



Quick start guide

After installing Drop my Dossier from the Appexchange, you will have a document of your Salesforce.com instance before you know it.

First – Create a Dossier Setting

Select the 'Drop my Dossier' application from the top right

Create a new Dossier Setting, add the basis for your document. i.e. name of the file and the objects you want documented

Drop my Dossier Search... Search

Kris Moyse Help & Training Drop my Dossier

Home Dossier Settings Documents

Create New... Dossier Test Recycle Bin

Document Settings Dossier Test Save Doc Me! Cancel

Basic Settings

Document Settings Name: SPK Dossier Title: SPK Dossier

Filename: SPK Dossier System Fields: ☐

Header

CONFIDENTIAL - SPK Dossier

Objects To Include

Account ☒	Ad Group ☐
Approval Request ☐	Article ☐
Campaign ☐	Campaign Member ☐
Case ☒	Case Solution ☐
Chapter ☐	Chatter Group ☐
Contact ☐	Content ☐
Contract ☐	Dashboard ☐
Document ☐	Dossier Settings ☐
Event ☒	Folder ☐
Google Campaign ☐	Keyword ☐
Lead ☐	License ☐

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Second – Adding introduction sections (optional)

From your newly created Dossier, create new Chapters. Chapters will be inserted in the document after the title page but before the system descriptions.

Drop my Dossier Search... Search

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Home Dossier Settings Documents

Create New... Recent Items SPK Dossier Recycle Bin

Chapter Introduction

Back to List: Installed Package Notes & Attachments (0)

Chapter Detail Edit Delete Clone

Chapter Title Introduction Order 0

Content 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.

You can link through to images in documents

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graph TD
    DS[Dossier Settings] --- C[Chapter]
    D[Documents] --- C
  
```

Finally - Doc me!

Press **Doc Me!** to get a Dossier of the system elements you selected.

