c360 Dashboard Developer Guide

Thursday, July 14, 2005

c360 Solutions, Inc.
www.c360.com

Table of Contents _____

Overview

The c360 Dashboard Developer Guide demonstrates the Custom Content Cell feature. The Custom Content Cell enables CRM administrators to create their own content cells apart from those which are in the default list. A custom cell can also be created as a 'subscriber' cell with the ability to retrieve object information from the context selected in the 'publisher' cell.

Creating a Custom Content Item

To create a custom content item, click on the 'Add Content Item' button on the Dashboard toolbar.
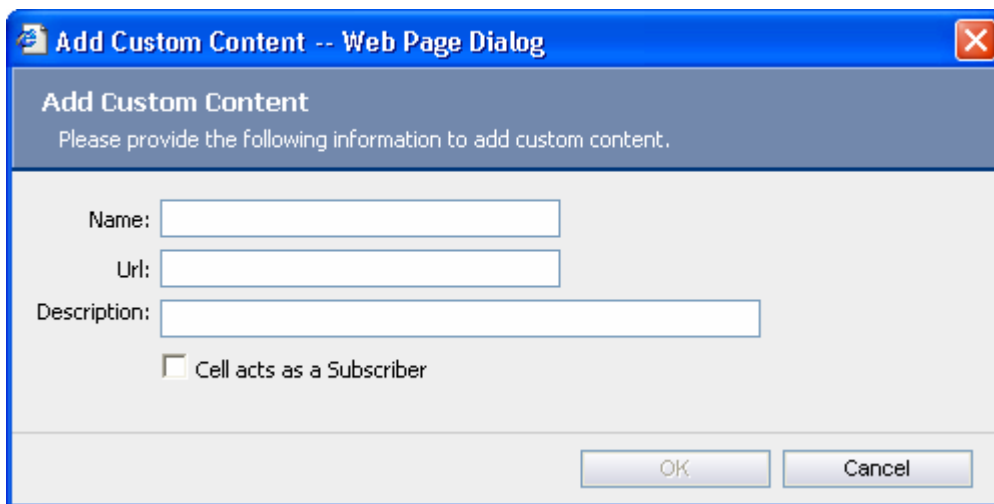

Figure 1: Add Content Item

A dialog, as shown in Figure 1, will appear which will ask for the following:

Name: The name of the cell which has to be added. This field is mandatory.

Url: The URL which this content cell will refer to. This field is mandatory.
The URL should begin with 'http://' if the page being accessed is not a part of the Dashboard virtual directory.

Description: The description for the cell which has been added.

A checkbox: Specify whether the cell is supposed to act as a Subscriber or not.

Adding a Custom Content Cell to Dashboard

Once the custom content cell has been added, it can be used on the dashboard like the other cells. To do so, simply click on 'Add Content' in a dashboard column and a dialog will appear as shown in figure 2.
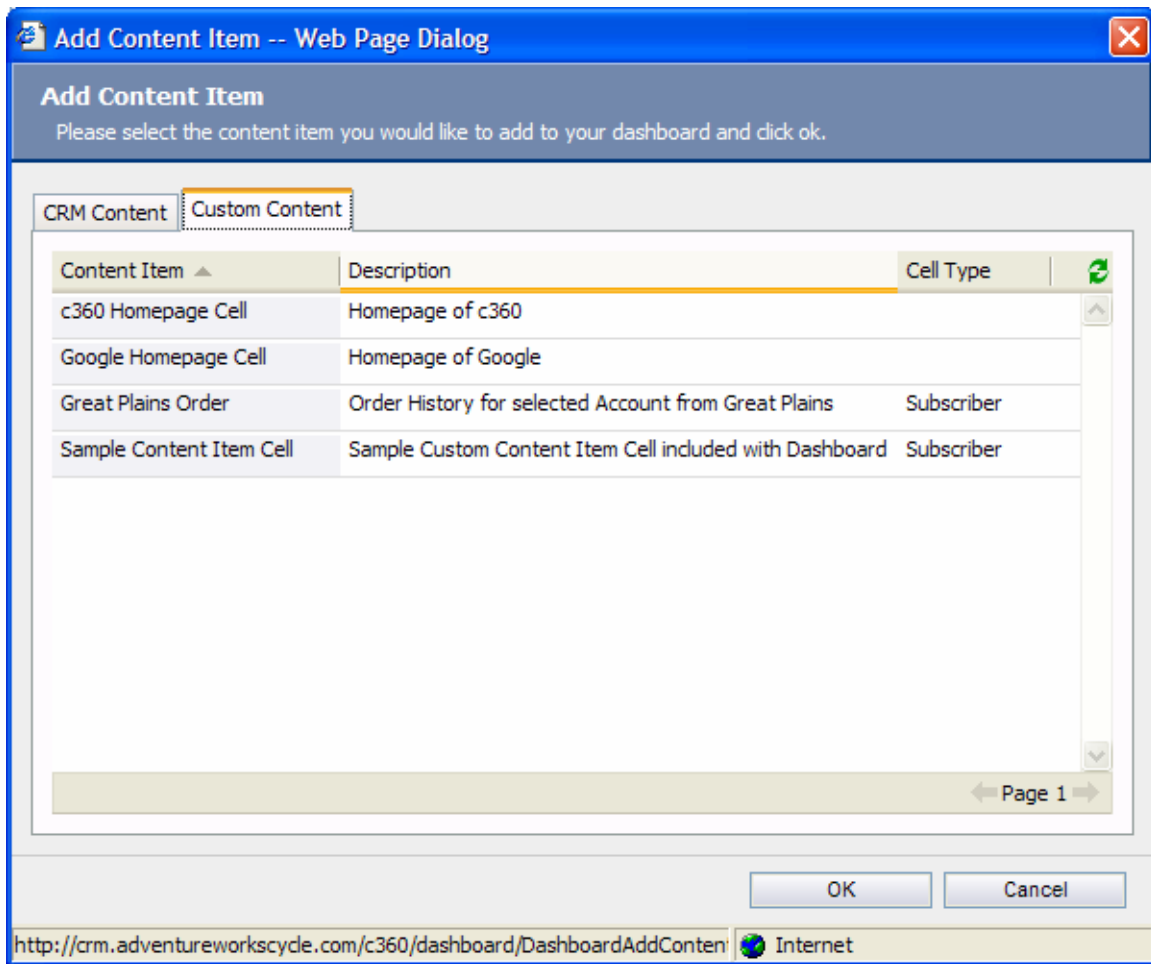

Figure 2: Adding a Custom Content cell onto a Dashboard Column

Now, select the required cell and click Ok. The selected cell will be added onto the Dashboard column.

Sample Content Items/Cells

1 – Custom Content Item of 'Subscriber' Type

This example shows how to add a custom content item of 'subscriber' type. Note when you install Dashboard, a sample content item is also installed. This page contains precompiled .NET code to display the Object Type and Object Id. This page is found in the Dashboard installation directory under 'CustomPageTest.aspx'

Subscriber content cells listen for changes to the Publisher Cell and display data related to the selected record.

Add a new Custom Content item as per values below. This is illustrated in Figure 3.

Name: "Sample Content Item Cell"

Url: "\c360\dashboard\CustomPageTest.aspx"

Description: "Sample Custom Content Item cell included with Dashboard"
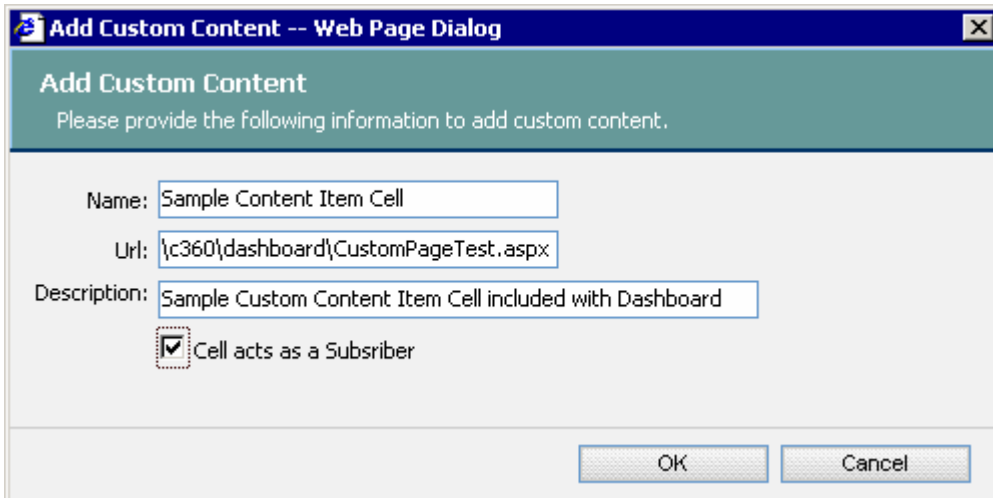Checkbox indicating whether "Cell acts as a Subscriber"

Figure 3: Adding a new Custom Content Item of 'Subscriber' Type

This cell is of the type 'Subscriber'. This cell works in collaboration with any of the 'Publisher' cells in the dashboard and displays the **Object Type** and **Object Id** for the record marked / selected in the publisher cell. These values are displayed using the following query strings:

Object type: Request.QueryString["OType"]
Object Id: Request.QueryString["oId"]

Add this new Custom Content Item cell to the Dashboard column by clicking on 'Add Content'. The "Sample Content Item Cell" will appear in the Custom Content tab as illustrated in Figure 4
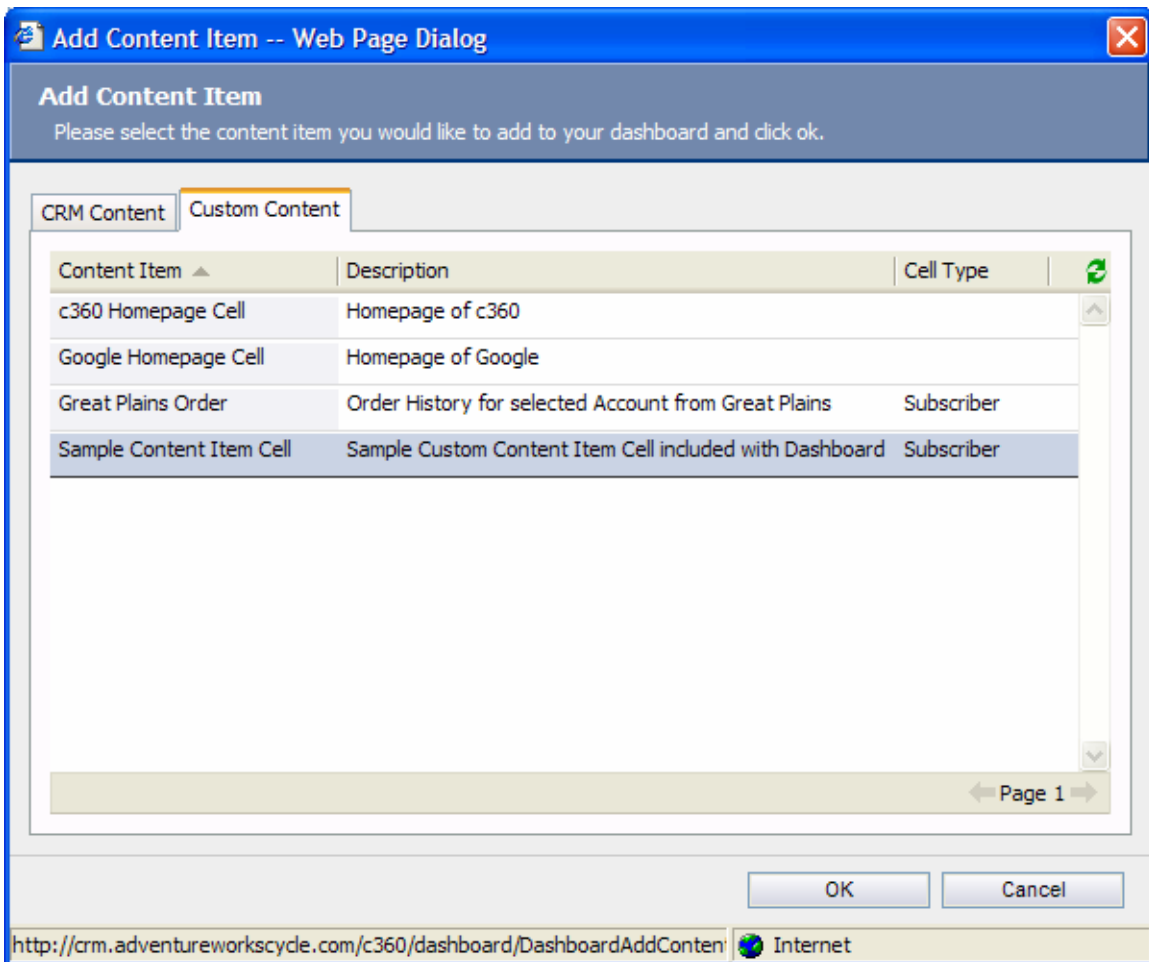

Figure 4: Custom Content Tab

The Dashboard column now contains this sample custom content cell. Figure 5 shows the Content cell in the Dashboard where an Account Record in the Search Publisher cell is the selected context.
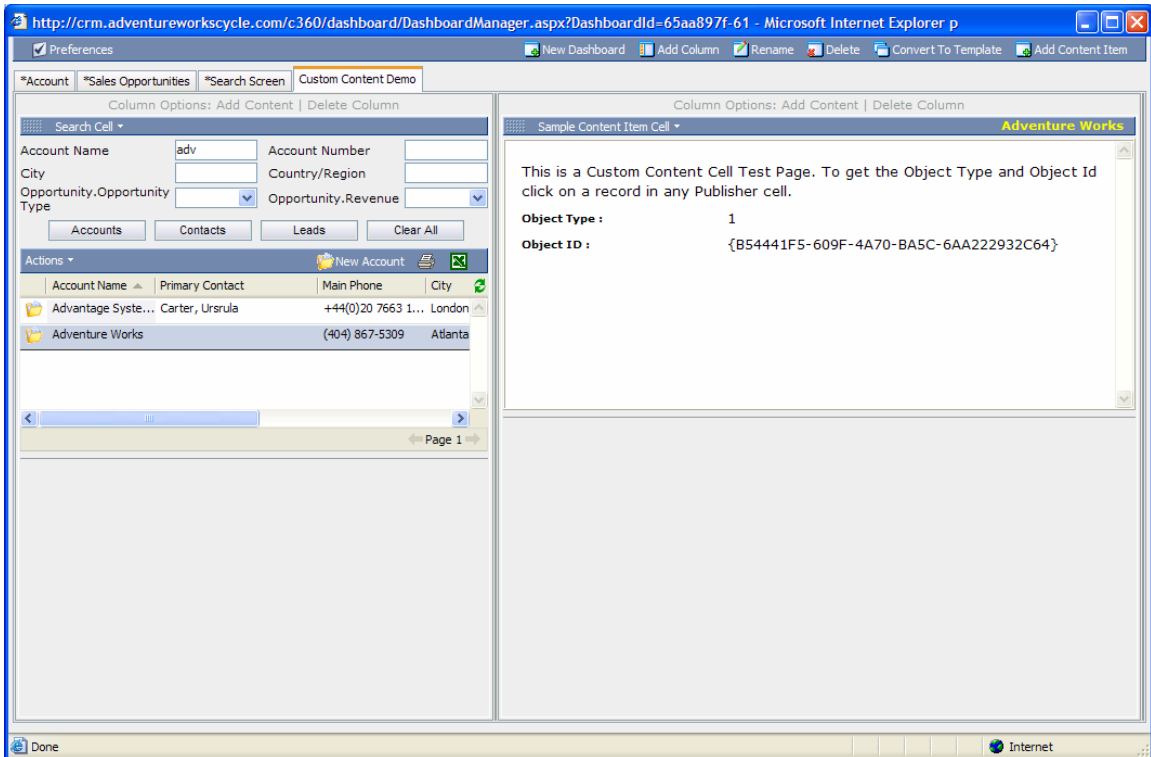
Figure 5: Custom Content Cell with Account Record as the Selected Context

Figure 6 shows the Custom Content cell in the Dashboard with a Contact Record in the Search Publisher cell being the selected context.
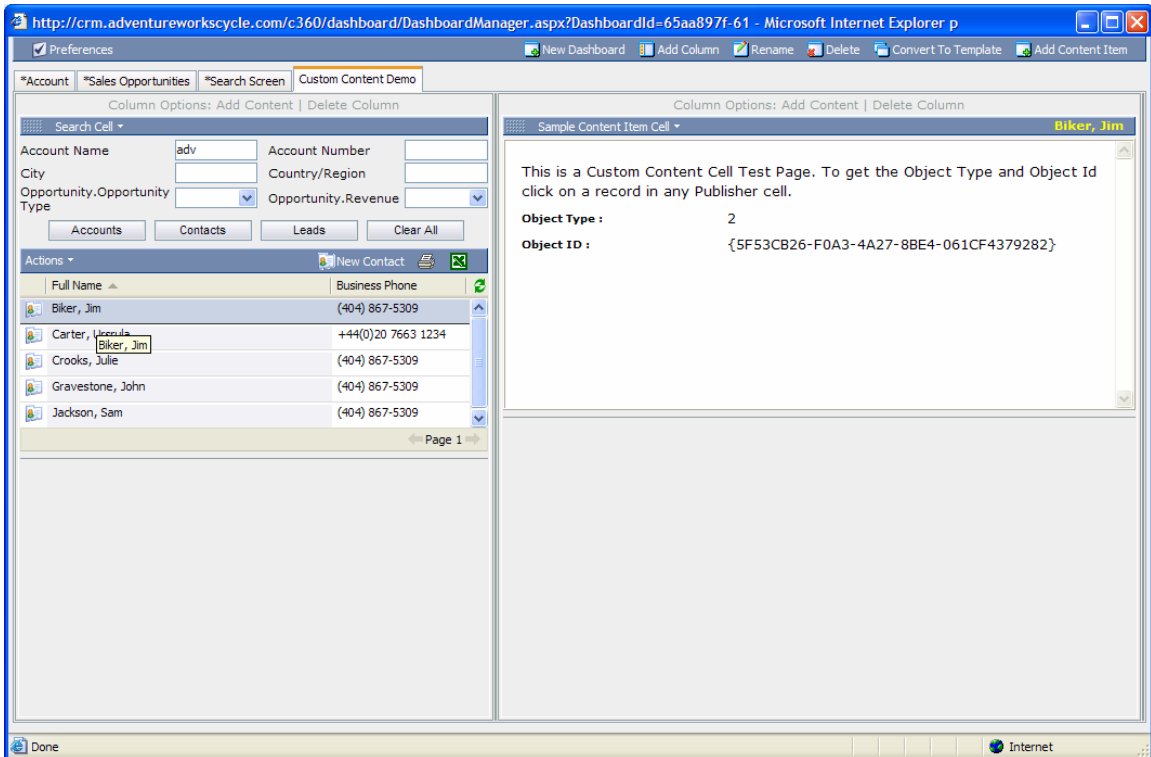
Figure 6: Custom Content Cell with Account Record as the Selected Context

Notice how the Object Type and Object Id are different in the above examples.

2 – Custom Content Item of 'Non-Subscriber' Type

This example illustrates how you can incorporate custom content to the Dashboard workspace. In this example, we are going to add a custom content that will reference the www.google.com webpage.

Add a new Custom Content Cell by clicking on 'Add Content Item' as per Figure 7
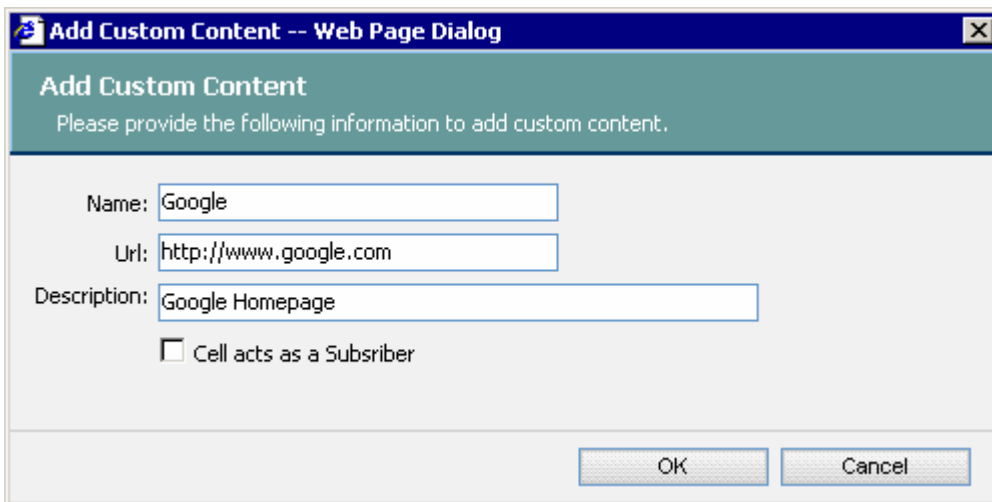

Figure 7: Adding a new Custom Content Item of 'Non-Subscriber' Type

Add the 'Google' custom item in the Dashboard column by clicking on 'Add Content'. The Google Homepage content item will appear in the tab 'Custom Content' as illustrated in Figure 8.
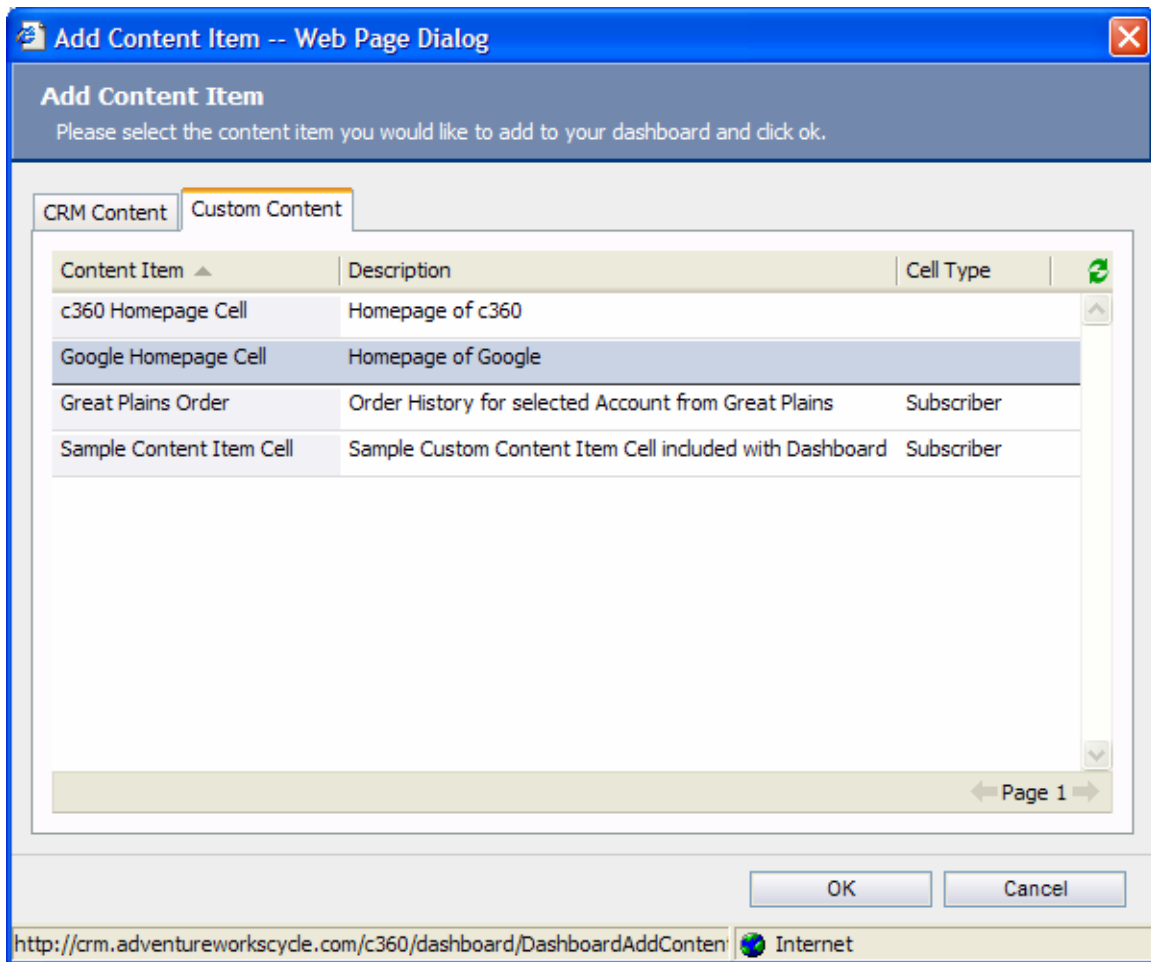
Figure 8: Custom Content Tab

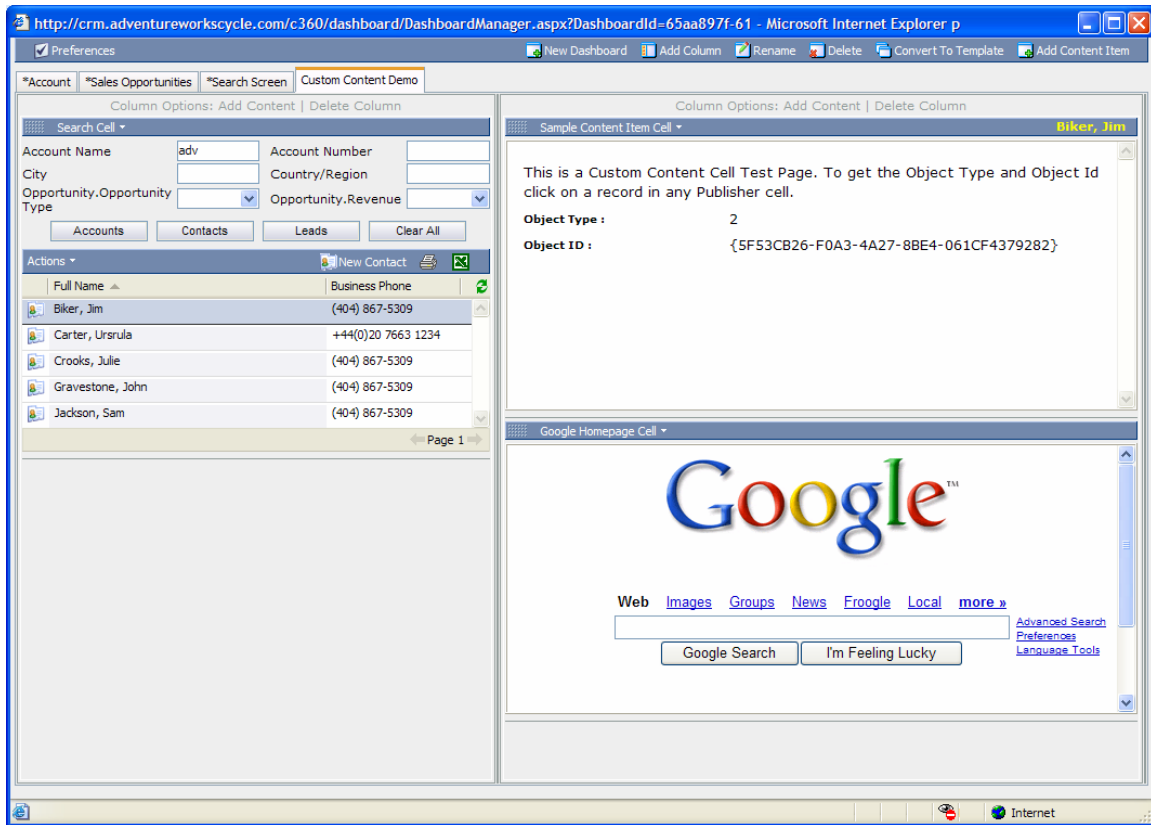The Dashboard column now contains the newly created Google homepage content item in its own cell. This is illustrated in Figure 9.

Figure 9: Dashboard with Google homepage cell