PROGRESS EXCHANGE 2013

DISCOVER. DEVELOP. DELIVER.

Progress Pacific – Introduction to Rollbase

TABLE OF CONTENTS

Purpose

This document accompanies the Progress Exchange 2013 Rollbase Workshop. It provides step-by-step instructions for the hands-on portions of the Workshop.

Disclaimer

This document is not a manual. It merely gives you an overview of how to create a simple Progress Rollbase application. Complete documentation for using Rollbase can be found in *Rollbase in Action*, which is available at ***<Add Address Here>***. Progress Software cannot be held responsible for the content of this document nor for any damage that may occur to your environment.

Overview

In this workshop, you will create an elementary Customer Relationship Manager application in Rollbase. During the session, you will learn about the Rollbase user interface and how to define the basic components that make up a Rollbase application.

Progress Rollbase - Introduction

In this workshop we will create a lightweight, straight-forward Customer Relationship Manager (CRM) application using Rollbase's core components – Objects, Tabs, and Portals.

The workshop consists of the following activities:

- Create a new application in Rollbase.

- Create the application's Account and Contact objects, showing how Rollbase's point and click interface lets you quickly add the right fields for each object.

- Create a relationship between Account records and Contact records.

- Create a Lead object.

- Create a workflow to manage the application's Lead records.

- Create a trigger to manage the conversion of Leads to Accounts.

- Create an Internet Portal to capture new Lead information about potential customers.

This workshop assumes that you already have a Progress Rollbase account or an evaluation account.

Lab 1
Creating an application framework and defining business objects

Objective

This section of the workshop consists of four parts.

- Part 1 – create the framework for the example Customer Relationship Manager (CRM) application

- Part 2 – define the CRM application's Account object

- Part 3 – define the Contact object

- Part 4 – define a relationship between the Account and Contact objects
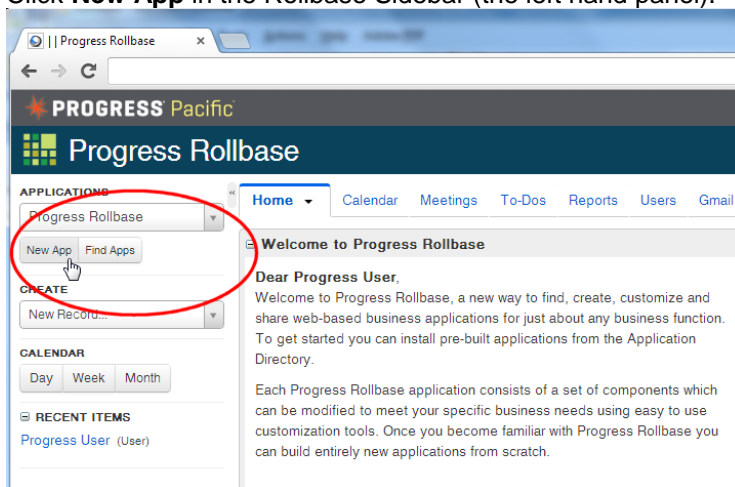
Duration

15 minutes

Goals

In this part of the workshop you create and name a new Rollbase application.

Instructions

Part 1

To create the application framework:

1. Click **New App** in the Rollbase Sidebar (the left hand panel).

2. In the Create Application dialog, select **A new application (from scratch)** and click **Create**.

3. In the **Application Name** field, give the application a name; for this workshop, call it `CRM`.

4. Click **Save**. The new **CRM** application is add to the Rollbase Sidebar and the Quick Start: Creating an Application page is displayed.

In the next part of this section of the workshop, you will begin defining the objects that make up the CRM application.

Lab 1 (continued)
Part 2

In this section you will define the CRM application's Account object. In this part of the workshop you will:

- Define the Account object

- Specify fields

- Specify Required fields

- Add a few Records to the Object

- Edit the New Record and View Record page

Instructions

Define the Account object.

1. On the **Quick Start: Creating an Application** page, click the Add symbol (**+**). This displays the What Do You Want to Create? dialog.

2. In the What Do You Want to Create? dialog, select **A New Object (with Tab)** and click **Create**.

3. In the **Object: New Object Setup** page, in the **Singular Name** field, specify `Account`. Rollbase fills in default values for the object's properties. In this workshop, accept the default values.

4. In the **Object: New Object Setup** page, scroll down to the Optional Properties section and select the **Audit trail** property. In the Object Attributes section, select the **Location** option as well as its associated **Add Google Maps to View Page** option. The **Location** option provides a standard, ready-to-use way of tracking location information.

5. Click **Save**.

6. On the **Tab: New Tab Setup** page, accept the default (`Accounts`) in the **Tab Name** field. In the Add to Applications field, make sure that the workshop application (`CRM`) is checked and click **Save**.

The **Accounts** tab is added to the CRM application. The **Accounts** tab will display all the Account records in the CRM application as you create them. In addition, Rollbase provides the following pages associated with the Account object:
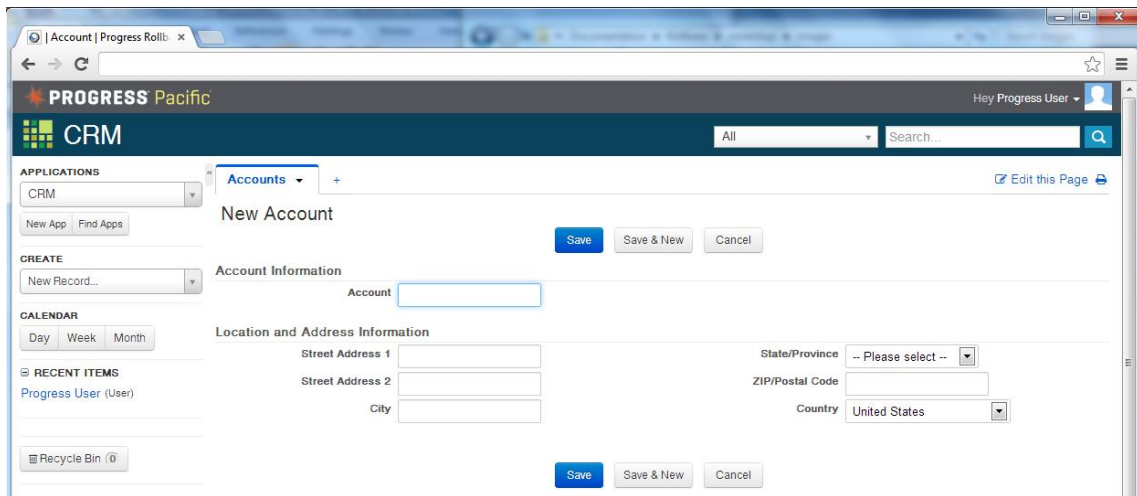
- **New Account** page for adding new Account records

- **View Account** page that displays the information about a single, specified Account

- **Edit Account** page to modify information for a single, specified Account

At this point we will create a new Account record so we can have some sample data to work with in the application.

Add a new Account record

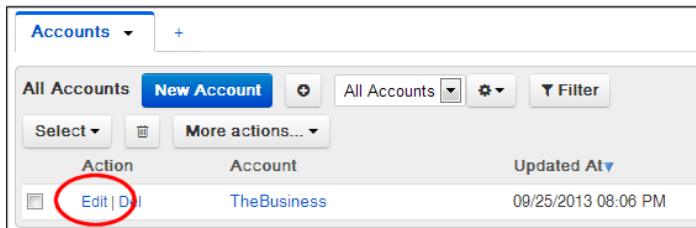1. Click **New Account**. The **New Account** page is displayed.

2. On the **New Account** page, specify account information in the **Account**, **Street Address**, **City**, and **State/Province** fields.

3. Click **Save**. The new Account record is added to the **Accounts** tab's List page.

Add new fields for additional Account information

In order to track additional company information in the application's Account object we will add a few more fields to the object. To do this, you will edit the **Edit Account** page.

1. On the CRM application's **Accounts** tab, under **Action**, click **Edit** in the row that corresponds to the record you just added.

This displays the Edit Account page.

2. On the **Edit Account** page, you would edit individual account information during day-to-day use of your application. However, at this point we want to add more fields in order to track additional Account information. To do this, click **Edit this page** in the upper right.
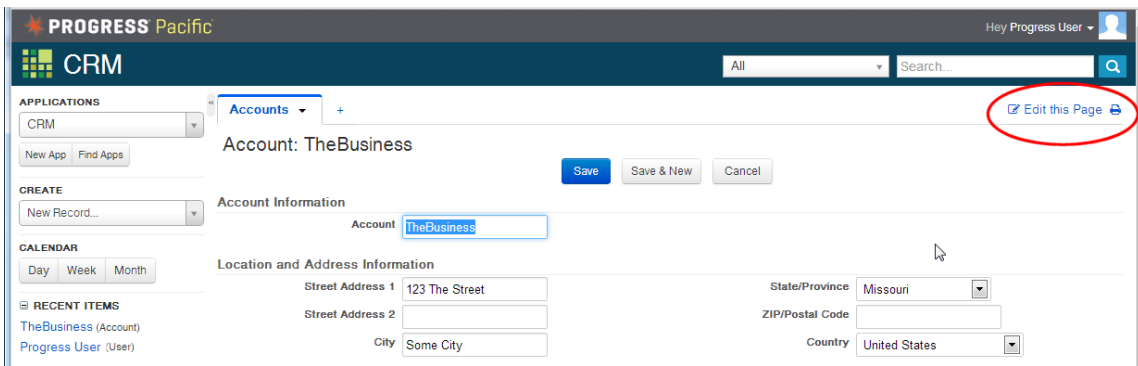
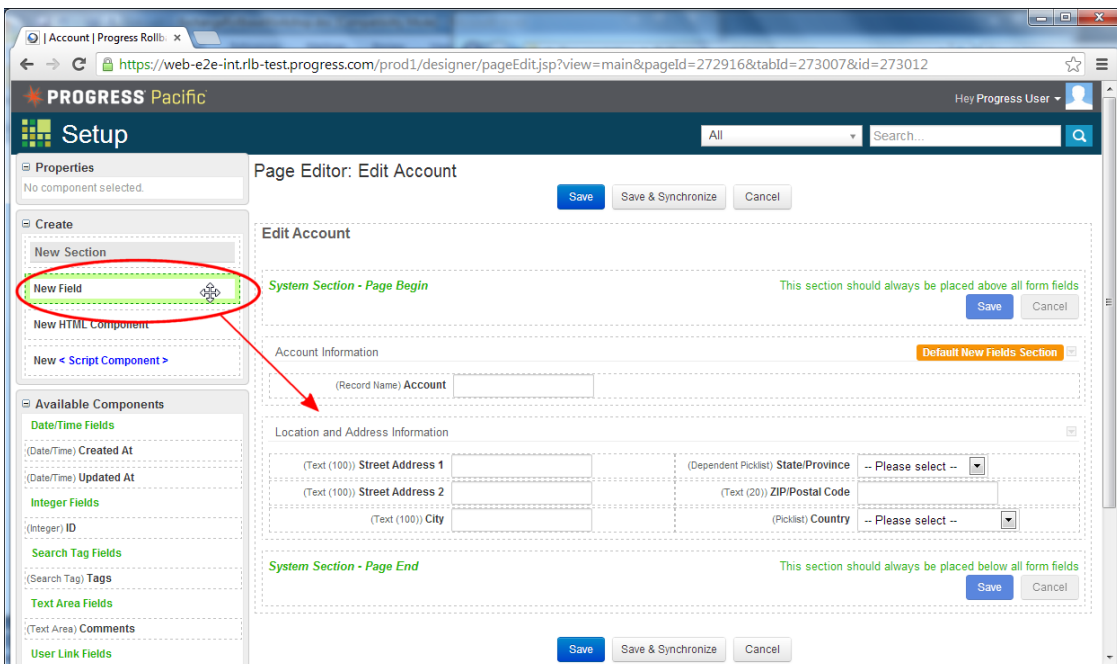3. In the **Page Editor: Edit Account** page from the Sidebar, drag **New Field** to a spot on the page just below the Account field.

In the Create New Field dialog in the Field Type field, select URL from the drop-down list and click **Next**.

4. Specify the Label you want to give to the URL field such as "Website". In this workshop, accept the default values for the other fields and click **Save**. When you add a new field, in addition to adding them to the Account page, the new fields are listed in the Sidebar in the Available Components section.

5. Similarly, add a new field with a Field Type of Currency labeled "Annual Revenue" and a field with a Field Type of Integer labeled "# of Employees".

6. In the **Page Editor: Edit Account** page, specify that the Account name will be a Required field and increase the size of field:

   a. Select the **Account** field (if a field is selected its background changes color).

   b. In the Sidebar, check the **Required** check box.

c. In the Sidebar, specify a new value in the **Size** field (such as "45").
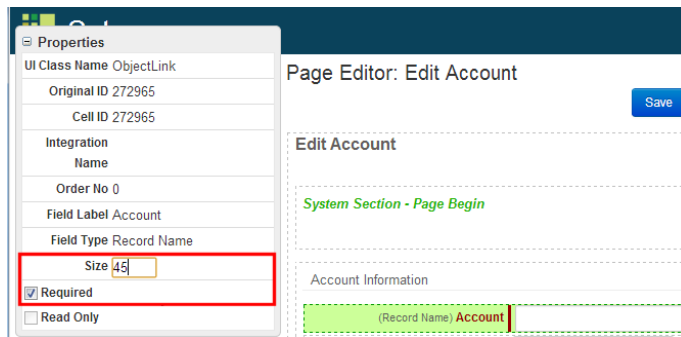
7. Similarly, specify that the **Website**, **Annual Revenue**, **# of Employees**, and **Country** fields will be Required.

8. Because we want these changes to apply to the **New Account** page as well as the **Edit Account** page, click **Save & Synchronize**.

9. On the **Synchronize: Edit Account** page, check the **New Account** check box and click **Save**. (In your own applications, you can select any of the available pages that you want to apply the changes to.)

10. On the **Edit Account** page, specify values for the new fields that you designated as Required and click **Save**. (If Required fields are left empty, Rollbase displays an error message when you try to save a record.)

11. We also want to show the new fields on the **View Account** page, so we will add them as follows:

   a. If necessary, click on a record in the **Accounts** tab to display the **View Account** page for an individual Account record.

   b. In the **View Account** page, click **Edit this Page**.

   c. In the **Page Editor: View Account** page, the **Website**, **Annual Revenue**, and **# of Employees** fields that you added are listed in the Available Components section of the Sidebar. To add them to the **View Account** page, simply drag them to the desired location on the page.
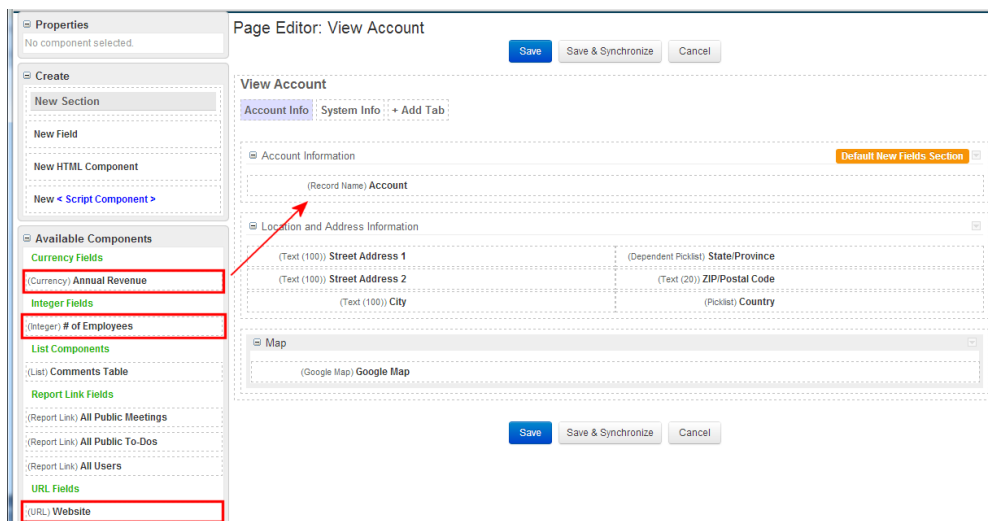
   d. Click **Save**.

e. Click **Back to List**.
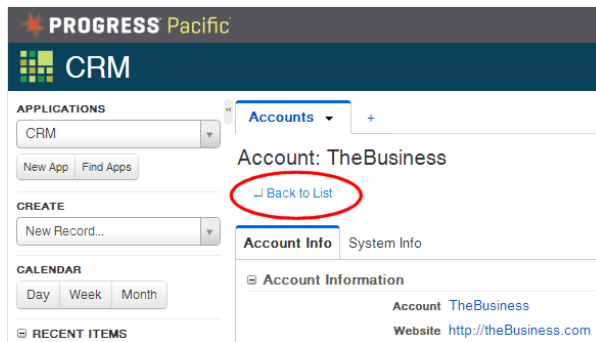
Edit the Accounts tab

In this section, we will change the CRM application's **Accounts** tab to show columns that correspond to the new fields we added to the Account object.

1. On the **Accounts** tab, click the **View Actions** button (⚙▾).

2. From the drop-down menu select Edit this View.

3. In the **Account: Edit View: All Accounts** page in the Columns section, in the Available Columns list select the new **Website**, **Annual Revenue**, and **# of Employees** fields and move them to the Selected Columns list using the Right-pointing arrow. Using the Up and Down arrows, position the fields in the desired order.

4. Click **Save**.

Add other Account records

Add a new Account or two as described in "**Add a new Account record**", above.

Lab 1 (continued)
Part 3

In this section you will define the CRM application's Contact object for tracking and managing Contacts. In this part of the workshop you will:

- Define the Contact object

- Add a few Contact Records to the application

- Edit the New Record and View Records page

Instructions

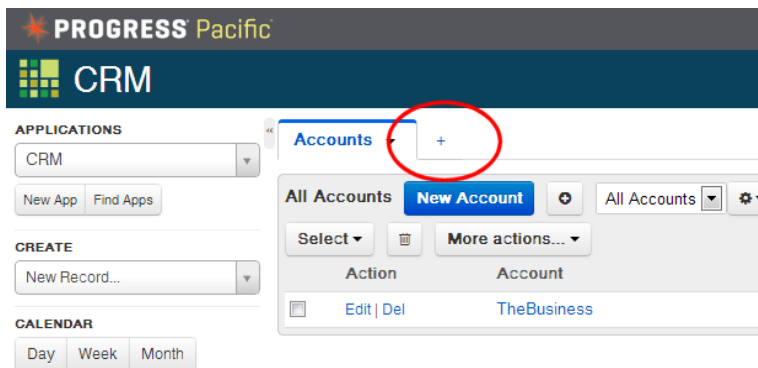**Define the Contact object**.

1. On the CRM application's home page, click the Add symbol (**+**).

This displays the What Do You Want to Create? dialog.

2. In the What Do You Want to Create? dialog, select **A New Object (with Tab)** and click **Create**.

3. In the **Object: New Object Setup** page, in the **Singular Name** field, specify `Contact`. Rollbase fills in default values for the object's properties. In this workshop, accept the default values.

4. In the **Object: New Object Setup** page, scroll down to the Optional Properties section and select the **Audit trail** property. Also, in the Object Attributes section, select the **Contact** option. The Contact option automatically provides fields for a person's information such as first and last names, telephone numbers, and email addresses.

5. For the rest of the settings, keep the default values and click **Save**.

6. On the **Tab: New Tab Setup** page, accept the default (`Contacts`) in the Tab Name field. In the **Add to Applications** field, make sure that the workshop application (`CRM`) is checked and click **Save**.

The **Contacts** tab is added to the CRM application.

Add a new Contact record

1. Click **New Contact**. The **New Contact** page is displayed.

2. On the **New Contact** page, specify account information in the desired fields; for this workshop, fill in the **First Name**, **Last Name**, and **Email Address** fields.

3. Click **Save**. The new Contact record is added to the listing on the **Contact** tab's .

Add columns to display additional Contact information

In order to present additional information when viewing Contact records, we will add more columns to display on the **Contacts** tab.

1. On the **Contacts** tab, click the **View Actions** button ( ) and select **Edit this View** from the drop-down menu.

2. In the **Contact: Edit View: All Contacts** page in the Columns section, in the Available columns list select the **Email Address** field and move it to the Selected Columns list using the Right-pointing arrow. Use the Up and Down arrows to specify the desired order.

3. Click **Save**. This adds the Email Address column to the list on the **Contacts** tab.

In the next part of this section we will associate a Contact with a specific Account.

Lab 1 (continued)
Part 4

In this section you will define a relationship between the Account and Contact object, so that a Contact record can be associated with a specific Account. In this part of the workshop you will:

- Create a Relationship between the Account and Contact objects

- Add a page-level tab to display the Contacts that are associated with an Account

Instructions

Create a relationship between two objects

To create the relationship between Contact and Account objects:

1. In the CRM application page, click the Down arrow on the **Contacts** tab and select Object Definition from the drop-down menu. The **Object: Contact Setup** page is displayed showing the definition for the Contact object.

2. Click on **Relationships** to open the Relationships section of the Contact object.
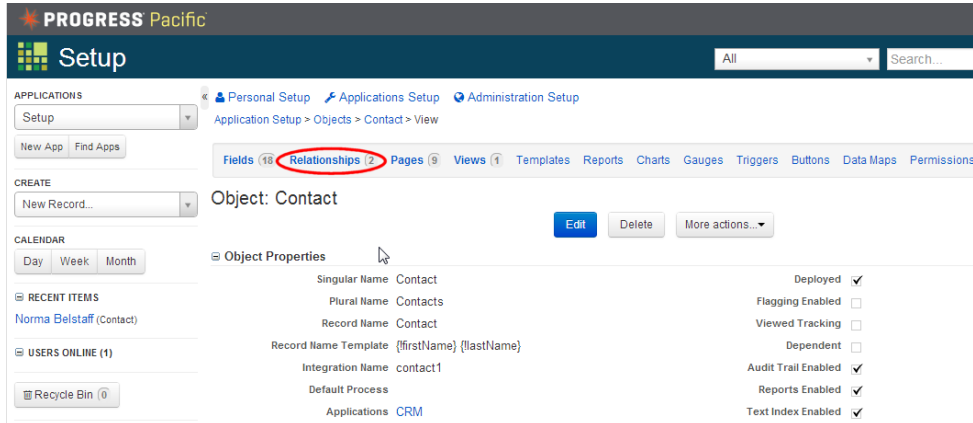
3. In the Relationships section, Click **New Relationship**.

4. On the **Contact: New Relationship** page, select the Account object from the list of available objects and click **Next**.

5. On the **Contact: New Relationship with Account** page, in the Cardinality section's **Cardinality** field, select **Many Contacts to One Account** from the drop-down list. Keep the default settings for the rest of the fields and click **Save**.

6. Click **return to CRM** at the upper right.

To demonstrate how this works:

1. On the CRM application's **Accounts** tab, click on a specific Account.

2. On the **View Account** page notice the Contacts section in the lower portion of the Account information. This section displays Contacts that are associated with the Account. Because we have not yet added any contact information for the specific account, this section is still empty.

3. To add an existing contact to this Account, click **Attach Contact**.

4. In the Attach Contact dialog, select the Contact you want to associate with the Account.

5. To add a new Contact, you can click **New Contact** or you can use the **Quick Create** button (⊕). For this workshop, click the **Quick Create** button and in the New Contact dialog, specify the Last Name of the Contact and click **Save**. (Note, you can always edit this new Contact to enter additional information.)

Create a new Account page-level tab for Contact information

In this section you will create a new tab on the **View Account** page to make it easy to display information about the Contacts associated with the Account. To create the tab:

1. On the **View Account** page, click **Edit this page**.

2. On the **Page Editor: View Account** page, click **Add Tab**.
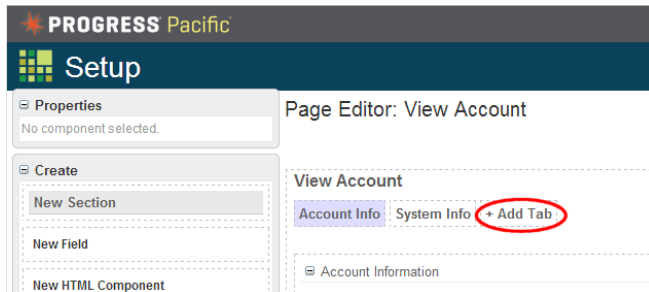
This creates a page-level tab with a default name such as **Tab2** right next to **Add Tab**.

3. To give the new tab a meaningful name, click on the tab and in the Properties section of the Sidebar, in the **Tab Name** field change its name to "Contacts".
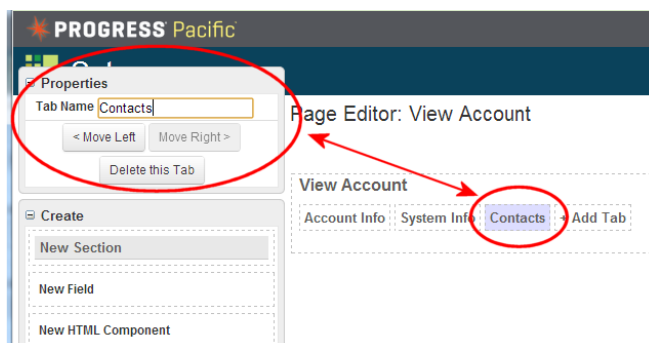
4. Re-position the new tab by clicking the **Move Left** button in the Properties section of the Sidebar.

5. Next, we will move the Contacts section of the **Accounts** page from the **Account Info** tab to the new **Contacts** tab as follows:

   a. In the **Page Editor: View Account** page, click the **Accounts Info** tab.

   b. Select the Contacts section.

   c. In the **Properties** section of the Sidebar, in the Tab field click the drop-down arrow and select the new Contacts tab.
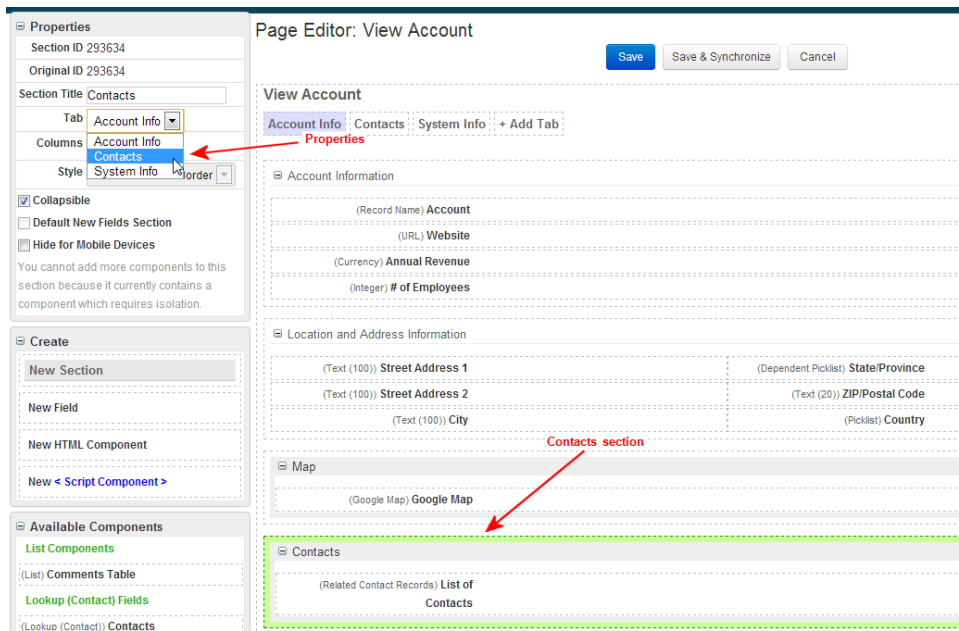
6. **Page Editor: View Account** page click **Save**.

Now when you display the **View Account** page, you can click the **Contacts** tab to display all the Contacts associated with that Account.

PROGRESS
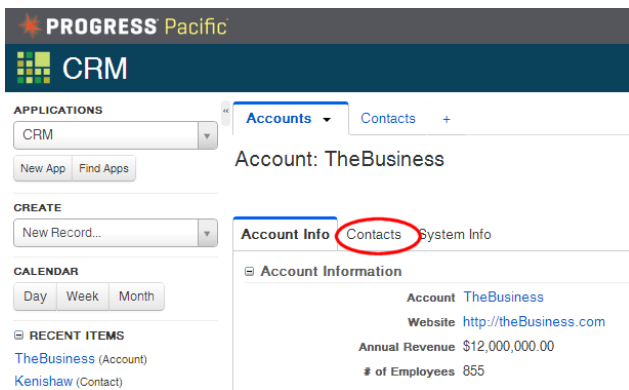
Lab 2
Creating a Lead object

Objective

In this section you will create a new Lead object that the CRM application will use to track and manage Lead information.

Duration

15 minutes

Goals

In this section you:

- Define the new Lead object
- Add the Workflow attribute to the Lead object
- Add a Lead record
- Associate a Lead with a company
- Add additional fields to the Lead objects

Instructions

Define the Lead object.

1. On the CRM Application page, click the Add symbol (**+**). This displays the What Do You Want to Create? dialog.

2. In the What Do You Want to Create? dialog, select **A New Object (with Tab)** and click **Create**.

3. In the **Object: New Object Setup** page, in the Singular Name field, specify `Lead`. Rollbase fills in default values for the object's properties. In this workshop, accept the default values.

4. In the **Object: New Object Setup** page, scroll down to the Optional Properties section and select the **Audit trail** property. In the Object Attributes section, select the **Contact** and **Location** options.

5. Under the Advanced Attribute part of the Object Attributes section, select the **Workflow** option. When you specify the **Workflow** attribute, Rollbase automatically adds a **Workflow Status** field to the object. In a subsequent activity, we will use the **Workflow Status** field values to specify the workflow process that Lead objects will move through in our CRM application.

6. Leave the default settings for the rest of the attributes. Click **Save**.

7. On the **Tab: New Tab Setup** page, accept the default (`Leads`) in the **Tab Name** field. In the **Add to Applications** field, make sure that the workshop application (`CRM`) is checked and click **Save**.

Add a Lead record

To add a new Lead record:

1. On the CRM application page's **Leads** tab, click **New Lead**.

2. Specify the Contact Information and the Location and Address information for the Lead record.

3. Click **Save**.

Associate a Lead with a company name

While we are adding information about a Lead, we will modify the Lead object so that each Lead will be associated with a company name as follows:

1. On the CRM application's **Leads** tab, click the entry for the Lead we added in the previous step.

2. On the **View Lead** page, click the **Edit** button.

3. On the **Edit Lead** page, click **Edit this Page**.

4. On the **Page Editor: Edit Lead** page, from the Sidebar's Available Components section, drag the **(Record Name) Lead** field to the top of the Contact Information section of the record page.
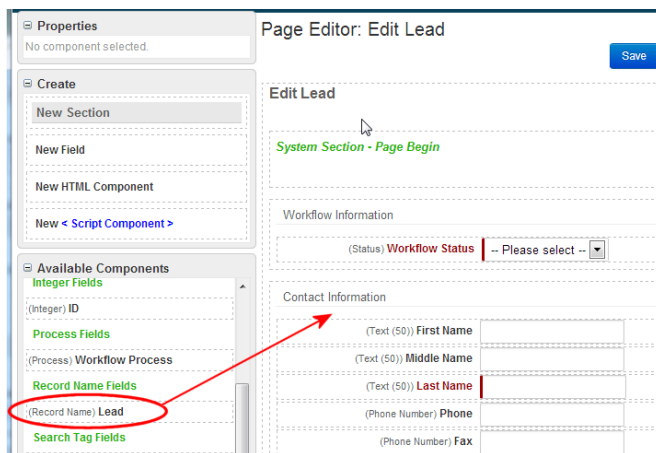
5. Click **Save**.

6. By default, the value of the **Record Name** field for records with the Contact attribute is automatically generated from the values of the **First Name** and **Last Name** fields. We will change this so you can specify a company name:

    a. On the **View Lead** page, click the Down arrow on the **Leads** tab and select Object Definition from the drop-down list.

    b. On the **Object Lead Setup** page, click **Edit**.

    c. In the section below **Template Helper** in the **Record Name Template** field, delete the default value of the template, **{!firstName}{!lastName}**. Leave the template empty, so that you can enter the name of a company when you create a new Lead.

    d. Check the **Update names of existing objects using this template** check box.

    e. Click **Save**.

7. Add the **Record Name** field to the Leads page:

    a. Click **return to CRM**.

![PROGRESS]

b. From the CRM application's Leads tab, click on a record.

c. From the **View Lead** page, click on **Edit this Page**.

d. From the Sidebar's Create section, drag **New Section** to the View Lead page.

e. In the Sidebar's Properties section, replace the default value of the **Section Title** field ("New Section") with "Lead Information".

f. From the Sidebar's Available Components section, drag the **(Record Name) Lead** field to the new Lead Information section you created in the previous step.

g. Click **Save**.

8. Similarly, add the **Record Name** field to the **Edit Lead** page:

a. In the **Lead page**, click **Edit**.

b. In the **Edit Lead page**, click **Edit this Page**.

c. From the Sidebar's Create section, drag the **New Section** to the top of the View Lead page.

d. In the Sidebar's Properties section, replace the default value of the **Section Title** field ("New Section") with "Lead Information".

e. From the Contact Information section of the **Edit Lead** page, drag the **Record Name** field to the new Lead Information section you created in the previous step.

f. While the **Record Name** field is still highlighted, make it a required field by checking the **Required** check box in the Sidebar's Properties section. Also increase the size of the field by adding a new value (such as "45") to the **Size** field of the Sidebar's Properties section.

9. Click **Save & Synchronize**.

10. On the **Synchronize: Edit Lead** page, check the New Lead check box.

11. Click **Save**.

12. Change the original default value for **Lead** field to the company name you want to use for the record.

13. Click **Save**.

14. Click **Back to List**.

Add columns for viewing Lead records

To display additional columns of Lead information:

1. On the CRM application's Leads tab, click the View Actions button (⚙▾) and select **Edit this View** from the drop-down menu.

2. On the **Lead: Edit View: All Leads** page, from the Available Columns list select the **Email Address**, **Country**, **First Name**, **Last Name**, and **Title** fields and with the Right Arrow move them to the Selected Column list. With the Up and Down arrows, position the fields in the order you want them displayed.

3. Click **Save**.

✳ **PROGRESS**

Add fields for tracking additional Lead information

In this step we will add more fields for tracking and managing Lead information. To add these fields:

1. On the CRM application's Leads tab, click on an individual Lead record to display the View Lead page.

2. On the **View Lead** page, click **Edit** and then click **Edit this Page**.

3. Using the Sidebar's Create section, click and drag **New Field** to create the following fields in the Lead Information section and specify which fields are "Required". Also, we will specify values for the two picklist fields. Each picklist value should be entered on a separate line without quotation marks. For the **Rating** field's picklist, specify example values *and* associated Integration Codes such as "Cold|COLD", "Warm|WARM", and "Hot|HOT". Integration Codes are used for programmatic access to values in a picklist field.

Field Type	Field Name	Required?	Suggested Picklist Value
URL	"Website"	Yes	
Integer	"# of Employees"	Yes	
Currency	"Annual Revenue"	Yes	
Picklist	"Industry"	No	"Software" "Automotive" "Healthcare" "Pharmaceuticals" "Banking"
Text	"Source"	No	
Picklist	"Rating"	Yes	"Cold|COLD" "Warm|WARM" "Hot|HOT"

4. Click **Save & Synchronize.**

5. On the **Synchronize: Edit Lead** page, check the **New Lead** check box to make sure that the additional fields are also added to the **New Lead** page and click **Save**.

6. In the **Lead** page, fill in values for the required fields that we just added and click **Save**.

Add the new fields to the View Lead page

1. On the **View Lead** page, click **Edit this Page**,

2. On the **Page Editor: View Lead** page, from the Sidebar's Available Components section, click and drag the new **Website**, **# of Employees**, **Annual Revenue**, **Industry**, **Source**, and **Rating** fields to suitable locations on the page. The **Page Editor: View Lead** page should look like this:

View Lead

Lead Info | System Info | + Add Tab

⊟ Workflow Information   `Default New Fields Section`

(Status) **Workflow Status**

(Workflow Actions) **Workflow Actions**

⊟ Contact Information

(Text (50)) **First Name**	(Text (50)) **Title**
(Text (50)) **Middle Name**	(Phone Number) **Mobile Phone**
(Text (50)) **Last Name**	(Email Address) **Email Address**
(Phone Number) **Phone**	(Lookup (User)) **Contact Owner**
(Phone Number) **Fax**	(vCard) **vCard File**

⊟ Lead Information

(Record Name) **Lead**

(URL) **Website**

(Currency) **Annual Revenue**

(Integer) **# of Employees**

(Text) **Source**

(Picklist) **Industry**

(Picklist) **Rating**

3. Click **Save**.

4. Click **Back to List**

Lab 3
Enabling a Workflow for Leads

Objective

In this section you will define a Workflow for the CRM application's Lead object

Duration

8 minutes

Goals

- Define the status levels

- Define the Integration Code for each status level

- Assign action names associated with status levels

Instructions

To create a Workflow, we will define the status levels and then assign actions to each level.

Create the status levels that will make up the Workflow for Leads

In this activity we will create the status level that make up the Workflow governing how Leads move through our CRM application. For each status level we will also assign an Integration Code that will be used to programmatically access the status level. The status levels and Integration Codes we use will be:

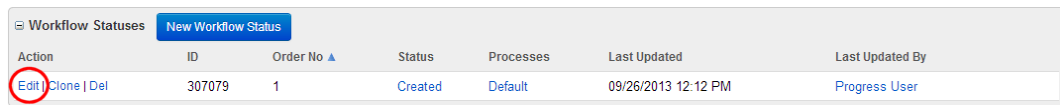| Status Level	Integration Code
Not yet reviewed	`NY`
Qualified	`QD`
Rejected	`RJ`
Negotiation Process	`NP`
Closed Won	`CW`
Closed Lost	`CL`

To set up these status levels:

1. From the CRM application's Lead tab, click the Down arrow and select **Object Definition** from the drop-down menu.

2. On the **Object: Lead Setup** page, click **Workflow Statuses** to display the Workflow Statuses section.
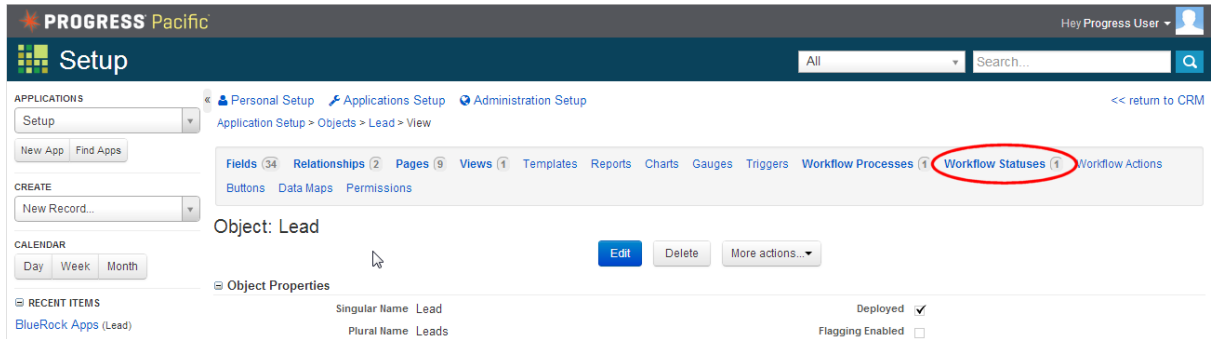
3. The Workflow Statuses section currently only lists the default "Created" status. Change "Created" to "Not yet reviewed" as follows:

   a. In the Action column for the "Created" status, click **Edit**.

   b. On the **Lead: Edit Workflow Status** page, change the value of the **Status Name** field to "Not yet reviewed"

   c. In the **Integration Code** field specify **NY** and click **Save**.

4. On the **Object: Lead Setup** page, again click **Workflow Statuses** so we can create the rest of the status levels.

5. In the Workflow Statuses section, click **New Workflow Status**.

6. On the **Lead: New Workflow Status** page create a new status as follows:

   a. In the **Status Name** field, enter the status level "Qualified".

   b. In the **Integration Code** field specify **QD** .

   c. Add a check in the **Create a new Workflow Action for moving records to this status** check box.

   d. In the **Action Name** specify a name for an action for moving the Lead to this status level; in this case name it "Qualify". We will create the actual definitions of the actions in a subsequent activity.

   e. Click **Save & New**.

   f. Repeat steps **a - d** to create the following status levels using the indicated action names.

Status Name	Integration Code	Action Name
Rejected	**RJ**	Reject
Negotiation Process	**NP**	Negotiation started
Closed Won	**CW**	Closed and won
Closed Lost	**CL**	Closed and lost

g. After creating the Closed Lost status, click **Save**.

In the next set of steps we will assign the actions to each status level that are appropriate for moving a Lead to a different status.

Assigning actions to status levels

In our CRM application at each status level of a Lead we want to see the actions to take to move the Lead to the next appropriate level. To do this we assign actions to each status.

1. On the **Object: Lead Setup** page, again click **Workflow Statuses**.

2. In the Workflow Statuses section, for the Qualified status, click **Edit** in the Action column.

3. On the **Lead: Edit Workflow Status** page, in the Available Actions list, select the Reject and Negotiation started actions and with the Right arrow move them to the Selected Actions list.

4. Click **Save**.

5. Repeat steps **2 - 4** for the Not yet reviewed status, specifying the Qualify and Reject actions.

6. Repeat steps **2 - 4** for the Negotiation Process status, specifying the Closed and won and Closed and lost actions.

7. Click **return to CRM**.

Note, for simplicity in this workshop, we have not associated any actions with the Rejected, Closed Won, and Closed Lost statuses. However, in our next activity we will use the Closed Won status to convert Lead records into Account records.

To demonstrate how this works:

1. On the CRM application's **Leads** tab, click on a Lead record.

2. On the **View Lead** page, in the Workflow Information section, the **Workflow Status** field should indicate "Not yet reviewed". In this workshop we will move the Lead to the "Qualified" status by clicking "Qualify" in the **Workflow Actions** field. This displays the Lead: Qualify page.

3. In the **Lead: Qualify** page, we can confirm that we want to change the Workflow status. Enter text in the **Comments** field and then click **Save**. The **Workflow Status** field will now display the updated Workflow Status of "Qualified".

4. Move the Lead to the "Negotiation Process" status by clicking "Negotiation started" in the **Workflow Actions** field. This displays the **Lead: Negotiation started** page.

5. On the **Lead: Negotiation started** page Add a comment if desired and click **Save**. The **Workflow Status** field will now display the updated Workflow Status of "Negotiation Process".

Leave the Lead record in the "Negotiation Process". In the next activity we will define a Trigger that will automatically convert a Lead to an Account when the Lead is moved "Closed Won" status.

Lab 4
Converting a Lead to an Account

Objective

This section shows how to use a Rollbase Trigger to convert a Lead to an Account. In our CRM application, when a Lead has moved to a Closed Won status we want to automatically convert the Lead record to an Account record.

Duration

8 minutes

Goals

- Create a Conversion Map to map the fields in a Lead record to the fields in an Account record

- Create a Rollbase Trigger to initiate the automatic conversion when the desired condition is met

Instructions

In order to specify the process of converting a Lead to an Account, we need to create a Conversion Map and then create a Trigger.

Creating a Conversion Map

Create a Conversion Map as follows:

1. On the CRM application's **Leads** tab, select a Lead record.

2. On the **View Lead** page, click **More Actions** and select **Convert** from the drop-down menu.
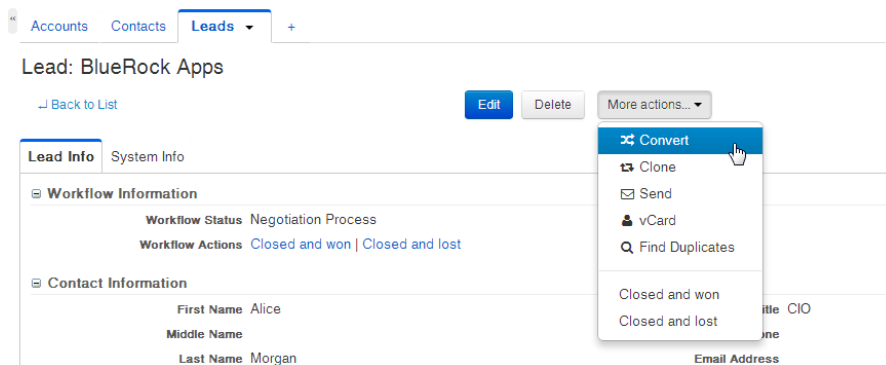
3. On the **Lead: Conversion Map** page, from the **Convert Lead into** drop-down list, select **Account** and click **Next**.

4. On the **Lead: Conversion Map (Account)** page, for this workshop accept the default mapping and click **Save Map**. Note, in a real world application you might need to specify how to map fields.

5. In the Save Map dialog, specify the **Map Name**, for this workshop, name it "Convert Lead to Account" and click **Save**. This name will be used by the Trigger to automatically convert Lead records to Accounts when the conditions we will specify are met.

6. On the **Lead: Conversion Map (Account)** page, click **Cancel** as we are not going to convert the Lead manually in this workshop.

Creating a Trigger

To create a Trigger:

1. On the CRM application's Leads tab, click the Down arrow and select Object Definition from the drop-down menu.

2. On **Object: Lead** page click **Triggers** to display the Triggers section of the Object definition.
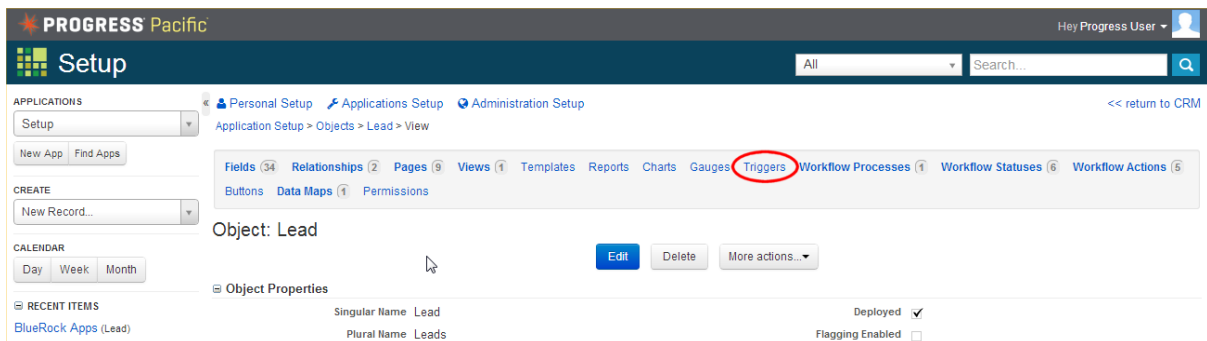
3. Click **New Trigger**.

4. On the **Lead: New Trigger** page, in the Trigger Type section, specify **Create New Record**. This tells Rollbase to automatically create a new Record using a Conversion Map, such as the one we created in the previous set of steps (**Creating a Conversion Map)**.

5. Click **Next**.

6. On the **Lead: New Trigger** page in the General Properties section, in the **Trigger Name** field, specify the name of the Trigger such as "Create Account from Lead".

7. In the Trigger Timing section check the **After Update** and **After Create** check boxes to indicate when the trigger should run.

8. In the Trigger Properties section in the **Conversion Map** field select the "Convert Lead to Account" conversion map that we specified earlier.

9. In the Trigger Condition Formula section in the Formula return type field, specify the JavaScript that determines whether or not the Trigger should run. We want the Trigger to run when the Workflow Status is "Closed and won".

    a. From the second column in the Template Helper section, click the Down arrow and select Workflow Status [code]. This displays the programmatic expression of the Workflow status `{!status#code}` in the text field on the second line of the Template Helper.

This expression is called a merge field and will be replaced with text at runtime so the entities need to be treated as Strings.

b. Enter the JavaScript expression that will evaluate the Integration Code in the merge field using the values from step **a**. The code looks like this:

```
if ("{!status#code}"=="CW"){
  return true;
}
return false;
```

You can use the **Validate Formula** and **Debug Formula** buttons to make sure your code is correct.

c. Click **Save**.

To demonstrate how this works:

1. On the CRM applications Leads tab, click on a Lead record.

2. On the **View Lead** page, in the Workflow Information section, the **Workflow Status** field should indicate "Negotiation Process". Move the Lead to the "Closed Won" status by clicking "Closed and won" in the **Workflow Actions** field. This displays the Lead: Closed and won confirmation page.

3. Enter descriptive text and click **Save**. The **Workflow Status** field on the View Lead page will now display the updated Workflow Status of "Closed Won".

4. To demonstrate that our Trigger works and our Lead has been converted to an Account, click the **Accounts** tab. We should now see that a new Account has been added to our list of Account records.

Lab 5
Creating a Portal to gather new Leads

Objective

For our CRM workshop application we will build a public facing Web site where visitors can register their interest in receiving information about our company.

Duration

16 minutes

Goals

- Create a Portal that will host our Web site.

- Create a Main page to welcome visitors to our Web site

- Create a New Lead page where visitors register their interest in our products. Rollbase will gather the information they submit and use it to create a new Lead record

- Create a Thank You page that thanks visitors for their interest

- Create links between the Web site pages

Instructions

To create our CRM application's Web site, we will create a Portal framework, three Web pages, a form on one of the pages to collect visitor information, and links for navigation around the site.

Create the Portal Framework and Main Page

1. On the CRM application page, click the **Setup** button (⚙) in the upper right-hand corner.

2. On the **Setup** page, click **APPLICATIONS SETUP**.

3. On the **Applications Setup** page, click **PORTALS**.

4. On the **Portal Development Helpers** page, click **New Portal**.

5. On the **Portal: New Portal** page specify the following information:

   a. In the **Portal Name** field, give a name to the Portal such as "Leads Portal for CRM"

   b. Check the **Is Deployed** field check box.

   c. Check the **"Powered by" Logo** field check box.

   d. Check the **CRM** field to make sure the Portal is added to the CRM application.

6. Click **Save**.

✳ PROGRESS

7. On the **Portal Development Helpers** page, in the Portal column, click the name of the new Portal, "Leads Portal for CRM".
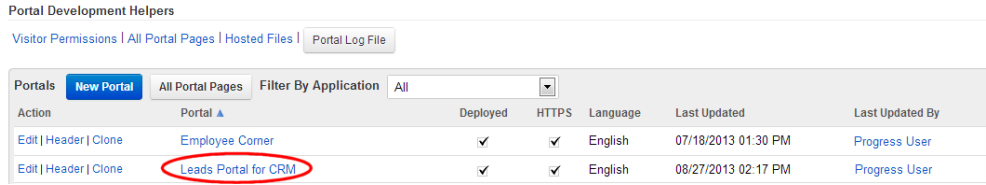
8. On the **Portal: Leads Portal for CRM** page, scroll down to the Portal Development Helpers section and in the Action column for the Main Page [Leads Portal for CRM], click **Edit**.

9. In the **Page Editor: Main Page [Leads Portal for CRM]**, from the Sidebar's Properties section, click and drag a New HTML Component to the Main Page and then click on the component's **Edit** button.
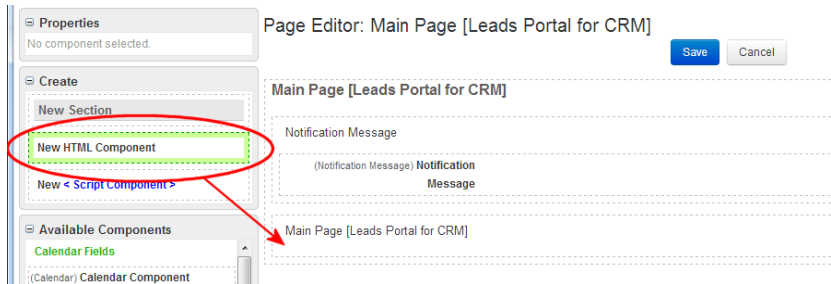
10. In the Edit HTML dialog, type a suitable Welcome message and format it appropriately. Then add text (such as "Click Here to submit your information") that will be used to link to a form on which visitors will enter their information. Click **Save**.

11. In the **Page Editor: Main Page [Leads Portal for CRM]** click **Save**.

Create a new page to gather information from visitors

In this section we create a page with a form in which visitors enter information about themselves so they can receive information about our products. When visitors submit this information, Rollbase creates a Lead record from it.

1. On the **Portal: Leads Portal for CRM** page in the Portal Development Helpers section, click **New Page**.
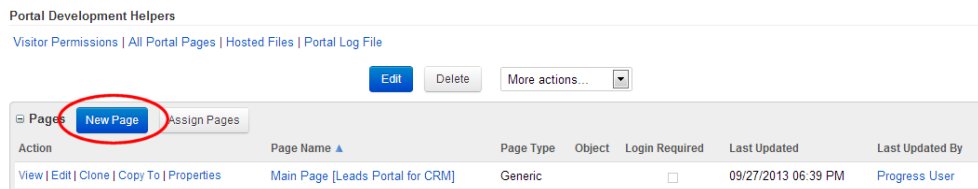
2. On the **New Portal** page, specify information about the page as follows:

   a. In the **Page Name** field specify a name such as "New Lead". (For this workshop we will leave the **Only logged-in portal visitors can access this page** option unchecked.)

   b. In the **Page Type** field, select Object Create Page.

   c. In the **Object Type** field, select the Lead object from the drop-down list.

3. Click **Save**.

Add fields to capture visitor information

In this section we add fields to the New Lead Web page to capture visitor information.

1. On the **Page Editor: New Lead** page from the Sidebar's Available Components section drag the following fields to the New Lead page.

   - Record Name (Lead)
   - Annual Revenue
   - State/Province
   - Email Address
   - # of Employees
   - Phone
   - Country
   - Industry
   - City
   - Street Address 1
   - First Name
   - Last Name
   - Title
   - Website

2. On the **Page Editor: New Lead** page from the Sidebar's Create section, click and drag a New Section to the New Lead page; give it a **Section Title** of "Company Information".

3. Drag the following fields to the new "Company Information" section:

   - Lead
   - Website
   - Industry
   - Annual Revenue
   - # of Employees
   - City
   - Street Address 1
   - State/Province
   - Country

4. Rename the "New Lead" section to "Your Information"

   a. Highlight the section.

   b. In the Sidebar Properties section edit the **Section Title** field.

5. Drag the Your Information section to a location above the Company Information section.

6. Make the following fields "Required" by highlighting them and adding a check to the **Required** check box in the Sidebar's Properties section:

   - First Name
   - Last Name
   - Email Address
   - Title
   - Lead
   - Annual Revenue
   - # of Employees
   - Website
   - Country

The New Lead Web page should look like this:

7. Click **Save**.

Create a Thank You Page

In this section, we create a page to thank visitors for submitting their information.

1. On the **Portal: Leads Portal for CRM** page, in the Portal Development Helpers section, click **New Page**.

2. On the **New Portal** page, specify information about the page as follows:

   a. In the **Page Name** field specify a name such as, "Thank You [New Lead]".

   b. In the **Page Type** field, select Generic Page.

3. Click **Save**.

4. In the **Page Editor: Thank You [New Lead]** page, from the Sidebar's Create section, click and drag a New HTML Component to the new page and click **Edit**.

5. In the Edit HTML dialog add suitable text such as "Thank you for registering. We will contact you as soon as possible." Arrange and format the text as desired and click **Save**.

6. In the **Page Editor: Thank You [New Lead]** page, click **Save**.

## Specify the Web site links

To continue building the Web Portal, we will specify the navigational links that take visitors to the various Web site pages. The first link takes visitors from the Main Portal page to the New Leads page when they explicitly click on the link. From the New Leads page, the second link takes visitors automatically to the Thank You page after they submit their company information.

To create the link from the Main page to the New Leads page:

1. On the **Portal: Leads Portal for CRM** page, in the Portal Development Helpers section, click **Edit** for the Main Page [Leads Portal for CRM] entry.

P a g e | **32**

2. On the **Page Editor: Main Page [Leads Portal for CRM]** page, click on the HTML Component section and click **Edit**. The Edit HTML dialog is displayed.

3. Instead of a hard-coded URL to the target page, we will use the page reference maintained by the application. To obtain this reference:

    a. In the Edit HTML dialog's Template Helper section, click the Down arrow in the left-hand field and select "Leads Portal for CRM" page in the Portals section.

    b. In the Template Helper's central field, click the Down arrow and select "New Lead [URL]". This displays the URL reference value for the page in the text field on the second line. This represents the merge field and will have a value such as " **{!#PORTAL.76149980.76150070#URL}**.
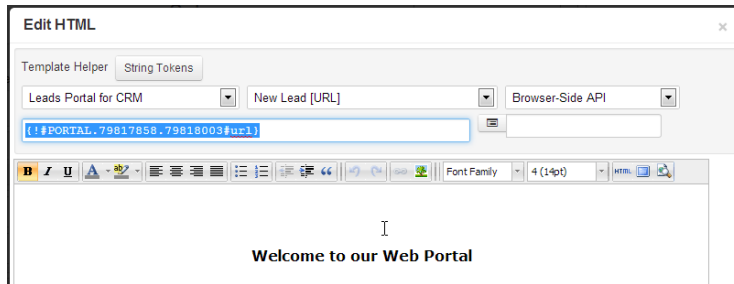

    Copy the contents of this field.

4. In the Edit HTML dialog, select the text you want to make into a link and click the link icon (   ).

5. In the Insert/Edit Link dialog in the **Link URL** field, paste the merge field value (from **step 3b**) into the Link URL field and click **Insert**.

6. In the Edit HTML dialog, click **Save**.

7. On the **Page Editor: Main Page [Leads Portal for CRM]** page, click **Save**.

To create a link that automatically takes a visitor from the New Lead page to the Thank You page:

1. On the **Portal: Leads Portal for CRM** page, in the Portal Development Helpers section, click **Edit** for the New Lead entry.

2. On the **Page Editor: New Lead** page, select the Submission Form component.

3. In the Sidebar's Properties section, click the **Destination Page** field and select Thank You [New Lead] from the drop-down list.
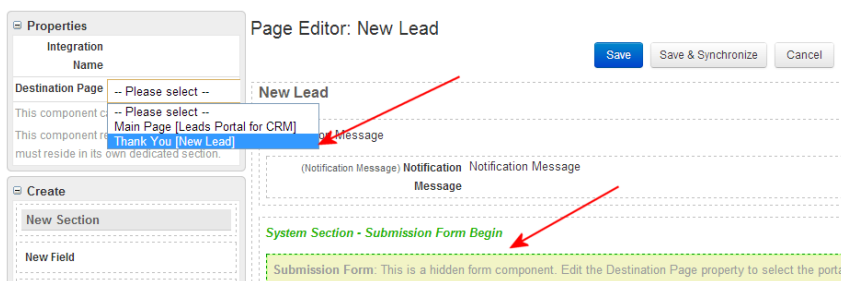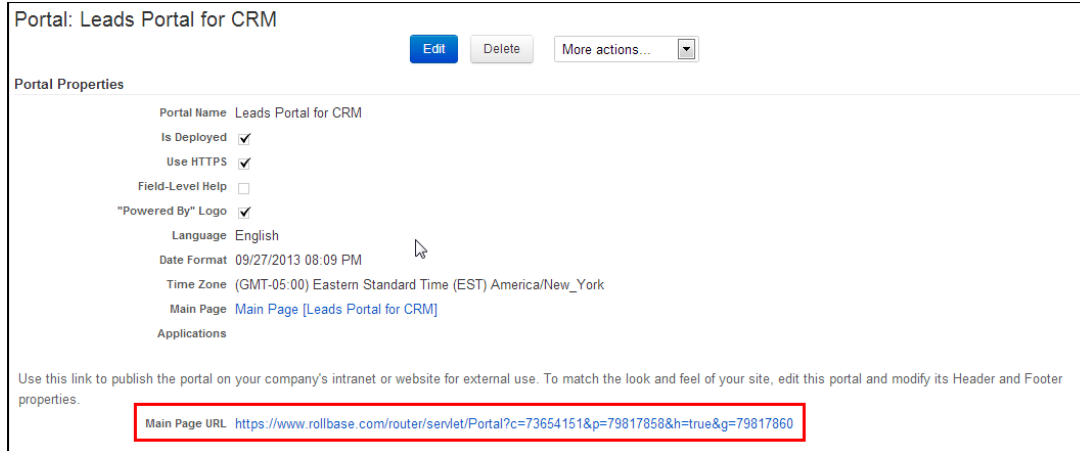

4. Click **Save**.

To demonstrate how this works:

1. On the **Portal: Leads Portal for CRM** page, click the link in the **Main Page URL** field. This opens the Portal's Main page on a new tab in your browser.

2. On the Main Page, click the "Click Here" link. This opens the Portal's New Leads page.

3. On the New Leads page, fill in the information about the Lead and click **Submit**. The Portal's Thank You page is displayed.

4. In your browser, return to the Rollbase tab.

5. Click **return to CRM**.

6. Click the **Leads** tab. You should see the new Lead that was submitted via the Web Portal.