PebbleForce

Enabling the ultra-mobile access to Salesforce to view information, post to Chatter or create a Case just by creating Salesforce records. Want more, you can execute any action by incorporating Salesforce Triggers or Flow – No Pebble Programming Require!

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Contents

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OVERVIEW

This Salesforce AppExchange solution was created to enable the easy deployment of a Pebble SmartPhone application using Salesforce. It allows the Pebble to display information from Salesforce and to create Cases records or Chatter Posts. Additionally, you can create your own actions in Salesforce to initiate any action.

The Pebble.js code that runs on the watch does not need to be modify for any of the functionality. If you wish to make changes to the Pebble.js code, it is available on GitHub.

The Salesforce Objects control what is displayed on the Pebble and the functionality that is to be executed on the watch. Then a record with all the user's selections is created in Salesforce. Once the new record is created, the Pebble Post Action trigger will evaluate that new record and execute the appropriate command – such as creating a case or new Chatter post.

The dynamically created apps are PebbleForce Apps (PF-Apps).

INSTALLATION

PEBBLE INSTALLATION

1. Install and set up the Pebble watch and Pebble App on your SmartPhone (the application has been tested on iOS 7 with iPhone 5)
2. Search for PebbleForce and install the app on your watch.

SALESFORCE INSTALLATION

1. Got to your Salesforce Org (it must be a SANDBOX or DEVELOPER EDITION) – do NOT install into a Production environment witout thoroughly testings.
2. Get the PebbleForce installation URL from Dan Harrison's – Search #PebbleForce in Org62 for the current link.
3. Click the URL link to install the package in your Org.

ADVANCED PEBBLE INSTALLATION

You can install the code using GitHub.

1. See the http://developer.salesforce.com/wear site under Pebble to make sure you can install the Pebble Dashboard code or any other CloudPebble solution.
   https://github.com/developerforce/WearablePack-Pebble/blob/master/samples/SF1PebbleDashboard/README.md
2. Get the PebbleForce.zip file available from Dan Harrison's – Search #PebbleForce in Org62 for the current file.
3. Go to https://cloudpebble.net/ and login
4. Click "Import" and load the zip file
5. Go to the PebbleForce app that loaded and click "COMPILATION"

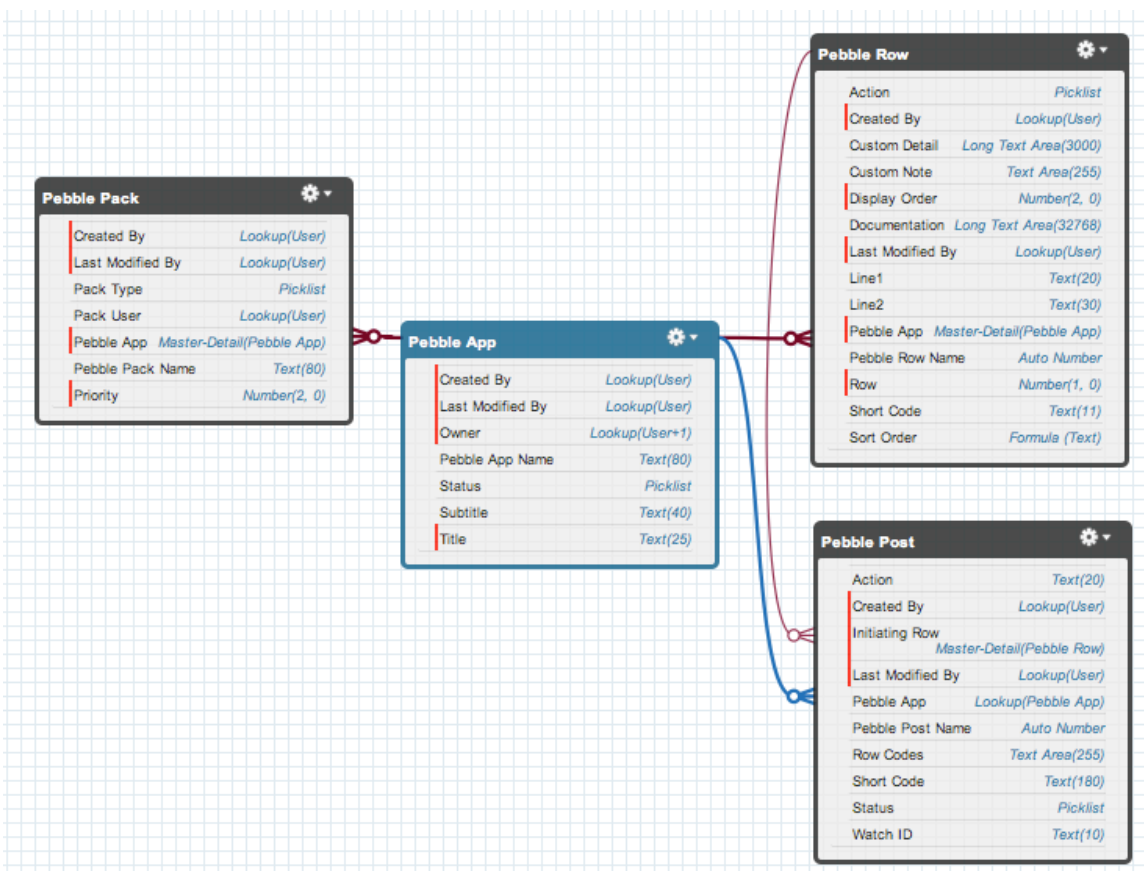
6. Make sure you smartphone is on, unlocked and that the Pebble app as Developer Mode enabled (see the Pebble Dashbord instructions for details).
7. Now click "INSTALL AND RUN" in the CloudPebble.net site.
8. The PebbleForce app should now be installed on your phone.

ARCHITECTURE

SALESFORCE OBJECTS

There are four objects used by PebbleForce:

Pebble Pack : Used to control which PebbleForce Apps are displayed to which user.
Pebble App : Defines the name of the PF-App on the name screen.
Pebble Row : Controls the Row and each item in the PF-App.
Pebble Post : The records created by the watch to initiate an action. The Post record will also display the success or error messages related to the Trigger action.



TRIGGER

The Salesforce Trigger was created to provide examples of two actions that you may want to initiate from the Pebble watch.

1. Chatter Post
2. Create Case

You can review the Trigger provided or generate you own triggers once you know the data that is in the Pebble Post custom object – it should be easy to initiate most functionality required.

CONFIGURATION

YOUR FIRST APP

In three easy steps you can create your first PebbleForce App (PF-App).

1) Define the App
2) Assign it to the users
3) Create the content (rows)

#1 To Define the PF-App you create a new record in the Pebble App object and fill in the fields and values as appropriate. Depending on the version, it should look something like this screenshot.

The **Status** must be **Active** or the PF-App will not be displayed on the watch. This is how you can easily control what is seen and when it is deployed.

#2 Now lets make the new App visible to all users. This is done by creating the Pebble Pack record for the new PF-App. You could assign it to a single user but for now it will be assigned to all uses by leaving the user field blank.

TEST: If you run PebbleForce on your watch now, it will display the application name. You need to follow the steps to log-in but you have created an 'empty' PebbleForce App.

#3 Next, you need to add a few lines to the PF-App so that when it loads it will have something to show.

Create a new record in the Pebble Row object and assign the Pebble App field to point the parent object you created in Step #1.

Line1 is the text that will show in the larger font on the watch.
Line2 is the small text that will show right under Line1 but still in the same row. This will be obvious when you look at the screen shot of the watch in the next section.

Short Code is purely for your use to help when you build your triggers. This is the value that will be stored in the Pebble Row record that is created. More about this under the Pebble Row object.

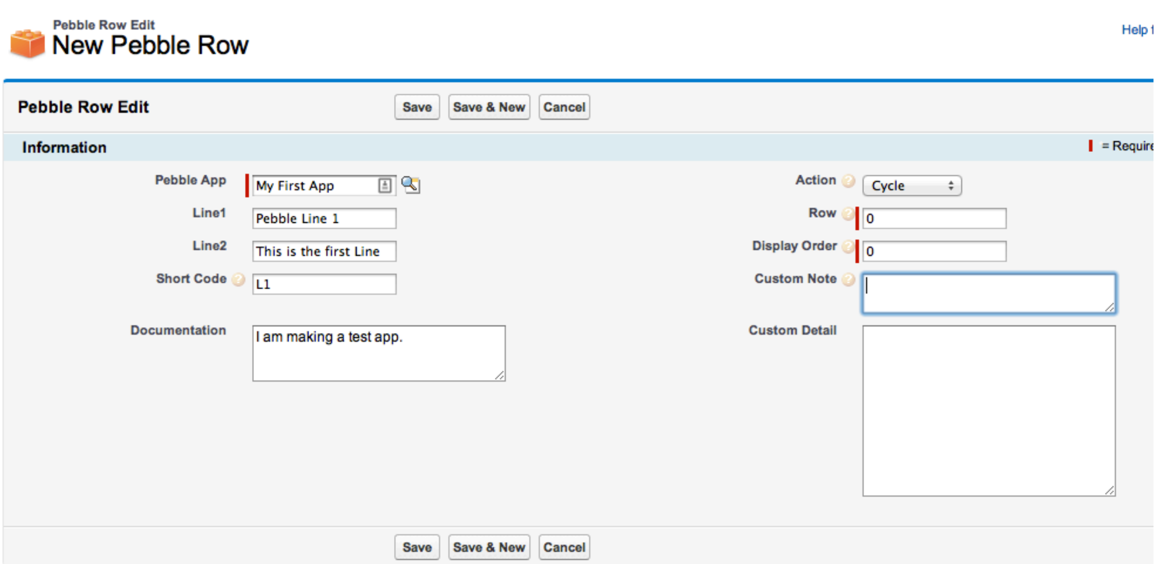
Action for the first app, set this to Cycle.

Row defines which row on the Pebble Screen you want this item to display. You can pick from 0-9. Although you don't need to go sequentially, PebbleForce won't show blank lines. I will often set row 9 to the "Post Now" message so I can add more lines later.
Display Order controls which items will show up in which order when using Cycle as the action.

Custom Note and **Custom Detail** are used by the Trigger to determine the action's parameters. More about this under the specific Action Types.

Lets use the following table to show the data that was just entered

My First App	Pebble Line 1	This is the first Line	L1	Cycle	0	0		



Pebble App	Line1	Line2	Code	Action	Rw	DO	Custom Note	Custom Detail
My First App	Pebble Line 1	This is the first Line	L1	Cycle	0	0		
My First App	Pebble Line 2	Select this line	L2a	Cycle	1	0		

My First App	Pebble Line 2	and it will change	L2b	Cycle	1	1		
My First App	Peb Line Two	and a title change	L2c	Cycle	1	2		
My First App	Line Three A	You pick what	LTA	Cycle	5	10		
My First App	Line Three B	you WANT to display	LTB	Cycle	5	20		
My First App	POST NOW	Create a record	GO	Post	9	0		

A couple of notes:

1. Notice there is no Row #2 through 4, that is so we could add more rows later if desired without needing to renumber
2. Row number three using Display Order 10 then 20. Again this is purely for sorting so it is easier to add items later if you are designing an application.
3. We don't need any Custom Note or Details for the first application.
4. Documentation can be anything you want to remind yourself why the row was created and how it should be used.

Now run your PF-App!!

LOGGING IN

The Pebble App uses SETTINGS to initiate the Salesforce log-on process. Once you are logged on to Salesforce via OAuth then PebbleForce can start. To help illustrate this – you can try the following:

1. Start PebbleForce on your watch.
2. You will see a screen indicating that you need to log in on your smartphone.
3. Click on SETTINGS on the PebbleForce.
4. Follow the standard OAuth process for Salesforce.
5. The PebbleForce screen will be updated indicating you are now authenticated and ready to proceed.
6. Click 'Select' on the watch.
7. Pick the PebbleForce App (PF-App) you want to use.

TESTING YOUR FIRST APP

The PF-App should now be on the screen. Here is the user experience you should notice.

- The first row in the app won't do anything when you click on it because there is only one item in that row. It is 'cycling' through a list of one.
- Selecting the second row will cycle through three different items. Notice how the first two keep the same Line1 that makes it look like you are only selecting the Line2 item. This is important for the UI.
- Even though the next line is define as "Row - 5" in the configuration, it will just show up next on the list, which is displaying as row 3.

The last line is "POST NOW" which will create a new record in Salesforce. After clicking this row, the app will return to the Main Menu of PebbleForce. Go to Salesforce and look at the Pebble Post object. It will show a new record with the short codes you had selected in the "My First App".

This is how you could trigger unique actions for each line. See the Custom Trigger example at the end of this document for more details.

ACTION TYPES

By selecting a different Action in the Pebble Row record, you are directing the PebbleForce to do different things when that specific item in that row is selected. There are rules to each of the Action types that must be followed for it to function properly.

Chatter

Being able to create a Chatter Post is a great use-case of the Pebble Watch. The posted message must be defined but updating a team on the status of a Case or providing feedback to employees based on activities you are observing while walking around the office/factory is easy to do with this PF-App.

The code expects the UUID of the Object you want to Chatter on to be stored in the Custom Note field of the top row (Row 0). This allows you to post to any type of record that has Chatter enabled, including Chatter Groups.
//Chatter-<Pebble Row Name of the record to post to>-<Pebble Row Name of the Message>

Case

Create a case from the Pebble Watch.

Post

The provides a simple way to create a Pebble_Post__c record which then can be used to initiate your own custom triggers or workflows. The key for creating a Post is to used the Short_Code to identify the type of action you want to initiate.

Dashboard

Under development

Limits

Outline Maximum number of rows, items per row, etc.

Example PF-Apps

Check List

Based on the concept that simple checklists can improve process in every industry (see The Checklist Manifesto, by Atul Gawande). The example here could be for a flight school that requires a Cesina Pre-Flight to be logged before take-off.

Other ideas for Check List

- Room Ready – have each cleaning person see which room is the priority, mark it "in progress" and "complete" to keep the status updated to the second.
- Job Check – About to manage a job or customer visit, use this to confirm each component of the task is complete and it could keep managers informed.

Pebble App	Line1	Line2	Short Code	Action	Row	Display Order	Custom Note	Custom Detail
Check List	Select a Plane	Pick the FIN Number	NA	Cycle	0	0		
Check List	Cessna SF186P	Blue Cessna 400	SF186P	Cycle	0	1		
Check List	Cessna SF190P	Yellow Cessna 350	SF190P	Cycle	0	1		
Check List	Battery	Voltage 11V +	BatNO	Cycle	1	0		
Check List	Battery	Done	BatOK	Cycle	1	9		
Check List	Fuel	Gauge & Valve ON	FuelNO	Cycle	2	0		
Check List	Fuel	Done	FuelOK	Cycle	2	9		
Check List	Electric & Avionics	Check each gauge	EleNO	Cycle	3	0		
Check List	Electric & Avionics	Done	EleOK	Cycle	3	9		
Check List	Flaps Down	Visually confirm	FlapNO	Cycle	4	0		
Check List	Flaps Down	Done	FlapOK	Cycle	4	9		
Check List	Exterior Check	350' and all hatches	ExtNO	Cycle	5	0		
Check List	Exterior Check	Done	ExtOK	Cycle	5	9		
Check List	Oil Level	between 3Qt - 4Qt	OilNO	Cycle	6	0		
Check List	Oil Level	Done	OilOK	Cycle	6	9		
Check List	Preflight Done	Engine Start Check List	CheckList	Post	8	0		

Chatter

Post to a group or contact or any other record. The possibility is endless. Although, you can't type on the Pebble, you can create the post and say "Posted from my Pebble SmartWatch and I will provide more detail when I am available."

Other ideas for Chatter:

- Progress Tracker: Rather than updating a recorder, you could post on a record the feedback for people interested. This could be an Opportunity where the Sales Person chats "On-site", "Just Left, great meeting", or "Just Left, needs follow-up".
- Live Feedback: While supervising employees, post to their Chatter feed the words or encouragement or things to focus on. In a Contact Center it could be posts like "Callers can hear the smile", "Do the up-sell", "Great diplomacy", "Come see me".
- Training: A fitness trainer or therapist could provide individual feedback to people in a class or a post to the whole class. "Great Session", "Watch your form", or "Let's schedule some one-on-one time".

Pebble App	Line1	Line2	Short Code	Action	Row	Display Order	Custom Note	Custom Detail
Chatter	All Salesforce	Group:All Salesforce	All	Cycle	0	0	0F9o00000000IrZ	
Chatter	Tim Barr	Post to User Tim Barr	TimBarr	Cycle	0	1	003o0000003PQVR	
Chatter	Jane Grey	Post to User Jane Grey	JaneGrey	Cycle	0	2	003o0000003PQVX	
Chatter	Great Job	Keep up the great work	GW	Cycle	1	0		Great job today. Keep up the …
Chatter	Rqst Meeting	Schedule a meeting	RM	Cycle	1	1		I recommend that we schedul…
Chatter	Running Late	Will arrive shortly	RL	Cycle	1	2		I am running late, I will arrive …
Chatter	POST NOW	Create Chatter Post	POST	Chatter	9	0		

Case

Pebble App	Line1	Line2	Short Code	Action	Row	Display Order	Custom Note	Custom Detail
Quick Case	Priority	High	H	Cycle	1	10	High	
Quick Case	Priority	Medium	M	Cycle	1	20	Medium	
Quick Case	Priority	Low	L	Cycle	1	30	Low	
Quick Case	Priority	Informational	X	Cycle	1	90	Informational	
Quick Case	Contact	None - leave blank	NoContact	Cycle	2	10		
Quick Case	Contact	Tim Barr-LineSrv	TimBarr	Cycle	2	20	003o0000001W…	
Quick Case	Contact	John Bond-Ground…	JohnBond	Cycle	2	25	003o0000001Wnbb	
Quick Case	Subject	Insulator or Wire	IW	Cycle	3	10	Insulator or Wire	My current work order has identi…
Quick Case	Subject	Ground Service	GS	Cycle	3	20	Technical Support	My work order had challenges t…
Quick Case	Subject	Land Owner	LO	Cycle	3	30		The Landowner has issues or w…
Quick Case	POST NOW	Create the Case	PN	Case	9	1	Case	

Custom Triggers

Under development

Flow Triggers

Under development