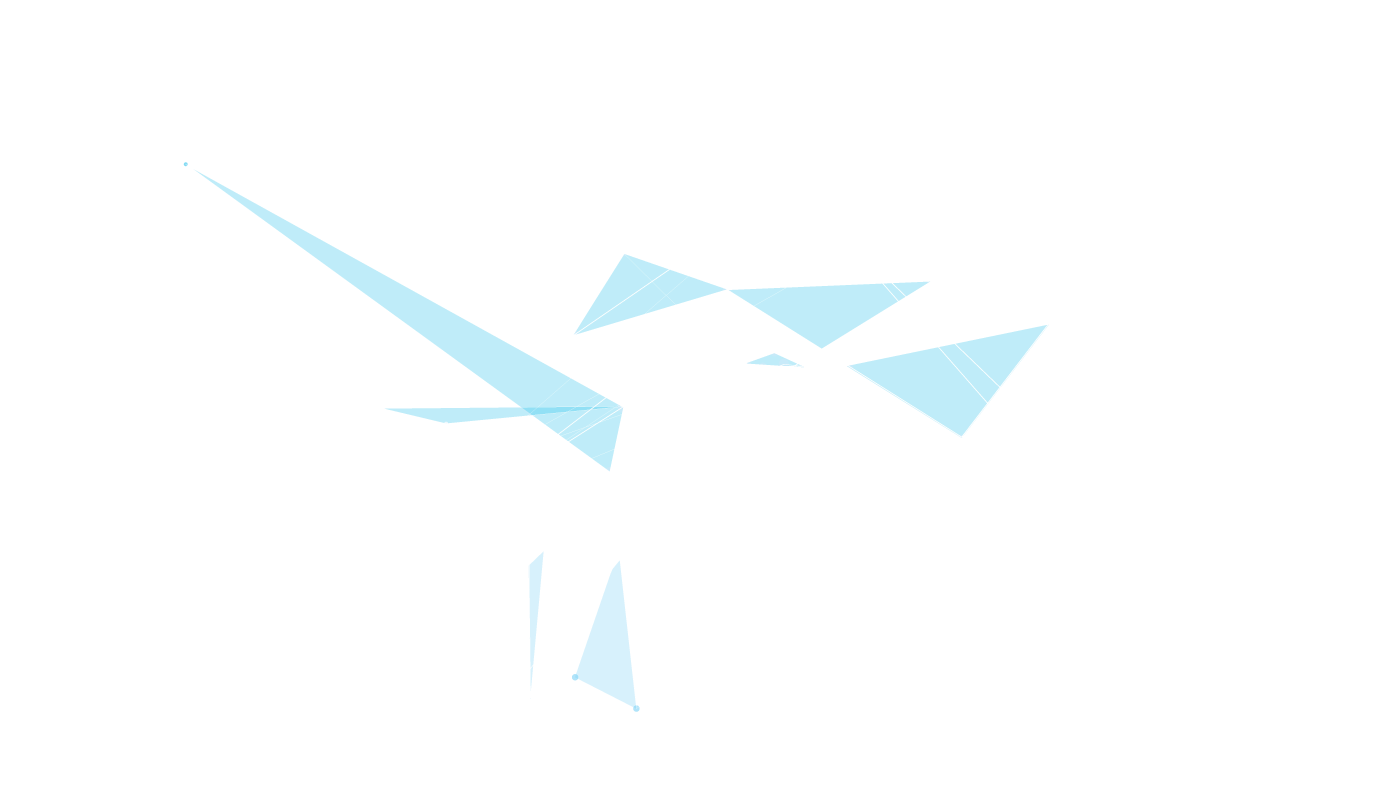
Salesforce Services

Digital Sales Aid v4.0

Implementation Guide



|  |
| --- |
|  |
|  |

Copyright © 2014 Salesforce.com

Table of Contents

Table of Contents 2

Chapter 1: Overview 1

Chapter 2: Deployment Strategy 3

2.1 Overview 3

2.2 Developer Edition Org 3

2.3 Sandbox Org 4

2.4 Production Org 4

Chapter 3: Installing DSA 5

3.1 Enabling Salesforce Content 5

3.2 Installing the DSA Managed Package 6

3.3 Installing the DSA iPad/Android App 9

Chapter 4: Configuring DSA 11

4.1 Setting Up Salesforce Content 11

4.2 Creating Your First Mobile App Configuration 12

4.2.1 DSA Builder Overview 12

4.2.2 Colors 13

4.2.3 Brand 13

4.2.4 Buttons 14

4.2.5 Categories 16

4.2.6 Settings 18

4.2.7 Functions 19

4.3 Editing a Mobile App Configuration 20

4.4 Adding Content to DSA 21

4.5 Notifying Users When New/Updated Content Files Are Available 24

4.6 Salesforce1 Configuration/Deployment of the DSA features 24

4.7 Sending links via email instead of attachments 25

Chapter 5: Reports 27

Chapter 6: Implementation Considerations 29

6.1 Main Screen Buttons 29

6.2 Search Function 29

6.3 Contacts 29

6.4 Playlists 29

6.5 Granting Access to Additional User Profiles 30

6.5.1 iPad or Android Tablet App Access 30

6.5.2 DSA Builder (Configurator) Access 30

6.6 Granting Access to Additional Individual Users 30

6.6.1 DSA\_User 30

6.6.2 DSA Administrator 30

6.7 User Configuration 31

6.8 Content Libraries and Files 31

6.9 SFDC Portal Users 31

6.10 Background Images Usable Space 31

Chapter 7: iPad or Android Tabblet App Basic Troubleshooting 36

7.1 Logging In / Synchronizing 36

Scenario 36

Possible Cause(s) 36

Suggested Solution(s) 36

7.2 Main Screen 37

Scenario 37

Possible Cause(s) 37

Suggested Solution(s) 37

7.3 Emailing Content Files 37

Scenario 37

Possible Cause(s) 37

Suggested Solution(s) 37

Chapter 1: Overview

Digital Sales Aid (DSA) is an accelerator, or base platform, which allows users to access/download Content files from a Salesforce org to their iPad or Android Tablet in a stand alone app, or on iPad, Android tables and iPhones or Android phones as part of Salesforce1, 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 or via Salesforce1 a very easy task. However, given its accelerator nature, DSA can also be extended or modified with custom development in order to add new features.

A DSA implementation is composed of three main parts: Salesforce 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 or Android Tablet app, which enables users to download and work with these Content files.

Salesforce Content stores the files that will be displayed on the iPad or Android tablet app using Libraries, which help govern how users can access these files. Content files and Libraries can be organized in any way you consider appropriate. This is because the DSA category structure is independent from Salesforce Content. If you are already using Salesforce Content for other purposes, it is not necessary to create any additional Content Libraries or reorganize existing Content files. However, for maintenance purposes, it is recommended to keep DSA Content files easily identifiable and organized.

The DSA managed package organizes Content files in a multi-level, hierarchical structure: top-level categories and subcategories. This hierarchical structure defines where each Content file will be shown and or downloaded locally on the iPad or Android Tablet app. Content files can be associated to subcategories and/or top-level categories, and subcategories can be associated to other subcategories or top-level categories. In turn, top-level 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 or Android Tablet app or within Salesforce1.

Top-level categories and subcategories are represented in SFDC by the same custom object (Category). A category record without a parent category represents a top-level category, while a category record with a parent category represents a subcategory.

These are the basic rules on how the category structure levels are related to each other:

* A Content file can be related to one or multiple subcategories or top-level categories at the same time
* A subcategory can only be related to either one subcategory or one top-level category
* A top-level category can be included in one or multiple mobile app configurations at the same time
* The category structure can contain multiple levels

Below is a conceptual example of the DSA categories structure:

|  |
| --- |
|  |
| A conceptual example of the DSA categories structure |

The DSA package contains all that is required to include the DSA implementation as part of your Salesforce1 Apps available to your end-users.

The DSA iPad or Android tablet app is the final piece of a DSA implementation. It is a lightweight, customizable iOS or Android 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 configuring DSA. Finally, you will find a basic troubleshooting section for the DSA iPad or Android Tablet app.

\*\*Note: Salesforce menu paths referenced in this guide assume your org has the “Enable Improved User Interface” feature enabled. You can check this under Setup > Customize > User Interface.

Chapter 2: Deployment Strategy

2.1 Overview

Your DSA implementation will typically involve 3 SFDC environments:

* A Developer Edition (DE) org
* A Sandbox org
* A Production org

2.2 Developer Edition Org

Salesforce Services will create this org for you. This environment stores the DSA components under a managed package. If you need to modify and/or extend DSA back-end functionality, you can do so by adding or editing Force.com components (objects, fields, VF Pages, Apex classes, etc.) to the DSA unmanaged package. After adding or modifying components, you will need to upload a new DSA managed package version, and install it in your sandbox and production environments for testing and go-live.

To get the DSA managed package installation URL, go to Setup > Build > Create > Packages and click on the DSA package name. Then click on the Versions tab and click on the package version number you would like to install. You can copy the installation URL from the following screen.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-09-24 at 7.00.27 PM.png |
| The managed package installation URL |

Keep in mind that Developer Edition organizations are available as long as there is some type of activity within the previous six months. Make sure you login to your DSA Developer Edition org at least once every six months so it does not expire.

2.3 Sandbox Org

This org serves as a testing environment for new DSA functionality before deploying to production. When you upload a new DSA Managed Package version in your Developer Edition org, get the installation URL and install the new package version on this org first, then perform all relevant tests and make sure everything works as expected before deploying to production.

2.4 Production Org

This is your live Salesforce.com org. During the life of your DSA implementation you will:

* Manage Content Libraries
* Upload Content files (or new versions of existing files) so they are available on the iPad or Android Tablet app
* Configure Mobile App Configurations
* Manage DSA user access and permissions
* Install new package versions when new DSA back-end functionality is available

Chapter 3: Installing DSA

3.1 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 Force.com app menu:

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:DSA Guide Screenshots:DSA Guide Screenshot 1.png |
| The Content Application as seen on the Force.com app menu |

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

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:dsa.png |
| Enabling Salesforce CRM Content from the Setup menu |

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

3.2 Installing the DSA Managed Package

First you need to obtain a DSA package installation URL (see section 2.2). Once you have the appropriate installation URL, login to your target 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.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-09-24 at 5.41.00 PM.png |
| The package installation details page |

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

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-09-23 at 8.40.50 PM.png |
| 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 or Android Tablets If later on you need to give access to other user profiles, you can manually do so as described in section 6.4.

You can either:

* Grant access to System Administrators only
* Grant access to all Salesforce users
* Grant access to specific Salesforce 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.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-09-23 at 8.44.56 PM.png |
| 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.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-09-24 at 5.44.28 PM.png |
| The package installer summary page |

The package installer creates a new SFDC application called Salesforce Services Digital Sales Aid, which is available on the Force.com app menu on the top-right corner.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-09-23 at 8.55.31 PM.png |
| The Salesforce Services Digital Sales Aid application as seen on the Force.com app menu |

The package installer automatically creates four (4) custom fields on the Content object:

* Assign multi category. Formula (text) field that launches a screen where you can relate Content files to the DSA categories structure
* Document Type. Picklist field that indicates whether a document can be emailed from the Tablet app
* Internal Document. Checkbox field that indicates whether a document will be shown when the Internal Mode feature is enabled on the Tablet app
* Available Offline. Checkbox that indicates the content that will be downloaded to the Tablet application for offline viewing. If this field is False – the content item will not appear on the Tablet Application and only be visible via Salesforce1

The Package also includes a Tab (labeled “DSA”) to deploy as part of your Salesforce1 Configuration when you are ready to extend the DSA functionality into your Salesforce1 application.

3.3 Installing the DSA iPad/Android App

The Salesforce Services team will provide you with an iPad or Android app build, which contains all the basic DSA features plus any other custom functionalities, if applicable.

In some cases, you will receive an installation URL to download the app. In other cases you will be able to download the app through your corporate MDM solution.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:photo.png |
| Confirming a 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 or Android Tablet app you will get the following message:

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:photo 2.PNG |
| Logging into DSA from with no mobile app configurations created |

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

Chapter 4: Configuring DSA

4.1 Setting Up Salesforce Content

Make sure the three (3) Content custom fields are created and visible:

1. Log into your SFDC org
2. Go to Setup > Build > 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 types that content managers will be using to publish content available for the iPad or Android app
4. Make sure the Assign Multi Category, Document Type, Available Offline and Internal Document fields are listed on the Fields section as shown below. If not, drag and drop these fields into the Fields section so they are visible on the content detail page.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-09-24 at 6.33.34 PM.png |
| Adding the Assign multi category, Document Type, and Internal Document fields to the Content fields section |

Typically, you (or somebody from your organization) will configure and organize all Content libraries and files that will be available on the iPad or Android 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 stored in the My Personal Content library.

4.2 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 or Android Tablet app. You need to setup at least one mobile app configuration in SFDC so DSA can work properly.

To setup a new mobile app configuration, click on Salesforce Services 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 or Android tablet app, and also build the categories structure for a particular mobile app configuration.

Important note: a mobile app configuration is a custom object record 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.

4.2.1 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 or Android tablet 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.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-09-24 at 7.50.20 PM.png |
| The DSA Builder screen |

4.2.2 Colors

This section allows you to configure the color features of the main buttons. 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.

Main Buttons

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

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-09-24 at 8.11.03 PM.png |
| The DSA Builder Colors section |

4.2.3 Brand

This section allows you to configure the branding features on the iPad or Androids app’s home screen. Pick files from your hard drive by clicking on the Browse button, selecting a file, and the clicking on the Upload button.

Application Title

Shows the Mobile App Configuration name.

Logo

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

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.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-09-24 at 8.12.41 PM.png |
| The DSA Builder Brand section |

4.2.4 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 New Category 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 (if you have uploaded an image on the “Main Button” field).

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.

Note: Top-level categories are available across all Mobile App Configurations. That is, all the top-level categories you create for a particular configuration will appear on the categories list when you open another mobile app configuration on the DSA Builder. This means that you need to select which top-level categories available are relevant for your configuration. Also, note that including a top-level category in a Mobile App Configuration will also automatically include all the subcategories below it.

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.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-02-04 at 1.37.43 PM.png |
| The DSA Builder Buttons section |

4.2.5 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 – 4.2.4 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 subcategory, click on the Add New Sub-Category button, type in a name and select a parent category, and then click on Save. The new subcategory will be automatically displayed in the tree view.

Clicking on any of the category names (top-level categories or subcategories) will show the following sections:

**Selected Category:** <Selected\_Category\_Name>

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

* Button text align: text alignment for the top-level category button on the home screen. Does not apply to subcategories
* Overlay background color: background color for the list of Content files shown when a top-level category or subcategory is selected
* Opacity: transparency for the overlay background color
* Overlay text color: color for the text displayed above the list of Content files shown when a top-level category or subcategory is selected
* Navigation area background color: background color for the subcategory navigation area (icon gallery on the left-hand side). Does not apply to top-level categories
* Gallery/Subcategory heading: smaller text displayed on top of the Category or Subcategory title
* Gallery/Subcategory heading text color: text color for the Gallery/Subcategory text

There are two (2) buttons at the bottom of this section:

* Click on Save to save any changes on the settings listed above for a given top-level category or subcategory, rather than using the Save function on the top-right corner of the screen. Changes on these settings will not be saved if you don’t use this function, even if you save the configuration using the main Save function on the top-right corner on the screen
* Click on Delete to remove a top-level category or subcategory from the category structure
* Category Name: displays the category name
* Category Order: numeric order in which the top-level category or subcategory will appear on the navigation area
* Today’s Special: places a subcategory at the top of the subcategory navigation area regardless of its numeric order (if there is one)
* Category Description: text shown below the top-level category or subcategory title
* Select Parent Category: parent category for the selected subcategory (or blank for a top-level category)

**Sub-Category Gallery Image**

Sets an image (icon) for the subcategory listed on the subcategory navigation area. Does not apply to top-level categories.

**Category Background: Landscape**

Sets a background image for the top-level category or subcategory view in landscape mode.

**Category Background: Portrait**

Sets a background image for the top-level category or subcategory view in portrait mode.

**Content List Background Bar**

Sets a background image for the each of the Content file names listed under a top-level category or subcategory.

**Content List Background Bar Selected**

Sets a “highlight” image for the each of the Content file names listed under a top-level category or subcategory. The image will be shown when you tap on any of them.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-11-15 at 6.18.09 PM.png Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-09-25 at 3.29.31 PM.png |
| The DSA Builder Categories section |

4.2.6 Settings

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

**Active Configuration 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 Settings: Active Configuration**

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

**Permissions**

The multi-select picklist shows the available user profiles on the current SFDC org. With this feature you can grant specific user profiles access to a given configuration on the iPad or Android tablet app.

**Report an Issue**

Enter a valid technical support email address. This address will be the default recipient for emails sent through the “Report an Issue” feature on the iPad or Android Tablet app.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-09-25 at 3.33.38 PM.png |
| The DSA Builder Settings section |

4.2.7 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.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2012-10-23 at 1.47.45 PM.png |
| The DSA Builder functions |

Important notice: every time you exit the DSA Builder 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 DSA Builder by closing the browser window, or closing the browser tab, or navigating to another web page.

When you open the DSA builder, DSA creates temporary records to keep track of the changes you made to a Mobile App Configuration and marks its InEdit field as true. InEdit = true prevents anybody else from opening the same configuration record from other browser/browser tab. When you exit the DSA Builder, DSA cleans up the temporary records, commits (or cancels) any changes, and sets InEdit = false. If you don’t exit the configuration page properly (by using the functions described above), the InEdit property will not be set to false and you will not be able to open this configuration using the DSA builder.

If for some reason you did not exit the DSA Builder properly, open the record using the standard SFDC record view and set the InEdit field to false. Then try opening the configuration using the DSA Builder.

4.3 Editing a Mobile App Configuration

To edit any mobile app configuration, click on Salesforce Services 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 view.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-07-10 at 3.27.59 PM.png |
| 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.

4.4 Adding Content to DSA

The last piece to configure before you can see any files on the iPad or Android Tablet app is your DSA Content Library (or Libraries). Every Content file you want to show on the app needs to be related to an existing category (top-level or subcategories) record. Click on the Libraries tab and locate a file that you want to show on the app.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-07-10 at 4.05.10 PM.png |
| 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.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-07-10 at 4.08.26 PM.png |
| Selecting the Edit Content Details option |

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

* 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
* Internal Document: this field indicates whether a document will be shown when the Internal Mode feature is enabled on the iPad or Android tablet app
* Available Offline: This field, when “TRUE” will make the content item visible on the mobile application during the next synch.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-11-18 at 10.50.55 AM.png |
| Selecting the Document Type on the edit Content window |

Once you have finished, click on Save. Then, on the file details page, go to the Additional Information section and click on Assign Multi Category. A new screen will be displayed on a new browser tab. From here you will be able to assign one or multiple categories for the Content file you are working with.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-07-10 at 4.26.57 PM.png |
| The Assign Multi Category window |

Go to the Categories section. On the Available list, you will see the available top-level categories and subcategories across all mobile app configurations. Make sure you use those relevant to your mobile app configuration. Select one or many top-level categories or subcategories from this list and move them to the Selected list on the right side using the arrow buttons. When you are done, click on Assign. You will see a confirmation message on top of the page. You can then close the browser tab.

4.5 Notifying Users When New/Updated Content Files Are Available

When a user minimizes the DSA iPad or android app, and re-launches it again from the iPad apps menu, it will check for new/updated Content files. If that is the case, the Update Content icon will show up on the app’s home screen, indicating there is new/updated content available, so it is recommended to synchronize the app.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:photo.PNG |
| The Synchronize icon on the home screen |

4.6 Salesforce1 Configuration/Deployment of the DSA features

Deployment of the DSA functionality as part of your Salesforce1 deployment consists of configuring the “DSA” Tab which was included as part of the managed package. You have the option of relabeling the tab and including a custom image to brand the Salesforce1 DSA application.

Once the Tab has been defined, including the application as part of the Salesforce1 app requires a quick configuration update in the Mobile Navigation section of the Setup area of your org. This is accomplished by navigating in the Setup menu under Mobile Administration then in the “Mobile Navigation Menu” and Editing the Navigation Menu Items to include the DSA Tab.

|  |
| --- |
|  |
| Deploying the DSA Application in Salesforce1 |

4.7 Sending links via email instead of attachments

Version 4 of the DSA introduces the ability to send document links instead of attachments in emails sent from the DSA app. This can prevent email size issues with large documents and reduces bandwidth requirements for mobile users.

Instead of an attachment the recipient receives a link (with optional password) to download the file directly from the Salesforce backend.

To enable this feature two conditions must be met:

* Salesforce Content Deliveries must be enabled for your organization
* Individual files in Content Libraries must have Content Delivery set up

**Enabling Salesforce Content Deliveries**

Please review this online documentation to learn how to enable Salesforce Content Deliveries for your organization, if it isn’t already enabled:

<https://help.salesforce.com/apex/HTViewHelpDoc?id=content_delivery_about.htm&language=nl>

NOTE: If, after enabling Content Deliveries, you don’t see the ‘Deliver Content’ button on any content items, make sure your user profile for Salesforce Content has the ‘Deliver Content’ Library Permission Option enabled. This setting is available from the setup menu in: Customize / Salesforce CRM Content / Content Permissions. Press ‘edit’ on any relevant profiles and verify the ‘Deliver Content’ check box. Users that need to be able to mark content for Content Delivery must have this enabled.

**Set up individual file for Content Delivery**

Once Salesforce Content Deliveries is enabled for your organization you will see a ‘Deliver Content’ button on the Content Details area of an individual content item.



Clicking this button will reveal a view with various options relating to the delivery, including notification settings, optional expiry of the download window and password options. Press ‘Save & Next’ after updating these options.

Next the system shows progress indicators as previews and links are generated for the Content Item. Content will not be delivered via link until this step has been completed.

NOTE: Users will need to synchronize their content before the DSA app will deliver the content via link.

Once the previous steps have been completed when the DSA app generates an email for any particular file that has been marked for Content Delivery the email will contain a link and/or password for the user to download the file, instead of an attachment.

Chapter 5: Reports

The DSA Managed Package also includes 5 base reports:

Content Review: Related Contacts. Shows all contacts that have been shown related content

Content Review: Reviews by Contact. Shows all content reviews grouped by contact

Content Review: Sum by Rating. Shows all content reviews grouped by rating

Content Review: Time Viewed. Shows total viewing time and average viewing time of content files

Content Reviews: all. Shows all content reviews

To access these reports, navigate to the Reports tab and click on the DSA Reports folder, on the left side menu.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-02-05 at 4.png |
| The DSA Reports folder on the Reports tab |

You can also find these reports by doing a Global Search using the word “Content”. Salesforce will list these report records under the Reports section in the search results

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:Screen Shot 2013-09-25 at 3.51.14 PM.png |
| Finding DSA Reports using Global Search |

You can customize these reports using the Report Builder in SFDC, as you would do with any other reports.

Chapter 6: Implementation Considerations

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

6.1 Main Screen Buttons

There are two options for adding main 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. for both landscape and portrait mode. 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 main screen background image everytime you add, remove a button, or change its position. Even though the buttons may be different, their “touchable” area will have the same shape and size because it is actually a transparent button (all buttons are the same)

6.2 Search Function

The search function looks for keywords on the Content file titles. It also searches by Content file tags, but only one tag at a time (no multiple tag search). For example, if you search for the tags “DSA” and “v3.2”, the search function will look for “DSA” and will ignore “v3.2”.

6.3 Contacts

DSA downloads all contact records that are owned by the logged user. The iPad or Android table app performance might decrease when logging in for the first time (or when the iPad or Android Tablet app’s local database is reset) if the logged user owns a very large number of contacts in Salesforce.

Although DSA is capable of handling hundred of thousands of contact records, a rule of thumb is keeping your downloaded contacts around or under 50K. In case you need to have access to a large number of contacts on the iPad or Android Table app, please contact the Salesforce Services team so they can evaluate your requirement and provide a solution.

6.4 Playlists

6.5 Granting Access to Additional User Profiles

6.5.1 iPad or Android Tablet App Access

Go to the profile object permissions in SFDC and set them up as follows:

* Categories: profile must have at least read-only access to all fields
* Mobile App Configurations: profile must have at least read only access to all fields
* Category Mobile Configurations: profile must have at least read only access to all fields
* Cat-Content-Junctions: profile must have at least read only access to all fields
* Content Reviews: profile must have write access to all fields

Make sure the profile is included in the appropriate Mobile App Configuration(s). See section 4.2.6 for details.

6.5.2 DSA Builder (Configurator) Access

* Go to Setup > Build > Develop > Apex Classes
* For every class with the Security action available and client’s Namespace Prefix, click on it and add the user profiles that will need access to the DSA Builder
* Go to Setup > Build > Develop > Pages
* For every page with the Security action available and DSA’s Namespace Prefix, click on it and add the user profiles that will need access to the DSA Builder

6.6 Granting Access to Additional Individual Users

The DSA package includes two (2) permission sets: DSA\_User and DSA Administrator. Both permission sets allows you to grant DSA access to individual users as DSA viewers and DSA administrators respectively. In your target org, clone any of these permission sets and make sure they have the following permissions enabled:

6.6.1 DSA\_User

* Categories: profile must have at least read only access to all fields
* Mobile App Configurations: profile must have at least read only access to all fields
* Category Mobile Configurations: profile must have at least read only access to all fields
* Cat-Content-Junctions: profile must have at least read only access to all fields
* Content Reviews: profile must have read/write access to all fields
* Assigned Apps: Salesforce Services Digital Sales Aid

6.6.2 DSA Administrator

* Categories: profile must have read/write access to all fields
* Mobile App Configurations: profile must have read/write access to all fields
* Category Mobile Configurations: profile must have read/write access to all fields
* Cat-Content-Junctions: profile must have read/write access to all fields
* Content Reviews: profile must have read/write access to all fields
* Assigned Apps: Salesforce Services Digital Sales Aid

Then, assign these permission sets to individual users as necessary.

6.7 User Configuration

Make sure all DSA users have the Salesforce CRM Content User permission enabled on their user records, and that they also have the appropriate access to Content files and libraries. Otherwise they will not be able to see any Content material on the iPad or Android Tablet app.

6.8 Content Libraries and Files

Typically you (or somebody else from your organization) will manage Content libraries and files. Note that the iPad or Android tablet app displays Content file titles. Make sure you use a naming convention that is easy to read so files can be quickly identified on the iPad or Android Tablet app.

6.9 SFDC Portal Users

DSA works out-of-the-box for regular (non-portal) SFDC users. However, if you need to give DSA access to portal users, the iPad or Android tablet app can be modified to support this requirement. Ask the Salesforce Services team to provide an iPad app build that supports this feature.

6.10 Background Images Usable Space

Background images used in DSA are full screen (main and category screen). However, on the main screen there is some space taken by the iPad or Android Tablet’s status bar, the DSA icons and searchbox at the top of the screen, and the DSA bottom menu at the bottom of the screen. Also, on the category screen there is space on the left side that is taken by the Visual Browser menu.

These spaces are not usable because the background image will be covered by the components mentioned above (menus, icons, etc.). The approximate unusable area is described on the images below.

|  |
| --- |
| Macintosh HD:Users:vutrera:Desktop:photo (1).PNG  Macintosh HD:Users:vutrera:Downloads:DSA Photos:photo 1.PNG  Macintosh HD:Users:vutrera:Downloads:DSA Photos:photo 2.PNG  Macintosh HD:Users:vutrera:Downloads:DSA Photos:photo 3.PNG |
| Background images unusable space |

Chapter 7: iPad or Android Tabblet 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:

|  |  |  |
| --- | --- | --- |
| 7.1 Logging In / Synchronizing | | |
| Scenario | Possible Cause(s) | Suggested Solution(s) |
| When I try logging in or synchronizing the tablet app, I get the following error message:  Macintosh HD:Users:vutrera:Desktop:photo 2.PNG | * There are no mobile application configurations created | * Create at least one mobile application configuration using the DSA Builder and activate it: go to the Settings section, and check the Active Configuration checkbox |
| * There are no active mobile application configurations | * Activate at least one mobile application configuration using the DSA Builder: go to the Settings section, and check the Active Configuration checkbox |
| * The current user profile has no access to any of the mobile app configurations | * Make sure the current profile has permission to see at least one mobile app configuration: go to the DSA Builder, Settings section. On the multi-select profiles picklist, select the current user profile |
| When I try logging in or synchronizing the iPad or Andorid Tablet app, I get the following error message:  Macintosh HD:Users:vutrera:Desktop:photo.PNG | * Object permissions are not properly configured for the current user profile | * Make sure the object permissions for the current profile are configured as follows: * Categories: read-only access to all fields * Mobile App Configurations: read only access to all fields * Category Mobile Configurations: read only access to all fields * Cat-Content-Junctions: read only access to all fields * Content Reviews: write access * Contacts: read-only access to this object |
| I cannot login with my portal user credentials | * The client app does not support portal user credentials | * Contact Salesforce Services to discuss DSA access for portal users. |
| 7.2 Main Screen | | |
| Scenario | Possible Cause(s) | Suggested Solution(s) |
| When I log in or synchronize the tablet app, I don’t see any of the configuration settings I have just setup | * The mobile app configuration you are trying to load is not active | * Check the current mobile app configuration is active: go to the Settings section, and check the Active Configuration checkbox |
| * The current user profile has no access to the mobile app configuration | * Make sure the current profile has access to the mobile app configuration: go to the DSA Builder, Settings section. On the multi-select profiles picklist, select the current user profile |
| I have setup some categories and subcategories using the DSA Builder, but one of the categories is missing on the iPad or Android Tablet app’s main screen | * There are no Content files related to any of the subcategories under that missing category | * Make sure that the category or one of the subcategories related to the category you cannot see has at least one Content file related to it |
| * You have not activated the category on the DSA Builder | * Go to the DSA Builder and look for the Buttons section. Check the missing category name is grayed out on the list and its correspondent button appears on the preview screen |
| 7.3 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 | * Select any contact from the contacts list and tap on Email Selected. When the Tablet email app opens, remove the sender (the contact you selected on the list) and type any email address |