Salesbuilder Demo Script

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Check http://coenraets.org for updates.

Initial Data Synchronization

1. Start the application.

   NOTE: If you have used a previous version of Salesbuilder, click the Home button in the menu bar and click Initialize database. You can then close the Tools dialog.

2. The sales pipeline dashboard is empty. Type a few letters in the search field (upper right corner): no data… you haven't populated your local database yet.
3. Optionally start the AIR SQLite Admin tool (download it here: http://coenraets.org/blog/2007/06/sqlite-admin-application-for-air/) .
   a) Click "Open Database".
   b) Navigate to your "Application Data\salesbuilder\Local Store" directory (~/Library/Preferences/salesbuilder on the MAC), select salesbuilder.db and click Open.
   c) Click "New Query" in the menu bar.
   d) Type "select * from account", "select * from contact", or "select * from opportunity": no data.
4. In the Salesbuilder application, click the Sync button in the menu bar. This will initially populate your local database with server data. In this demo, the server data is read from serverdata.xml.

   Note: If the Dashboard and/or the Account Summary tabs are open, the data will automatically be loaded in these screens after the synchronization process completes.

5. If you started the SQLite Admin tool, click the "Execute" button again to re-execute your query, and notice that your local database has now been populated.

Sales Pipeline

The sales pipeline features many "direct manipulation" options:

1. Grab the background of the chart with your mouse and scroll it left and write to navigate along the time axis.
2. Grab a vertical grid line, and move it left and right to zoom-out/zoom-in.
3. Coolest feature: to modify your pipeline directly, grab a bubble with your mouse and move it up and down or left and right to adjust the probability and the expected closing date respectively. The projected revenue is automatically updated in the chart title.
4. To see that the new values are automatically saved to the database, move a few bubbles, click the sync button, and then click "Show Details"… Notice that the local changes to the opportunities are picked up by the synchronization process. Alternatively, you can run the following query in the SQLite admin tool: select * from opportunity.

5. You can also double click a bubble to open a details view for the opportunity.

Search and Summary Screens

1. Type a few letters in the search box (upper right corner): matching accounts, contacts, and opportunities appear.
2. Use the arrow keys to navigate in the search results popup.
3. Use the Enter key to open the selected item.
4. Alternatively, you can also open the summary screens (“Accounts”, “Contacts”, and “Opportunities” buttons in the menu bar), and open individual items from there.

Working with Data

1. Open the “Adobe” account.
2. Make some changes to the Adobe data (for example, change the phone number), and click “Save”.
3. Click the Sync button and “Show Details” again and notice that the change you just made is picked up by the synchronization process.
4. In the Contacts view of the Adobe tab, you can grab an org chart item with your mouse and move the org chart around.
5. To open the details view for a contact, either double-click an org chart item or click the Grid button (lower left corner) and double-click a contact in the datagrid.
6. Add a contact by clicking “Quick Contact”. Make sure you select a manager, click save and notice that the org chart is updated automatically.
7. On the Market History view of the Adobe tab, you can grab the chart with the mouse and move it left and right, adjust the time selection using the dividers in the bottom chart, etc.
8. On the News view of the Adobe tab, you can look at news for the selected account (leverages the HTML component).
9. Continue to add and modify accounts, contacts, and opportunities and click the Sync button to see the changes being picked up by the synchronization process.
10. At any point, you can go back to the SQL admin tool and re-execute the query to show that the local db has been updated.

Native drag-and-drop

1. Click the “Dashboard” tab, or the Dashboard button in the menu if you had already closed the dashboard tab.
2. Drag the dashboard title on the desktop: the chart is saved as a JPG on the desktop. Note: it can take a few seconds before you actually see the drag icon.

3. Open a Word document, drag the dashboard title again, and, this time, drop it directly in the Word document.

4. Open the Opportunity summary screen. Select some rows in the datagrid, and, without releasing the mouse button, drag the selected rows and drop them on the desktop. The rows are saved as an Excel document on the desktop.
5. Double-click the Excel document to open the spreadsheet.
6. Drag some rows from the Datagrid again, and, this time, drop them directly somewhere in the Excel spreadsheet.

Reinitializing the demo

To reinitialize your database and start with an empty db and show the initial sync process, click the Home button and click Initialize database.