

SAM Software Developers Kit Overview

Version 1.1

White Springs

Park End,
Croughton,
Nr. Brackley,
Northants, UK
NN13 5LX

t +44 1869 810555
f +44 1869 810595
e info@white-springs.com
w www.white-springs.com

White Springs

1900 South Norfolk Street
Suite 950
San Mateo
CA 94403
United States

t 650-577-2306
f 650-577-2307
e info@white-springs.com
w www.white-springs.com

Overview

The purpose of this document is provide an overview of Miller Heiman’s Sales Access Manager (SAM) Software Developers Kit (SDK), developed and supported by White Springs.

The documents intended audience is

They are 2 versions of the SDK

- A server based version, and
- A client based version

Server Based

The server based SDK is designed for CRM systems which are accessed by a browser and where the user is always online.

The SAMserver software is installed on an IIS server which can either be a customer’s internal server or hosted externally by White Springs.

The SAM components or “sheets”, written in Macromedia Flash, are invoked by a URL placed within the CRM system pointing to the SAMserver and passing parameters such as the selected entity (Opportunity in the case of Bluesheet, Account in the case of Goldsheet and Activity in the case of Greensheet). This URL then invokes another URL or Web Service back into the host CRM application to retrieve the required data for the selected entity which is then displayed in the selected sheet. When a user decides to save the sheet or perform a Contact Search then this is again executed via URLs back to the host CRM application.

In order to implement the server based solution, you will need to:

- Install the SAMserver component
- Use the associated Administration function to specify the target URLs
- Write 3 URLs which are used to:
 - Load XML data in a specified format, search for Contacts and return these in a specified format
 - Save the XML back into the CRM system so that it can be mapped back into appropriate fields for visibility in the host CRM system and so that it can be returned to the SAMserver application when a Load is next requested.

In this scenario, no software will need to be installed on client machines with the exception of the standard Macromedia Flash player (version 7 or later) and users are not restricted by client browser or operating system. The application has been tested and supported on Windows and Apple platforms using either Internet Explorer, Firefox or Safari.

Client Based

The client based SDK is designed for offline, client server based CRM systems.

The SAM components are installed on each client machine. In this case the installation is an ActiveX DLL and so can only be implemented on Microsoft Windows machines. The ActiveX DLL is a wrapper around the basic Macromedia Flash components providing properties and methods to allow the host CRM system to pass data into the component, display the selected sheet and then retrieve data from the component. It is expected that in this case a scripting language such as VBscript or Javascript will be used to invoke the component.

In both of the above scenarios it must be made clear that the sheet data is always stored within the host CRM system. It is the duty of the implementers of the application to ensure that the data associated with each sheet is held within the CRM application in an appropriate location so that authorized users are allowed to retrieve the data and, in the case of offline operation, that this data is synched correctly with the server.