Business Applications for a Mobile World

CRM Lead App

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6th October 2014

PROGRESS EXCHANGE 2014

Welcome to the Workshop

Your Hosts

Shelley Chase

Ricardo Perdigao

Richard Stone

Edsel Garcia

This Workshop

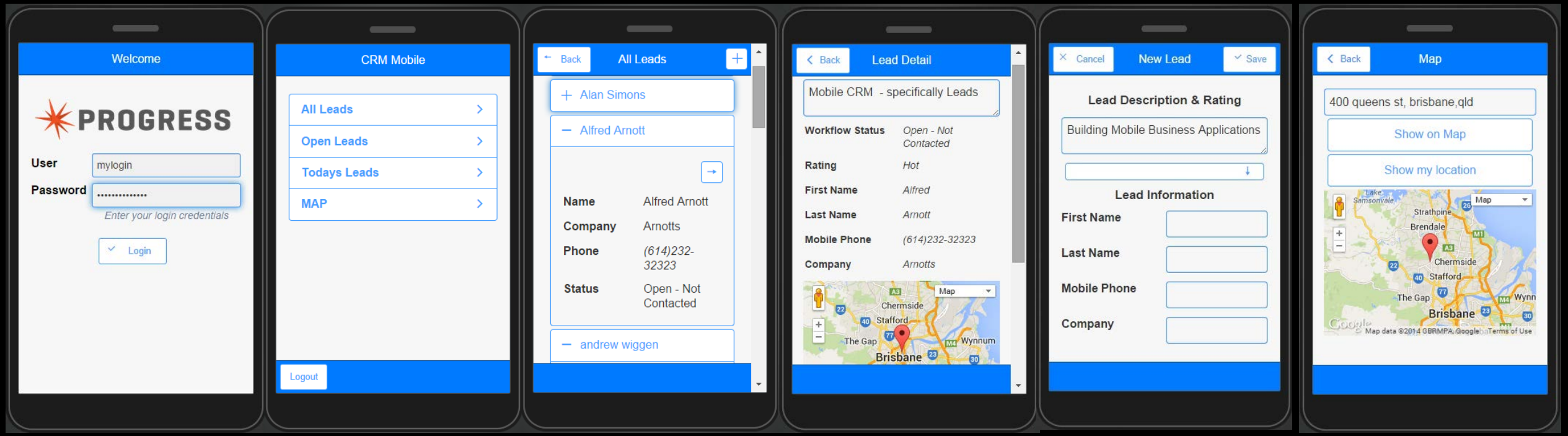
- You will build a CRM Lead Mobile Application based on the CRM Application
- The workshop is segmented in 3 parts

Today's Goals

- Enjoy working with Rollbase Mobile
- Understand how to rapidly and efficiently build a Business Mobile App.

Workshop Flow, Begin at 9 AM / Finish at 12PM

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*


Welcome
PROGRESS
User
mylogin
Password
Enter your login credentials
Login
CRM Mobile
All Leads
Open Leads
Todays Leads
MAP
Logout
Back
All Leads
Alan Simons
Alfred Arnott
Name
Alfred Arnott
Company
Arnotts
Phone
(614)232-32323
Status
Open - Not Contacted
andrew wiggen
Back
Lead Detail
Mobile CRM - specifically Leads
Workflow Status
Open - Not Contacted
Rating
Hot
First Name
Alfred
Last Name
Arnott
Mobile Phone
(614)232-32323
Company
Arnotts
Map
Chermside
Stafford
The Gap
Wynnum
Brisbane
Cancel
New Lead
Save
Lead Description & Rating
Building Mobile Business Applications
Lead Information
First Name
Last Name
Mobile Phone
Company
Back
Map
400 queens st, brisbane,qld
Show on Map
Show my location
Strathpine
Brendale
Chermside
Stafford
The Gap
Wynn
Brisbane
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Part 1: Introduction to Rollbase Mobile

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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

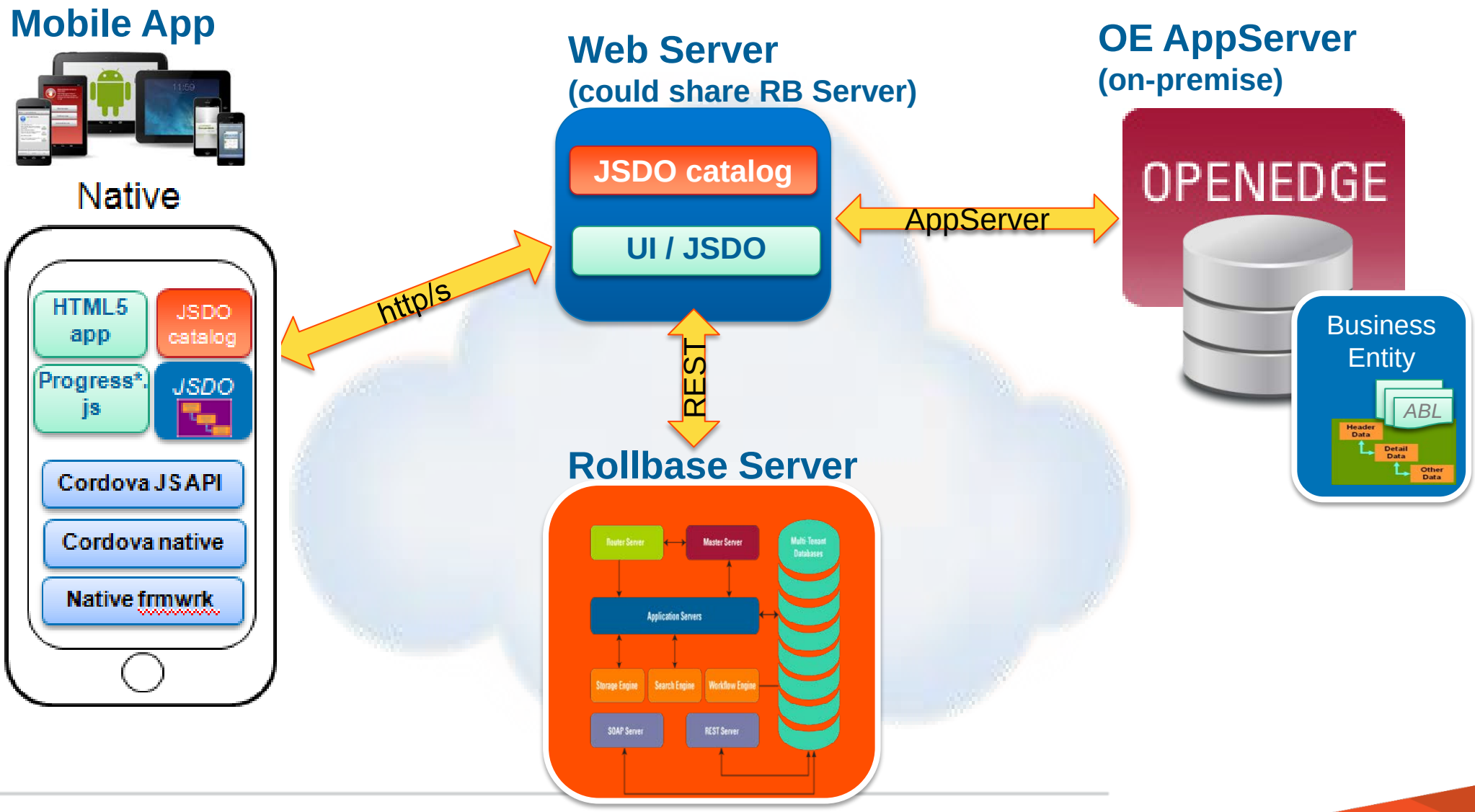
- BYOD – Windows 7 or 8 laptop
- Wireless Connectivity
- Progress Pacific Community ID
- Google Chrome Browser or Safari Browser
- (Optional) Get QR Reader App
- Download Rollbase Tester App
- Leave your mobile on, you may want to test your work!

- 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



Lab 1: Creating a Mobile App project

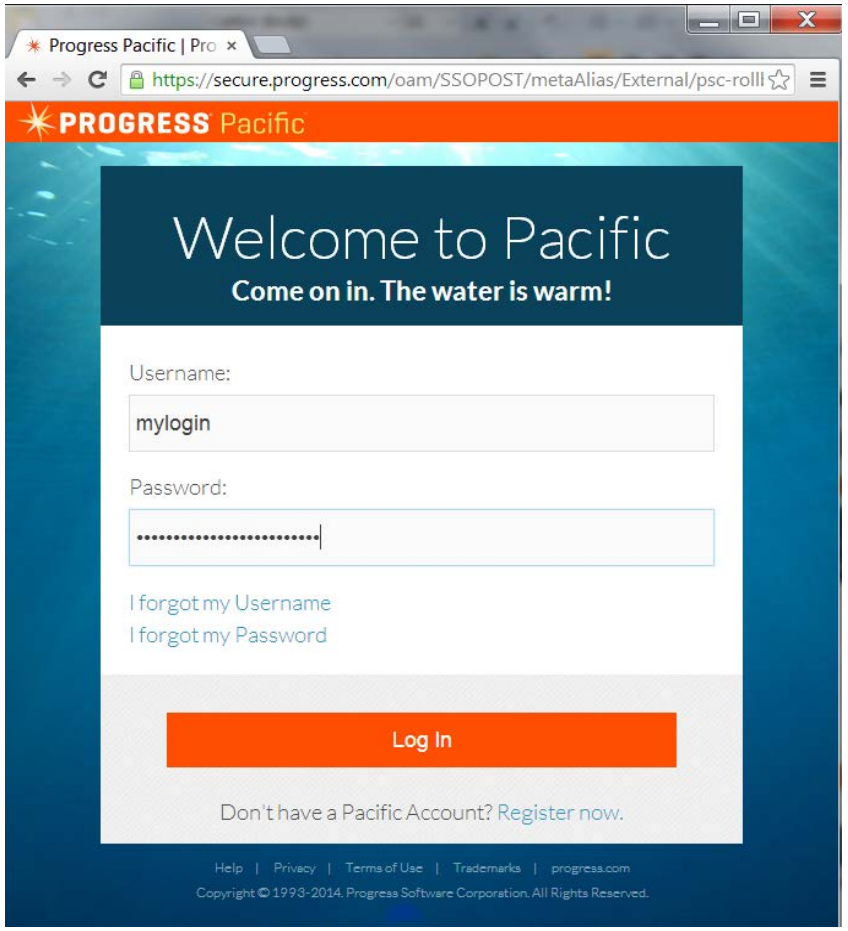
In this lab, you will install the CRM application and create a Mobile App project.

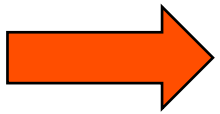
- Lab 1.1—Installing the CRM Rollbase application
- Lab 1.2—Creating a Mobile App project

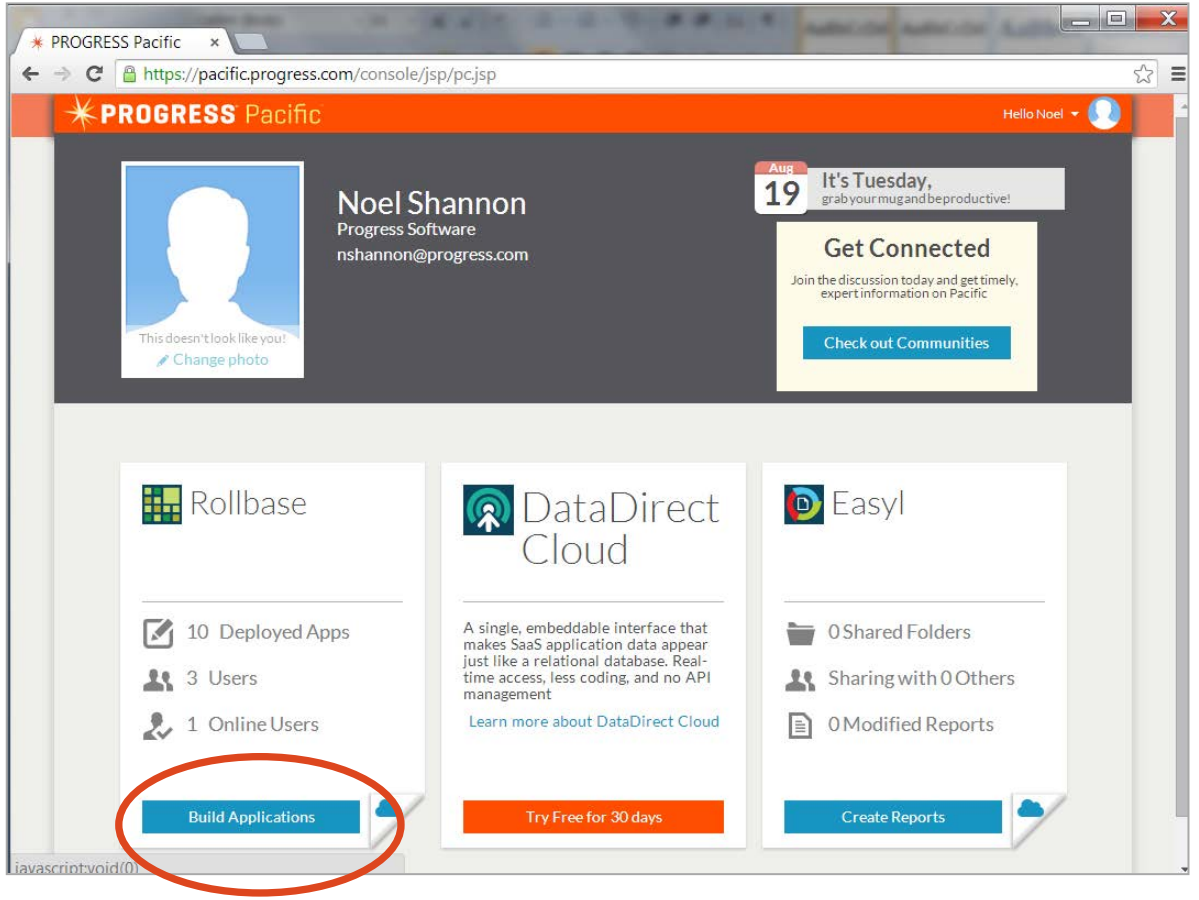
The lab steps take approximately 15 minutes to complete.

Lets do a quick walkthrough…

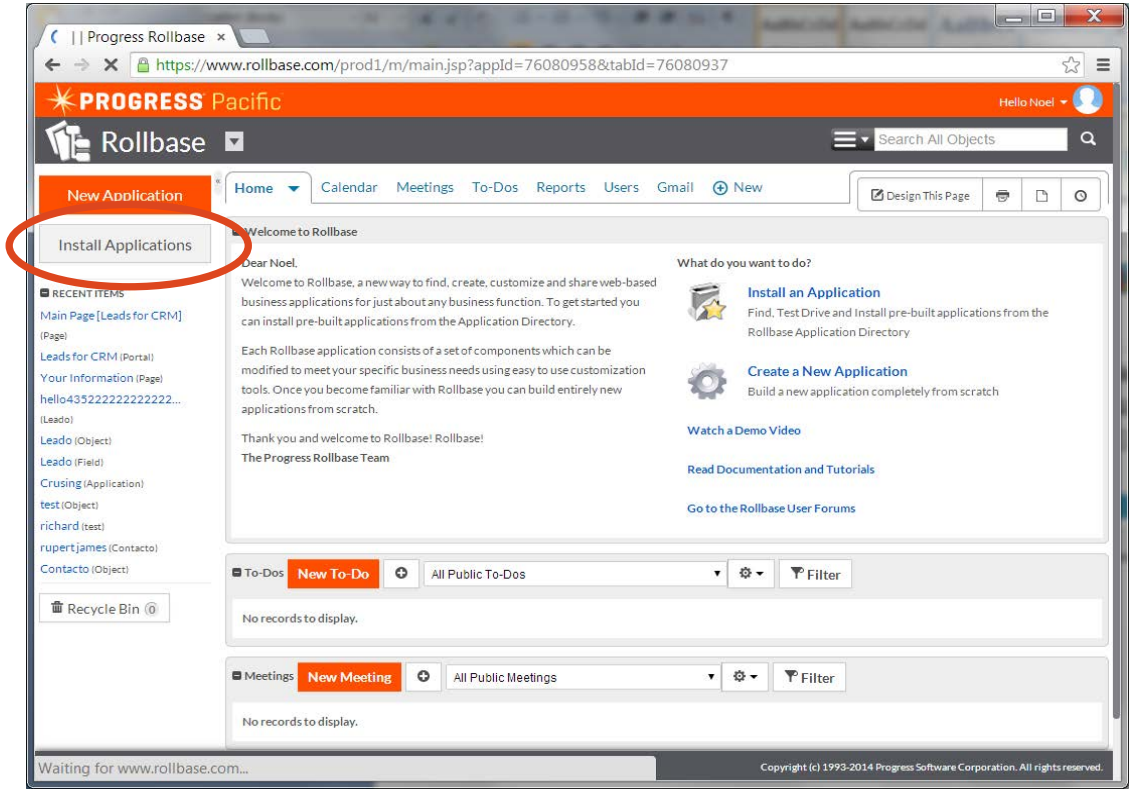
Lab 1: Login and Select Build Applications

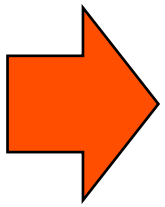


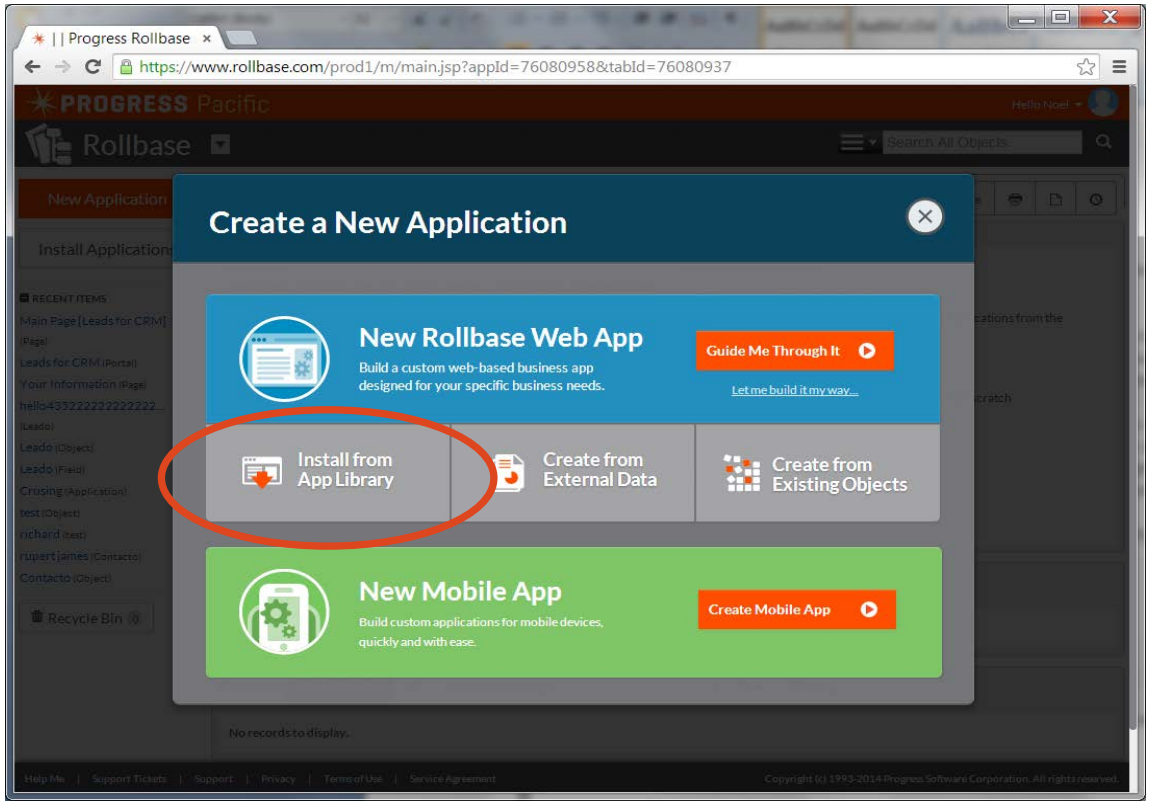




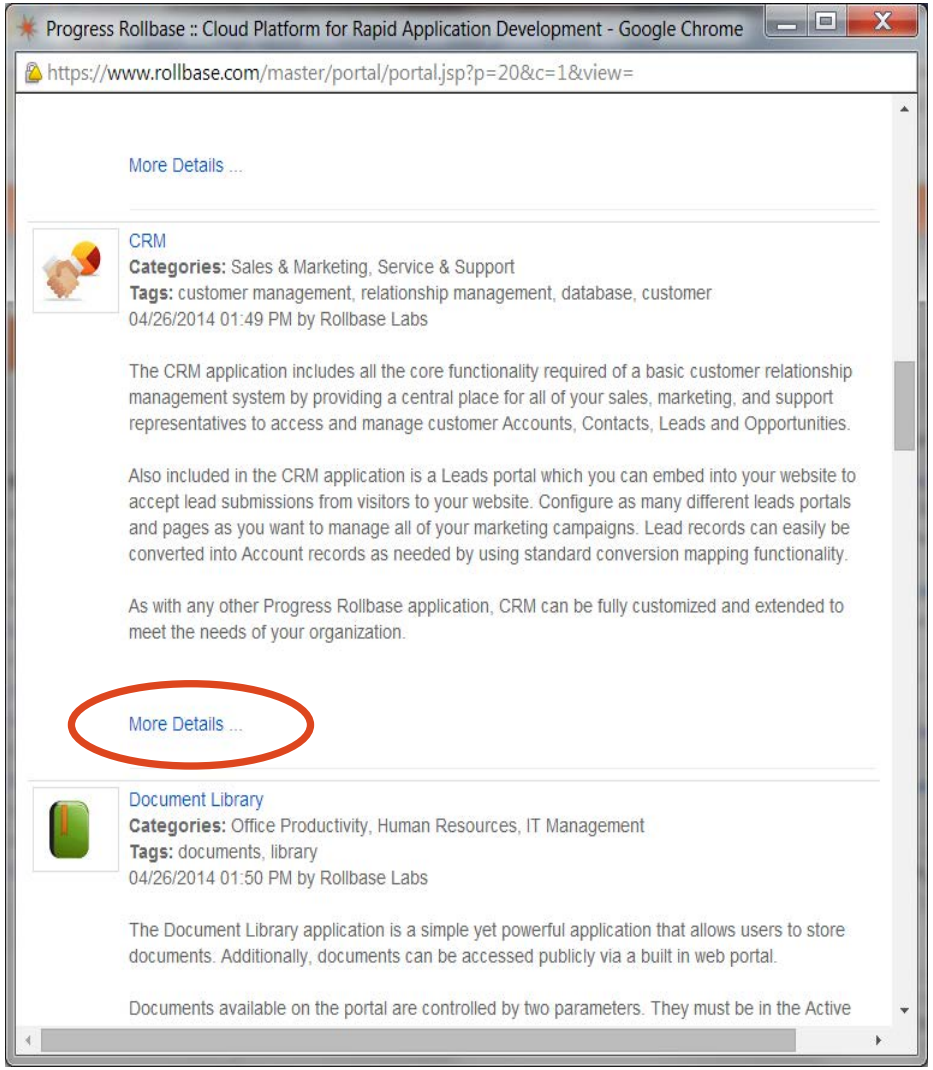
Lab 1: Select Install Application & Install from App Library

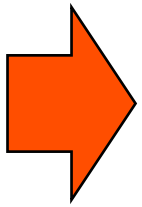


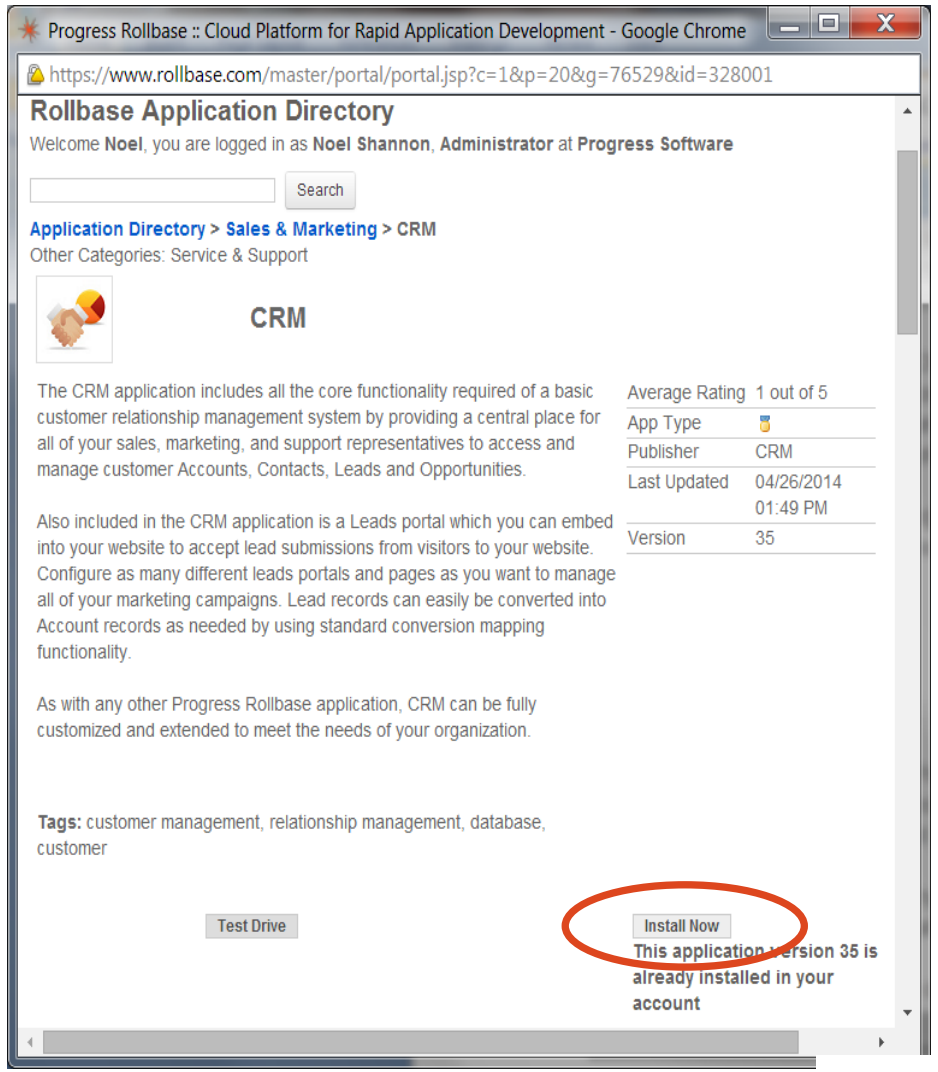




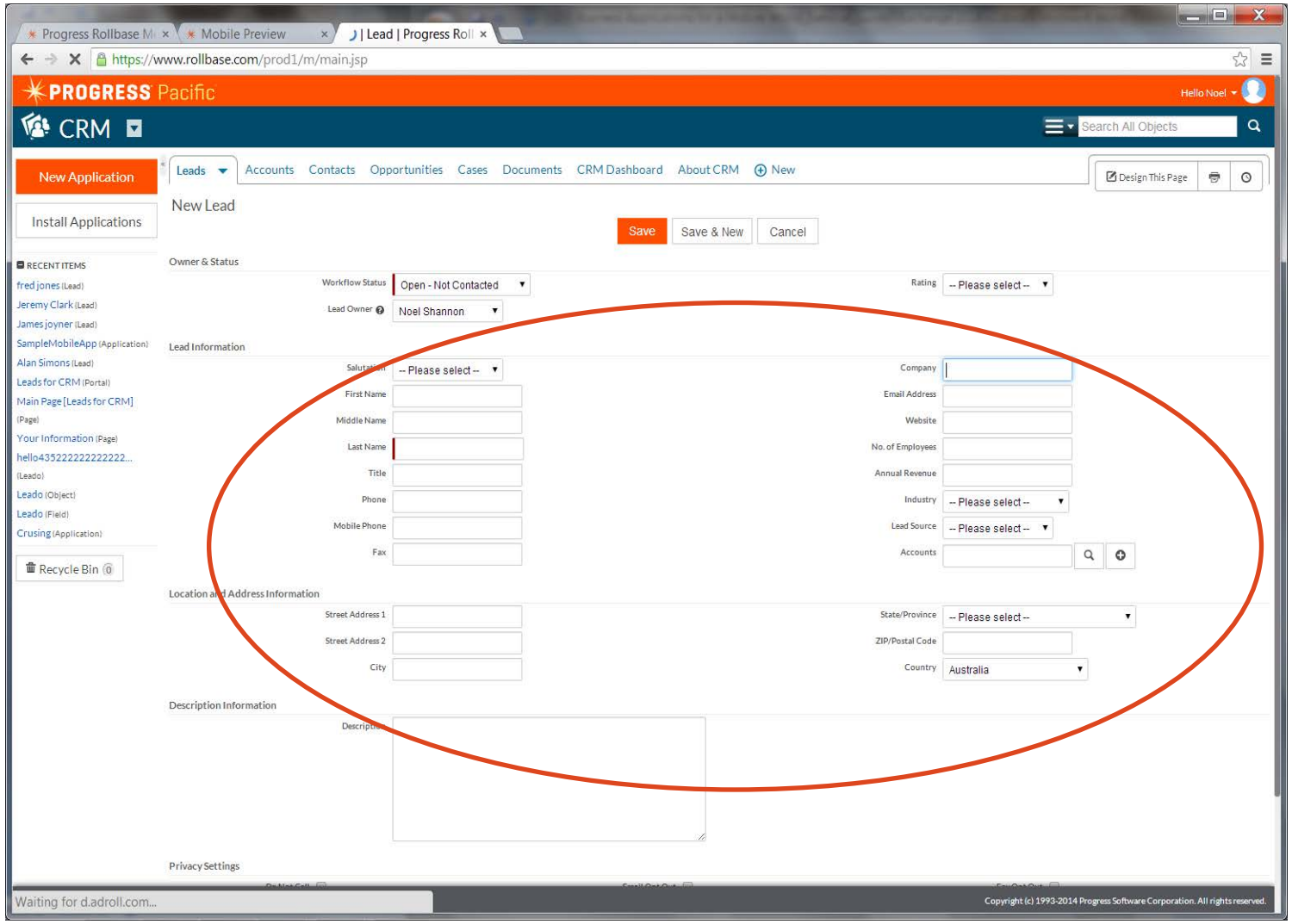
Lab 1: Install CRM; Select *More Details* for CRM, then Install Now



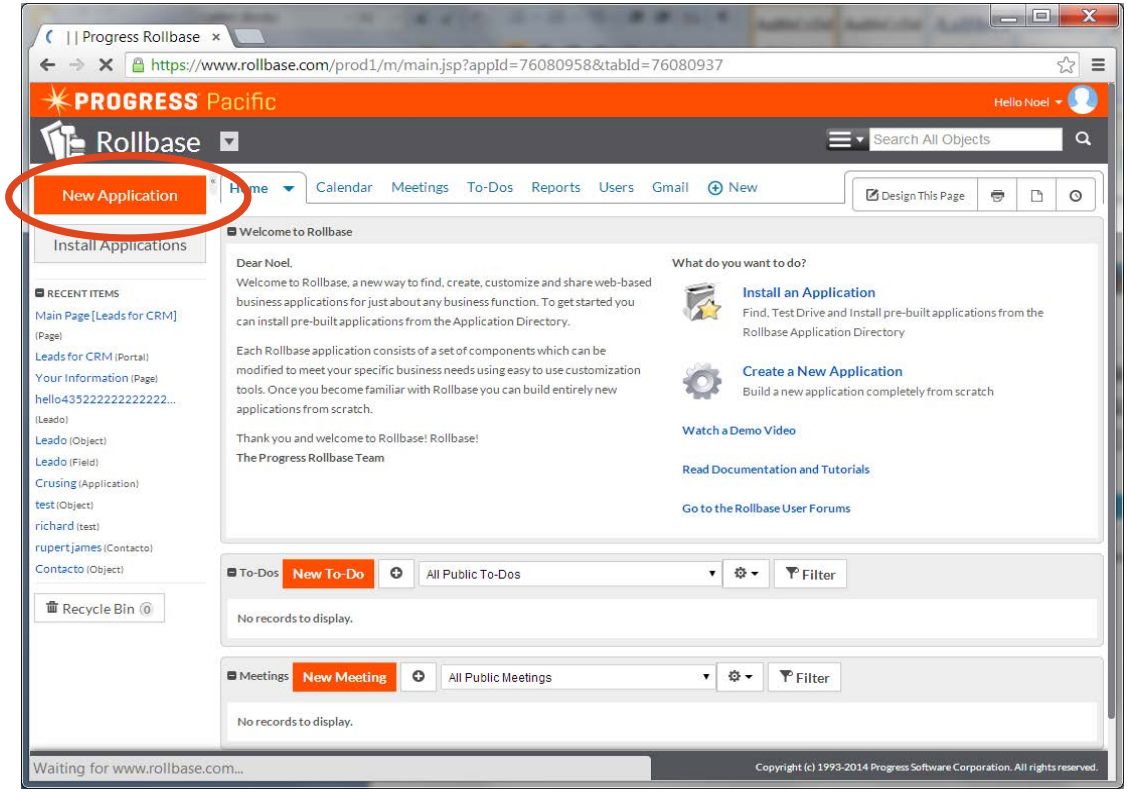


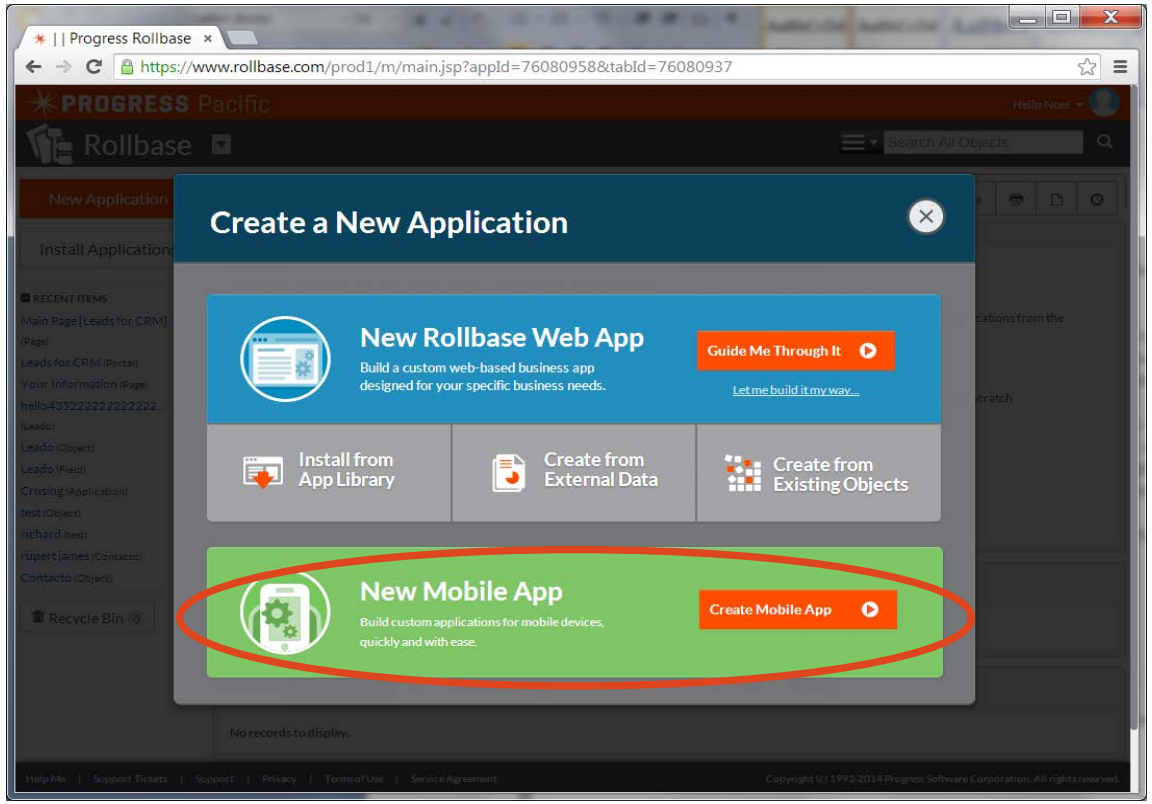


Lab 1: Testing will require data, so, remember to enter some Leads

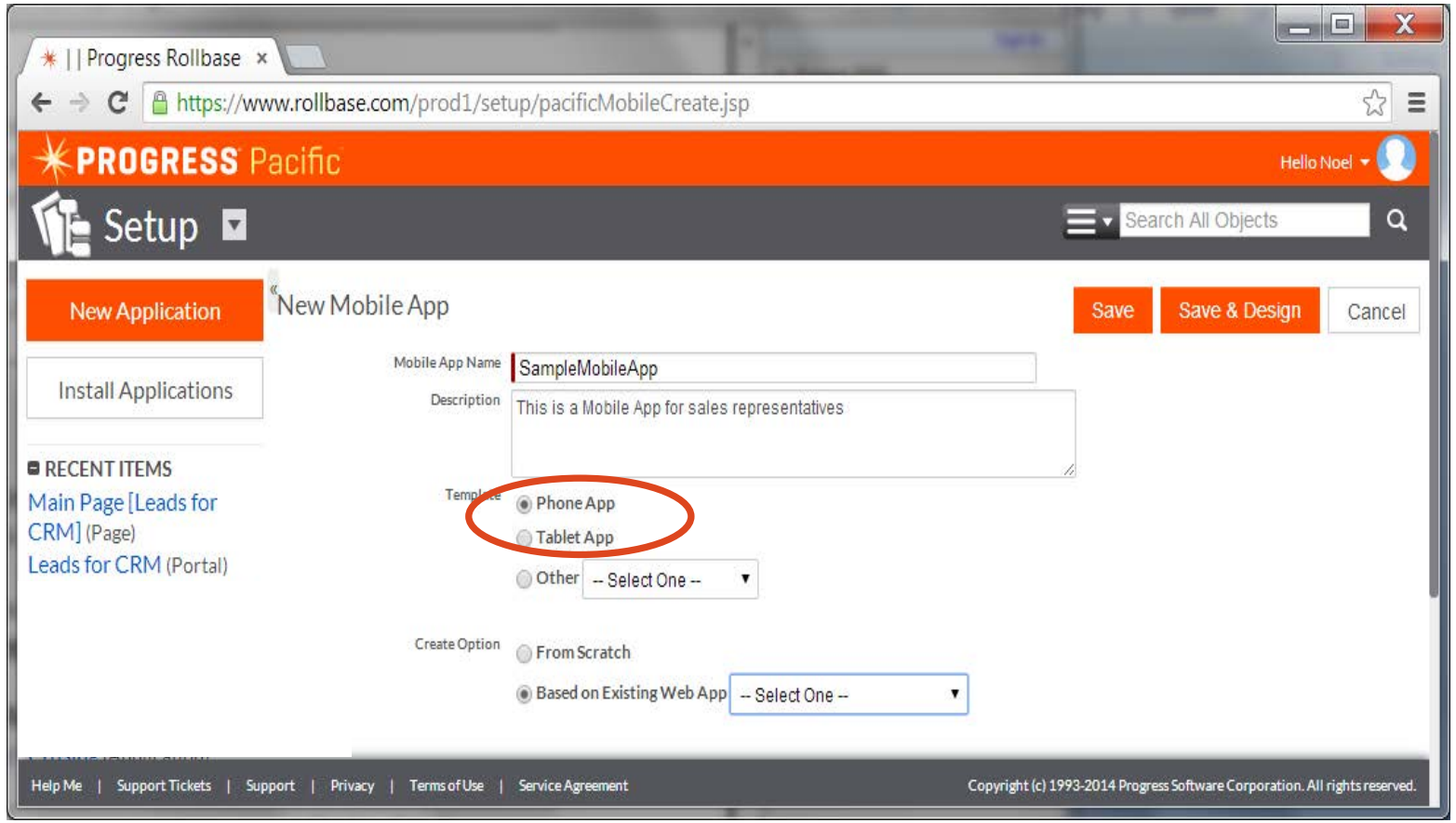


Lab 1: Select New Application and Create Mobile App

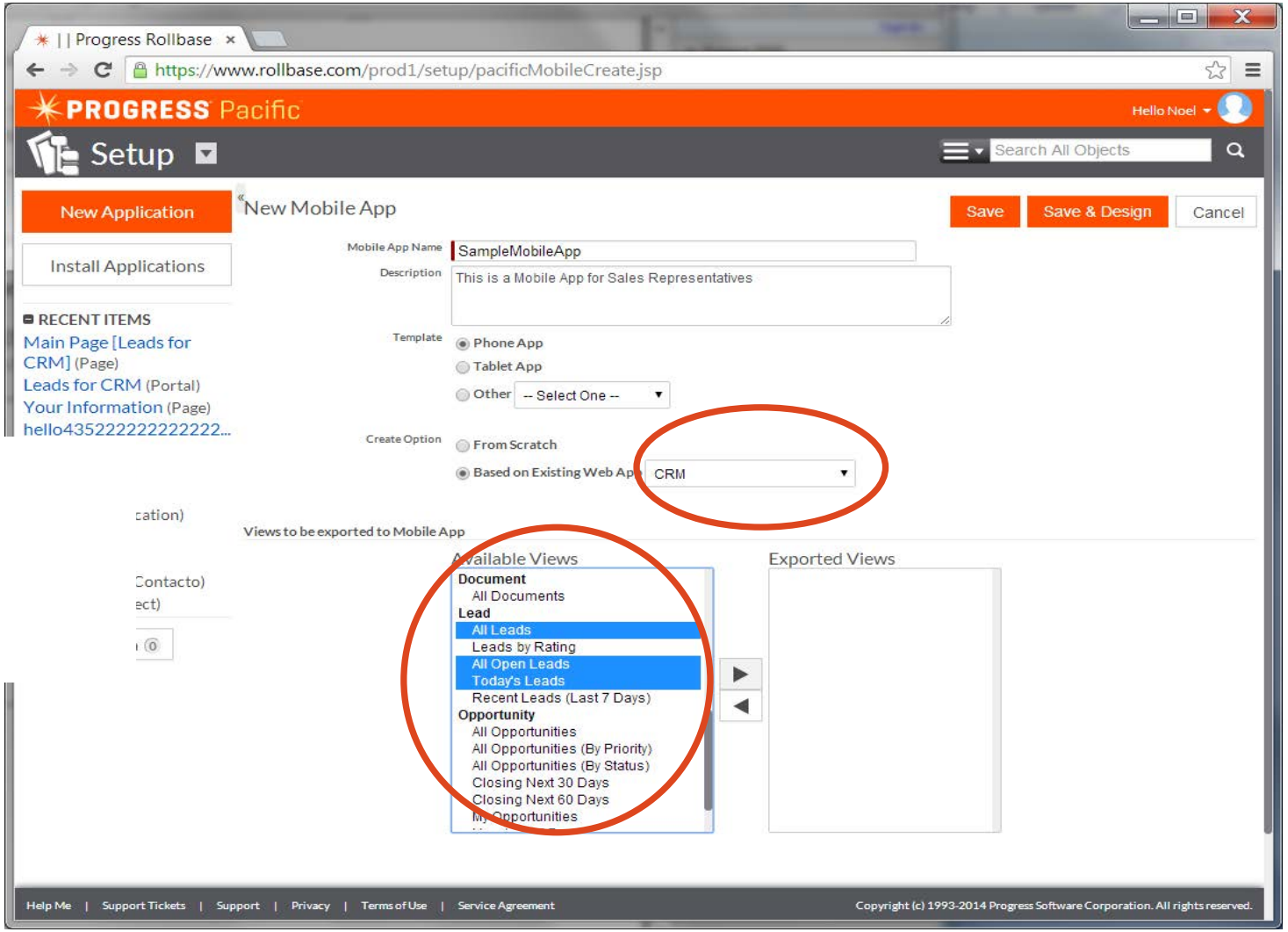




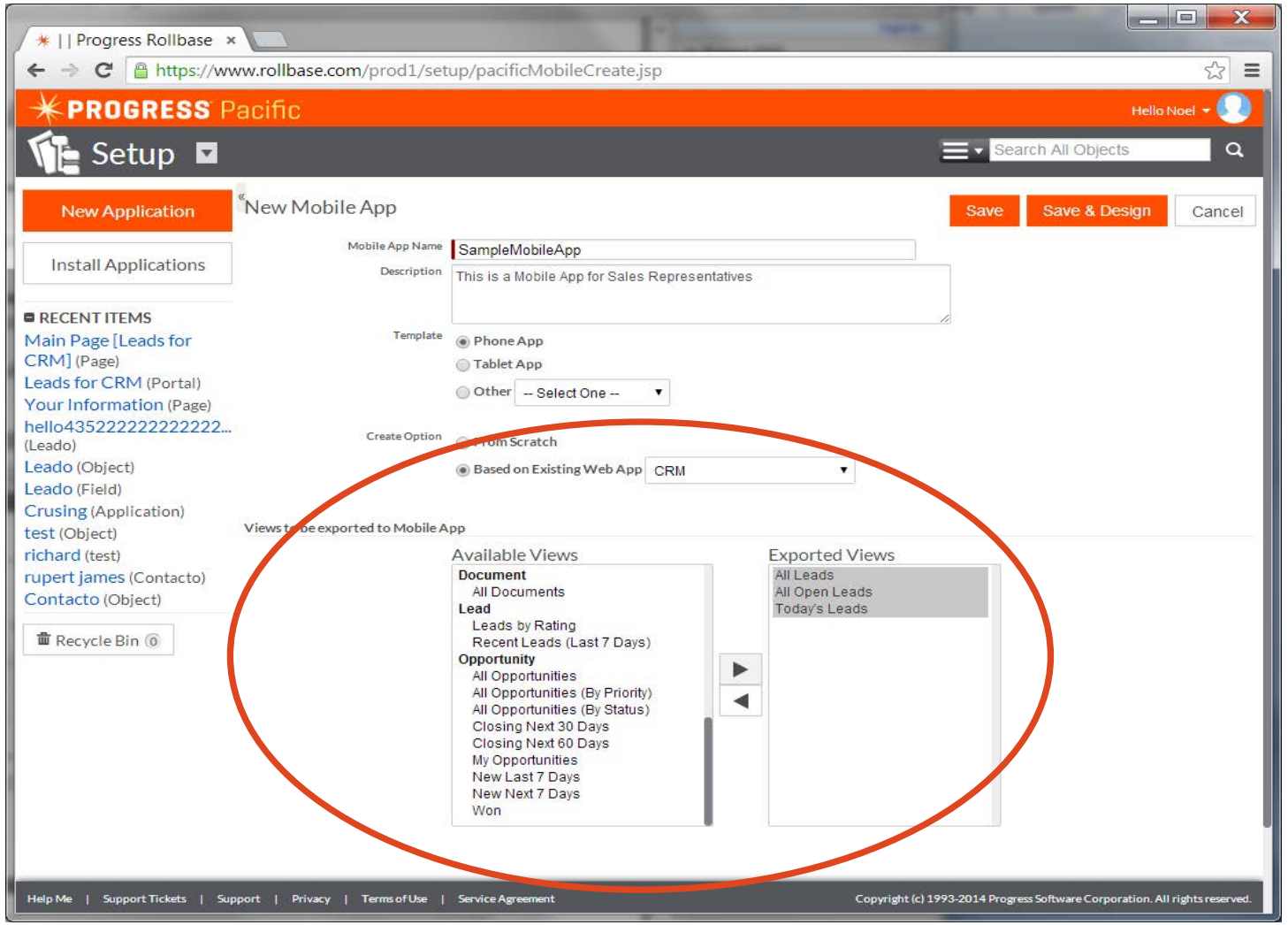
Lab 1: Choose the Template, Phone App



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



Lab 1: Choose the Views from the Application



Lab 1: Installing CRM and Creating a Mobile App project

15:00 minutes

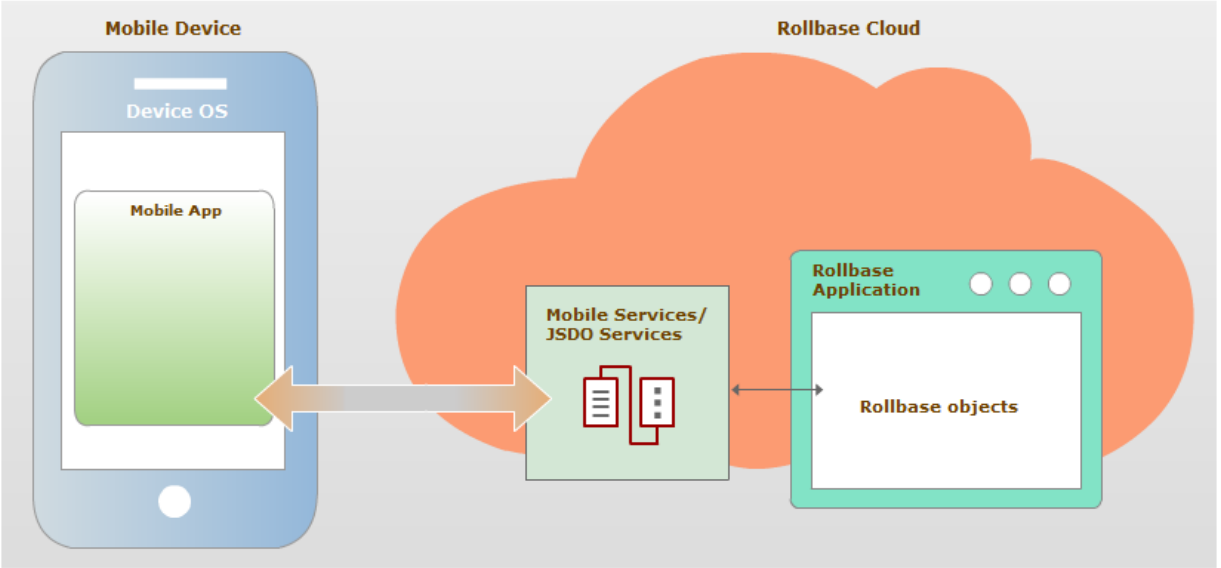
Behind the Scenes - Created Session Services and JSDO Services

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

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Lab 2: Design Pages and Navigation

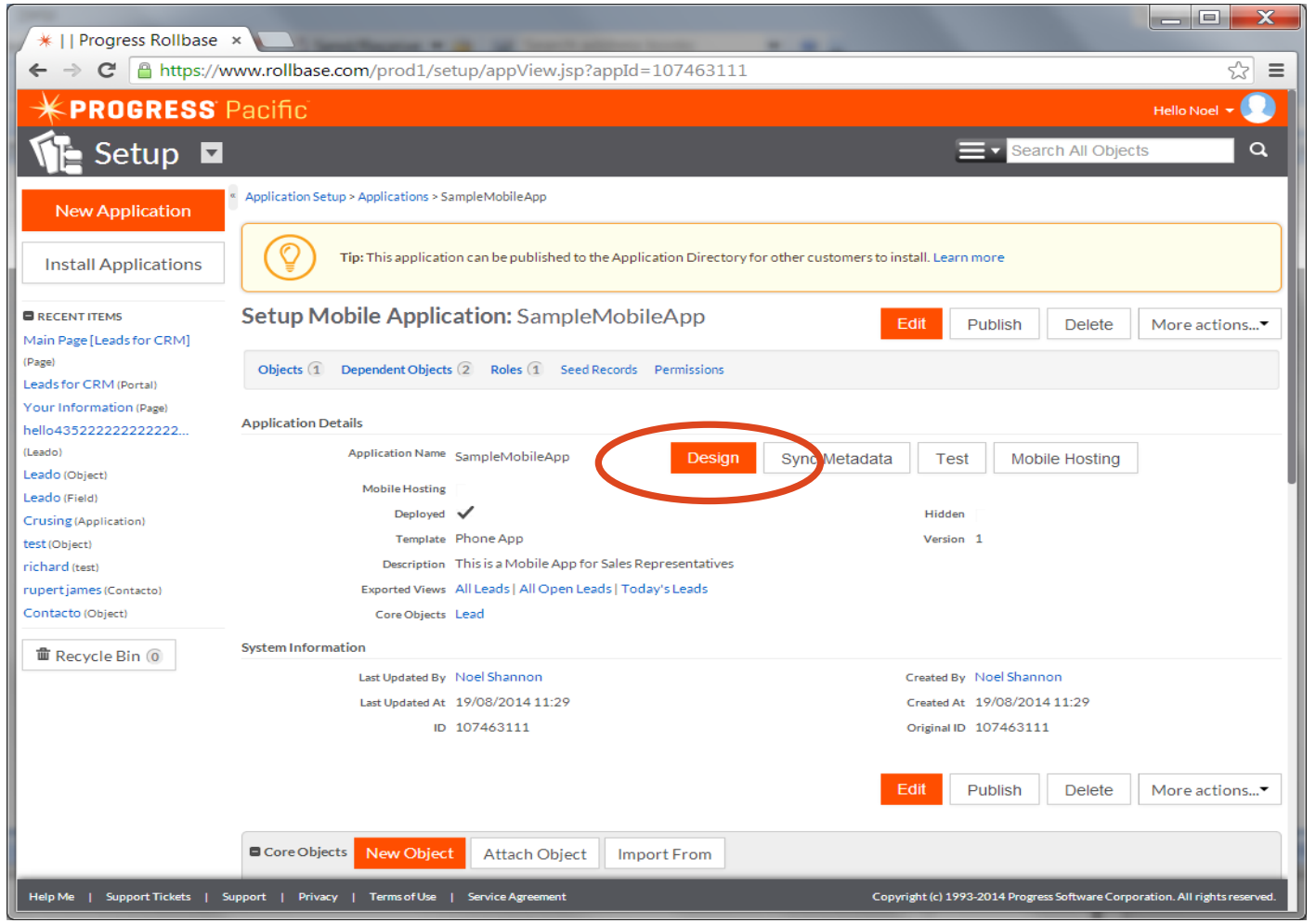
In this lab, you will design two pages , navigate between the pages and test the App

- 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

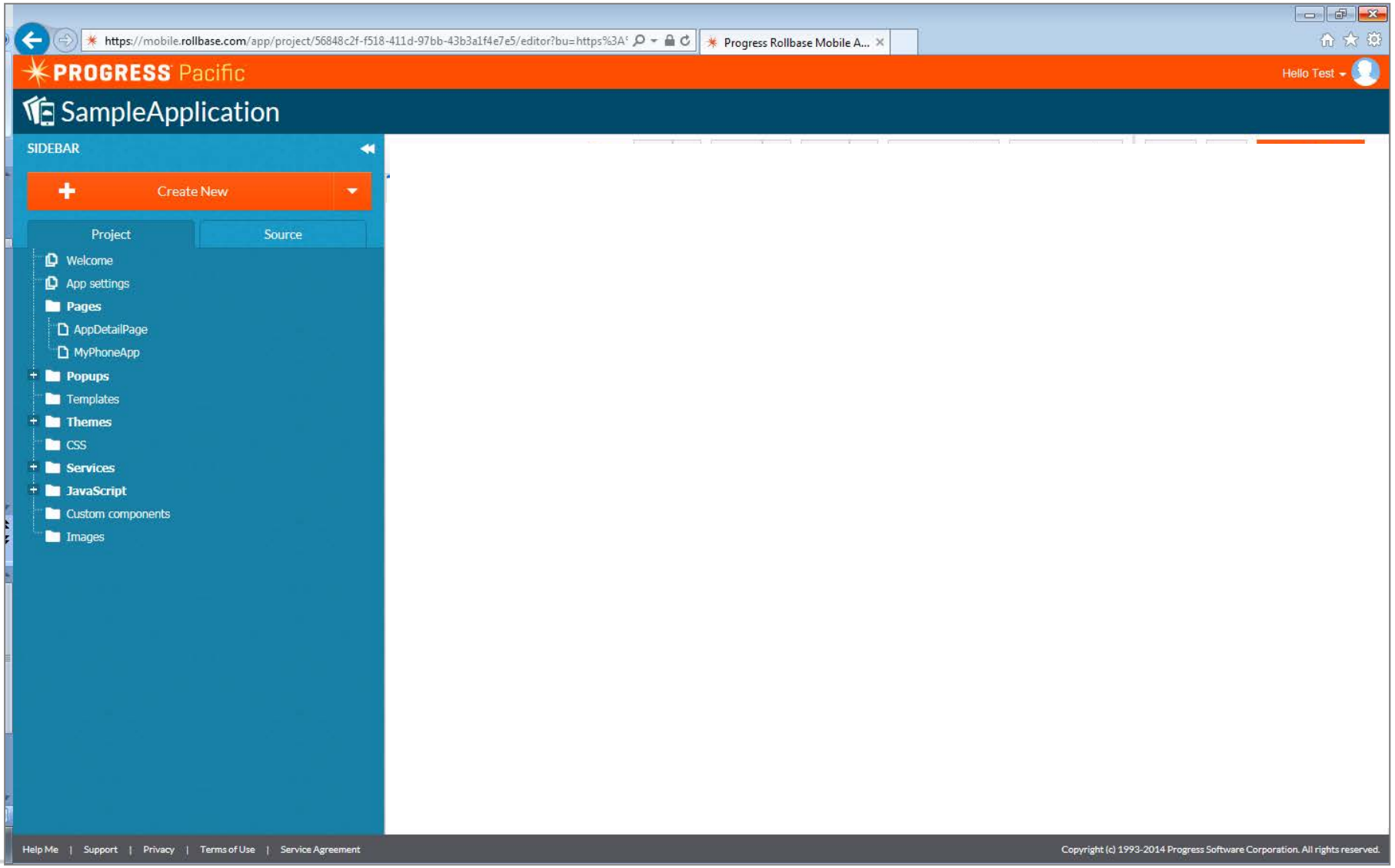
The lab steps take approximately 30 minutes to complete.

Lets do a quick walkthrough…

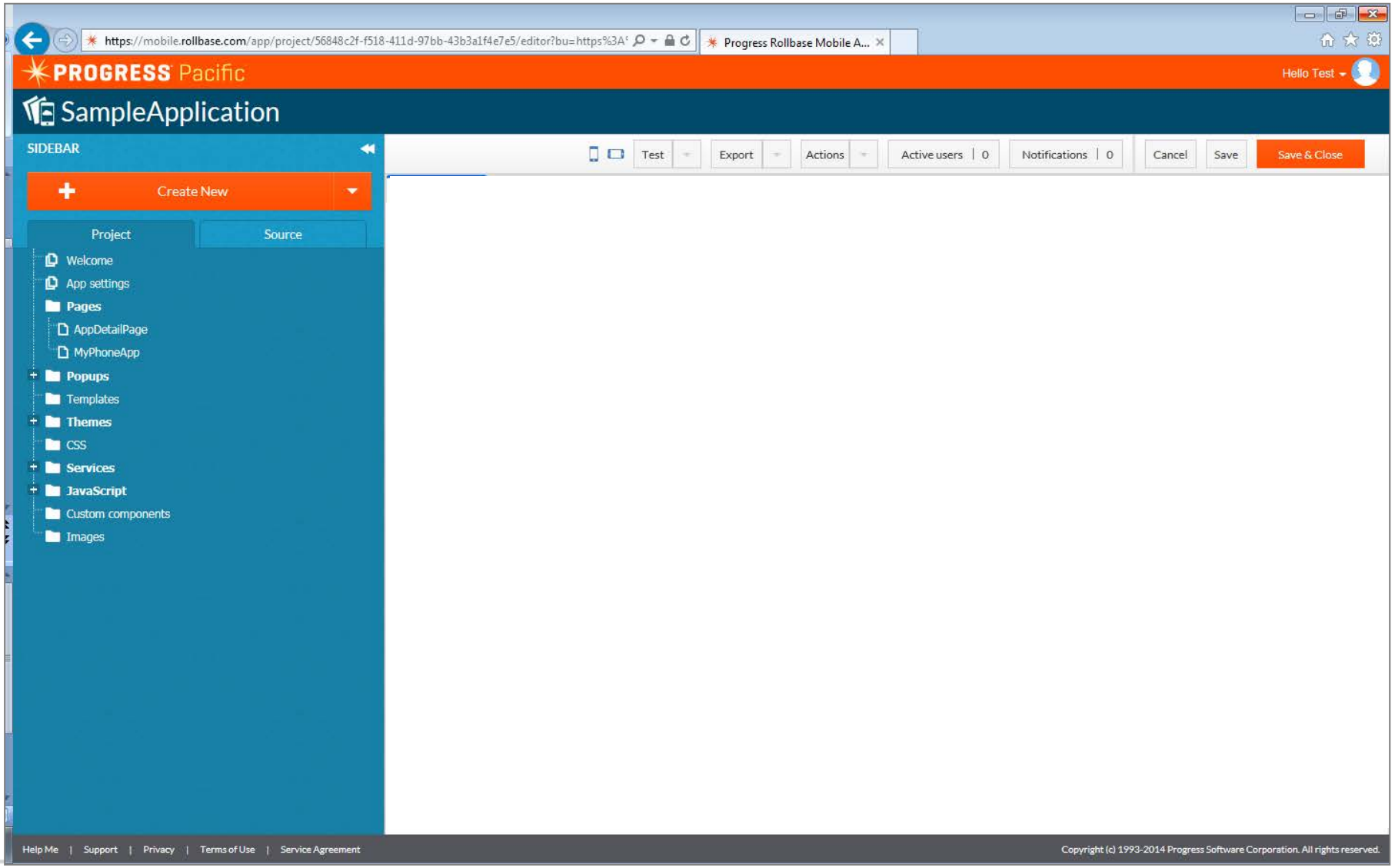
Lab 2: And then you get to play at UX design!



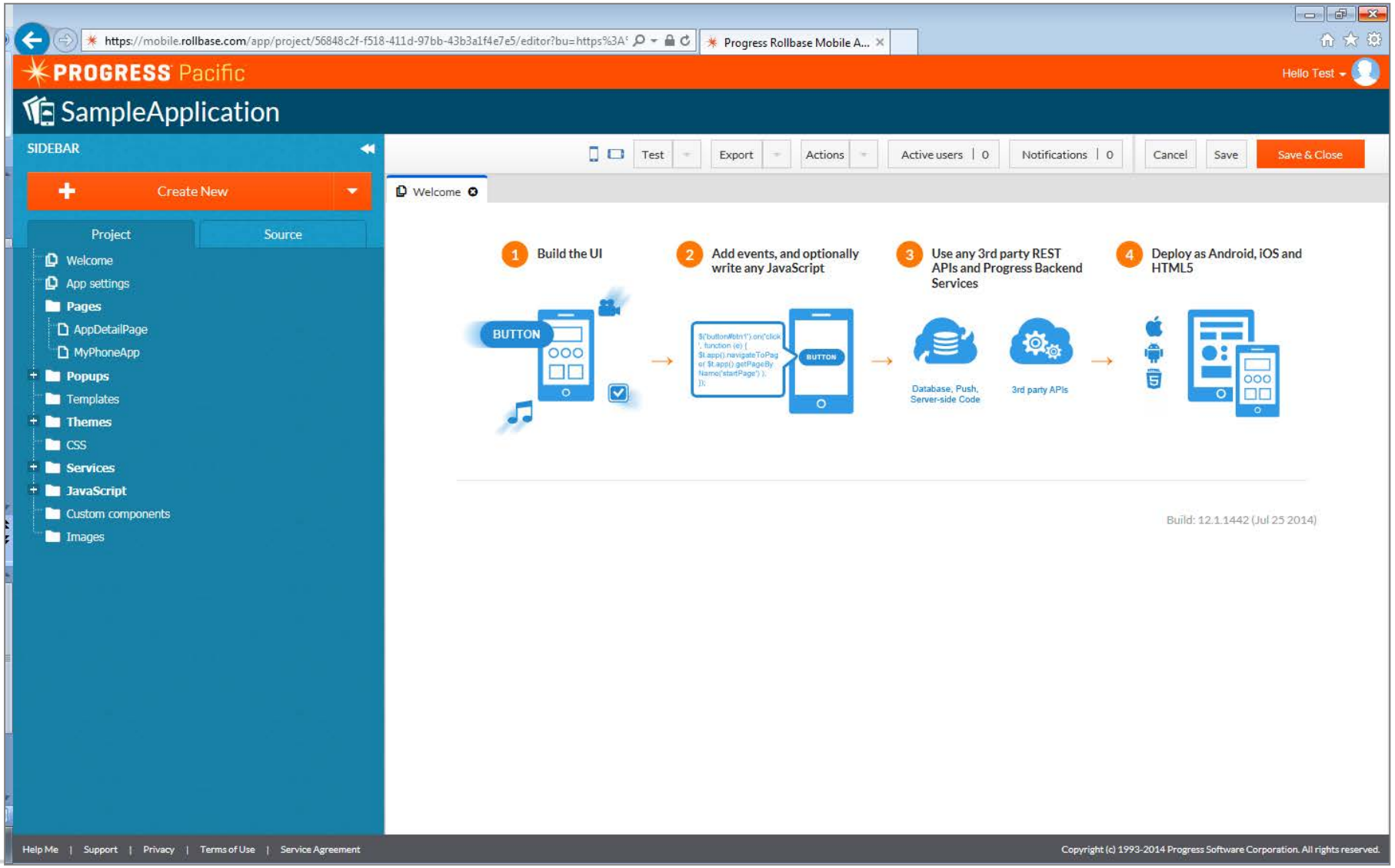
Lab 2: Getting started with Mobile App Builder - Sidebar



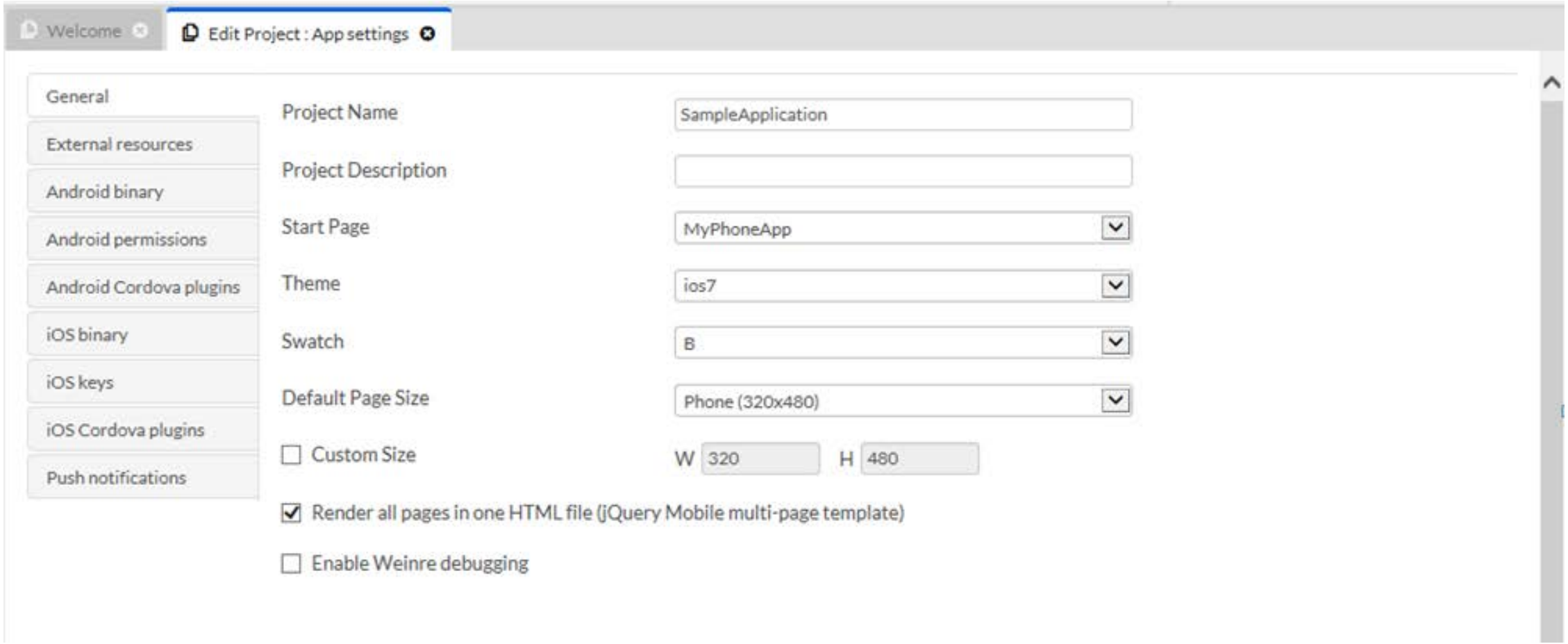
Lab 2: Getting started with Mobile App Builder – Top Menu



Lab 2: Getting started with Mobile App Builder – Ready to Begin



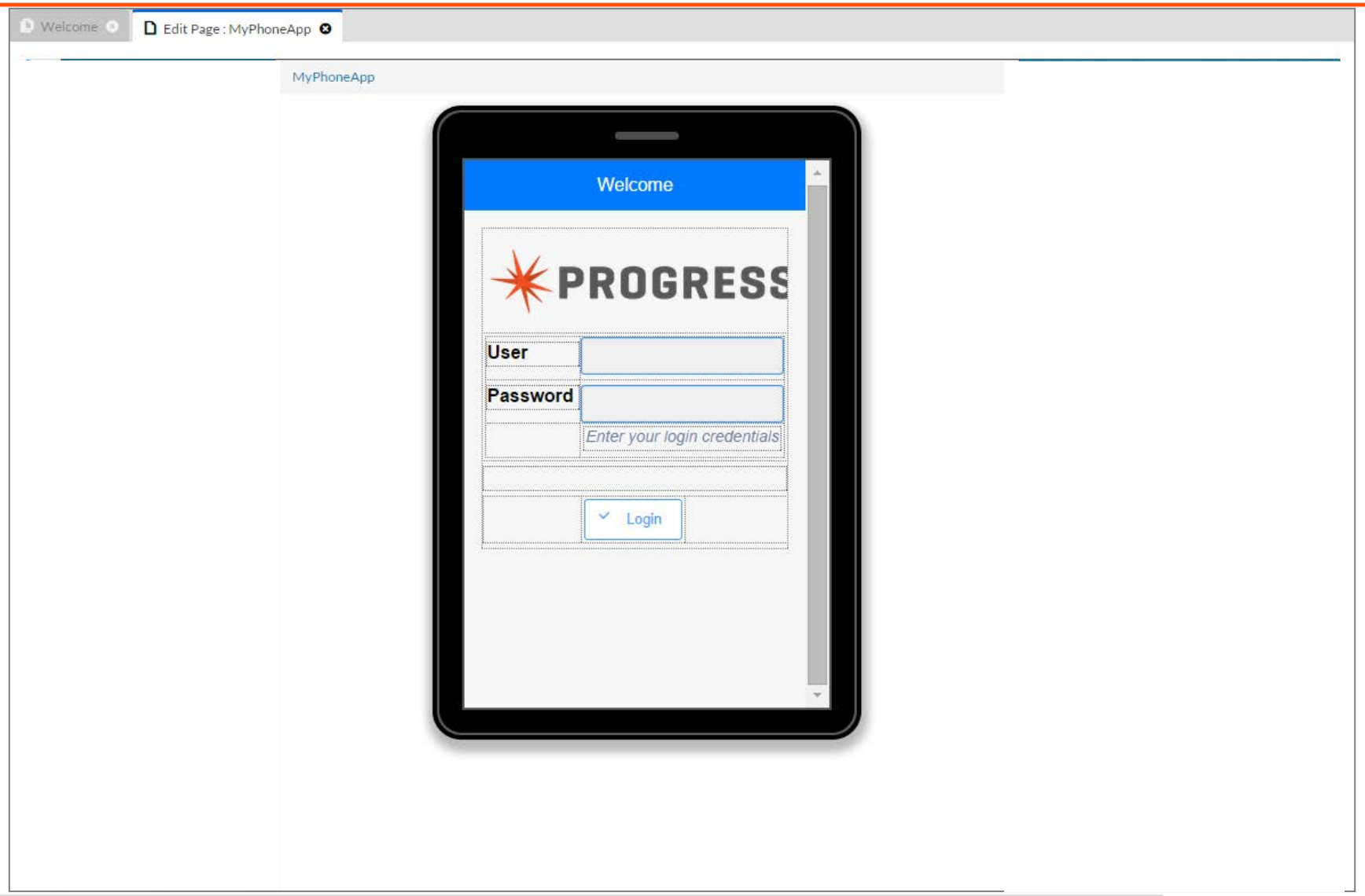
Lab 2: App settings



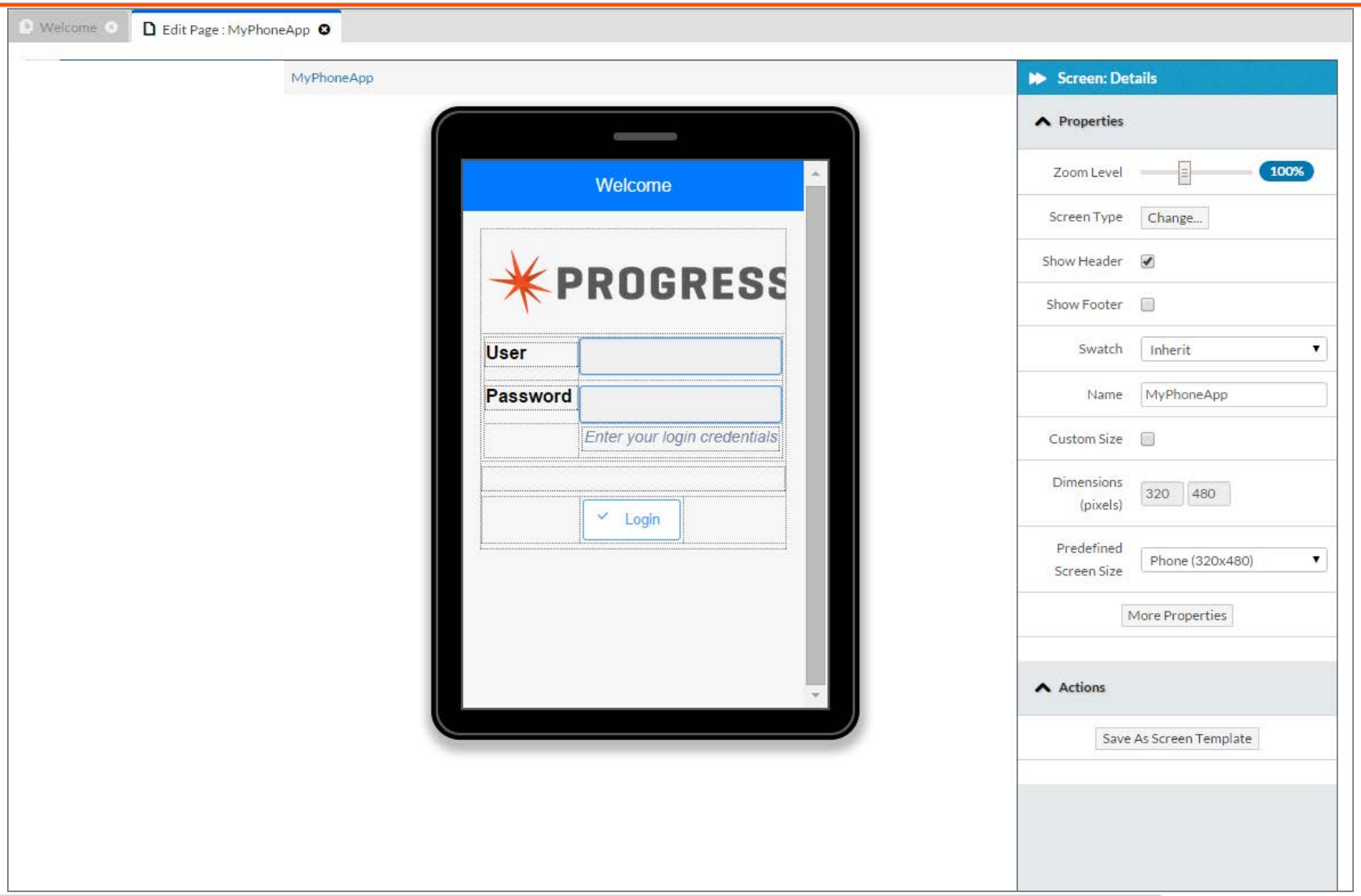
Lab 2: Pages

- 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)

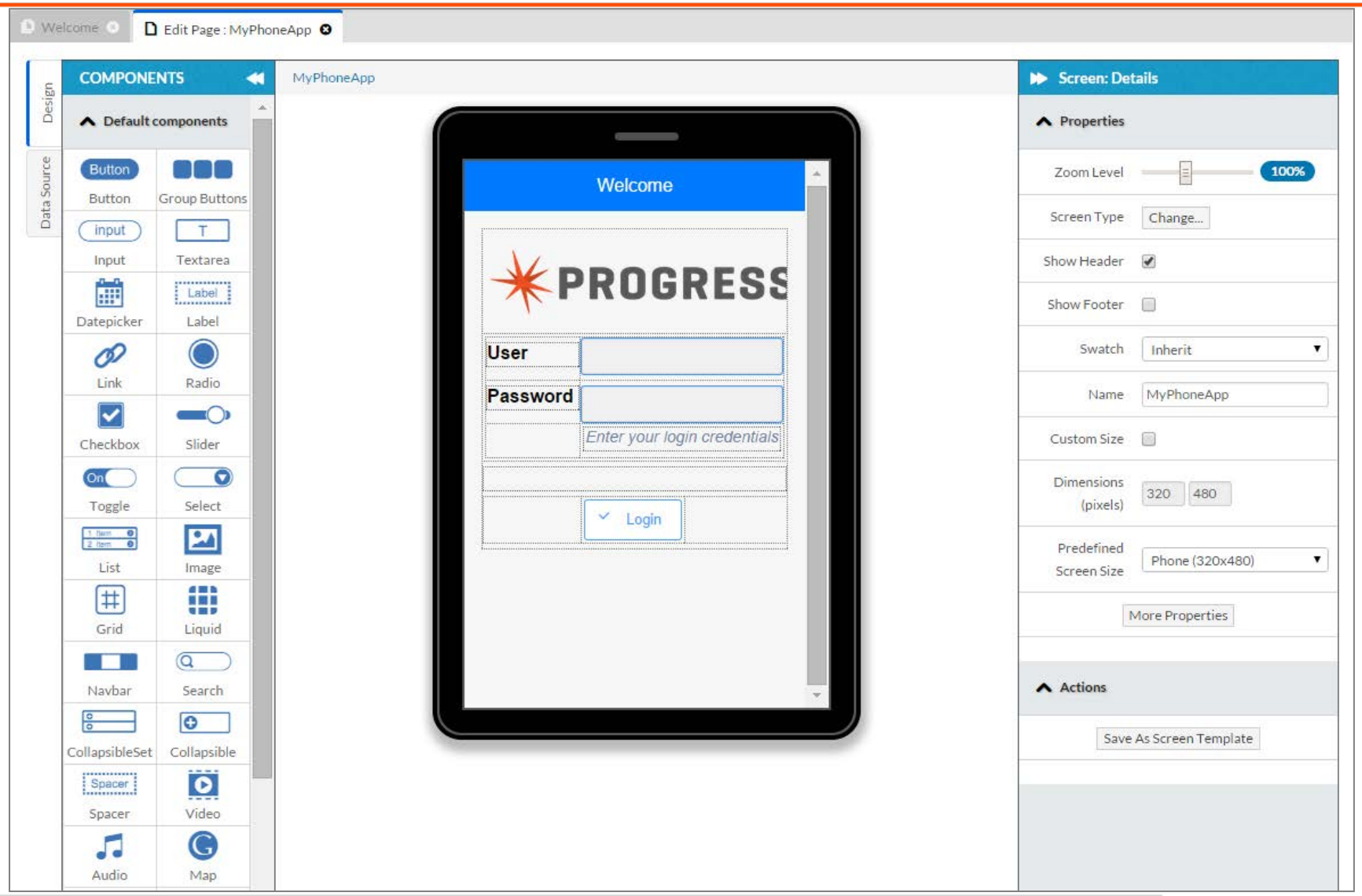
Lab 2: Mobile App Builder – Page Design – Page Layout



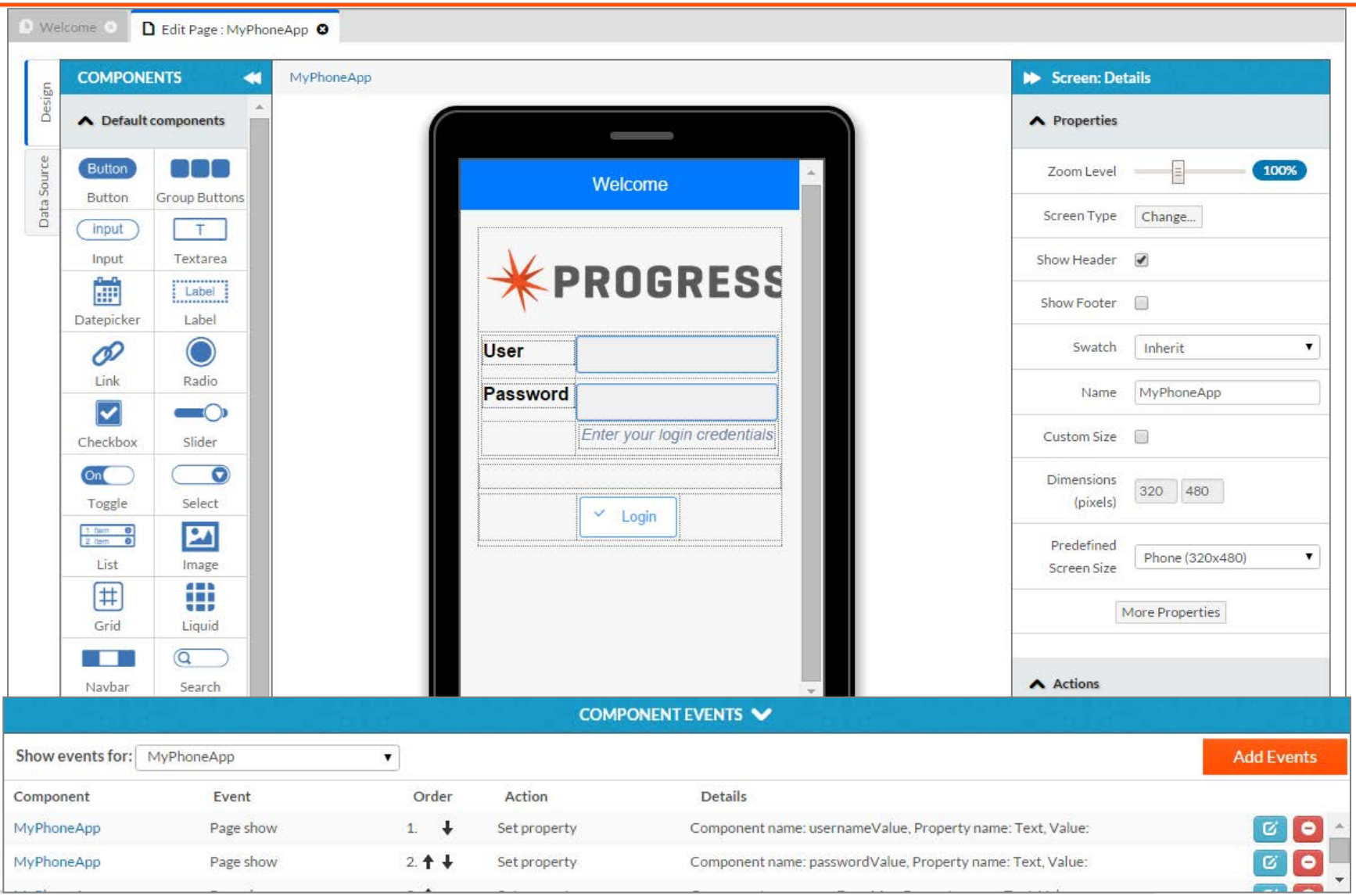
Lab 2: Mobile App Builder – Page Design – Page Properties, Detail Entry



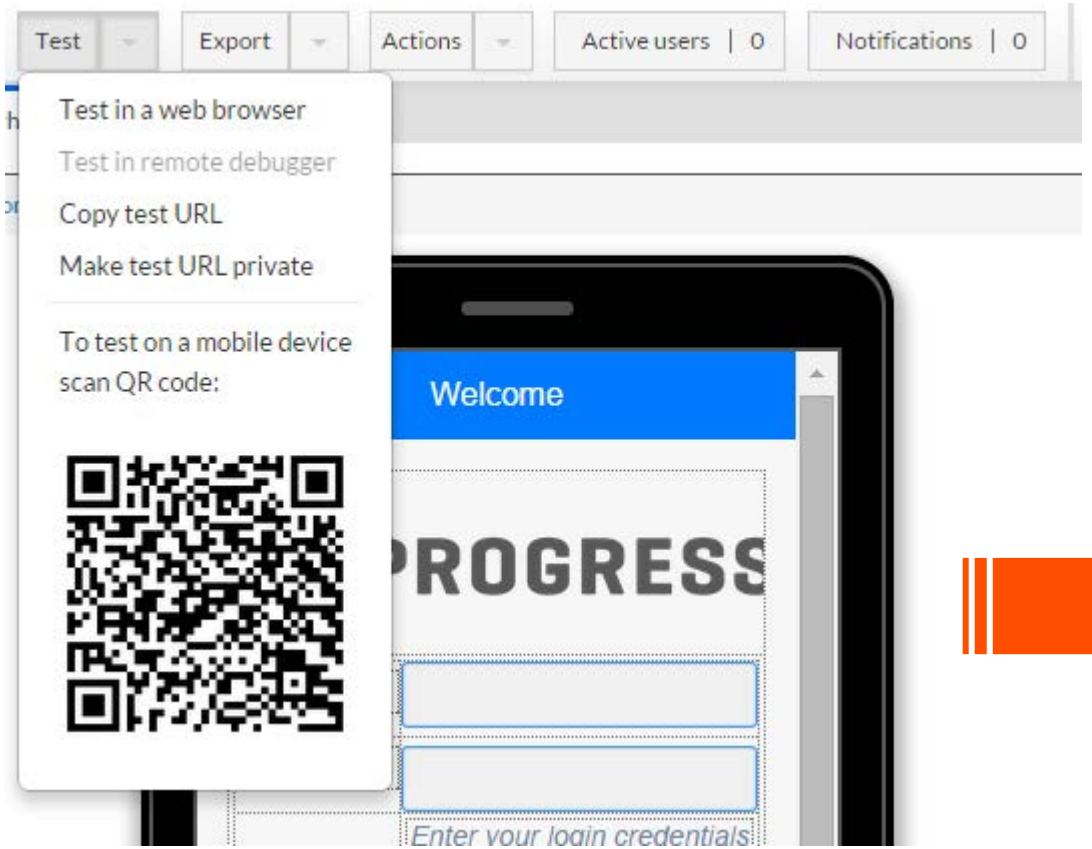
Lab 2: Mobile App Builder – Page Design – Page Layout - Components

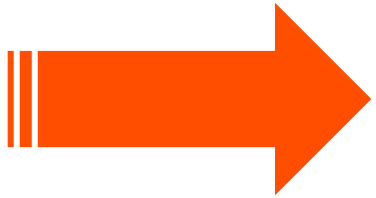


Lab 2: Mobile App Builder – Page Design – Page Layout – Component Events



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





Lab 2: Design Pages and Navigation

30:00 minutes

Part 3: Read Leads, Add Leads and Invoke operations

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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

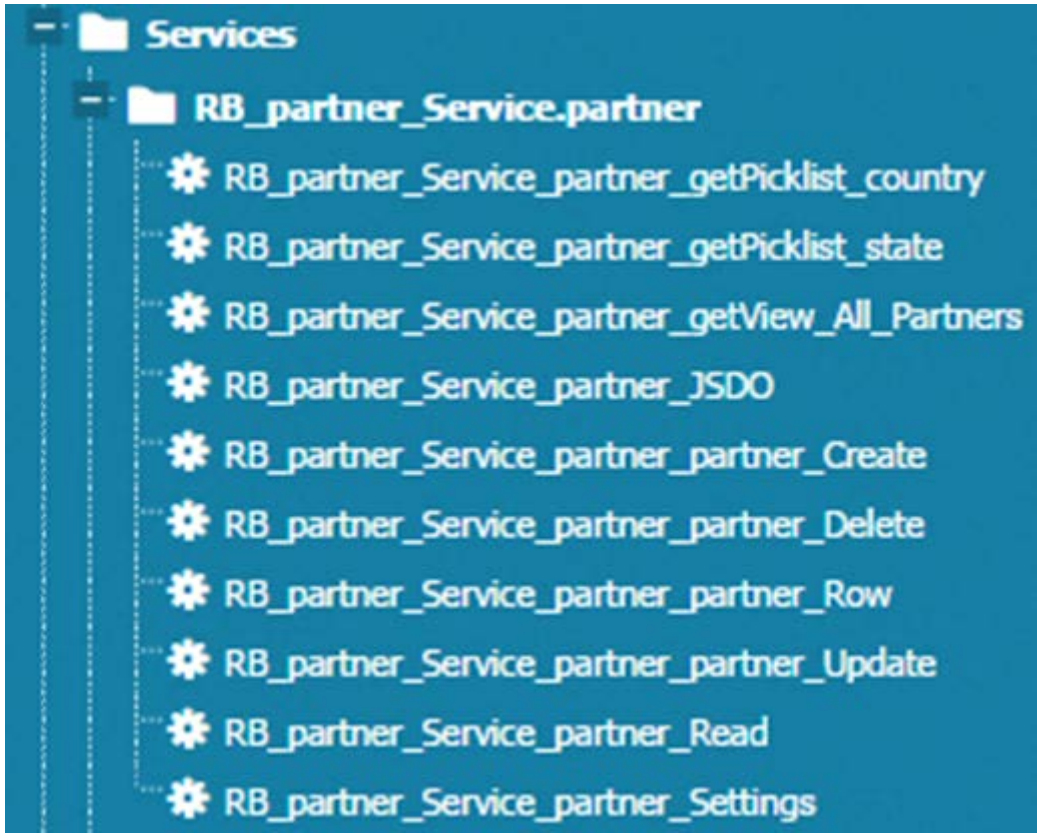
- Lab 3.1— Initializing the Leads Data source
- Lab 3.2— Configuring the All Leads operation
- Lab 3.3— Testing the functionality
- Lab 3.4— Creating and designing the New Lead page
- Lab 3.5— Adding and configuring operations to populate Rating Picklist
- Lab 3.6— Adding and configuring the Create Lead 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.

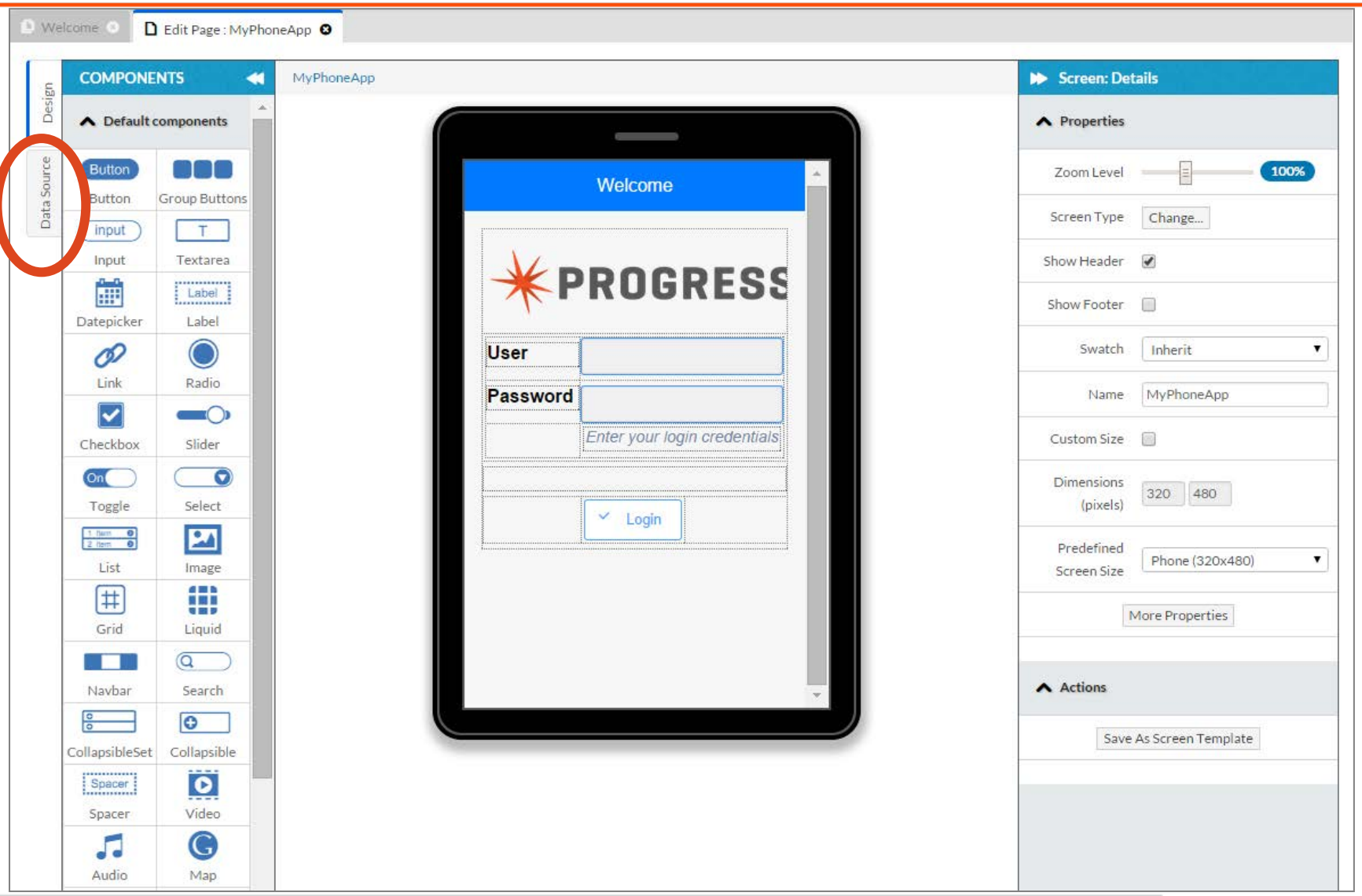
Lets do a quick walkthrough…

Lab 3: Datasources

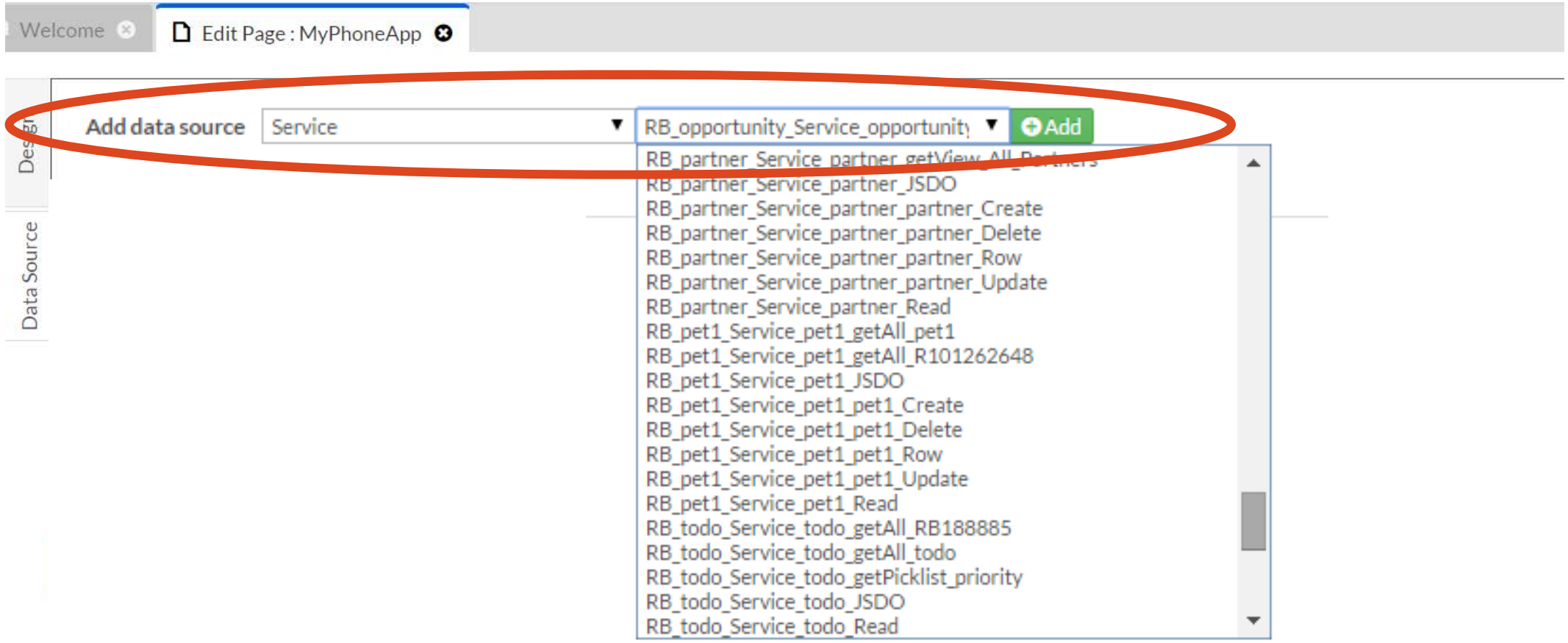
- Service is the way to Request and Receive data
- Types
  - REST API Services
  - Device Services
  - Progress-specific
    - JSDO Services (Rollbase)
    - Session Services
- Select Object Views in Rollbase
  - JSDO Services generated automatically
  - Invoke operations
    (based on Views, Relationships,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



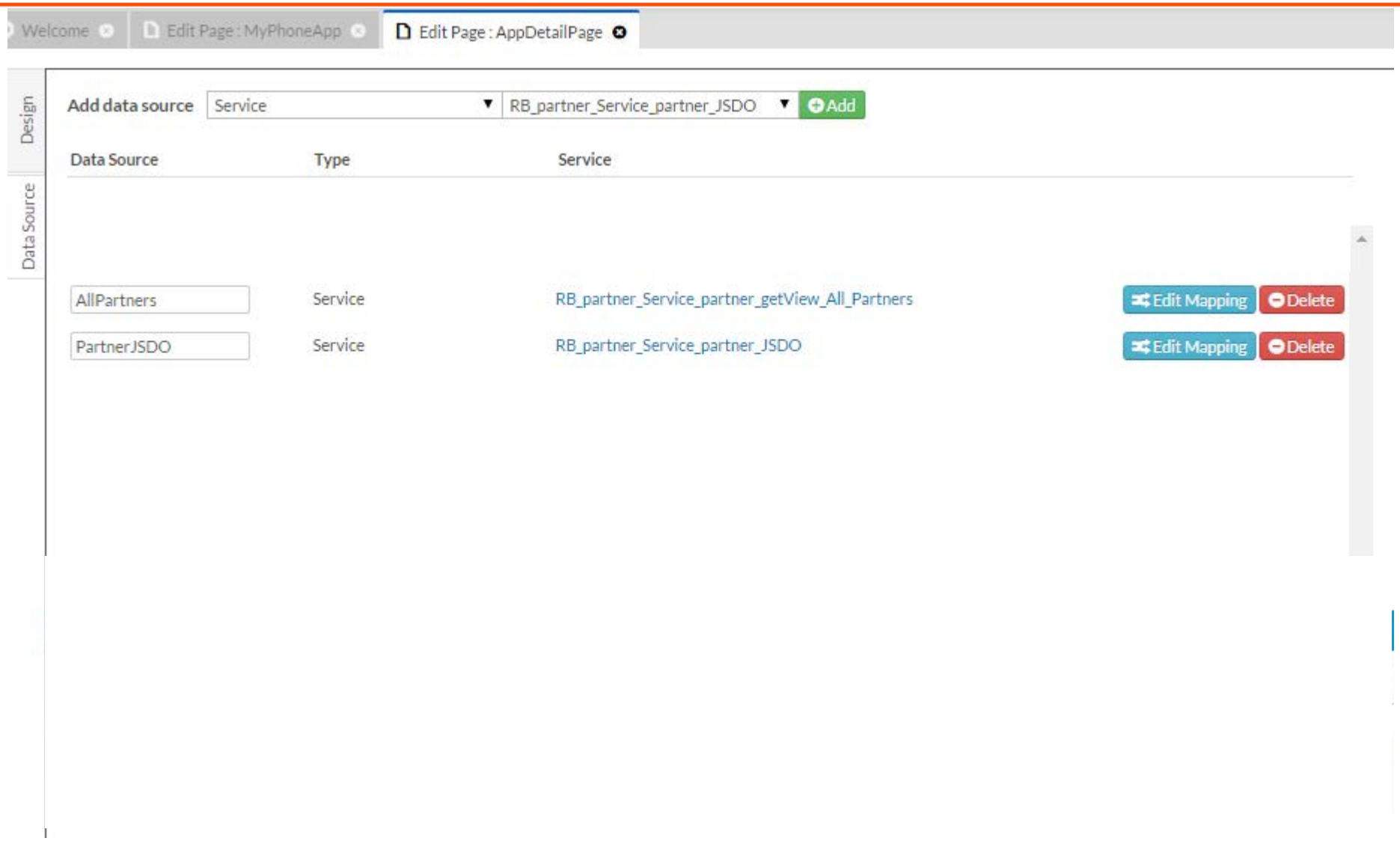
Lab 3: Mobile App Builder – Data Source



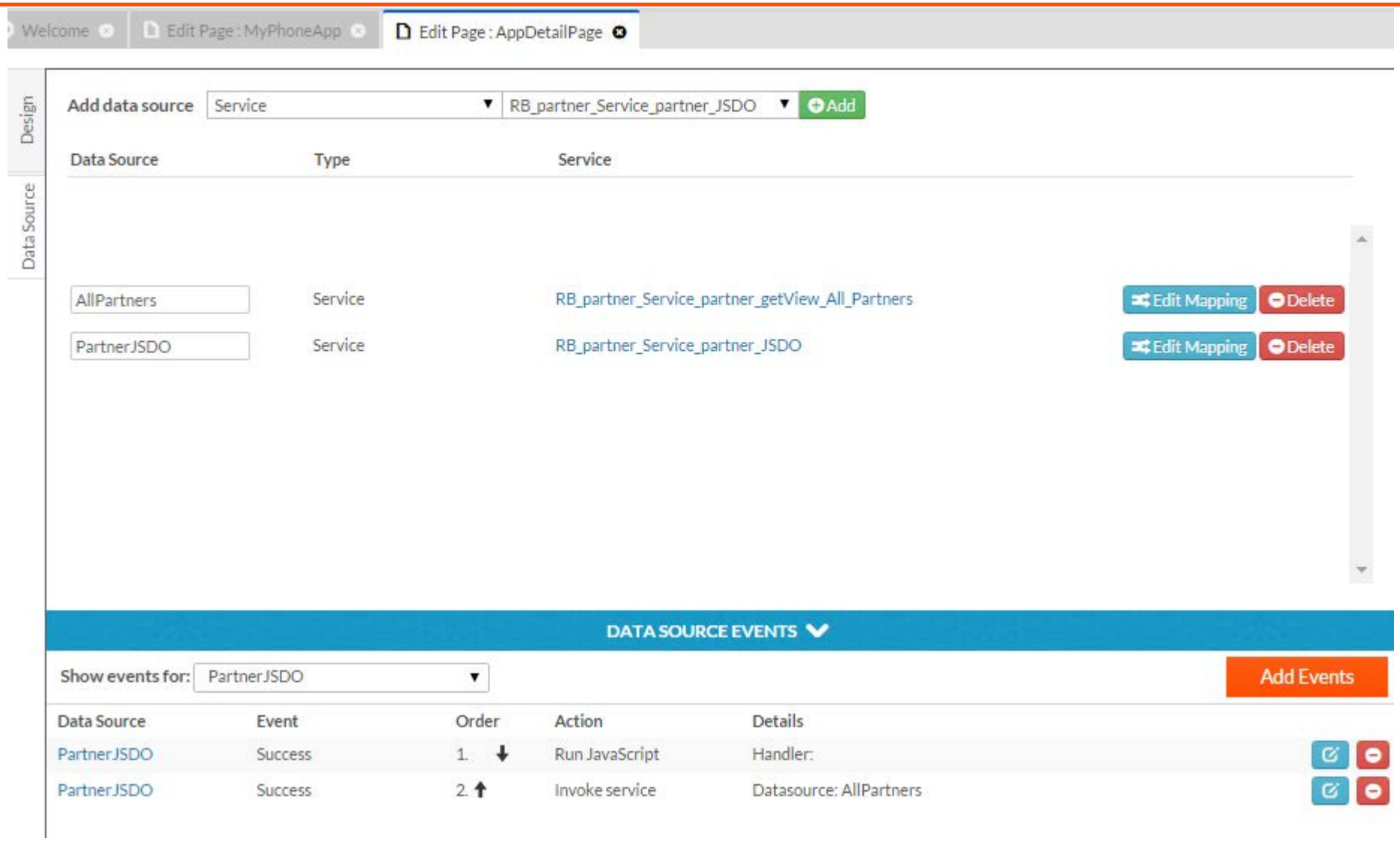
Lab 3: Data Source – Add a New one



Lab 3: Data Source – Added



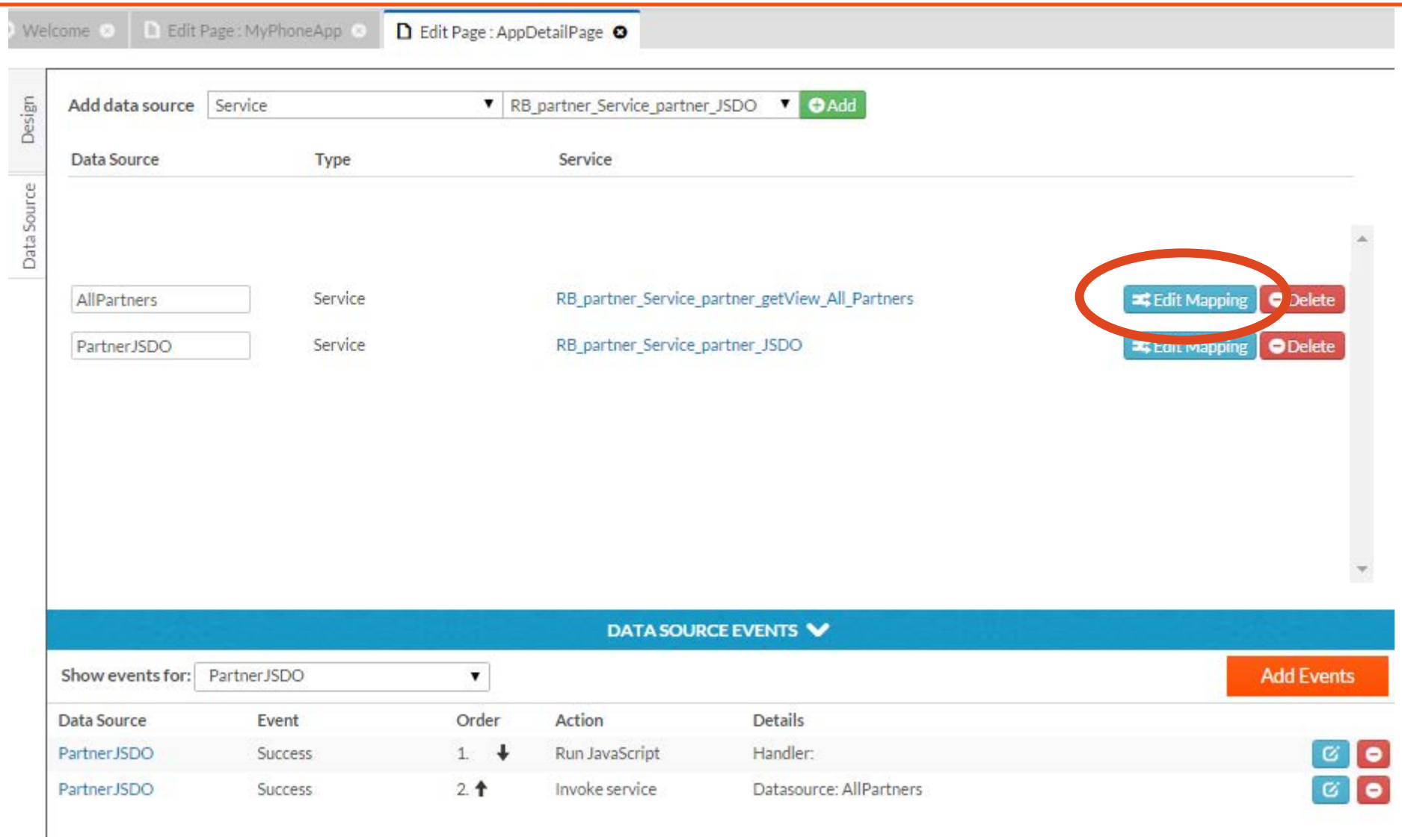
Lab 3: Data Source – Adding Data Source Events



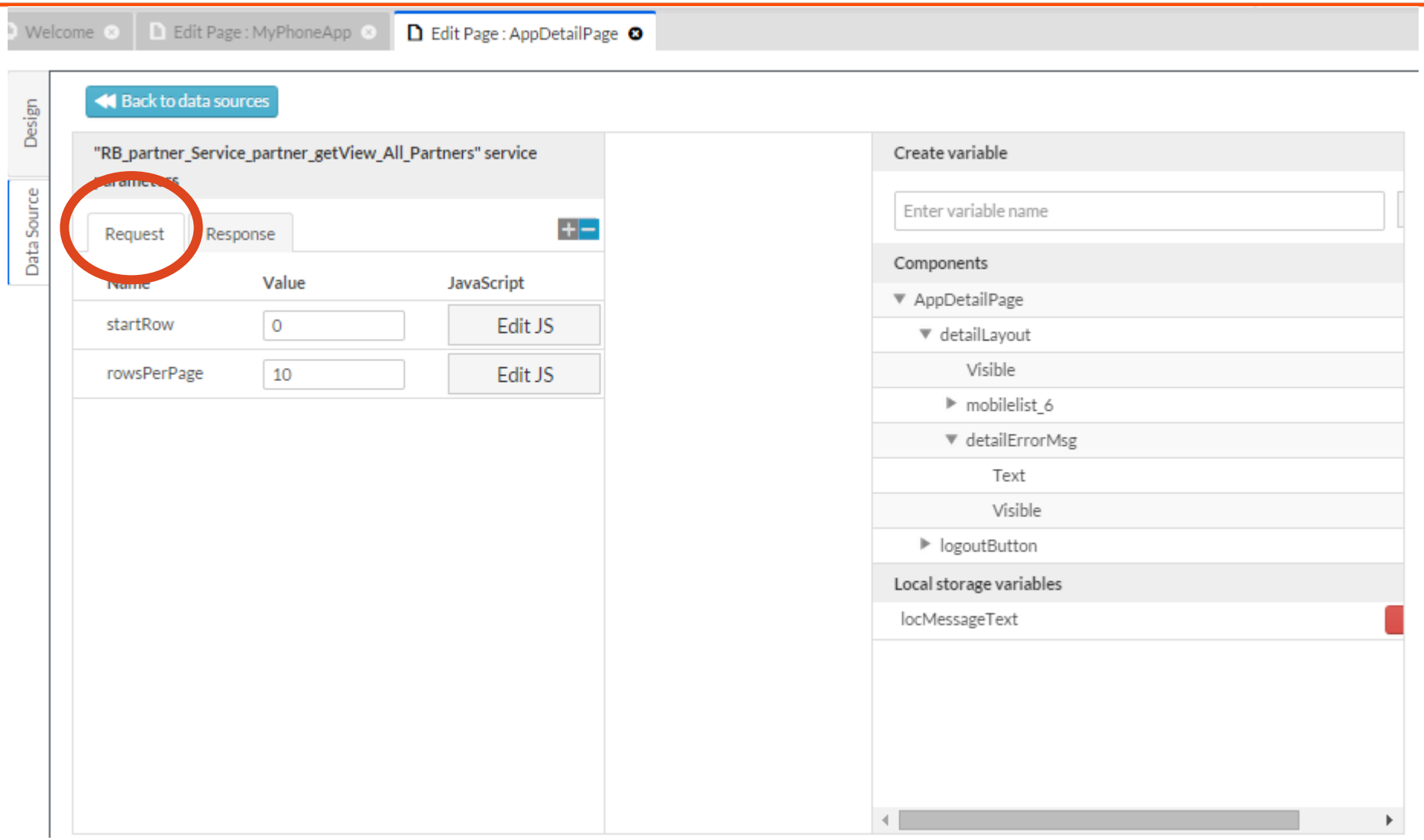
Lab 3: Creating, Reading, Updating, Deleting and Invoking

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

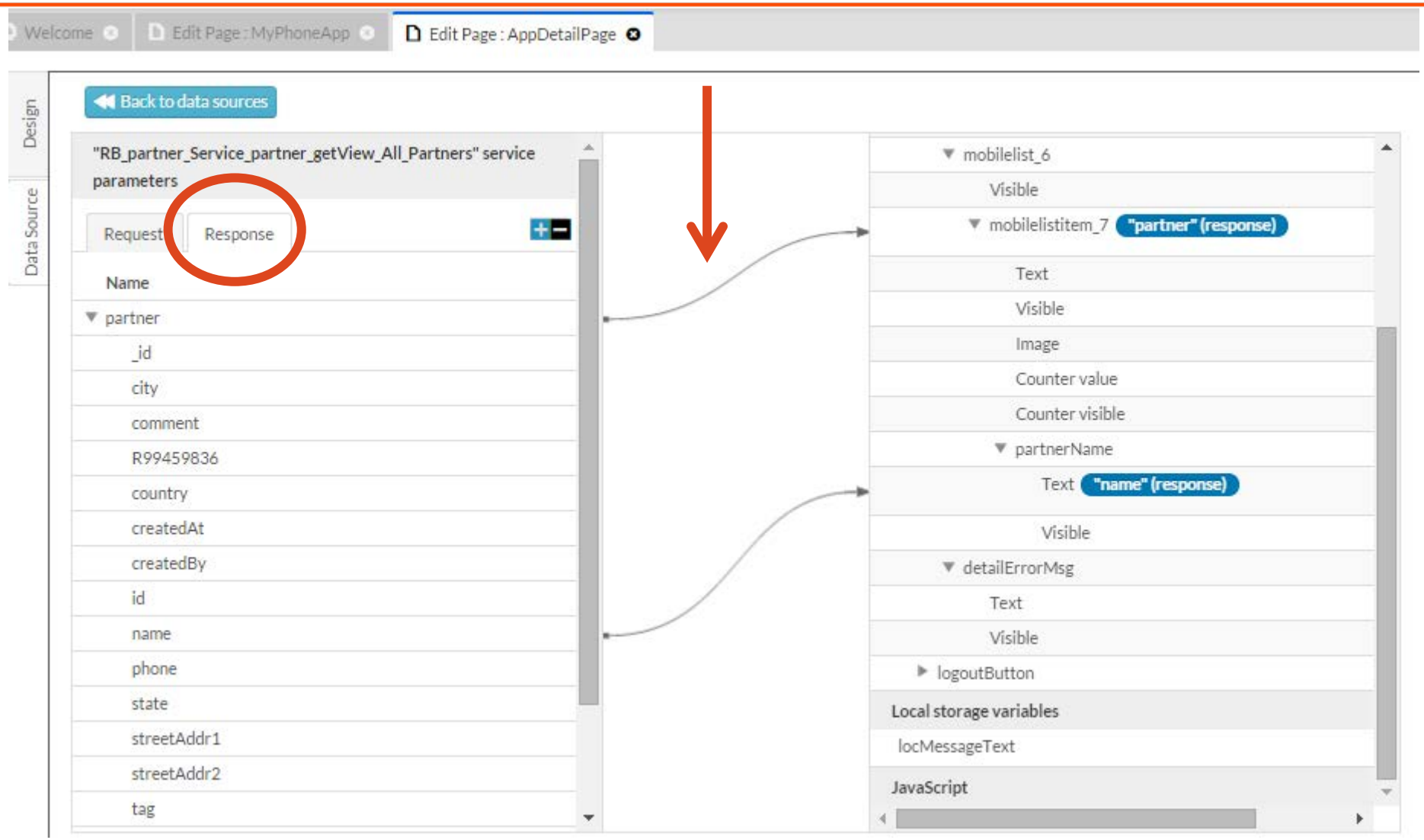
Lab 3: Data Source – Edit Mapping



Lab 3: Edit Mapping - Request



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

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

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

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Lab 4: Using the Geolocation Service

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.

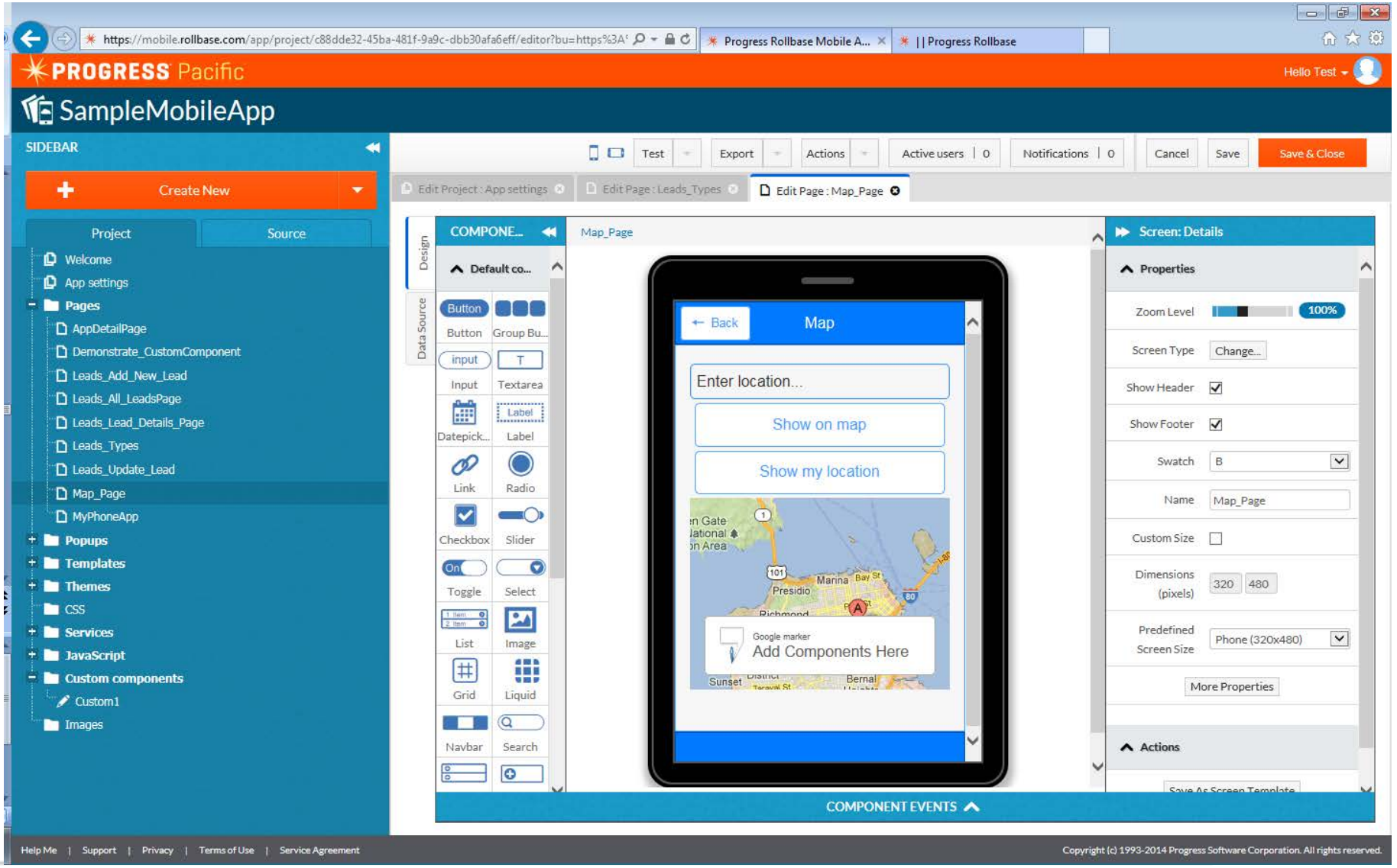
Lets do a quick walkthrough

Lab 4: Native Device API Services and REST API Services

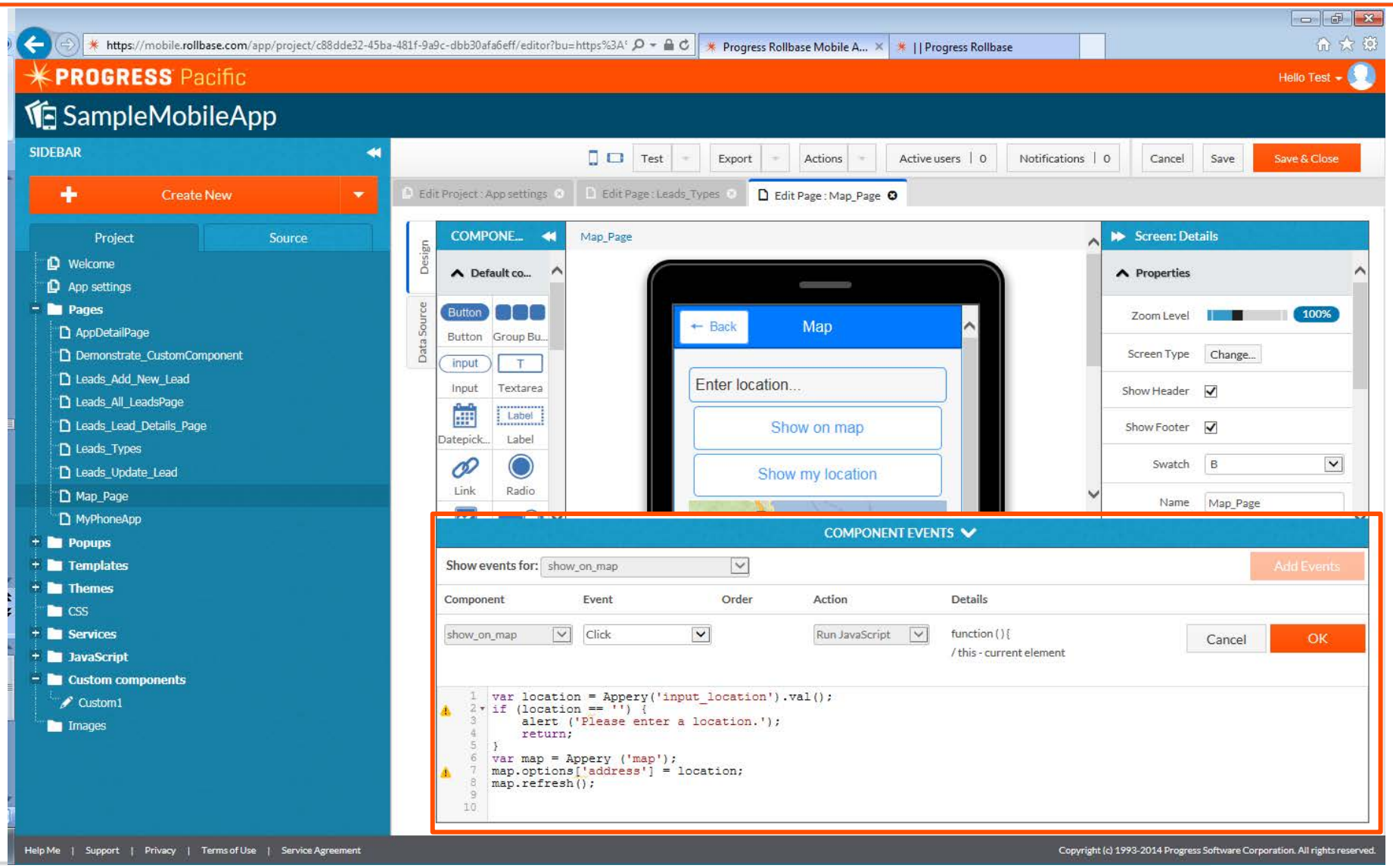
- Native Device API Services:
  - Barcode
  - Camera
  - Contacts
  - Geolocation

- REST API Services:
  - REST
  - Generic (custom JavaScript implementation)
  - Settings (REST settings)
  - Generic Security Context

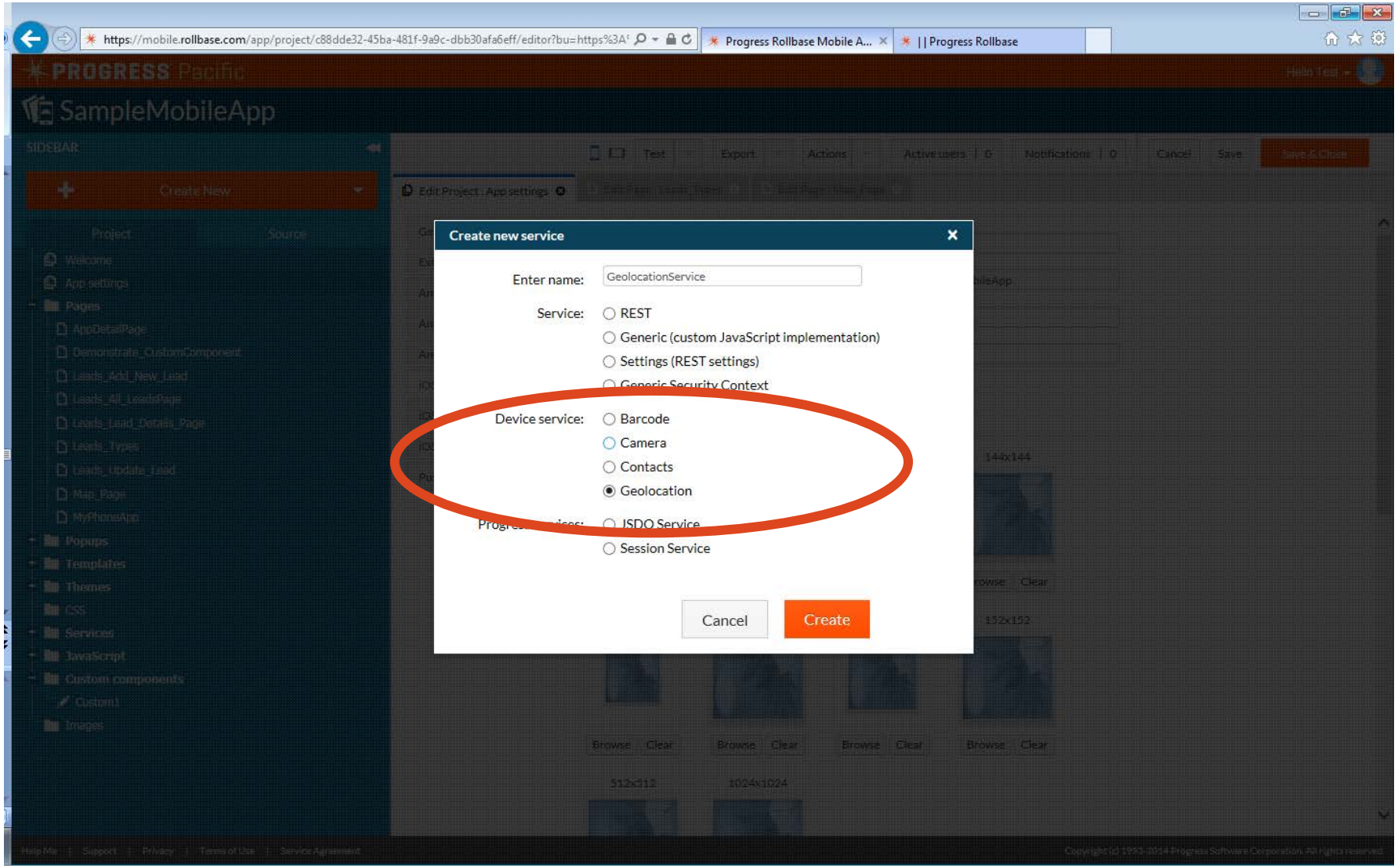
Lab 4: Adding Required UI Components



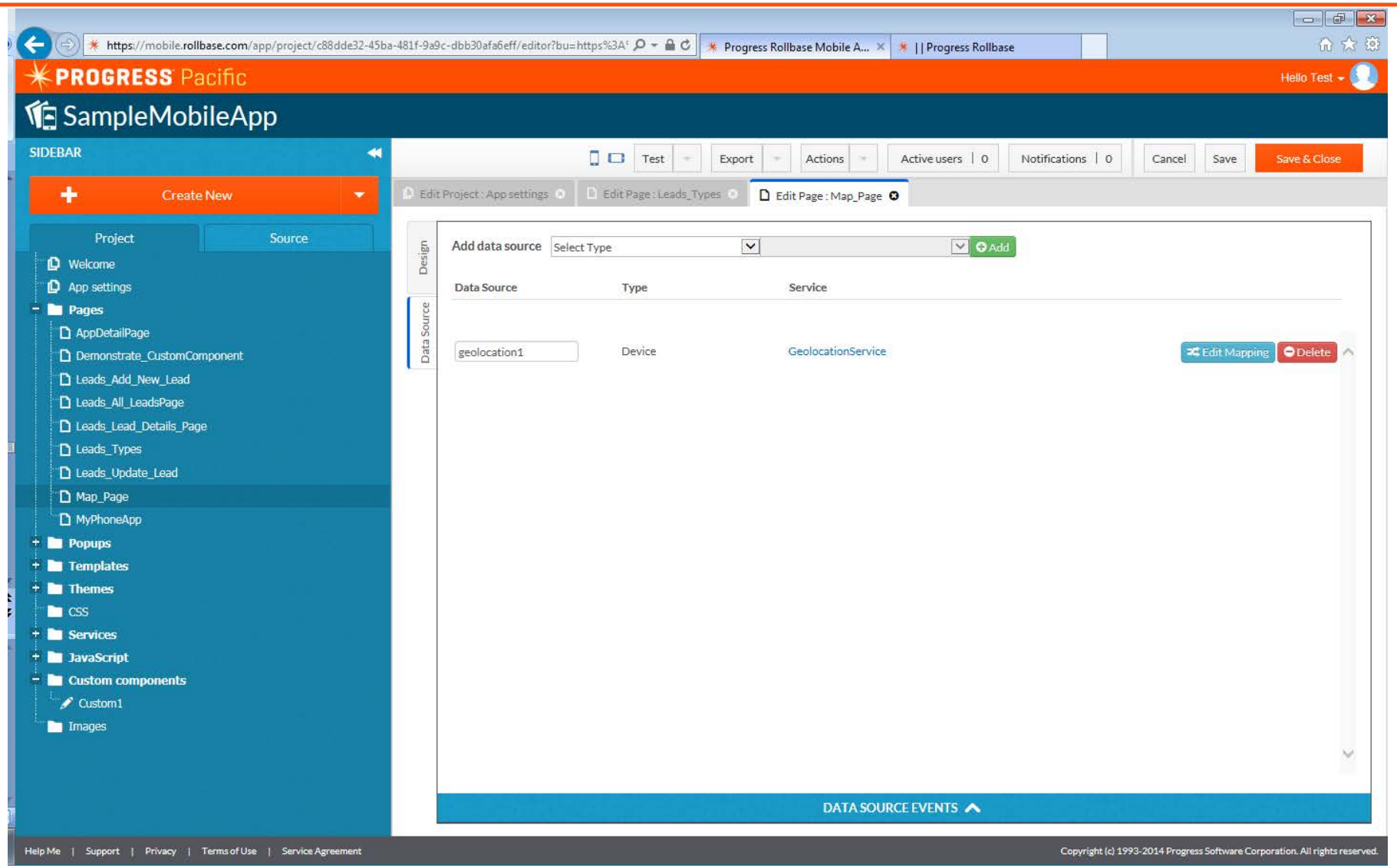
Lab 4: Showing a User-entered Location on the Map



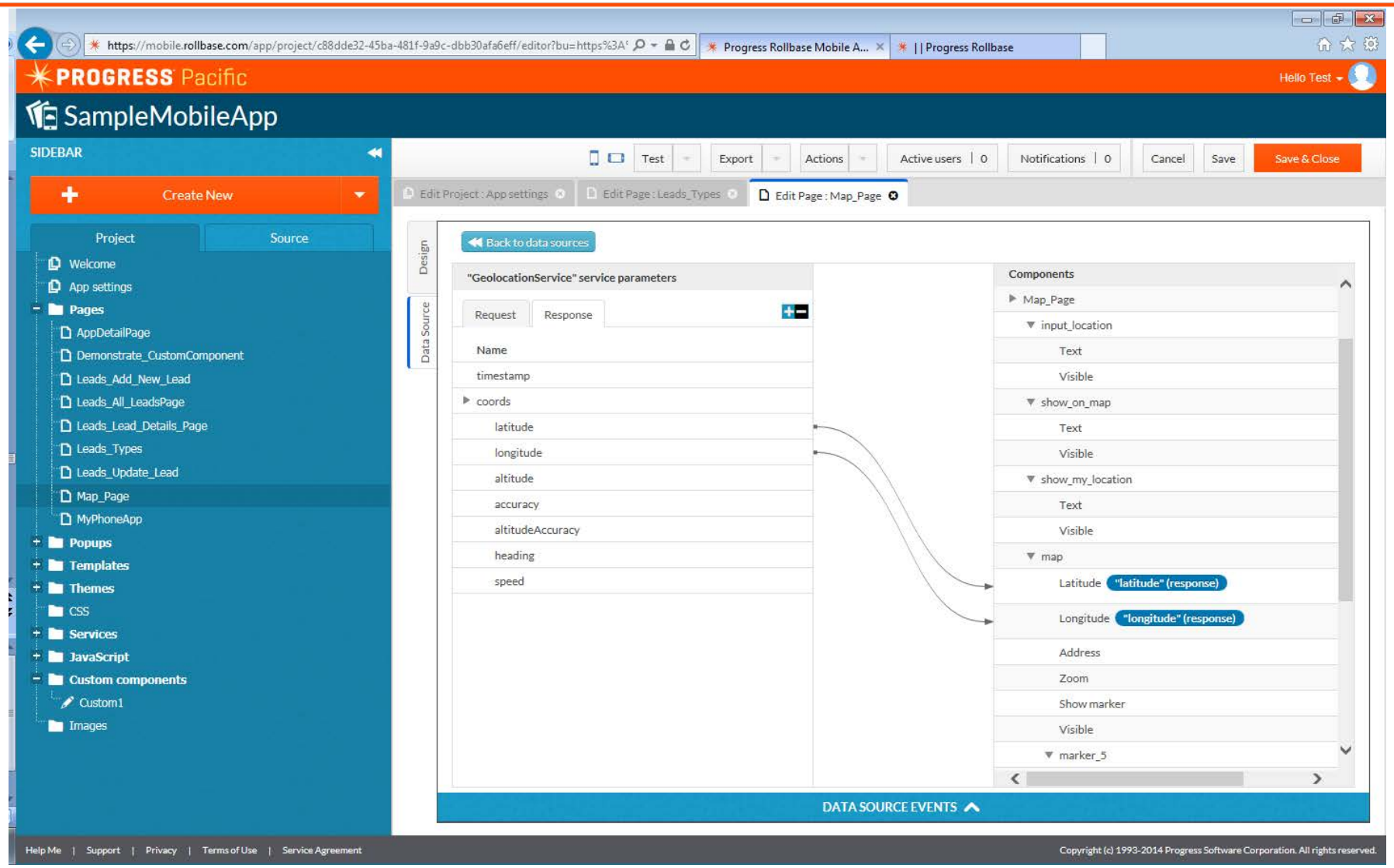
Lab 4: Showing the Current Location with Geolocation: Creating a Geolocation Service



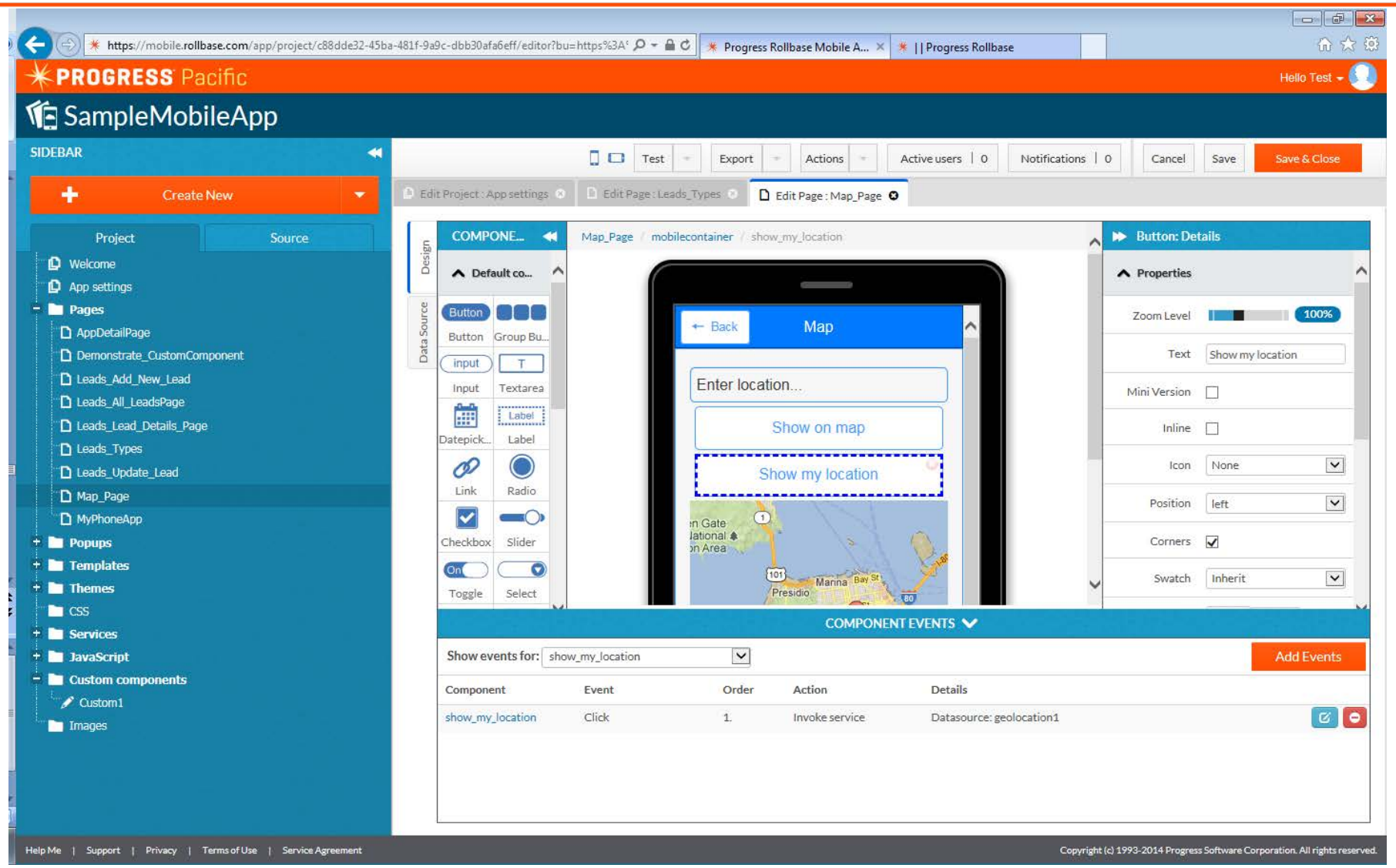
Lab 4: Showing the Current Location with Geolocation: Adding a Datasource



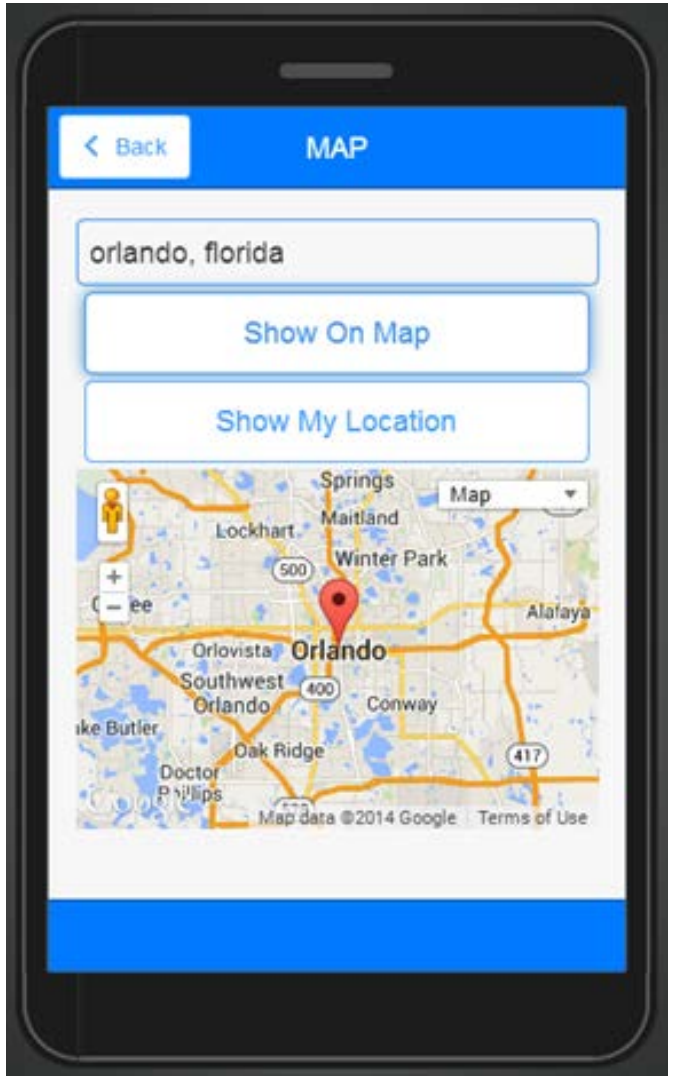
Lab 4: Showing the Current Location with Geolocation: Mapping Response Parameters



Lab 4: Showing the Current Location with Geolocation: Adding Event to Invoke the Geolocation Service



Lab 4: Where are you?

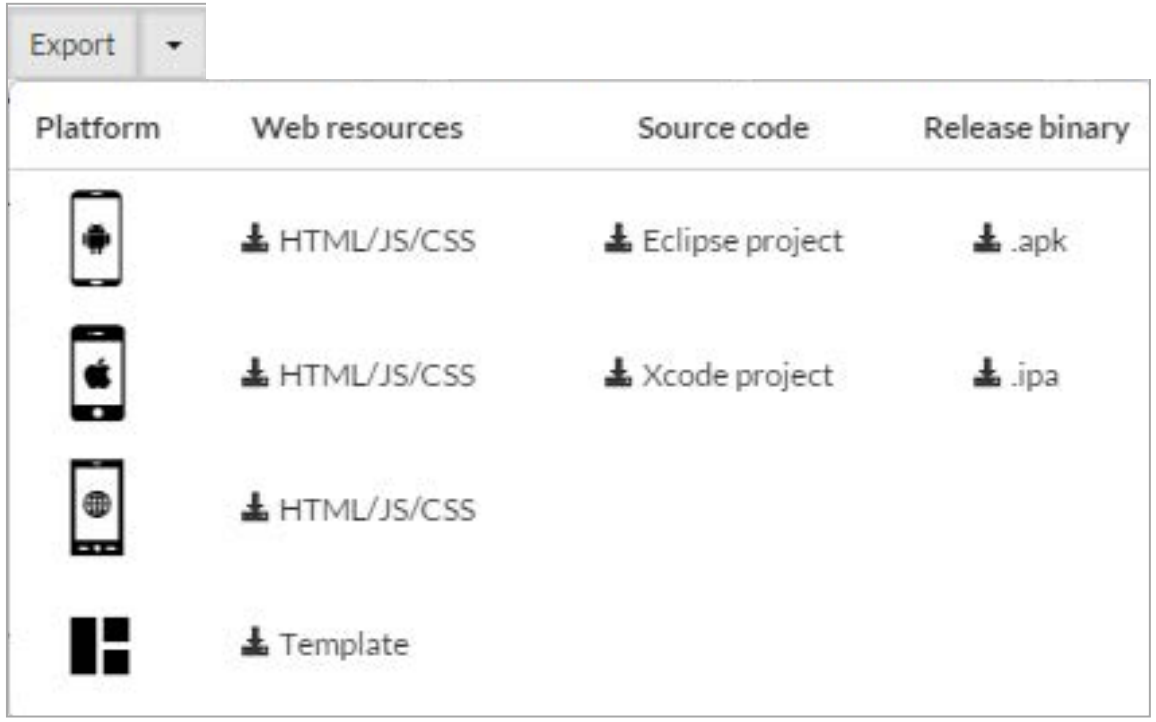


Lab 4: Using the Geolocation Service

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

Mobile and Rollbase Sessions this Week

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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