Customization Required at Salesforce CRM Web UI

Version: 26

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1. Customization Required at Salesforce CRM WWW-client

This document walks you through the installation process of M-Files for Salesforce CRM UI components.

1.1 Install Static Resources

Go to Salesforce Setup. Navigate to "App Setup/Develop" section and open the Open the "Static Resources" page.

Click "New". Type "MFiles" as a name, and browse the file "*Visualforce pages\MFiles.zip*" (see the enclosed Visualforce.zip).

Cache control: Public

Upload the file to the Salesforce site.

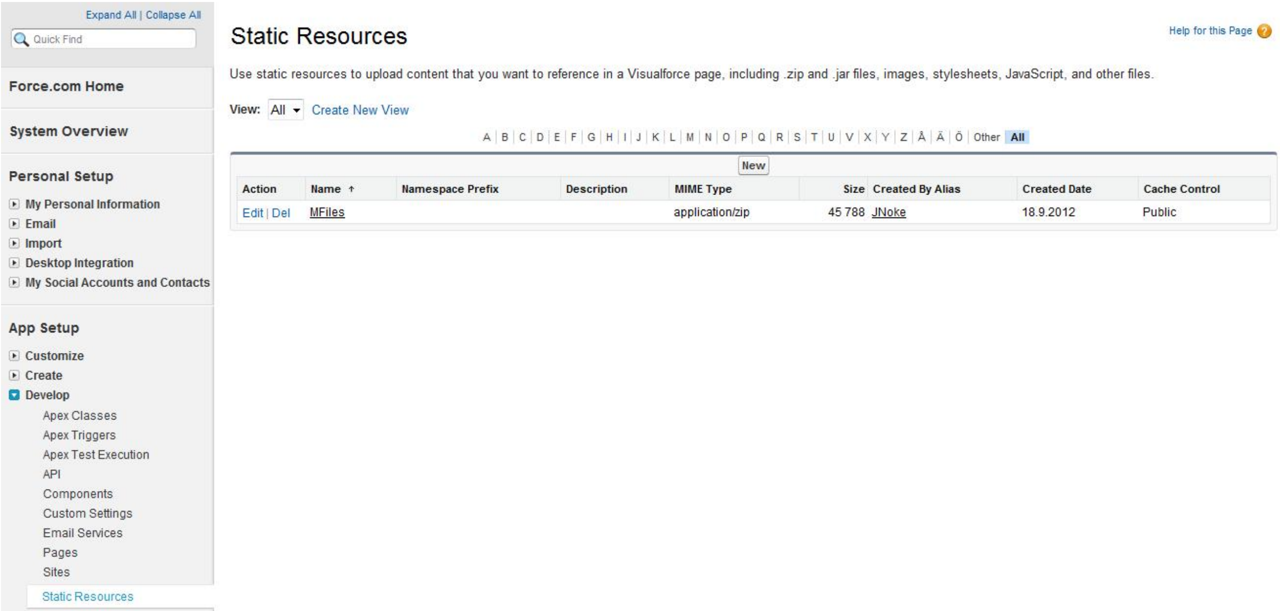

Figure 1 - Installing static resources

1.2 Set up Custom Labels

Go to Salesforce Setup. Navigate to "App Setup/Create" section and open the Open the "Custom Labels" page.

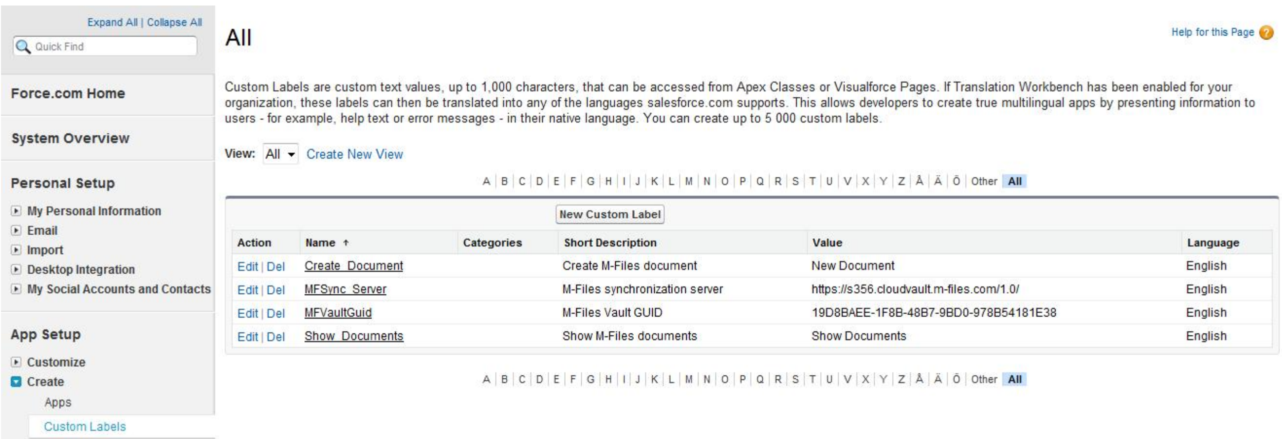

Figure 2 - Creating custom labels

Create following labels:

Name	Short Description	Value (in English)	Explanation
Create_Document	Create M-Files document	New Document	Label displayed on pages next to "create document in M-Files" action.
MFSync_Server	M-Files synchronization server	https://openurl.m-files.com/2.0/	This is the address for the URL opening service
MFVaultGuid	M-Files Vault GUID	E.g. "19D8BAEE-1F8B-48B7-9BD0-978B54181E38"	GUID of the vault where data is synchronized. Can be found in M-Files Server Administrator, vault Properties.
Show_Documents	Show M-Files documents	Show Documents	Label displayed on pages next to "show documents in M-Files" action.

Note: these labels are language-aware. Labels are saved for current default language only. If other languages are required, the personal default language must be changed first.

Leave other options to their default values.

1.3 Set up Visualforce Pages

Go to Salesforce Setup. Navigate to "App Setup/Develop" section and open the Open the "Pages" page. Click "New" to add a new page.

Paste Visualforce code for customized pages. The code is located in folder *Visualforce pages* (Visualforce.zip).

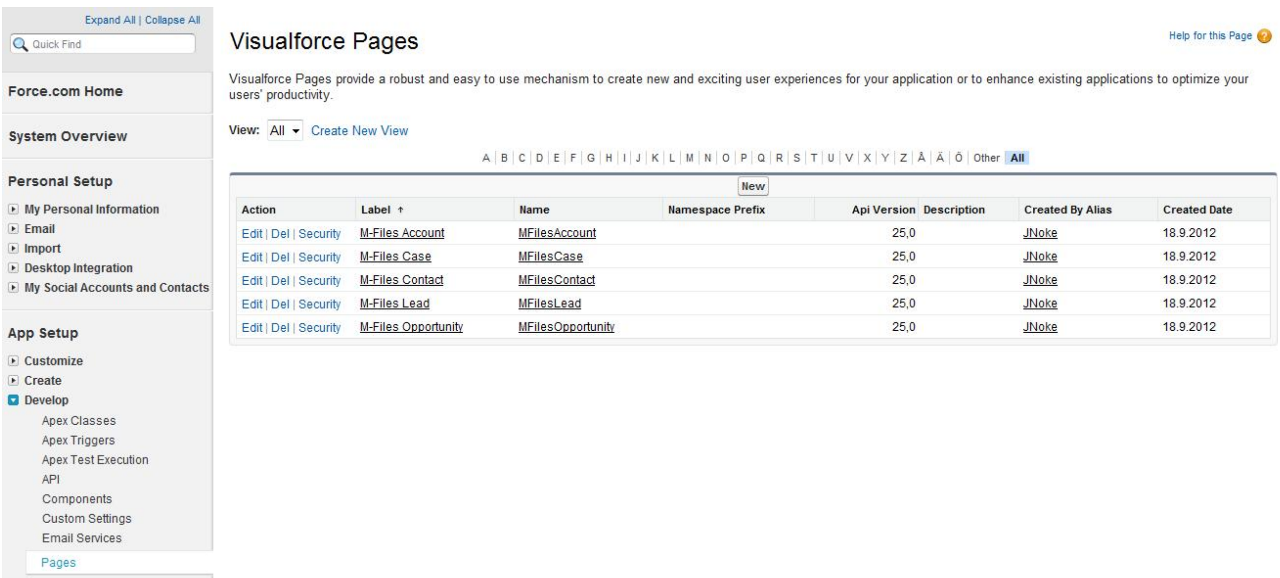

Figure 3 - Setting up Visualforce code

Following pages should be created. Copy the contents of each source file to the code editor.

Page label	Name	Source file
M-Files Account	MFilesAccount	Account.txt

M-Files Case	MFilesCase	Case.txt
M-Files Contact	MFilesContact	Contact.txt
M-Files Lead	MFilesLead	Lead.txt
M-Files Opportunity	MFilesOpportunity	Opportunity.txt

After this, enable the Visualforce pages for all users:

Open Security info for Account (see above figure)

Select all profiles (shift works for large selection), Add, Save

Repeat for other Visualforce pages.

1.4 Customize the Layout of Salesforce Pages

Go to Salesforce Setup. Navigate to "Customize/Accounts" section and open the Open the "Page Layouts" page. Edit all pages. Professional Edition can have only one page layout per object type, so e.g. Accounts -> Page Layout will bring directly to the Layout editing.

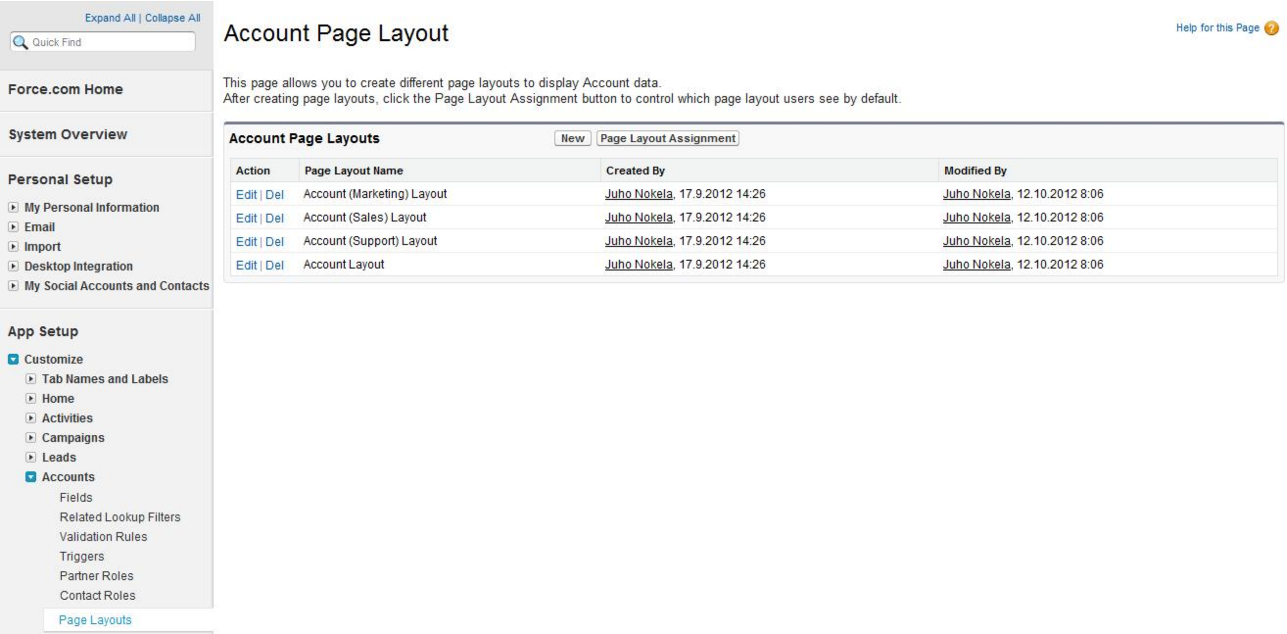

Figure 4 - Editing pages

When editing a page layout, choose the "Visualforce pages" tab (see spot A in the picture below) from the ribbon.

Drag Section to below the Custom Links section (B1 -> B2). Section Name: M-Files, Layout: 1-Column, Display Section Header On Detail Page (not on Edit Page).

Use drag & drop operation to place the M-Files Account (C) below the new Section (B2).

Modify the Visualforce page properties (D) and set height to 128 pixels.

Select "Save" (E).

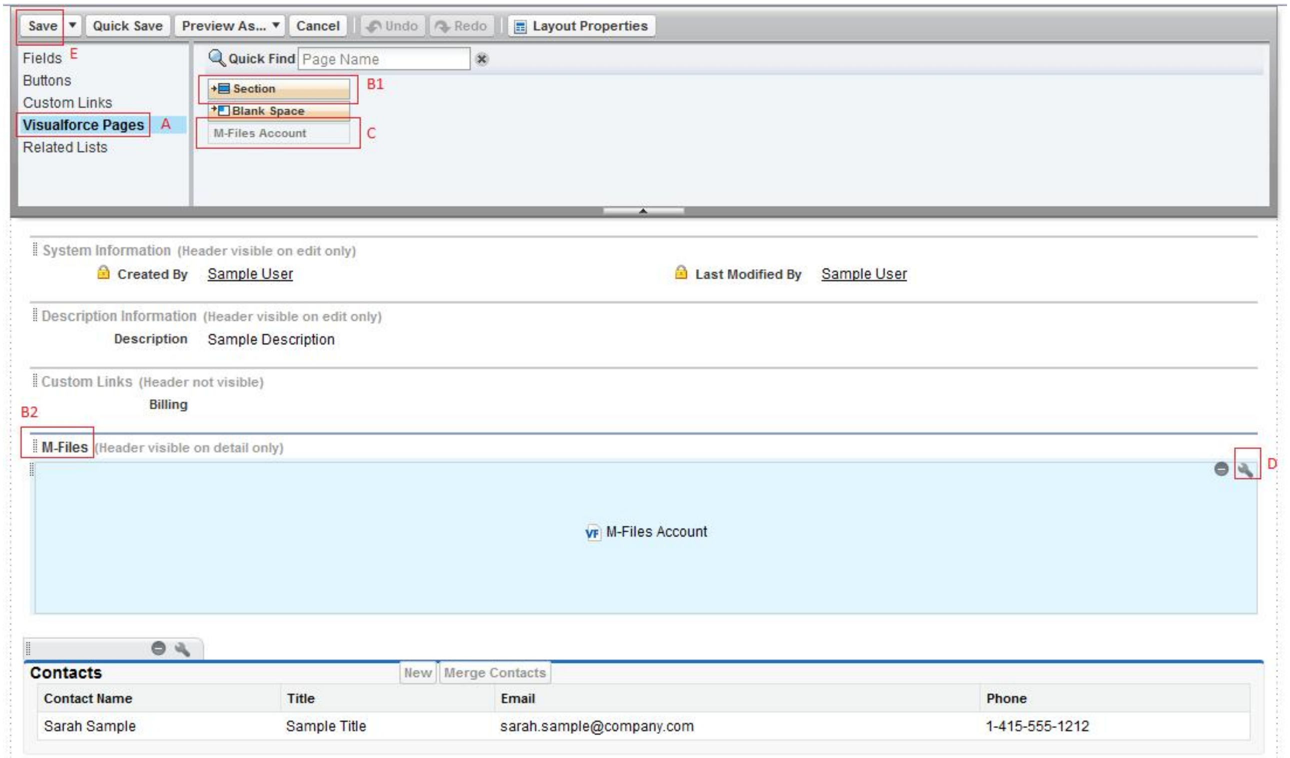

Figure 5 - Editing a page layout

Repeat the operation for following pages:

- Leads (Customize → Leads → Page layouts)
- Account (Customize → Accounts → Page layouts)
- Contacts (Customize → Contacts → Page layouts)
- Opportunities (Customize → Opportunities → Page layouts)
- Cases (Customize → Cases → Page layouts) (except for "Case Closed" layout)

Some layouts can be skipped if it is intended that M-Files integration won't be used with them.

1.5 Sample result