



Dossier on Demand

January 28, 2013

Author: Kris Moyse



1. Introduction

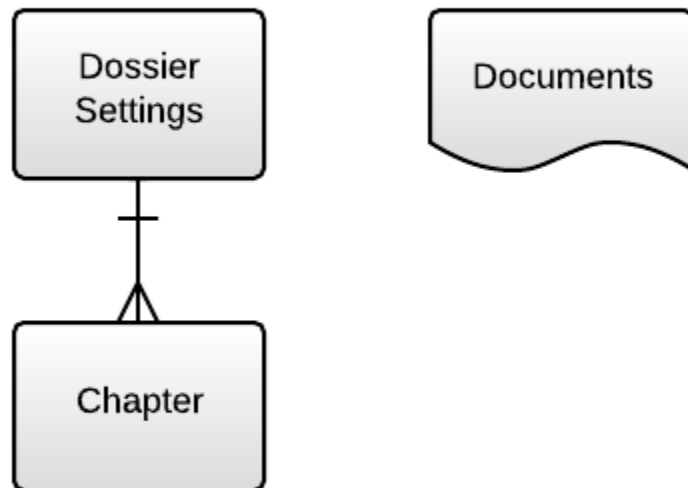
After working in consulting for enough years, studying computer science and business among other things, I have learnt a lot about how to get the best results and it seems clear to me that most businesses are held back for three main reasons:

- People are stuck in old processes that are not efficient with new technology
- Decisions are not made when they need to be, resulting in meeting for meeting sake, and
- The 9-5 work environment does not fit into the current social business model.

This document is a proof of concept that a system can be documented from the system. With current technology, building a solution can actually take less time than it does documenting it. Prototyping not only increases time to market but also ROI and reduces risk by clearing assumptions and failing early.

2. Dossier ERD

You can link through to images in documents





3. Object Details

3.1. Account

Plural	Accounts
API Name	Account
Key Prefix	001

Record Types

- Hospital (default)
- Pharmacy
- Master

Field Summary

Label	API Name	Type	Unique	Required	Custom
-------	----------	------	--------	----------	--------



Label	API Name	Type	Unique	Required	Custom
SLA Serial Number	Dossier__SLASerialNumber__c	String (10)		0	0
Account Phone	Phone	Phone		0	
Account Source	AccountSource	Picklist		0	
Data.com Key	Jigsaw	String (20)		0	
Billing State/Province	BillingState	String (20)		0	
Parent Account ID	ParentId	Reference		0	
Billing Country	BillingCountry	String (40)		0	
Account Type	Type	Picklist		0	
Last Activity	LastActivityDate	Date		0	



Label	API Name	Type	Unique	Required	Custom
Created By ID	CreatedById	Reference			
Last Modified Date	LastModifiedDate	DateTime			
Account ID	Id	ID			
Customer Priority	Dossier__CustomerPriority__c	Picklist		o	o
Account Description	Description	TextArea		o	
Billing City	BillingCity	String (40)		o	
SLA	Dossier__SLA__c	Picklist		o	o
Shipping Street	ShippingStreet	TextArea		o	
Account Name	Name	String (255)			



Label	API Name	Type	Unique	Required	Custom
Deleted	IsDeleted	Boolean			
Record Type ID	RecordTypeid	Reference		0	
Account Number	AccountNumber	String (40)		0	
System Modstamp	SystemModstamp	DateTime			
Industry	Industry	Picklist		0	
Account Site	Site	String (80)		0	
Number of Locations	Dossier__NumberofLocations__c	Double		0	0
SIC Code	Sic	String (20)		0	
Account Fax	Fax	Phone		0	



Label	API Name	Type	Unique	Required	Custom
Ticker Symbol	TickerSymbol	String (20)		0	
Website	Website	URL		0	
Master Record ID	MasterRecordId	Reference		0	
Shipping City	ShippingCity	String (40)		0	
Billing Zip/Postal Code	BillingPostalCode	String (20)		0	
Shipping State/Province	ShippingState	String (20)		0	
Shipping Country	ShippingCountry	String (40)		0	
Annual Revenue	AnnualRevenue	Currency		0	
Jigsaw Company ID	JigsawCompanyId	String (20)		0	



Label	API Name	Type	Unique	Required	Custom
Created Date	CreatedDate	DateTime			
SLA Expiration Date	Dossier__SLAExpirationDate__c	Date		0	0
Owner ID	OwnerId	Reference			
Active	Dossier__Active__c	Picklist		0	0
Billing Street	BillingStreet	TextArea		0	
Ownership	Ownership	Picklist		0	
Employees	NumberOfEmployees	Integer		0	
Upsell Opportunity	Dossier__UpsellOpportunity__c	Picklist		0	0
Shipping Zip/Postal Code	ShippingPostalCode	String (20)		0	



Label	API Name	Type	Unique	Required	Custom
Account Rating	Rating	Picklist		0	
Last Modified By ID	LastModifiedById	Reference			
SIC Description	SicDesc	String (80)		0	

Field Details

Account Source	
Picklist Values	Web; Phone Inquiry; Partner Referral; Purchased List; Other;
Account Type	
Picklist Values	Prospect; Customer - Direct; Customer - Channel; Channel Partner / Reseller; Installation Partner; Technology Partner; Other;
Customer Priority	



Picklist Values	High; Low; Medium;
SLA	
Picklist Values	Gold; Silver; Platinum; Bronze;
Industry	
Picklist Values	Agriculture; Apparel; Banking; Biotechnology; Chemicals; Communications; Construction; Consulting; Education; Electronics; Energy; Engineering; Entertainment; Environmental; Finance; Food & Beverage; Government; Healthcare; Hospitality; Insurance; Machinery; Manufacturing; Media; Not For Profit; Recreation; Retail; Shipping; Technology; Telecommunications; Transportation; Utilities; Other;
Active	
Picklist Values	No; Yes;
Ownership	
Picklist Values	Public; Private; Subsidiary; Other;
Upsell Opportunity	



Picklist Values	Maybe; No; Yes;
Account Rating	
Picklist Values	Hot; Warm; Cold;

Child Relationships

Relationship	Details	
AccountContactRoles	Object	AccountContactRole
	Field	AccountId
Histories	Object	AccountHistory
	Field	AccountId

Relationship	Details	
AccountPartnersFrom	Object	AccountPartner
	Field	AccountFromId
AccountPartnersTo	Object	AccountPartner
	Field	AccountToId
ActivityHistories	Object	ActivityHistory
	Field	AccountId
Assets	Object	Asset
	Field	AccountId



Relationship	Details	
Attachments	Object	Attachment
	Field	ParentId
Cases	Object	Case
	Field	AccountId
Contacts	Object	Contact
	Field	AccountId
Contracts	Object	Contract
	Field	AccountId

Relationship	Details	
Events	Object	Event
	Field	WhatId
Notes	Object	Note
	Field	ParentId
NotesAndAttachments	Object	NoteAndAttachment
	Field	ParentId
OpenActivities	Object	OpenActivity
	Field	AccountId



Relationship	Details	
Opportunities	Object	Opportunity
	Field	AccountId
OpportunityPartnersTo	Object	OpportunityPartner
	Field	AccountTold
PartnersFrom	Object	Partner
	Field	AccountFromId
PartnersTo	Object	Partner
	Field	AccountTold



Relationship	Details	
Tasks	Object	Task
	Field	WhatId



3.2. Document

Plural	Documents
API Name	Document
Key Prefix	015

Field Summary

Label	API Name	Type	Unique	Required	Custom
Body	Body	Base 64		0	
Keywords	Keywords	String (255)		0	
Externally Available	IsPublic	Boolean			
Folder ID	FolderId	Reference			



Label	API Name	Type	Unique	Required	Custom
Document Content Searchable	IsBodySearchable	Boolean			
Document Unique Name	DeveloperName	String (80)			
Internal Use Only	IsInternalUseOnly	Boolean			
Created Date	CreatedDate	DateTime			
MIME Type	ContentType	String (120)		o	
File Extension	Type	String (40)		o	
Body Length	BodyLength	Integer			
Created By ID	CreatedById	Reference			
Url	Url	String (255)		o	



Label	API Name	Type	Unique	Required	Custom
Last Modified Date	LastModifiedDate	DateTime			
Document ID	Id	ID			
Author ID	AuthorId	Reference			
Namespace Prefix	NamespacePrefix	String (15)		0	
Description	Description	TextArea		0	
Deleted	IsDeleted	Boolean			
Document Name	Name	String (255)			
System Modstamp	SystemModstamp	DateTime			
Last Modified By ID	LastModifiedById	Reference			



3. Apex Class Summary

Class	Namespace Prefix	API Version
Create	Dossier	26.0
Generate	Dossier	26.0
Tests	Dossier	26.0
Whitelist	Dossier	26.0



4. Apex Trigger Summary

Trigger	Namespace Prefix	API Version	Status	Object	B.I.	B.U.	B.D.	A.I.	A.U.	A.D.	A.Und.
FakeTrigger_DoNotPackage	Dossier	26.0	Active	Account	o	o					

Key

B.I.	Before Insert
B.U.	Before Update
B.D.	Before Delete
A.I.	After Insert
A.U.	After Update
A.D.	After Delete

A.Und.

After Undelete



5. Visalforce Page Summary

Page	Namespace Prefix	Label	API Version	Controller Type	Controller	Description
WordDoc	Dossier	WordDoc	26.0	Standard	Document_Settings__c	
Create	Dossier	Create Dossier	26.0	Standard	Document_Settings__c	Page facilitating the easy creation of Dossier objects by providing a user friendly interface for object selection.

