Business Applications for a Mobile World

CRM Lead App

Shelley Chase Senior Software Architect 6th October 2014

PROGRESS EXCHANGE

Your Hosts	This Workshop	Today's Goals
Shelley Chase Ricardo Perdigao Richard Stone Edsel Garcia	 You will build a CRM Lead Mobile Application based on the CRM Application The workshop is segmented in 3 parts 	 Enjoy working with Rollbase Mobile Understand how to rapidly and efficiently build a Business Mobile App.

9:00 AM	Introduction to Rollbase Mobile + CRM Application
9:30 AM	Designing and Develop a Business Mobile Sales Lead App
11:15 AM	Mapping - Integrate with the Device Geolocation Service
Noon	Smiles all around



Part 1: Introduction to Rollbase Mobile



Workshop Introduction

- Quick Overview of Rollbase Mobile
- Labs on how to
 - Create a new Mobile App
 - Design pages and navigation
 - Read Leads, Add Leads and Invoke operations from the Rollbase Server
 - Using the Geolocation Service

Workshop Prerequisites

- BYOD Windows 7 or 8 laptop
- Wireless Connectivity
- Progress Pacific Community ID
- Google Chrome Browser or Safari Browser
- (Optional) Get QR Reader App
- Download Rollbase Tester App
- Leave your mobile on, you may want to test your work!
- Rollbase trial subscription provided for you



Accessing Rollbase applications from mobile devices

- Rollbase Web App with Mobile-Web enabled
 - Generated HTML5-compatible version of a Rollbase application
 - Mobile Web App created no device interaction
- Rollbase Mobile
 - Mobile App Builder
 - Cloud-based Visual Designer
 - Connect to Data and Logic
 - Access Native Device Services and REST API Services
 - Push notifications
 - Emulator for testing
 - Exports
 - Hybrid Mobile Apps
 - Mobile Web App (like Rollbase Mobile Web but customizable)

Run-time architecture



In this lab, you will install the CRM application and create a Mobile App project.

Lab 1.1—Installing the CRM Rollbase application

Lab 1.2—Creating a Mobile App project

The lab steps take approximately 15 minutes to complete.

Lets do a quick walkthrough...

Lab 1: Login and Select Build Applications

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← → (C 🛯 https://secure.progress.com/oam/SSOPOST/metaAlias/External/psc-rolli 값 📄	← → C A https://pacific.progress.	com/console/jsp/pc.jsp	☆
* PR	Welcome to Pacific	* PROGRESS Pacific	Noel Shannon Progress Software nshannon@progress.com	Aug 19 It's Tuesday, grab your mugand beproductive! Get Connected
	Come on in. The water is warm! Username: mylogin	This doesn't look like you! Change photo		Join the discussion today and get timely, expert information on Pacific Check out Communities
	Password:	Rollbase	DataDirect Cloud	D Easyl
	I forgot my Username I forgot my Password	10 Deployed Ap	DDS A single, embeddable interface that makes SaaS application data appear just like a relational database. Real- time access, less coding, and no API management	O Shared FoldersSharing with 0 Others
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	Help Privacy Terms of Use Trademarks progress.com Copyright © 1993-2014. Progress Software Corporation. All Rights Reserved.	liavascriptvoid(0)		

Lab 1: Select Install Application & Install from App Library





Lab 1: Install CRM; Select More Details for CRM, then Install Now

/www.rollbase.com/master/portal/portal.jsp?p=20&c=1&view=	https://www.rollbase.com/master/portal/portal.jsp?c=1&p=20&g=76529&id=328	001
	Rollbase Application Directory	
	Welcome Noel, you are logged in as Noel Shannon, Administrator at Progress Software	
More Details		
	Search	
CRM	Application Directory > Sales & Marketing > CRM	
Categories: Sales & Marketing, Service & Support	Other Categories: Service & Support	
Tags: customer management, relationship management, database, customer		
04/26/2014 01:49 PM by Rollbase Labs		
The CRM application includes all the core functionality required of a basic customer relationship		
management system by providing a central place for all of your sales, marketing, and support	The CRM application includes all the core functionality required of a basic Average Rating	1 out of
representatives to access and manage customer Accounts, Contacts, Leads and Opportunities.	customer relationship management system by providing a central place for all of your sales, marketing, and support representatives to access and	<u> </u>
Also included in the CDM application is a Loade portal which you can embed into your website to	manage customer Accounts Contacts Leads and Opportunities	CRM
accept lead submissions from visitors to your website. Configure as many different leads portals	Last Updated	04/26/2
and pages as you want to manage all of your marketing campaigns. Lead records can easily be	Also included in the CRM application is a Leads portal which you can embed	01.49 P
converted into Account records as needed by using standard conversion mapping functionality.	into your website to accept lead submissions from visitors to your website.	30
	Configure as many different leads portals and pages as you want to manage	
As with any other Progress Rollbase application, CRM can be fully customized and extended to	Account records as needed by using standard conversion manning	
meet the needs of your organization.	functionality.	
	As with any other Deserves Dellares and institution, ODM and he follow	
More Details	As with any other progress Rolidase application, CRM can be fully customized and extended to meet the needs of your organization	
	editionized and excited to need the needs of your organization.	
Document Library		
Categories: Office Productivity, Human Resources, IT Management	Tags: customer management, relationship management, database,	
Tags: documents, library	customer	
04/26/2014 01:50 PM by Rollbase Labs		
The Document Library application is a simple yet powerful application that allows users to store	Test Drive Install Now	
documents. Additionally, documents can be accessed publicly via a built in web portal.	This applicati	on versi
	already instal	led in yo
Documents available on the portal are controlled by two parameters. They must be in the Active	- account	

Lab 1: Testing will require data, so, remember to enter some Leads



Lab 1: Select New Application and Create Mobile App



Lab 1: Choose the Template, Phone App

 ★ Progress Rollbase ★ → C	• • • • • • • • • • • • • • • • • • •	ıp/pacificMobileCreate.jsp	Ser.	
	Pacific			Hello Noel 🗕 😡
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New Application	[«] New Mobile App		Save Sa	ve & Design Cancel
Install Applications	Mobile App Name Description	SampleMobileApp This is a Mobile App for sales representatives		
 RECENT ITEMS Main Page [Leads for CRM] (Page) Leads for CRM (Portal) 	Template	Phone App Tablet App Other Select One	11	
	Create Option	 From Scratch Based on Existing Web App Select One 	7	
Help Me Support Tickets Su	pport Privacy Terms of Use	Service Agreement	Copyright (c) 1993-2014 Progress Softw	rare Corporation. All rights reserved.



Lab 1: Choose Base on Existing Web app: CRM Rollbase Application

* LL Progress Bollbase		
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		- Search All Objects
Ne Setup		Search All Objects
New Application [®] New Mobile App		Save Save & Design Cancel
Mobile App Name	SampleMobileApp	
Install Applications Description	This is a Mobile App for Sales Representatives	
RECENT ITEMS		1
Main Page [Leads for Template	Phone App	
Leads for CRM (Portal)	Tablet App	
Your Information (Page)	Other Select One •	
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	All Opportunities All Opportunities (By Priority)	
	All Opportunities (By Status) Closing Next 30 Days	
	Closing Next 60 Days	
Help Me Support Tickets Support Privacy Terms of Use	Service Agreement Copyright (c) 19	93-2014 Progress Software Corporation. All rights reserved.

Lab 1: Choose the Views from the Application



Lab 1: Installing CRM and Creating a Mobile App project

15:00 minutes





Behind the Scenes - Created Session Services and JSDO Services

Session Service for Rollbase Server

- Session Object
- Login Service
- Logout Service
- Session Settings

JSDO Services for each Object

- JSDO Object
- Create Service
- Read Service
- Update Service
- Delete Service
- Row Service
- [optional] Invoke Operation Service...



Part 2: Design Pages and Navigation

PROGRESS EXCHANGE

In this lab, you will design two pages, navigate between the pages and test the App

- Lab 2.1— Adding a List
- Lab 2.2— Creating and designing the Leads_All_LeadsPage
- Lab 2.3— Enabling navigation
- Lab 2.4— Testing the Mobile App

The lab steps take approximately 30 minutes to complete.

Lets do a quick walkthrough...

Lab 2: And then you get to play at UX design!



Lab 2: Getting started with Mobile App Builder - Sidebar

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ROGRESS Pacific	Hello Test -
Commission Application	
SampleApplication	
NR 📢	
Create New	
Project Source	
Welcome	
App settings	
Pages	
AppDetailPage	
MyPhoneApp	
ropups Templates	
Themes	
CSS	
Services	
JavaScript	
Custom components	
Images	

Lab 2: Getting started with Mobile App Builder – Top Menu

+ https://mobile.rollbas	e.com/app/project/56848c2f-f518-4	411d-97bb-43b3a1f4e7e5/editor?bu=https%3A' 🔎 – 🗎 🖒 🏾 🗰 Progress Rollbase Mobile A 🗙	± 10 €
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AppDetailPage			
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Custom components			
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Lab 2: Getting started with Mobile App Builder – Ready to Begin



Lab 2: App settings

General	Project Name	SampleApplication		
External resources				
Android binary	Project Description			
Android permissions	Start Page	MyPhoneApp	V	
Android Cordova plugins	Theme	ios7	~	
OS binary	Swatch	В	~	
OS keys	Default Page Size	Phone (320x480)	V	
OS Cordova plugins				
ush notifications	Custom Size	W 320 H 480		
	Render all pages in one HTM	L file (jQuery Mobile multi-page template)		

Lab 2: Pages

- Basic building blocks of a Mobile app
- Associated properties for look and feel
- Two Pages created by default
 - MyPhoneApp (Login)
 - AppDetailPage (Landing Page after Login)

Lab 2: Mobile App Builder – Page Design – Page Layout

MyPhoneApp Welcome	2
Welcome	
Welcome	
Welcome	
Password	
Enter your login credentials	
∠ Login	

Lab 2: Mobile App Builder – Page Design – Page Properties, Detail Entry

Welcome Welcome Comme Comme Comme Comme Comm	s el e Change r e
Welcome Screen Type Show Heads Show Foote User Password	e Change
Screen Type Show Head Show Foote User Password	r Change
Show Head Show Foota User Password	r 🛛
With the second seco	
User Swatch Password Name	
Password Nam	n Innerit 🔹
	e MyPhoneApp
Enter your login credentials Custom Siz	e 📄
Dimension (nivel	s 320 480
Login Predefine Screen Siz	d e Phone (320x480)
	More Properties
× Actions	
Sa	ve As Screen Template

Lab 2: Mobile App Builder – Page Design – Page Layout - Components

COMPONENTS MyPhoneApp		► Screen: Details
▲ Default components		Properties
Button	Welcome	Zoom Level 100%
input T		Screen Type Change
Input Textarea		Show Header 🕑
Label	*PRUGRESS	Show Footer
	User	Swatch Inherit 🔻
Link Radio	Password	Name MyPhoneApp
Checkbox Slider	Enter your login credentials	Custom Size 📄
		Dimensions and the
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Navbar Search	· · · · · · · · · · · · · · · · · · ·	Actions
		Save As Screen Template
CollapsibleSet Collapsible		
Spacer Video		
. . ©		
Audio Map		

Lab 2: Mobile App Builder – Page Design – Page Layout – Component Events

СОМРО	ients 🔫	MyPhoneApp				► Screen: Det	tails	
▲ Defau	It components					Properties		
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Link	Radio		Password			Name	MyPhoneApp	
Checkbox	Slider		Enter	your login credentials		Custom Size		
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List	Image					Predefined Screen Size	Phone (320x480)	•]
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	<u>م</u>							
Navbar	Search		COMP		·	▲ Actions		
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ponent	Event	Order	Action	Details				
								-

Lab 2: Testing a Mobile App – Web Browser or Device (QR Code)

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				PR	0(GRESS		
				Enter	r vour	login credentials		

Refresh Remov	<i>r</i> e frame 240 x 320 320 x 480
	Welcome
*P	ROGRESS
User	mylogin
Password	
	Enter your login credentials

Lab 2: Design Pages and Navigation

30:00 minutes





Part 3: Read Leads, Add Leads and Invoke operations



Lab 3 – Part 1: Read Leads, Add Leads and Invoke operations

In this lab, you will design two pages, fill the data on page one, navigate between the pages and test the App

- Lab 3.1— Initializing the Leads Data source
- Lab 3.2— Configuring the All Leads operation
- Lab 3.3— Testing the functionality
- Lab 3.4— Creating and designing the New Lead page
- Lab 3.5— Adding and configuring operations to populate Rating Picklist
- Lab 3.6— Adding and configuring the Create Lead operation
- Lab 3.7— Adding events to populate the ratings PickList
- Lab 3.8— Adding the Add button and an event
- Lab 3.9— Testing the functionality of the New Lead Page

The lab steps take approximately 60 minutes to complete.

Lets do a quick walkthrough...

Lab 3: Datasources

- Service is the way to Request and Receive data
- Types
 - REST API Services
 - Device Services
 - Progress-specific
 - JSDO Services (Rollbase)
 - Session Services
- Select Object Views in Rollbase
 - JSDO Services generated automatically
 - Invoke operations

 (based on Views, Relationships, and Picklists)

	Services
-	RB_partner_Service.partner
	RB_partner_Service_partner_getPicklist_country
	RB_partner_Service_partner_getPicklist_state
	RB_partner_Service_partner_getView_All_Partners
	RB_partner_Service_partner_JSDO
	RB_partner_Service_partner_partner_Create
	RB_partner_Service_partner_partner_Delete
	RB_partner_Service_partner_partner_Row
	RB_partner_Service_partner_partner_Update
	*** RB_partner_Service_partner_Read
	RB_partner_Service_partner_Settings

Lab 3: Mobile App Builder – Data Source

COMPONENTS		Screen: Details
Default components		Properties
Button	Welcome	Zoom Level 100%
Button Group Buttons		Screen Type Change
Input Textarea		Show Header 🕑
tabel	* PRUGRESS	Show Footer
	User	Swatch Inherit 🔻
ink Radio	Password	Name MyPhoneApp
and Slider	Enter your login credentials	Custom Size
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Lab 3: Data Source – Add a New one



Lab 3: Data Source – Added

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AllPartners	Service	RB_partner_service_partner_getview_All_Partners	Content of the second s
ar and 2000			

Lab 3: Data Source – Adding Data Source Events

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Data Source	Туре		Service			
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AllPartners	Service		RB_partner_Service_	partner_getView_All_Partners	Edit Mapping	
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Show events for: Data Source PartnerJSDO	PartnerJSDO Event Success	▼ Order 1. ↓	DATA SOUR Action Run JavaScript	RCE EVENTS V Details Handler:	▼ Add Events	

Lab 3: Creating, Reading, Updating, Deleting and Invoking

- Add the operation to the page
- Map request parameters
- Map response parameters
- Add an event to invoke the operation

Lab 3: Data Source – Edit Mapping

come 🙁 🗈 Edit	Page: MyPhoneApp 🛞	Edit Page : Appl	DetailPage 🖸		
Add data source	Service	▼ RB	_partner_Service_partne	er_JSDO 🔻 😋 Add	
Data Source	Туре		Service		
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AllPartners	Service		RB_partner_Service_	partner_getView_All_Partners	Edit Mapping C Delete
PartnerJSDO	Service		RB_partner_Service_	partner_JSDO	
					*
			DATA SOUL	RCE EVENTS 💙	
Show events for:	PartnerJSDO	¥			Add Events
Show events for: Data Source	PartnerJSDO Event	▼ Order	Action	Details	Add Events
Show events for: Data Source PartnerJSDO	PartnerJSDO Event Success	▼ Order 1. ↓	Action Run JavaScript	Details Handler:	Add Events

Lab 3: Edit Mapping - Request

"RB_partner_Servi	ce_partner_getView	_All_Partner	s" service	Create variable
Request Res	ponse		+-	Enter variable name
	Mahaa			Components
Name	value	Ja	vascript	AppDetailPage
startRow	0		Edit JS	▼ detailLayout
rowsPerPage	10		Edit JS	Visible
				mobilelist_6
				▼ detailErrorMsg
				Text
				Visible
				► logoutButton
				Local storage variables
				locMessageText

Lab 3: Edit Mapping – Response



Lab 3 Part 1: Read Leads, Add Leads and Invoke operations

Labs: 3.1 to 3.9

60:00 minutes



In this lab, you will design the second of two pages and test the App

- Lab 3.10— Creating and designing Lead Details Page
- Lab 3.11— Adding an event to set a local storage variable and to enable navigation
- Lab 3.12— Adding and configuring Read Data source
- Lab 3.13— Adding events for invocation and for enabling navigation
- Lab 3.14— Testing the functionality of the Lead Details page

The lab steps take approximately 30 minutes to complete.

Lab 3 Part 2: Read Leads, Add Leads and Invoke operations

Lab 3.10 to Lab 3.14

30:00 minutes





Part 4: Using the Geolocation Service

PROGRESS EXCHANGE

In this lab, you will create a mobile client UI that accesses the Geolocation Service.

Lab 4.1—Using the Geolocation Service

Lab 4.2—Adding an event to display an user entered location on the map

Lab 4.3—Enabling navigation from CRM Mobile Page to the Map Page

Lab 4.4—Testing the "Show on map" button

Lab 4.5—Adding and configuring the Geolocation Service and then adding an event to refresh the map

Lab 4.6—Adding an event that invokes the Geolocation service

Lab 4.7—Testing the Geolocation Service

The lab steps take approximately 30 minutes to complete.

Lets do a quick walkthrough

Lab 4: Native Device API Services and REST API Services

- Native Device API Services:
 - Barcode
 - Camera
 - Contacts
 - Geolocation
- REST API Services:
 - REST
 - Generic (custom JavaScript implementation)
 - Settings (REST settings)
 - Generic Security Context



Lab 4: Adding Required UI Components



Lab 4: Showing a User-entered Location on the Map

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l Pages		Button Battan		+ Back	Мар	~	Zoom Level	100%
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Leads_All_LeadsPage		input rextarea		Entor locator	179),		Show Header	
Leads_Lead_Details_Page		Label		SI	now on map		Show Footer	\checkmark
Leads_Types		Datepick Label						- 1000 - 1000
Leads_Update_Lead		02 🔘		Sho	w my location		Swatch	В
Map_Page		Link Radio			and the second s		✓ Name	Map Page
MyPhoneApp					COMPONENT DA			
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Themes		Component	Event	Order	Action	Details		
CSS		Component		o ruci				
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JavaScript						/ this - current element	nt —	
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Custom1		A 2 * if (locat	ion == '') {	input_location.)	.var();			
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Lab 4: Showing the Current Location with Geolocation: Creating a Geolocation Service

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Lab 4: Showing the Current Location with Geolocation: Adding a Datasource

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Leads_Add_New_Lead							
Leads_All_LeadsPage							
Leads_Lead_Details_Page							
Leads_Types							
Leads_Update_Lead							
Map_Page							
MyPhoneApp							
Popups							
Templates							
Themes							
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Services							
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Custom1							
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							\sim
		1월 전생 전 일상	DATA SOUR	CE EVENTS 🔨			

Lab 4: Showing the Current Location with Geolocation: Mapping Response Parameters

RUGRESS Pacific			Hello Test -
SampleMobileApp			
AR •	📢 🚺 🗖 Test 👻 Export 👻 Acti	ons · Active users 0 Notifications 0 Cancel Sa	ve Save & Close
Create New 🔻	Edit Project : App settings	Map_Page O	
Project Source	E Kack to data sources		
Welcome App settings	"GeolocationService" service parameters	Components	^
Pages	Request Response	Map_Page	
AppDetailPage	Name SS	Text	
Leads_Add_New_Lead	timestamp.	Visible	
Leads_All_LeadsPage	▶ coords	▼ show_on_map	
eads_Lead_Details_Page	latitude	Text	
ads_Types	longitude	Visible	
eads_Update_Lead	altitude	▼ show_my_location	
lap_Page	accuracy	Text	
lyPhoneApp	altitudeAccuracy	Visible	
pups	heading	▼ map	
plates	speed	Latitude "latitude" (response)	
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Lab 4: Showing the Current Location with Geolocation: Adding Event to Invoke the Geolocation Service

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Custom1	show_my_location	Click	1.	Invoke service	Datasource: geolocation1			60

Lab 4: Where are you?





Lab 4: Using the Geolocation Service

30:00 minutes



Next Steps

- Host Mobile Web App in Rollbase Cloud
- Host Mobile Web App in your cloud
- Export as a native app



Taking Your Work Home

- Accounts available for 30 days
- Best to create Backup of Rollbase App
 - Include CRM Web App and Mobile App

When	What
Tues 10.45am – 11.45	Modern Business Application Development
Tues 1.15pm – 2.15pm	Rollbase for OpenEdge Dudes
Tues 1.15pm – 2.15pm	Using OpenEdge, Corticon, Rollbase and Node.js to Create a Dynamic, Rule- and Model-Driven Web-UI
Tues 4:15pm - 5:15pm	Advanced Mobile App Capabilities Made Simple
Tues 2.30pm - 3.30pm	ASP software Takes Trucking Business Mobile to Improve Accident Reporting and Safety
Tues 4.00pm – 5.00pm	How to Build a Mobile App in One Hour or Less
Wed 11.00am - 12.00	How Mobility Benefits Your Workforce, Your Customers, Your Business
Wed 11.00am - 12.00	Mastering Progress Rollbase, Inside and Out
Wed 2.45pm – 3.45pm	Integrating Rollbase and OpenEdge – The Rest of the Story

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