



For Salesforce

User Manual



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1. General Information

This guide provides the necessary information for using the Watchdox for Salesforce connector.

2. Watchdox Login

- a) Once WatchDox has been installed, navigate to the 'watchdox setup' tab click the 'watchdox login icon' link and save your login credentials.

watchdox setup | watchdox documents | Recipients +

watchdox for Salesforce

Start Here

- Overview
- 1 watchdox login**

watchdox login

User Name

Password

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watchdox

3. Upload/Create file via Salesforce Document

- a) Navigate to the 'watchdox documents' tab and click the new button.

Home | watchdox documents | Documents | watchdox setup | Leads +

Search
watchdox documents
Limit to items I own
Advanced Search...

Create New...

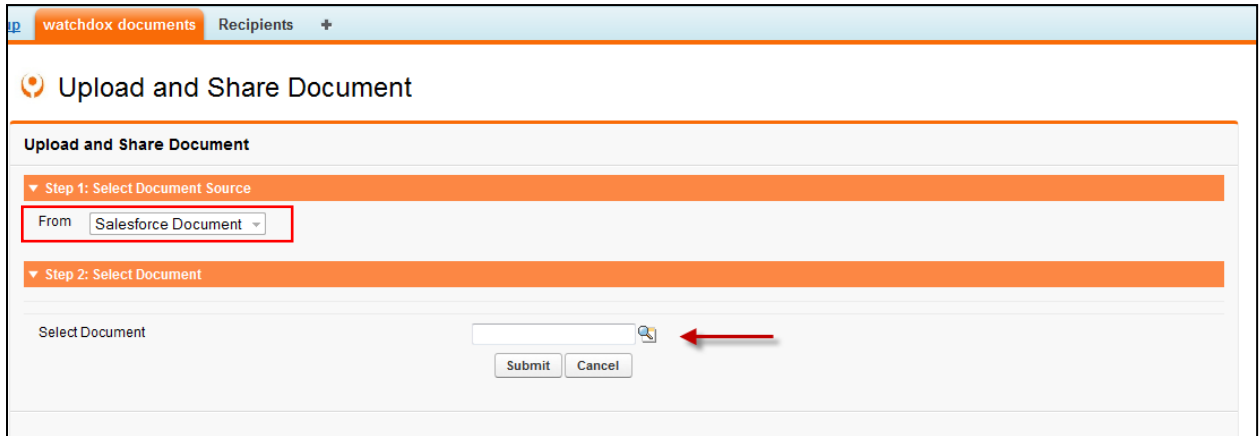
Recent Items
zipfinder.bt
CloudDrop Datasheet - 3.pdf
InfoPlateau Profile
Aasheesh
recip-000371
harsha
uu.bt
Recycle Bin

watchdox documents
Home
View: All | Got | Edit | Create New View

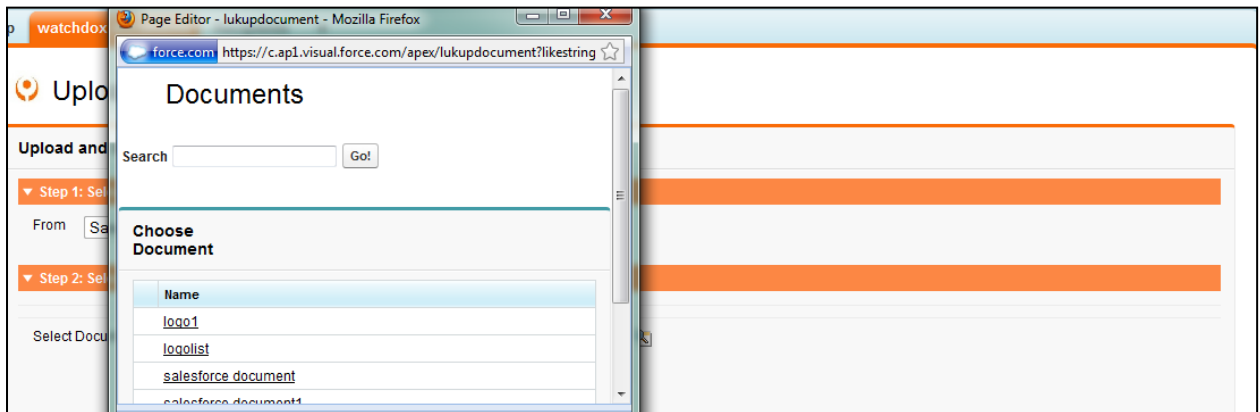
Document Name	watchdox URL	Salesforce Document	Created By	Created Date
InfoPlateau Profile	http://www.watchdox.com/doc?a=ov&c=asihqXbqE6c...	https://c.ap1.visual.force.com/015900000001770AAC	Siva Devaki AM	5/13/2011 3:10
CloudDrop Datasheet - 3.pdf	http://www.watchdox.com/doc?a=ov&c=alxnlm1YRDn...	https://c.ap1.visual.force.com/01590000000871AAC	Siva Devaki AM	5/13/2011 1:27
uu.bt	http://www.watchdox.com/doc?a=ov&c=anxbG5GpHU1C...	https://c.ap1.visual.force.com/01590000000Hr19AAC	Siva Devaki AM	5/13/2011 12:37
zipfinder.bt	http://www.watchdox.com/doc?a=ov&c=al_QiZ696RufB...	https://c.ap1.visual.force.com/00P90000000kSu5FAE	Siva Devaki PM	5/12/2011 11:30
untitled.bmp	http://www.watchdox.com/doc?a=ov&c=a72vXJGU4w...	https://c.ap1.visual.force.com/01590000000HsP6AAK	Siva Devaki AM	5/12/2011 4:21
WatchDox Test May 12th 2011	http://www.watchdox.com/doc?a=ov&c=a5v15vhSMoVL...	https://c.ap1.visual.force.com/01590000000AJ0AA4	Siva Devaki AM	5/12/2011 12:02
cutsair12.jpg	http://www.watchdox.com/doc?a=ov&c=av/qKH9nQIID...	https://c.ap1.visual.force.com/01590000000HsPQAA0	Siva Devaki AM	5/12/2011 12:01

- b) The drop down is defaulted to Salesforce documents only, which means you can only select documents that exist in the Documents object.

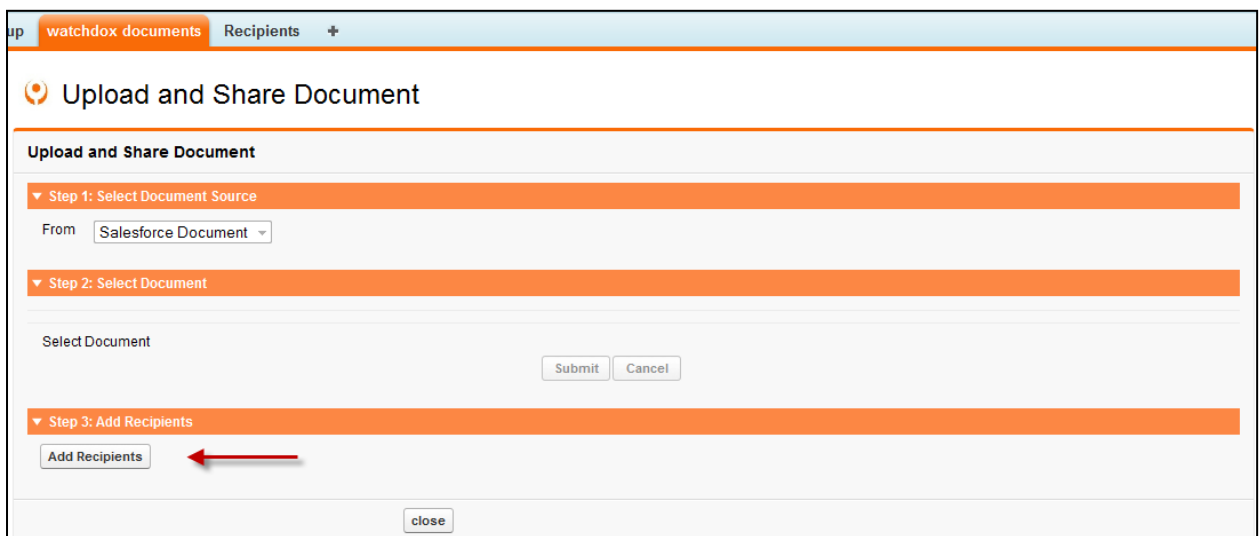
- c) Click the magnifying glass lookup icon and select the Salesforce document that you wish to upload.



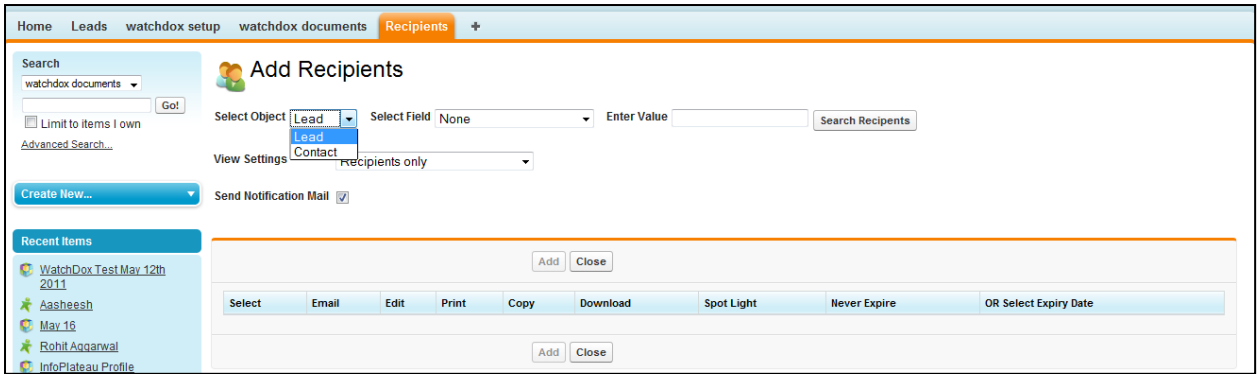
- d) Select the file from the pop up window. If the file has already been uploaded you cannot upload the file again.



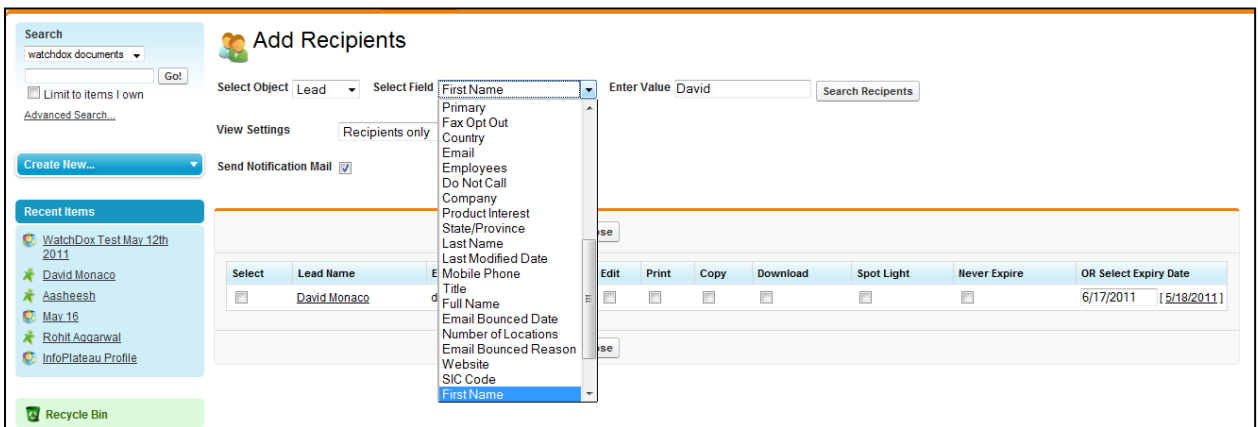
- e) Click Submit
f) Click on add recipients



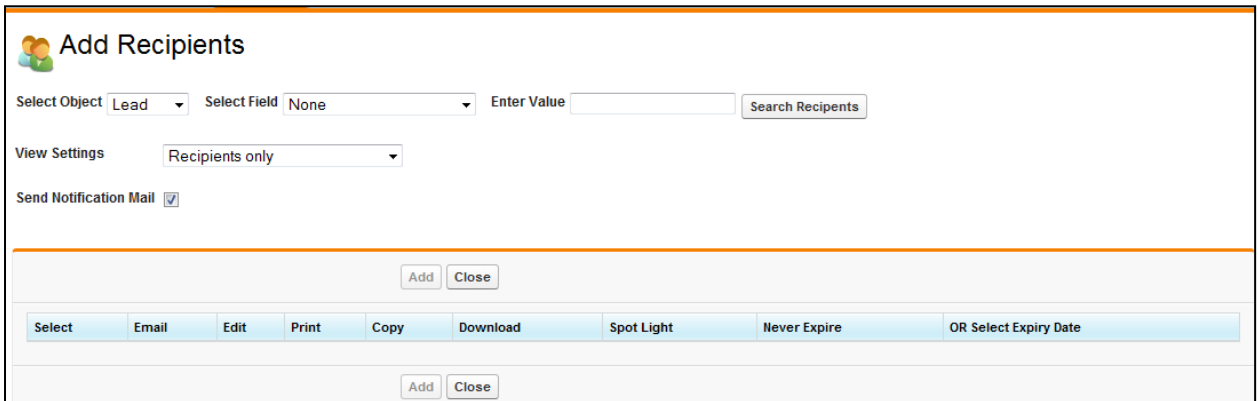
- g) Select recipients from Lead or contacts to add recipients for document.



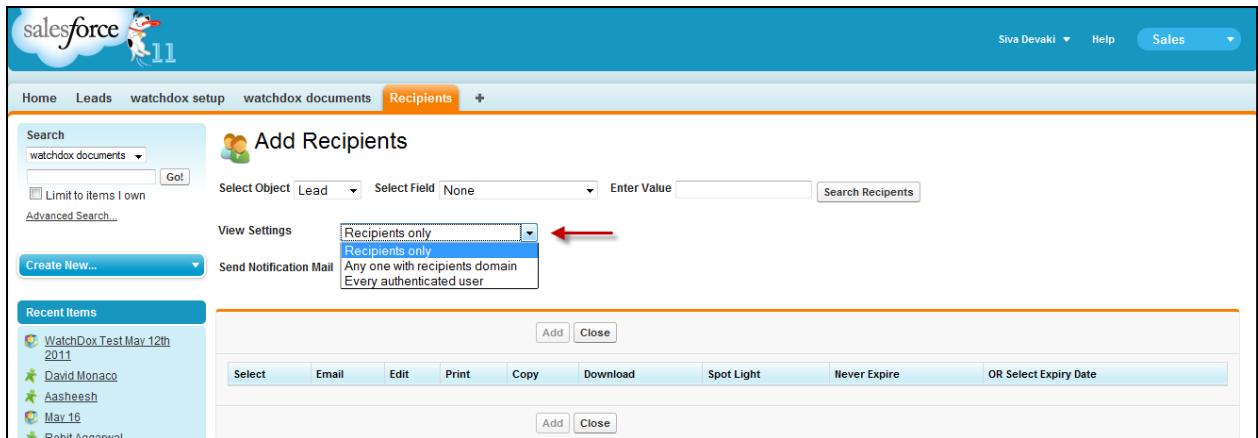
h) You can also search for Leads or Contacts you want to add by entering a value in the search bar and clicking 'Search Recipients'



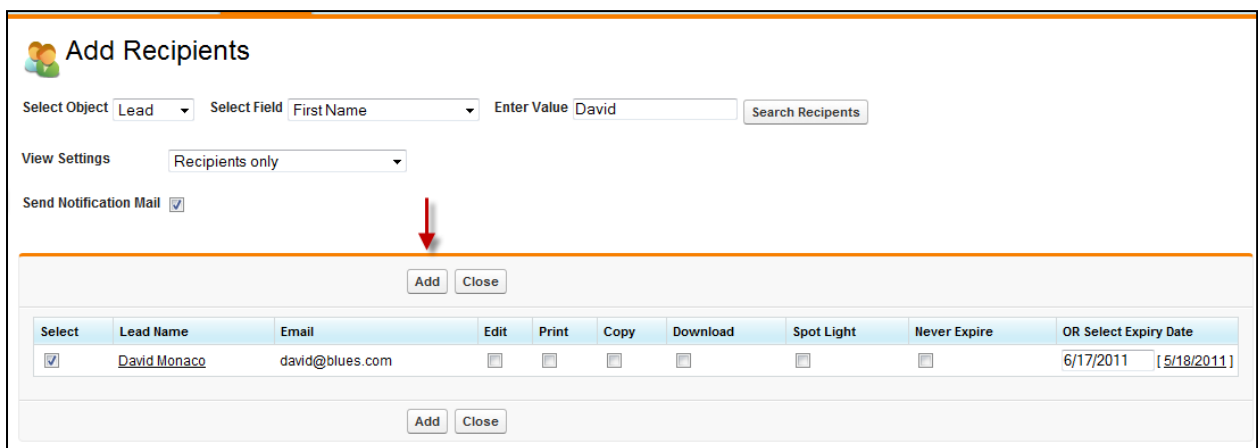
i) You can select "Send Notification" If you want the recipients to receive a notification.



j) You can select the "View Settings" for the document that you are sharing. The options are Recipients Only, Any one with recipients domain and every authenticated user.



k) Click 'Add'



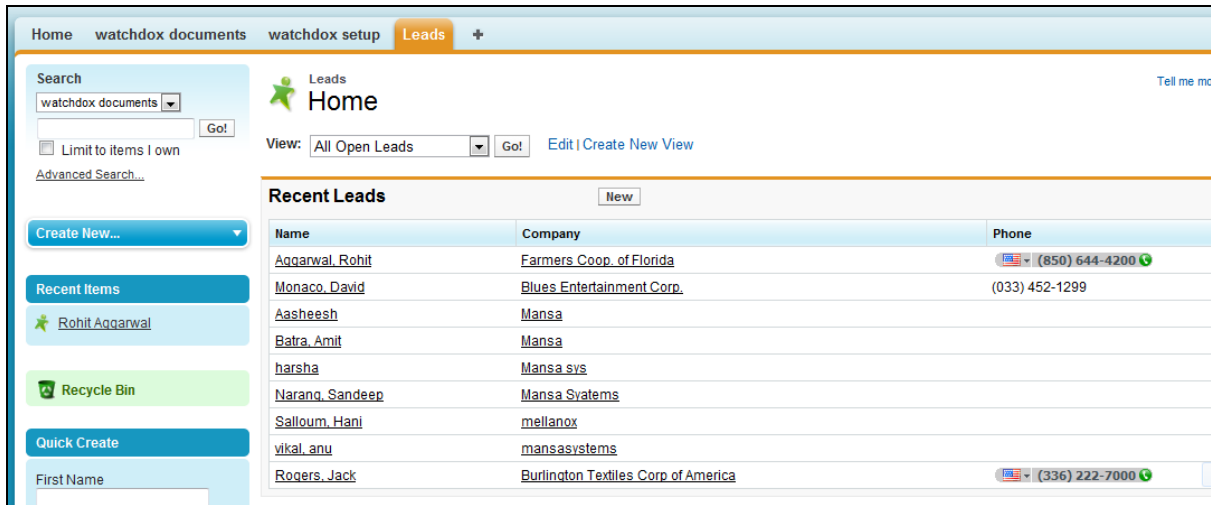
Note: You can add permission by selecting or unselecting check boxes that are explained below.

1. **"Edit"** - specifies whether recipient has access to edit the document.
2. **"Print"** - specifies whether recipient has access to print the document.
3. **"Copy"** - specifies whether recipient has access to copy the document.
4. **"Download"** - specifies whether recipient has access to download the document.
5. **"Spot Light"** - Obscures the file from view except for the portions that you hover over with the mouse.
6. **"Never Expire"** - specifies that recipients access to document never expires.
7. **"Or Select Expiry Date"** - You can specify date up to which recipient have access to document if Never expire is not selected.

4. Upload and share file via objects

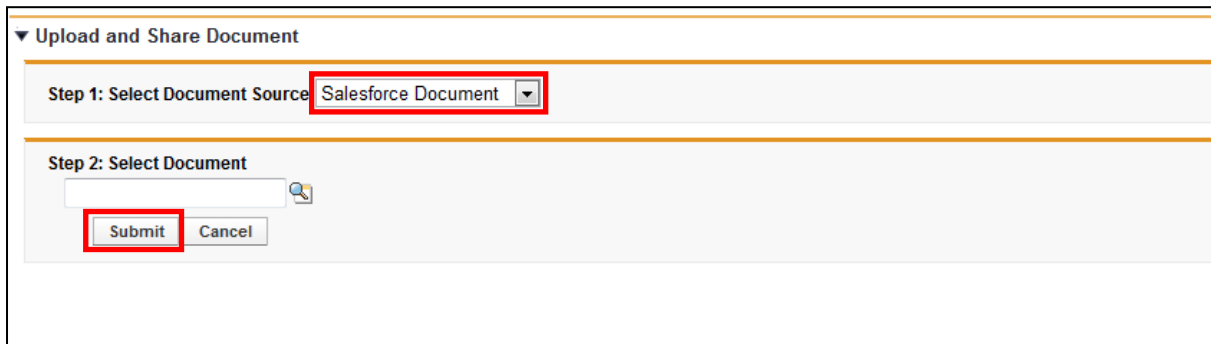
a) Select the leads/contacts object & the record from which you want to share the file

Note – Currently you can upload and share files from the lead or the contact objects only.

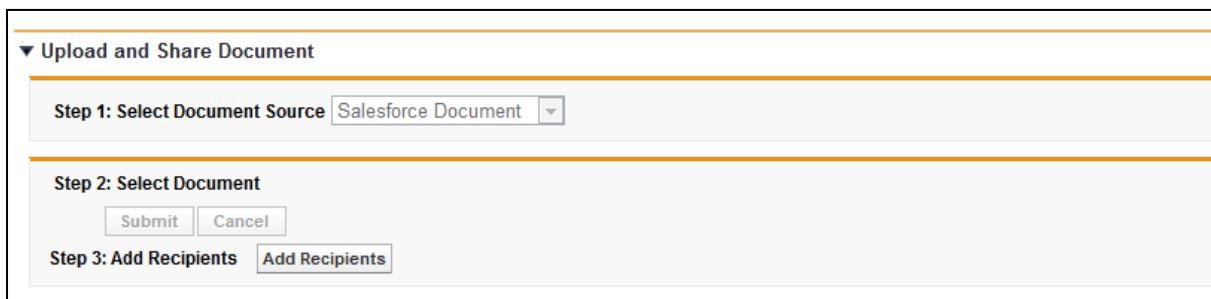


b) Select the document source that can be either Salesforce document or Salesforce attachment.

c) Select the document that you want to upload & click on “Submit”



d) Click on “Add Recipients” to share the documents



- e) The lead/contact name would get auto populated when the file is shared via the object

5. View/Download file

- a) For viewing uploaded document, click on Watchdox document tab.
- b) You can click on the watchdox icon or the Salesforce icon to the right of the document name to open the document in either Salesforce or watchdox respectively.

Document Name	Watchdox Link	Salesforce Document Link	Created By	Created Date
logo			Siva Devaki, 5/18/2011 10:54 PM	5/18/2011
May 16			Siva Devaki, 5/18/2011 1:29 AM	5/18/2011
InfoPlateau Profile			Siva Devaki, 5/18/2011 1:29 AM	5/18/2011
CloudDrop Datasheet - 3.pdf			Siva Devaki, 5/17/2011 9:24 AM	5/17/2011
cutegirl.jpg			Siva Devaki, 5/16/2011 1:40 AM	5/16/2011
zipfinder.txt			Siva Devaki, 5/12/2011 11:30 PM	5/12/2011
untitled.bmp			Siva Devaki, 5/12/2011 4:21 AM	5/12/2011
WatchDox Test May 12th 2011			Siva Devaki, 5/12/2011 12:02 AM	5/12/2011
cutegirl12.jpg			Siva Devaki, 5/12/2011 12:01 AM	5/12/2011

- c) You can also open the document from the document detail page by clicking on either salesforce or watchdox by clicking on the respective URL.

watchdox document
May 16

Customize Page | Edit Layout | Printable View | Help for this Page ?

Recipients [0]

watchdox document Detail Edit Delete Add Recipients Change Permission Revoke Permission

Document Name	May 16	Owner	Siva Devaki [Change]
Salesforce Document	May 16		
Watchdox Link	Click Here		
Created By	Siva Devaki, 5/18/2011 1:29 AM	Last Modified By	Siva Devaki, 5/18/2011 1:29 AM

Edit Delete Add Recipients Change Permission Revoke Permission

Recipients Recipients Help ?

No records to display

d) The document will open in watchdox as:

Hi amit.batra@mans... VIEWER Switch User My Account Products My Documents Send a Document

WatchDox Test May 12th 2011.txt TRACKED AND CONTROLLED DOCUMENT

Shared by noam@confidela.com on Thursday, 12:32 Info

Thumbnails Download Print More 80% Search 1 of 1 Prev Next Full

test

6. Edit File Name

a) Navigate to the watchdox document tab and select the document that you want to edit.

watchdox documents Recipients +

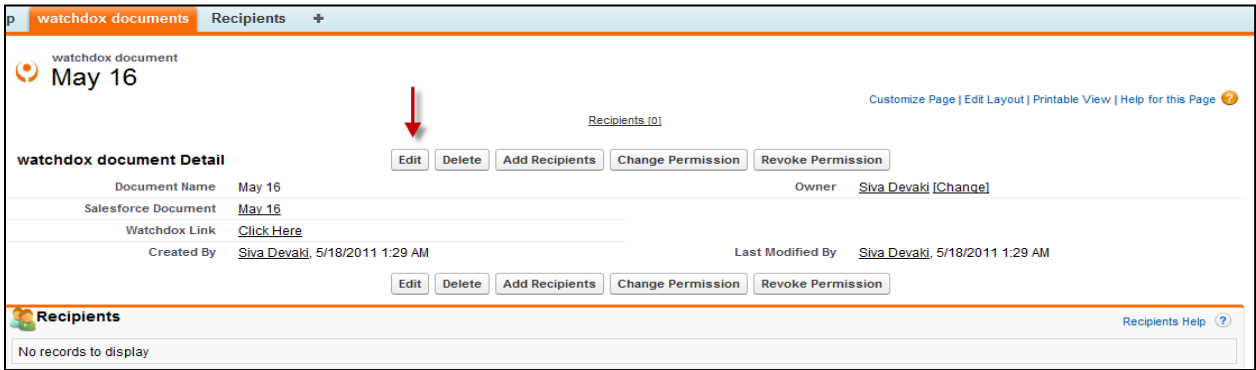
watchdox documents Help for this Page ?

Home View: All Go! Edit Create New View

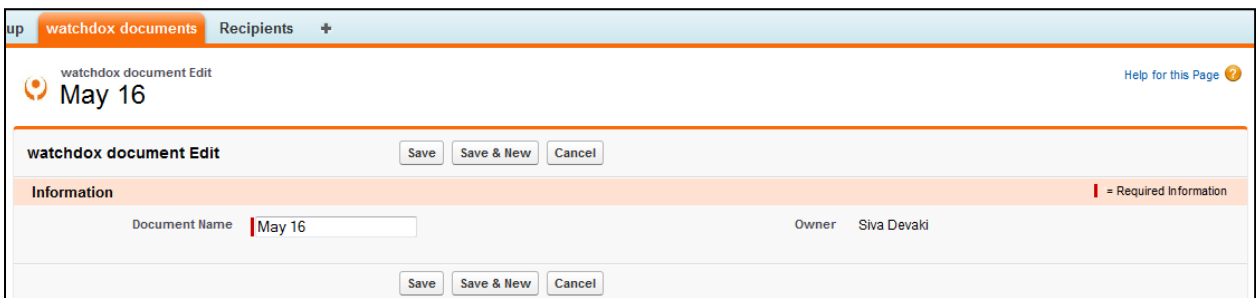
Recent watchdox documents New Recently Created

Document Name	Watchdox Link	Salesforce Document Link	Created By	Created Date
logo			Siva Devaki, 5/18/2011 10:54 PM	5/18/2011
May 16			Siva Devaki, 5/18/2011 1:29 AM	5/18/2011
InfoPlateau Profile			Siva Devaki, 5/18/2011 1:29 AM	5/18/2011
CloudDrop Datasheet - 3.pdf			Siva Devaki, 5/17/2011 9:24 AM	5/17/2011
cuteqirl.jpg			Siva Devaki, 5/16/2011 1:40 AM	5/16/2011
zipfinder.txt			Siva Devaki, 5/12/2011 11:30 PM	5/12/2011
untitled.bmp			Siva Devaki, 5/12/2011 4:21 AM	5/12/2011
WatchDox Test May 12th 2011			Siva Devaki, 5/12/2011 12:02 AM	5/12/2011
cuteqirl12.jpg			Siva Devaki, 5/12/2011 12:01 AM	5/12/2011

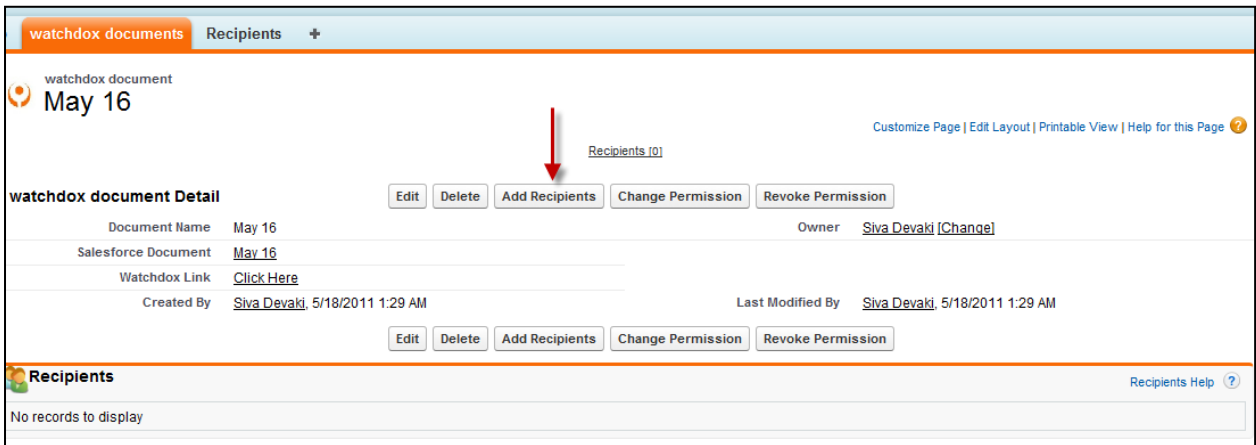
b) Click on “edit”



c) Edit the document name and click on “Save”



7. Add Recipients



a) Refer to Step 3(e) to add recipients.

b) After the recipient has been added the below screen will be displayed.

8. Change Permissions

a) For changing permission of recipients, click on **“Change Permission”** button.

b) You can change permission by selecting or unselecting check boxes that are explained below -

1. **“Edit”**- specifies whether recipient has access to edit the document.
2. **“Print”**- specifies whether recipient has access to print the document.
3. **“Copy”**- specifies whether recipient has access to copy the document.
4. **“Download”**- specifies whether recipient has access to download the document.
5. **“Spot Light”**- Obscures the file from view except for the portions that you hover over with the mouse.
6. **“Never Expire”**- specifies that recipient’s access to document never expires.
7. **“Or Select Expiry Date”**- You can specify date up to which recipient have access to document if Never expire is not selected.

c) After changing permission of recipients, click on **“Save”** button.

up watchdox documents Recipients +

Change Permission For Recipients

Save Cancel

Edit	Print	Copy	Download	Spot Light	Never Expire	OR Select Expiry Date	Email	Contact Name	Lead Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6/11/2011 [5/19/2011]	sandeep.narang@mansasvs.com		Sandeep Narang
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[5/19/2011]	amit.batra@mansasvs.com		Amit Batra
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6/17/2011 [5/19/2011]	david@blues.com		David Monaco

Save Cancel

8. Revoking Permissions of Recipients

a) For revoking or removing permission of recipients, click on “**Revoke Permission**” button.

watchdox documents Recipients +

watchdox document

WatchDox Test May 12th 2011

Recipients [3]

Customize Page | Edit Layout | Printable View | Help for this Page ?

watchdox document Detail

Edit Delete Add Recipients Change Permission **Revoke Permission**

Document Name WatchDox Test May 12th 2011 Owner Siva Devaki [Change]

Salesforce Document WatchDox Test May 12th 2011

Watchdox Link [Click Here](#)

Created By Siva Devaki, 5/12/2011 12:02 AM Last Modified By Siva Devaki, 5/12/2011 12:02 AM

Edit Delete Add Recipients Change Permission **Revoke Permission**

b) After selecting recipients, click on “**Save**” button.

up watchdox documents Recipients +

Revoke Permission for Recipients

Save Cancel

Select	Email	Contact Name	Lead Name
<input type="checkbox"/>	sandeep.narang@mansasvs.com		Sandeep Narang
<input type="checkbox"/>	amit.batra@mansasvs.com		Amit Batra
<input type="checkbox"/>	david@blues.com		David Monaco

Save Cancel

9. Delete file

a) Navigate to the watchdox document tab, click on the URL for the file and then Click the delete button.

watchdox documents Recipients +

watchdox document
WatchDox Test May 12th 2011

Recipients [3]

watchdox document Detail

Document Name WatchDox Test May 12th 2011 Owner Siva Devaki [Change]

Salesforce Document WatchDox Test May 12th 2011

Watchdox Link [Click Here](#)

Created By Siva Devaki, 5/12/2011 12:02 AM Last Modified By Siva Devaki, 5/12/2011 12:02 AM

Buttons: Edit, Delete, Add Recipients, Change Permission, Revoke Permission

b) After clicking on Delete, a warning message will be displayed “Are you sure you want to delete all its contents?” Click OK, if you want to delete, otherwise click Cancel.

10. Search file

a) You can search for any file by entering any string in the left search bar and choosing ‘watchdox documents’ from the drop down and clicking ‘Go!’. In the screenshot the file searched for was CloudDrop Datasheet which returned one result.

Home Leads watchdox setup watchdox documents Recipients +

Search watchdox documents Clouddrop datasheet Go! Limit to items I own Advanced Search...

Search Results

Search Clouddrop datasheet Search Limit to items I own

Scope: watchdox documents | Advanced Search

watchdox documents [1]

watchdox documents [1]

Action	Document Name
Edit	CloudDrop Datasheet - 3.pdf

Recent Items: WatchDox Test May 12th 2011