

GOLD DEMO ORG SOLUTION

INTRODUCTION & SETUP

CONTENTS

I.	INTRODUCTION.....	2
1.	About GDO Solution.....	2
2.	How it works.....	2
3.	GDO Solutions.....	3
II.	MILTOS CORPORATION.....	3
1.	Miltos Company.....	3
2.	About Miltos.....	3
3.	Miltos Units.....	4
III.	GETTING DEMO ORG & PREPARATION	5
1.	Get a Demo Org	5
2.	Update and Prepare the Org	5

I. INTRODUCTION

1. About GDO Solution

GDO (Gold Demo Org) solution aims to provide a standard environment with a completed data set and ready-made Dynamo solutions for Dynamo Partners. The goals of the solution are:

- To provide ready-made Dynamo solutions for Demo purposes, making it easier for say, Salesforce SE's or SI partners, to demo Dynamo or to include Dynamo in your solutions.
- To standardize our demo story and message, thus everybody, regardless of technical skill, can deliver a top-notch product demonstration.
- To provide each partner their own Salesforce org, which they can use to produce a customized demo when needed, without building the data model from scratch or interfering with other people's standard demo.
- GDO type orgs could be spun up for training purposes as well.

2. How it works

Individual demo environment

Technically, the GDO team has created a "master Salesforce org" which includes a pre-built set of data, dynamo templates, and configurations. GDO users will fill in a signup form to receive a copy or clone of that master org, which will be their demo environment (aka GDO org). A small amount of configuration will be required each time a new org is "spun up" to ensure all the Salesforce internal references are updated because although each GDO org is a clone, each has a unique Salesforce ID and exists in its own right.

GDO update

A timescale is pre-determined to set the lifetime of each GDO, everyone is set to expire after **6 months** and users will need to "spin up" new orgs. This lifetime comes with Salesforce's set validity allowed for this TSO solution. Also, the master org is under constant maintenance as new solutions are added to extend the range of demo's available and to ensure it is updated in line with Salesforce and Dynamo product updates. All the customization you did in the old org will be lost. Please keep that in mind. Therefore, we advise you to either keep all as standard as possible or do remember to download your customized data before the expiration date and migrate them to the new org later. If we introduce new packages or features, we will make sure to communicate it out and you can get them by generating a new org the same way. You may want to keep up with our Dynamo Partner Connect communications.

3. GDO Solutions

GDO stands for Gold Demo Org, so the solutions we have built are designed to be the gold standard demonstration of how customers can benefit from Documill Dynamo. The solutions show our core functionality and promote some of our capacity. The solutions are combinations of Dynamo and Salesforce features. They can be customized based on the business processes. Whether the customization will be made in Dynamo or Salesforce depend on the requirements and sometimes depend on the consultant's preference. This is very important to understand to deliver the correct messages.

- **A GDO solution is different from a Dynamo template:**
 - A solution includes one or more templates, and the Salesforce configuration/Dynamo workflow to tell a story of how an end user will achieve their work.
 - One template can be used in different solutions to demo different use cases/ user experiences.
 - For demo purposes, we focus on talking about the solution, in other words: the use cases, the user stories.
- **GDO solutions are not our fixed offers:** For a similar purpose of creating a quotation, customer A and B can have slightly different solutions.
- **GDO doesn't have to show all our advanced capacities:** The best demo is usually the simplest one. The mix of business rules, workflow automation, template layout, template logic, and Salesforce configuration provides endless options to customize a solution. But it's in the implementation or enterprise pre-sales process. The standard demo cherry-picks our USPs. Functionalities selected in each solution aim to create a relevant story, while the whole GDO is to cover a genuine business case, in which a company will have different working scenarios.

II. MILTOS CORPORATION

1. Miltos Company

To make the Gold Demo Org most effective we have used a single faux customer case study throughout. The model for doing this is Salesforce and their faux company Universal Containers (which has gone on to have something of a cult following in the Salesforce community). Miltos is designed to be the "everyman" of companies, something with its own clear products, services, and business model but that is easily transferrable and relatable to every customer/ prospect we might engage with.

2. About Miltos

Miltos Corporation, established in 1995, offers various products and services from sales down to rental and repair of transport and construction equipment. We have partnerships

with manufacturers and a large dealer network to provide the best products and services at a competitive price.

The Miltos mission statement is to be always accessible to customers and never lose touch with them. Miltos gets to know our customers – and their business – so we can handle any of their equipment needs, whether large or small. With Miltos Corporation as your partner, you are assured of exceptional service on every transaction. We are there for you!

3. Miltos Units

Miltos 

Corporation: **Miltos Corporation**: sell trucks, heavy machines, construction equipment and accessories (currently used in Sales Cloud).

Miltos 

Expert Care: **Maintenance Services**: upgrade, maintain and repair equipment & heavy machine (currently used in Field Service).

Miltos 

Easy Rental: **Easy Rental**: provide rental services of transport and construction equipment.

III. GETTING DEMO ORG & PREPARATION

1. Get a Demo Org

Setup demo email

Create your own Gmail account following the format: yourname.miltos@gmail.com

Example: jonhdoe.miltos@gmail.com

OR

Use your own email that is not connected to any other org. Salesforce only allows 1 email for 1 org.

Sign up for a Gold Demo Org

- Follow this link: <https://www.documill.com/dynamo-partners/gold-demo-org/>
 - *Company: your company*
 - *Email: using the GMAIL address you created*
 - *Country: your Country*
- Submit the form. A verifying email will be sent to the Gmail mailbox.
- Verify the account, create a password.

Log into Demo org

- Go to <https://login.salesforce.com/>
- Log in using the username provided in the verification email and the password you just created

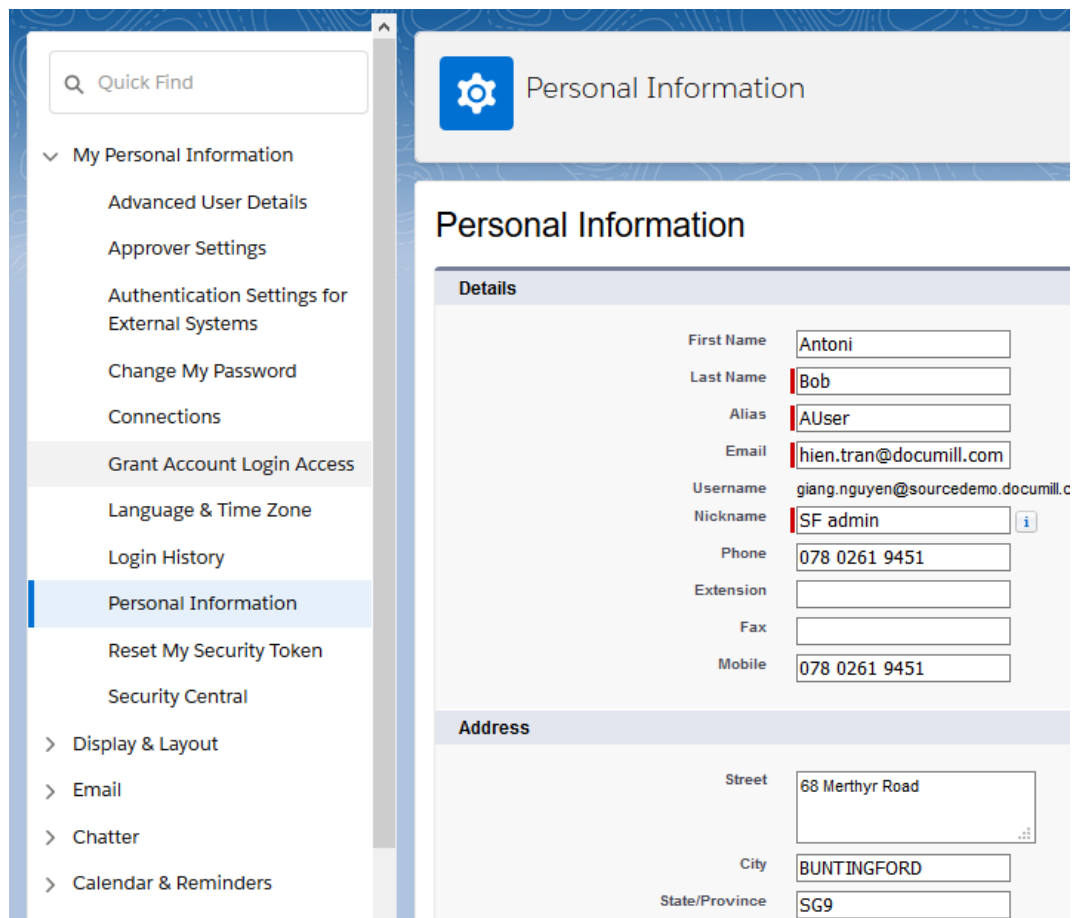
2. Update and Prepare the Org

**If you need help with the following configuration, please write to us at dynamo.support@documill.com with your Org credentials and we are happy to get done for you! 😊*

Otherwise, you can totally follow our guidelines below and get it done yourself!

Update your personal information

- Go to **User Setting** >> **Personal Information**, fill in *Names, Phone...*



The screenshot shows the 'Personal Information' settings page. On the left is a navigation menu with 'Personal Information' selected. The main content area is divided into 'Details' and 'Address' sections. The 'Details' section contains several input fields with the following values: First Name: Antoni, Last Name: Bob, Alias: AUser, Email: hien.tran@documill.com, Username: giang.nguyen@sourcedemo.documill.c, Nickname: SF admin, Phone: 078 0261 9451, Extension: (empty), Fax: (empty), Mobile: 078 0261 9451. The 'Address' section contains: Street: 68 Merthyr Road, City: BUNTINGFORD, State/Province: SG9.

Details	
First Name	Antoni
Last Name	Bob
Alias	AUser
Email	hien.tran@documill.com
Username	giang.nguyen@sourcedemo.documill.c
Nickname	SF admin
Phone	078 0261 9451
Extension	
Fax	
Mobile	078 0261 9451

Address	
Street	68 Merthyr Road
City	BUNTINGFORD
State/Province	SG9

- Under **Address**, give the address:
 - *Street: 68 Merthyr Road*
 - *City: BUNTINGFORD*
 - *State: SG9*
 - *Postal Code: 1WY*
 - *Country: US*
 - *Company: Miltos Corporation*

Address

Street	68 Merthyr Road
City	BUNTINGFORD
State/Province	SG9
Zip/Postal Code	1WY
Country	US

- Under **My Work Information**, fill in *Company Name: "Miltos Corporation"* and your *Title*. Then **Save**.
- Go to **Language & Time Zone** (on the left panel):
 - *Timezone: Any*
 - *Locale: English (United States)*
 - *Language: English*

Language & Time Zone

Settings

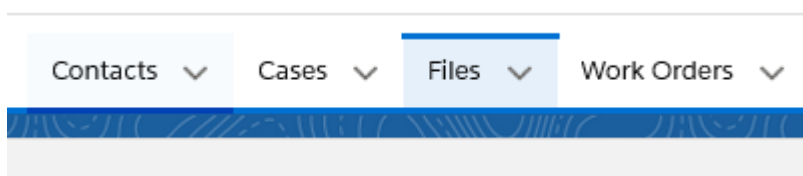
Time Zone	(GMT+02:00) Eastern European Standard Time (Europe/Helsinki)
Locale	English (United States) i
Language	English
Email Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1) i

Save Cancel

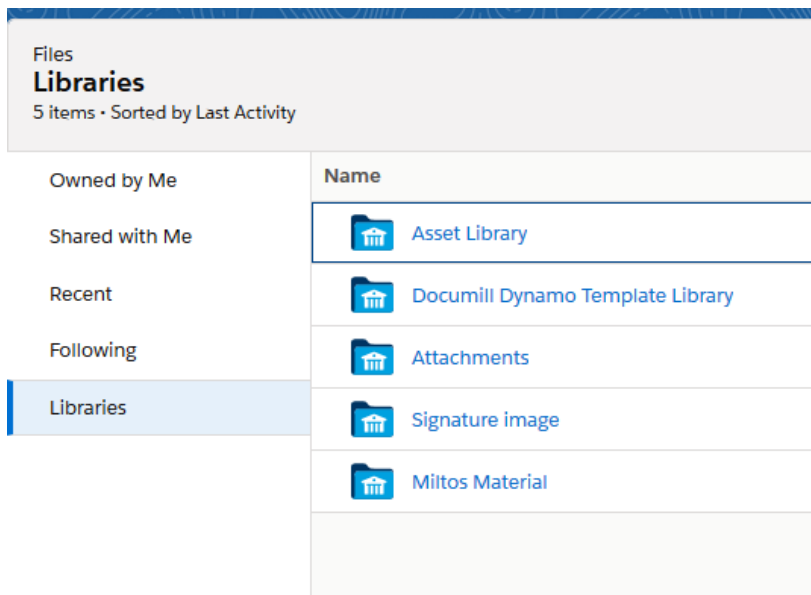
- Click **Save**

Update your signature image

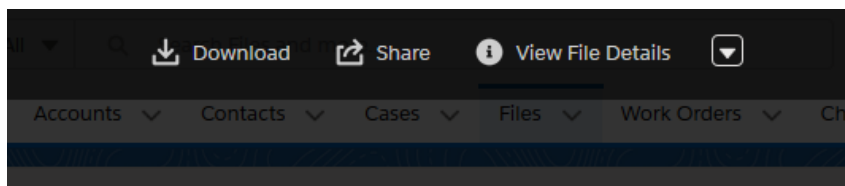
- Go to **Files**



- From the left column, under **Libraries**, select **Signature Image**



- Select **Your signature**
- Click on the small button with the triangle >> select **Upload New Version**

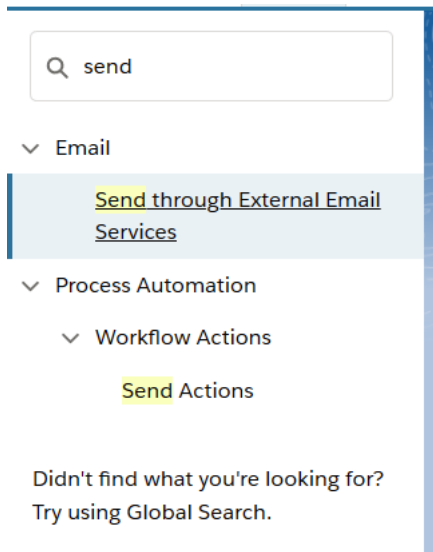


- Choose file and **Upload** your own signature image
- Again from the small button with the triangle >> **Edit File Details**, change the title to **[Your name] signature** and set yourself as **Signature Owner**

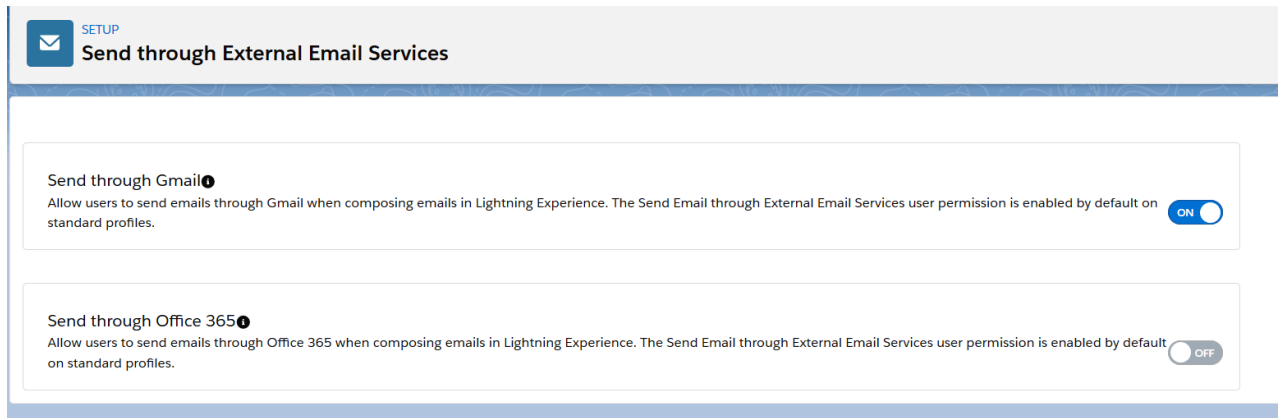
- Then **Save**

Update your email sending through Salesforce

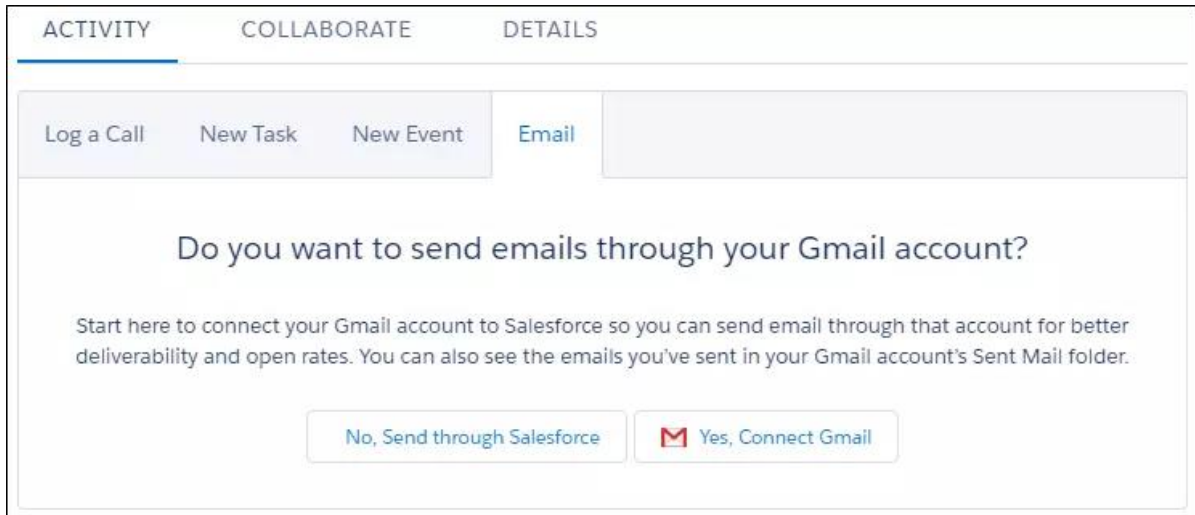
- Go to **Setup** and search for **Send through External Email Services**



- Turn **Send through Gmail** on if you are using a **Gmail** email. The same with Outlook. If you are using a different email service other than Gmail or Outlook, please turn both off



- Then go to **Opportunities**, choose any record, click tab **Activity**, choose **Email**

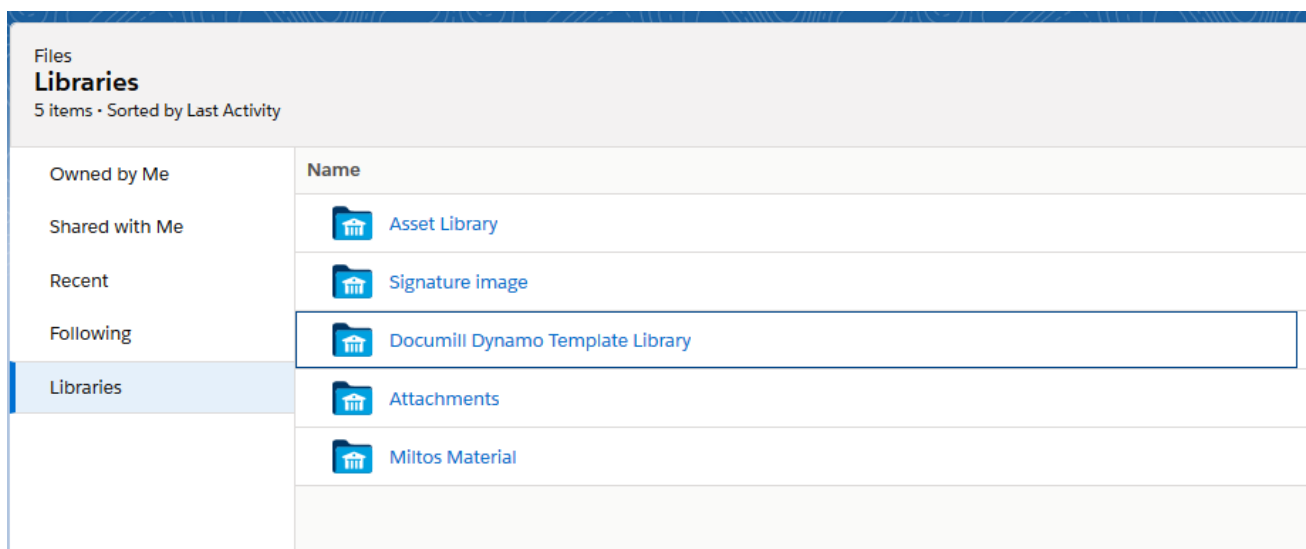


- Then allow Salesforce to send email through your Gmail or Outlook

Enable **Send through Gmail or Outlook** services will prevent the email sent from Salesforce from going to the Spam or Junk folder.

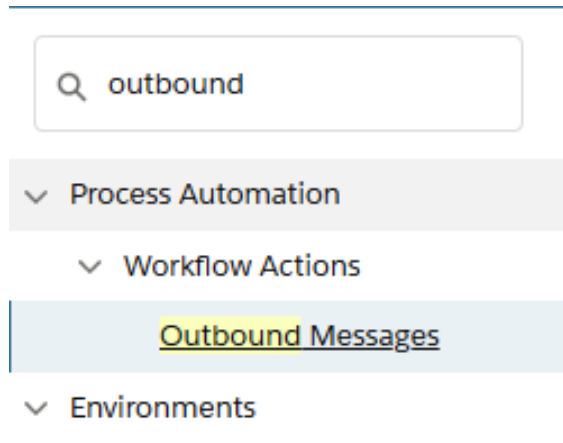
Update template ID in Outbound Message

- Send an email to dynamo.support@documill.com with your name, company, and org ID (you can get this in **Setup** >> **Home** >> **Company Information** >> **Organisation ID**) and say that you would need API module enabled for your GDO
- Go to **Files**
- From the left column, under **Libraries**, select **Documill Dynamo Template Library**



- Choose **Automate Invoice**, and click **View File Details** on the top bar
- Look at the URL, copy the ID series in the URL. The ID is shown below

- Go to **Setup**
- In **Quick Find**, search for "Outbound Messages"
- Select the **Outbound Messages** under **Workflow Actions**



Note: If the search doesn't show the result, you can search for "Workflow" and select the **Outbound Messages** under **Workflow Actions**

- Click **Edit** next to **Automate Invoice**

All Outbound Messages

Outbound Messages are SOAP transactions that Salesforce automatically s

View: [Edit](#) | [Create New View](#)

Action	Name ↑	Endpoint URL
Edit Del	Automate Invoice	https://dynamo-eu1.documill.c

- In the Endpoint URL, replace the ID after the **templateID=** with the new ID

Edit Outbound Message: Opportunity

Name:

Unique Name: i

Description:

Endpoint URL:

User to send as: 🔍

Send Session ID:

Opportunity fields to send

Available Fields	Selected Fields
Amount	AccountId
Automate_Invoice__c	Id
CampaignId	
CloseDate	
ContactId	

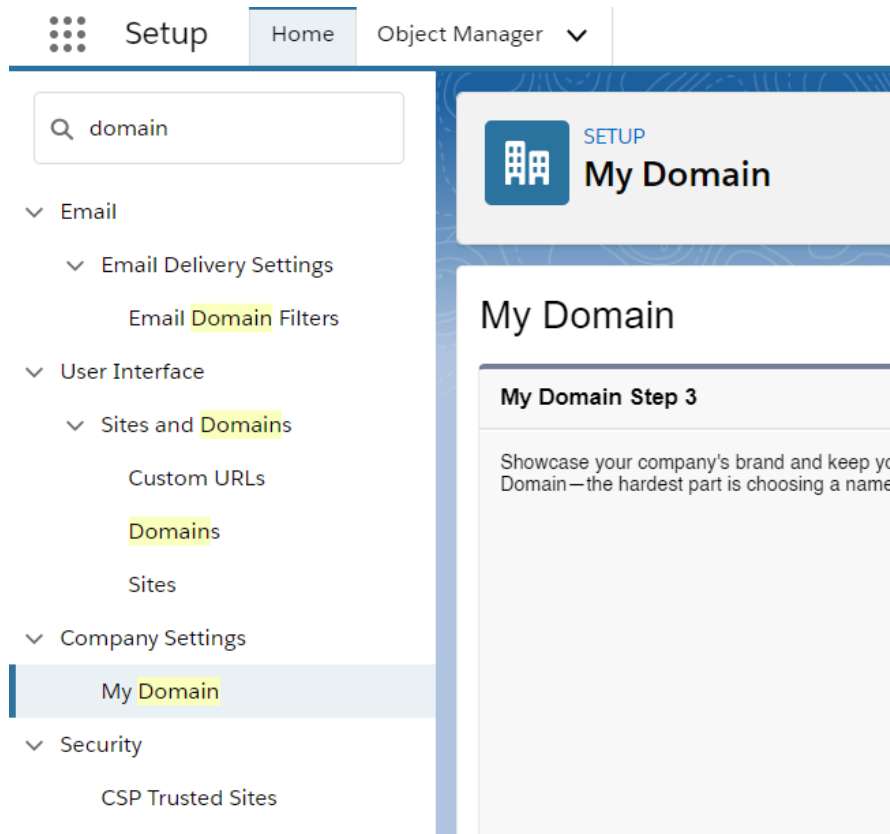
- Click **Save**

Enable Collaboration Module Feature

- Send an email to dynamo.support@documill.com with your name, company, and org ID (you can get this in **Setup >> Home >> Company Information >> Organisation ID**) and say that you would need Collaboration module enabled for your GDO.
- Once **the Collaboration module license is enabled for you**, proceed to the next step

In our Collaboration Module Package installed in GDO, there is a custom Lightning Component that requires the Salesforce Org to deploy custom domain to use. To enable Custom Domain:

- Go to **Setup**, search "Domain" in **Quick Look**
- Choose **My Domain**, under **Company Settings**



- Enter the name that you want to use for your **My Domain** subdomain
- Check availability, if your domain is taken, please choose another one
- Click **Register Domain**
- Check back after a few minutes if it's ready for testing by refreshing the page (You may or may not receive the notification email, but it should be ready in a few minutes)
- Once your domain is ready. Click **Deploy to Users**

Your domain name is **mlltosc corp.my.salesforce.com**

Your domain name is ready. Log in to test it out. [Log in](#)

To test your new domain, click tabs and links. If you've customized the UI, check for hard links to your original URL.

[Deploy to Users](#) Roll out the new domain to your org. [i](#)

FeedItem Triggers configure

- Copy your new domain name

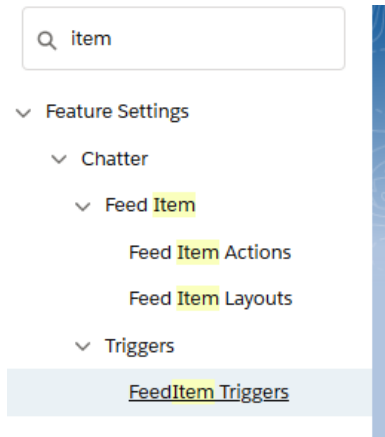
Your domain name is **miltoscorp.my.salesforce.com**

Your domain name is ready. Log in to test it out. [Log in](#)

To test your new domain, click tabs and links. If you've customized the UI, check for hard links to your original URL.

[Deploy to Users](#) Roll out the new domain to your org. [i](#)

- Go to **Setup** and find **FeedItem Triggers** in **Quick Find**



- Click **Edit** next to the **DynamoDocLinkCommentTrigger**

Feed Item Triggers

Define the Apex triggers for Feed Items here.

Triggers New			
Action	Name	Api Version	Status
Edit	DynamoDocLinkCommentTrigger	47.0	Active

- Replace the old domain with your new domain name to **line 11**, between **https://** and **/lightning...** like in the image below

```
1 trigger DynamoDocLinkCommentTrigger on FeedItem (after insert) {
2   for(FeedItem item : Trigger.new)
3   {
4     String parentObjectName = item.ParentId.getSObjectType().getDescribe().getName();
5     if(parentObjectName != 'Dynamo_Document__c')
6       continue;
7     FeedComment comment = new FeedComment();
8     comment.FeedItemId = item.Id;
9     comment.IsRichText = true;
10    //String body = '<a href="' + URL.getOrgDomainUrl().toExternalForm() + '/' + item.ParentId + '?extra=' + item.Id + '">Open Do
11    String body = '<a href="https://miltoscorp.my.salesforce.com/lightning/r/Dynamo_Document__c/' + item.ParentId + '/view?extra='
12    comment.CommentBody = body; insert comment;
13  }
14 }
```

- Click **Save**

END OF SETUP.

NEXT, PLEASE CHECK GDO DEMO STORY & HOW TO DEMO GUIDELINE.