



Shortcuts – Quickstart & FAQs

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Quickstart

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

The screenshot displays the 'Drop my Dossier' application interface. The top navigation bar includes 'Home', 'Dossier Settings', and 'Documents'. The 'Dossier Settings' section is active, showing a 'Document Settings Dossier Test' configuration page. The page has a 'Basic Settings' section with fields for 'Document Settings Name' (SPK Dossier), 'Filename' (SPK Dossier), and 'Title' (SPK Dossier). Below these is a 'Header' section with a text area containing 'CONFIDENTIAL - SPK Dossier'. At the bottom, there is an 'Objects To Include' section with a list of Salesforce objects and checkboxes to select them. The 'Account' checkbox is checked. A right-hand sidebar shows a list of Salesforce applications, including 'Sales', 'Call Center', 'Marketing', 'Salesforce Chatter', 'Community', 'Salesforce for Google AdWords', 'License Management App', 'Partner Order', 'Add AppExchange Apps...', and 'Create New Apps...'. The 'Force.' button is visible at the top right.

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

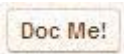
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SIRADING CO.

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.

The screenshot shows the 'Drop my Dossier' web application. The top navigation bar includes 'Home', 'Dossier Settings', and 'Documents'. The left sidebar has 'Create New...', 'Recent Items' (listing 'SPK Dossier'), and 'Recycle Bin'. The main content area displays a 'Chapter Introduction' with a 'Back to List: Installed Package' link and 'Notes & Attachments (0)'. The 'Chapter Detail' section shows the chapter title 'Introduction' and its content, which includes a paragraph and a bulleted list. The content text is: '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:'. The bulleted list contains: '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', and 'The 9-5 work environment does not fit into the current social business model.'. Below the list, there is a paragraph: '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.'. At the bottom, there is a diagram showing 'Dossier Settings' and 'Documents' boxes, with 'Dossier Settings' connected to a 'Chapter' box. A note at the bottom states: 'You can link through to images in documents'.

Finally - Doc me!

Press  to get a Dossier of the system elements you selected.



Frequently Asked Questions

Why do my images not show in the document but they do in the rich text?

Images need to be public to display and inserting images straight into a rich text field does not do that in Salesforce.

The steps to follow are; Create a **Document** and select **Externally available** check box, then it can be accessed without login. For example if you upload a gif image in a document and made it externally available. Below is URL to use when adding into the rich text field:

Format

<https://{your server}/servlet/servlet.ImageServer?id={imageID}&oid={OrgID}>

Example

<https://na14.salesforce.com/servlet/servlet.ImageServer?id=015d0000001KZWMAA4&oid=00Dd00000000hn4sEAA>

