

vtoffline
version 1.2

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About

vtoffline is a sample application written using the Javascript client library. It demonstrates the ability to create vtiger CRM records even in offline mode.

Requirement

1. Install the Gears extension for your browser, visit <http://gears.google.com>
2. vtoffline should work on the same domain under which your vtiger CRM is working. Due to cross-domain restriction of Ajax request.

Overview

The features of the application are captured in the sections below:

Grant Access

When you try to visit vtoffline page you will be prompted by Gears to allow access:



Allow the access to the site to proceed with the application.

Login Page

Enter your vtiger CRM username, Access Key (see My Preferences) and URL (like, <http://en.vtiger.com/wip>)

vtiger Offline Client

Username:

Access Key:

vtiger URL:

Home Page

The Home page indicates the mode in which application is working (**Online** / **Offline**) at the top left corner.

Number of records still offline and needs to be Synchronized is shown beside [Setup Offline](#) link.

List of accessible module links are shown to the left.

The screenshot displays the vtiger CRM interface. At the top left, the text "vtiger CRM" is followed by a green box containing the word "Online". To the right, there is a box showing "Records: 0" and a link for "Setup Offline", followed by the text "Welcome admin | Logout". On the left side, a vertical list of module links is shown: Calendar, Leads, Accounts, Contacts, Potentials, Products, Documents, Emails, HelpDesk, Faq, Vendors, PriceBooks, Quotes, PurchaseOrder, SalesOrder, Invoice, Campaigns, and Users. The main content area features an "About" section with the text: "Powered by vtiger Webservice and Google Gears", "This application can save you records even if you go offline!", and "Click [Setup Offline](#) now if you have not done yet."

Setup Offline

At first you should click on [Setup Offline](#) link to configure application to load required data to work even during offline.

Once you click [Setup Offline](#) link, it gets disabled and progress is indicated. The link will be re-enabled once the setup is complete.

vtiger CRM Online

Setting Contacts... Records 0 Setup Offline Welcome admin | Logout

About

Powered by **vtiger Webservice** and **Google Gears**

This application can save you records even if you go offline!

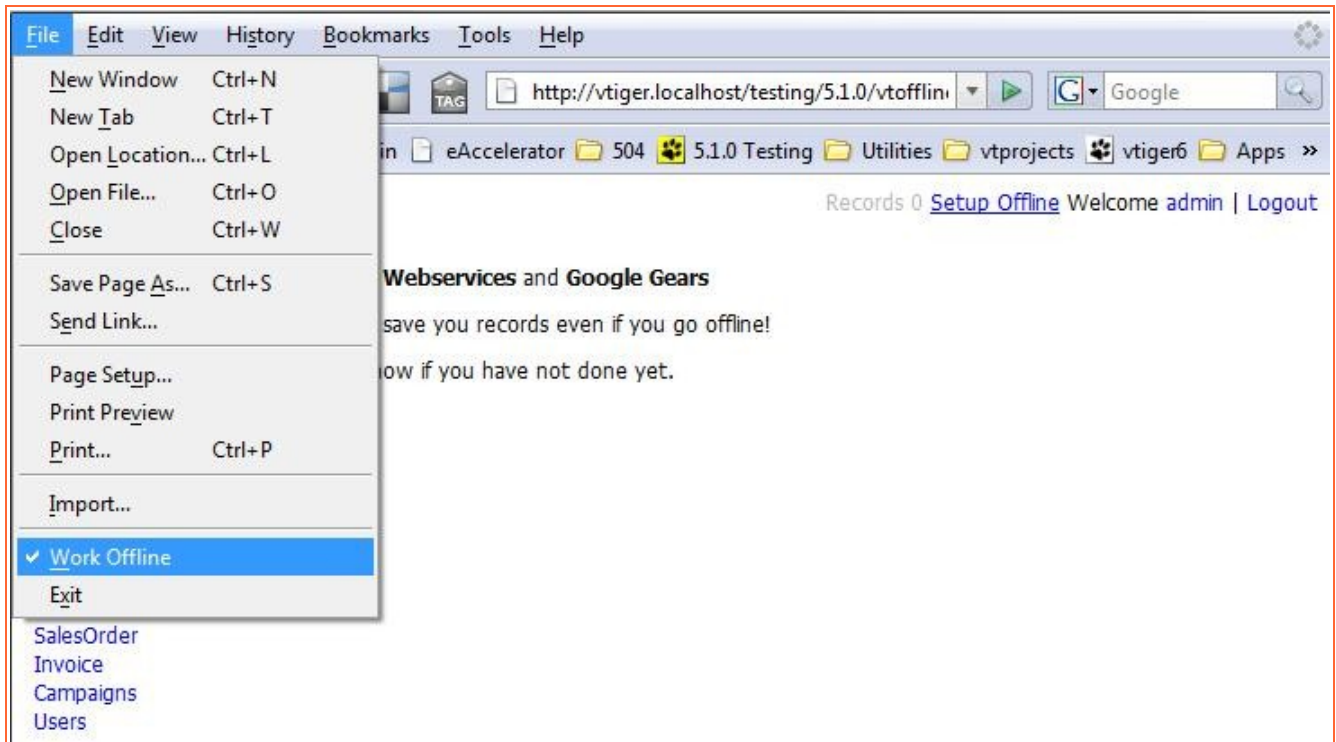
Click [Setup Offline](#) now if you have not done yet.

Calendar
Leads
Accounts
Contacts
Potentials
Products
Documents
Emails
HelpDesk
Faq
Vendors
PriceBooks
Quotes
PurchaseOrder
SalesOrder
Invoice
Campaigns
Users

NOTE: Each time you click Setup Offline, the configuration made through the application is reset.

Go Offline

To test the application behavior during offline mode, make your browser work offline.



Mode Indicator

Offline mode is detected when you loose the network connection to the vtiger CRM server and it will be indicated as highlighted below.

vtiger CRM Offline Records 0 [Setup Offline](#) Welcome admin | [Logout](#)

About

Powered by **vtiger Webservice** and **Google Gears**

This application can save you records even if you go offline!

Click [Setup Offline](#) now if you have not done yet.

- Calendar
- [Leads](#)
- Accounts
- Contacts
- Potentials
- Products
- Documents
- Emails
- HelpDesk
- Faq
- Vendors
- PriceBooks
- Quotes
- PurchaseOrder
- SalesOrder
- Invoice
- Campaigns
- Users

Module View

Clicking the module link will show the module view.

You can configure the columns to be shown on the Create form or Create new record.



The screenshot displays the vtiger CRM interface. At the top left, it says "vtiger CRM Offline". At the top right, it shows "Records 0", a link to "Setup Offline", and "Welcome admin | Logout". On the left side, there is a vertical menu of modules: Calendar, Leads, Accounts, Contacts, Potentials, Products, Documents, Emails, HelpDesk, Faq, Vendors, PriceBooks, Quotes, PurchaseOrder, SalesOrder, Invoice, Campaigns, and Users. The "Leads" module is highlighted with a red box. To the right of the menu, the "Leads" module view is shown. It features two buttons: "Create" and "Columns", both highlighted with red boxes. Below the buttons, there is a text instruction: "Configure your form by clicking Columns". Further down, another text instruction reads: "With Create you can add new record of this module. It will be synchronized with vtiger CRM when you are Online."

Configure Columns

You can choose the columns to be shown on the Create Form for the module.

Mandatory fields of the module will not be available for selection.

vtiger CRM Offline Records 0 [Setup Offline](#) Welcome admin | Logout

Leads

<input type="checkbox"/> Annual Revenue	<input checked="" type="checkbox"/> Company *	<input type="checkbox"/> Created Time	<input type="checkbox"/> Title
<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Fax	<input type="checkbox"/> First Name	<input type="checkbox"/> Industry
<input checked="" type="checkbox"/> Last Name *	<input type="checkbox"/> Lead Source	<input type="checkbox"/> Lead Status	<input type="checkbox"/> Mobile
<input type="checkbox"/> Modified Time	<input type="checkbox"/> No Of Employees	<input type="checkbox"/> Phone	<input type="checkbox"/> Rating
<input type="checkbox"/> Salutation	<input checked="" type="checkbox"/> Assigned To *	<input checked="" type="checkbox"/> Website	<input type="checkbox"/> Yahoo Id
<input type="checkbox"/> City	<input type="checkbox"/> Postal Code	<input type="checkbox"/> Country	<input type="checkbox"/> Street
<input type="checkbox"/> PO Box	<input type="checkbox"/> State	<input type="checkbox"/> Description	<input type="checkbox"/> leadid

NOTE: The configuration will be lost if you click Setup Offline again!

Create Record

When you are creating new record for the module, the create form displays selected columns configured for the module.

The screenshot shows the 'vtiger CRM Offline' interface. On the left is a navigation menu with items: Calendar, Leads, Accounts, Contacts, Potentials, Products, Documents, Emails, HelpDesk, Faq, Vendors, PriceBooks, Quotes, PurchaseOrder, SalesOrder, Invoice, Campaigns, and Users. The main content area is titled 'Leads'. At the top right, it says 'Records 0' (highlighted in red), followed by links for 'Setup Offline', 'Welcome admin', and 'Logout'. The form contains the following fields: '* Company:' with the value 'Test Company', 'Email:' with the value 'tester@offline.com', '* Last Name:' with the value 'Test Lead', '* Assigned To:' with the value 'admin', and 'Website:' with the value 'www.online.com'. At the bottom of the form are 'Save' and 'Cancel' buttons.

The record can be saved even when you are in Offline mode. This record will be synchronized with vtiger CRM if you are online.

The count of records which are not synchronized is shown as highlighted in the screenshot below:

The screenshot shows the 'vtiger CRM Offline' interface. On the left is the same navigation menu as in the previous screenshot. The main content area is titled 'Leads'. At the top right, it says 'Records 1' (highlighted in red), followed by links for 'Setup Offline', 'Welcome admin', and 'Logout'. Below the title are 'Create' and 'Columns' buttons. The text below the buttons reads: 'Configure your form by clicking [Columns](#). With [Create](#) you can add new record of this module. It will be synchronized with vtiger CRM when you are Online.'

Record Synchronization

The records created during offline mode will be synchronized one by one when vtiger CRM server is accessible. The progress is shown for this process and record count is decrement on successful synchronization.



The screenshot displays the vtiger CRM interface. At the top left, the text "vtiger CRM" is followed by a green box containing the word "Online". To the right, a green box contains "Syncing..." followed by "Records 1", a link for "Setup Offline", and user information "Welcome admin | Logout". A vertical sidebar on the left lists various modules: Calendar, Leads, Accounts, Contacts, Potentials, Products, Documents, Emails, HelpDesk, Faq, Vendors, PriceBooks, Quotes, PurchaseOrder, SalesOrder, Invoice, Campaigns, and Users. The "Leads" module is currently selected and highlighted. Below the sidebar, the "Leads" module page is visible, featuring a "Create" button and a "Columns" button. A message below these buttons reads: "Configure your form by clicking [Columns](#). With [Create](#) you can add new record of this module. It will be synchronized with vtiger CRM when you are Online."