CT CUSTOMERTIMES

CT Presenter

Creating Interactive CLM Presentations

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About CT Presenter

CT Presenter provides a comprehensive tool for content authoring and editing as a CLM presentation with several ways to distribute:

- offline and online in the CT Mobile app:
    - in the **Applications** module
    - in the carousel of CLM presentations on the **Home** screen
    - in the carousel of CLM presentations on the mobile layout of a record
- using a co-browsing session online on the PC, tablet, or phone, including the in-app browser of the CT Mobile app, known as a **Remote Detailing** session
- as a self-dependent online viewing content by a customer on the PC, tablet, or phone, known as a **Self-Detailing** session.

CLM presentations are stored in the Salesforce database and may have multiple scenarios that run based on user choice or specific interaction on a slide. Using CT Presenter tools, it is possible to collect statistics per CLM presentation slide for audit and marketing purposes.

Interactive CLM presentation is an advanced HTML5 application that can provide a full route map of a representative’s visit, interactive product presentations, contract visualizations, educative and training materials, mini applications for trade & retail audits, etc.

Content Creation Tools

CT Presenter allows you to manage CLM presentations via Application Editor and Plain Application Editor. For example, create a CLM presentation based on .pdf, .ppt(x), or a template with desired widgets to store media.

Walkthrough this guide to know how to create an interactive CLM presentation for Windows users by yourself. Within the interactive CLM presentation, you can play audio or video, fill out various forms, navigate slide-to-slide with default gestures or custom code, and perform other interactions implemented in a slide markup.

CLM Presentation Sources and Slides

Each CLM presentation consists of sources and slides. Sources contain media and text to fill the slide and are also used to perform various interactions with slides and content. Both sources and slides must be uploaded to Salesforce.

Upload Sources to Salesforce

Each CLM presentation has sources—a variety of content and assets:

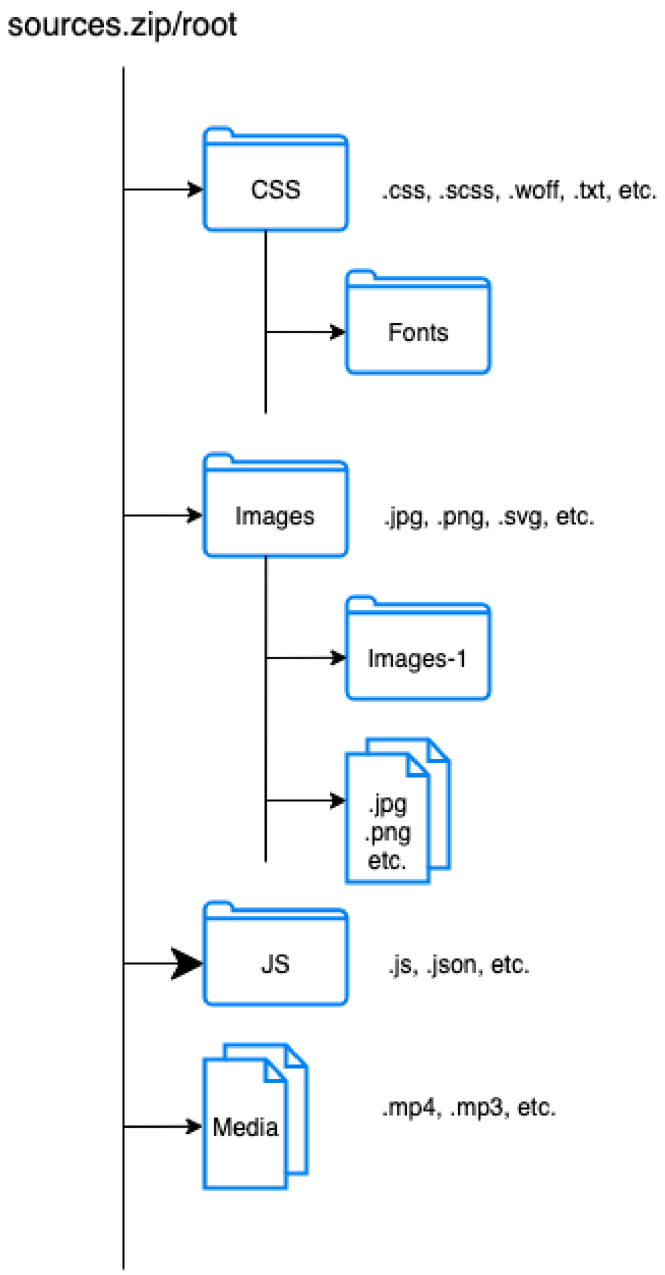
- media, such as images, gifs, video, and audio
- attached files, such as .pdf, .doc(x), etc.
- styles and fonts
- JSONs and JS methods.

Content and associated CLM presentation assets must be packed in ZIP archive(s) in order to load them to Salesforce.

- The size of a ZIP archive cannot exceed **25 MB**. Otherwise, it must be split into several ZIP archives.
- The file extension must be .zip.
    - The available formats: sources[n].zip, where [n] is the number of the archive part, starting from 1.
    - You can use the 7-Zip utility to create and divide ZIP archives into parts less than 25 MB. In this case, the output format will be sources.zip.00[n], where [n] is the number of the archive part, starting from 1. **Important!** Select the ZIP format when creating an archive.

- The ZIP archive may contain folders and subfolders. **Important!** DO NOT create a ZIP archive with the **Sources** folder that include folders with images, video, etc. The sources/images/image-1.jpg path will not be handled.

The sources.zip structure:



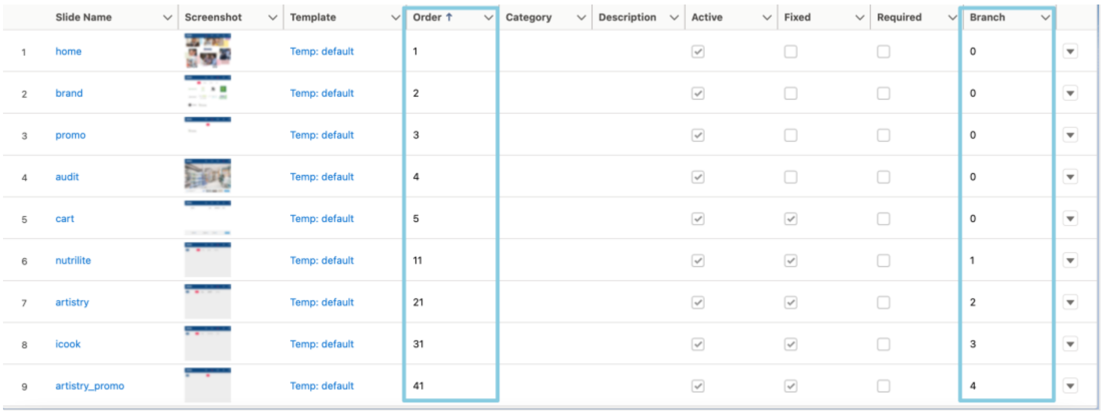
Upload Slides to Salesforce

CLM presentation slides must be loaded to Salesforce as the **Slide** object. For more information, go to Slide.

To simplify work with slides, especially when there are several scenarios within a CLM presentation, use the following format for naming: slide-[n][k].html, where [n] is the number of a branch and [k] is the number of a slide in the appropriate branch.

You can count slides from either 0 or 1. Branches are always counted from 0. For example, the first slide of a CLM presentation always has [n] = 0 and may have [k] = 0 or [k] = 1: slide-00.html, slide-01.html.

Important! When you uploaded slides in Salesforce, you should specify the **Order** and **Branch** for a slide. Note that Salesforce automatically hide [n] = 0 in the slide order.



	Slide Name	Screenshot	Template	Order ↑	Category	Description	Active	Fixed	Required	Branch	
1	home		Temp: default	1			☑	□	□	0	▼
2	brand		Temp: default	2			☑	□	□	0	▼
3	promo		Temp: default	3			☑	□	□	0	▼
4	audit		Temp: default	4			☑	□	□	0	▼
5	cart		Temp: default	5			☑	☑	□	0	▼
6	nutrilite		Temp: default	11			☑	☑	□	1	▼
7	artistry		Temp: default	21			☑	☑	□	2	▼
8	icook		Temp: default	31			☑	☑	□	3	▼
9	artistry_promo		Temp: default	41			☑	☑	□	4	▼

When you have uploaded ZIP archive(s) to Salesforce and you need to change something on a slide, like adding a new image or replacing a video:

1. Download sources.zip from Salesforce that contains the content you want to replace.
2. Remove the sources.zip (step 1) from Salesforce.
3. Replace the content in the downloaded sources.zip.
4. Upload the updated sources.zip (step 3) to Salesforce.

Important! DO NOT modify or remove from Salesforce other sources.zip that used in the CLM presentation.

Test CLM Presentations

CT Presenter contains a set of CLM presentations to get you examples of ZIP archives, slide markups, and interactions within CLM presentations. For more information, refer to Test CLM Presentations.

Slide Markup

Usually, a slide is a single HTML page with the following structure:

```
<!DOCTYPE html>
<html>
 <head>
   …
 </head>
 <body>
   …
 </body>
</html>
```

When each slide is a single HTML page, you can use CT Presenter tools to collect statistics per slide. For more information about tracked parameters, refer to Application Stats.

Large Slides

If you do not need to track slide statistics, you can create a CLM presentation as indivisible content. The peculiarity of such CLM presentations is:

- CLM presentation will be uploaded as one slide
- HTML size on that slide may exceed the allowed limit—the number of characters in a slide markup, which is **131,072 characters**.

To upload such a slide:

1. Create a JS file with the HTML code of a slide, for example, with the addMarkup.js name in the following format:

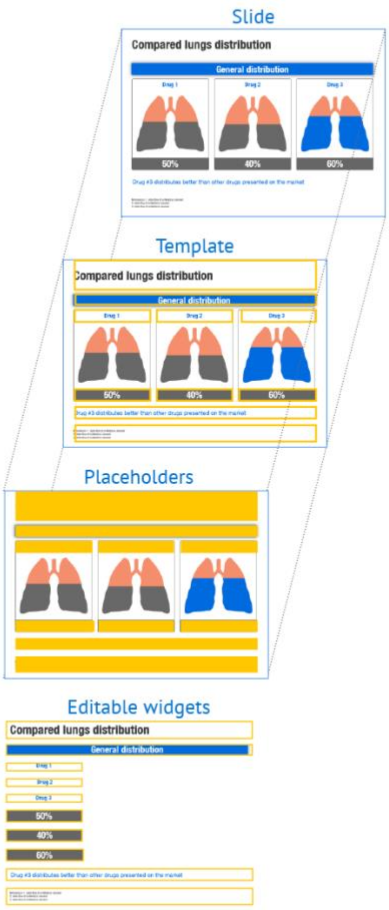
   ```
   document.body.innerHTML = `
   <div>
    <!-- content -->
   </div>`
   ```

2. Add add.Markup.js to sources.zip and upload it to Salesforce.
3. Create a slide-name.html with the following markup and upload it to Salesforce:

```
<!DOCTYPE html>
<html>
  <head>
    …
  </head>
  <body>

    <script src="js/addMarkup.js">   </script>

  </body>
</html>
```

Slide Structure

For more information, go to CLM Presentation Components.


Slide
Compared lungs distribution
General distribution
Drug 1
Drug 2
Drug 3
50%
40%
60%
Drug #3 distributes better than other drugs presented on the market
Template
Placeholders
Editable widgets

JS Libraries

JS libraries are responsible for displaying CLM presentations. Also, you can use JS Bridge methods to manage CRM data, access an external functionality, or control interactions on slides. For more information, refer to JS Bridge Methods Availability.

Required JS Library

The system JS library **must be** specified in the <head> tag of each slide:

```
<!DOCTYPE html>
<html>
 <head>

   <script type="text/javascript" src="../JSLibrary/js/app.js">
   </script>

 </head>
 <body>

   <!-- content -->

 </body>
</html>
```

Additional JS Libraries for Using Widgets

In the case of using widgets supplied with the solution, add the following resources in the <head> tag of a slide:

```
<!DOCTYPE html>
<html>
  <head>

    <script type="text/javascript" src="../JSLibrary/js/app.js">
    </script> <!—the required JS library for each slide -->
    <script type="text/javascript" src="../JSLibrary/js/jquery-1.8.2.min.js">
    </script>
    <script type="text/javascript" src="../JSLibrary/js/jquery.jqChart.min.js">
    </script>
    <script type="text/javascript" src="../JSLibrary/js/jquery.jqRangeSlider.min.js">
    </script>
    <script type="text/javascript" src="../JSLibrary/js/jquery-ui-1.9.1.min.js">
    </script>
    <script type="text/javascript" src="../JSLibrary/js/jquery.ui.touch-punch.min.js">
    </script>
    <script type="text/javascript" src="../JSLibrary/js/app.js">
    </script>
    <link rel="stylesheet" type="text/css" href="../JSLibrary/css/jquery.jqChart.css"/>
    <link rel="stylesheet" type="text/css"
href="../JSLibrary/css/jquery.jqRangeSlider.css"/>
    <link rel="stylesheet" type="text/css"
href="../JSLibrary/themes/redmond/jquery-ui.css"/>
    <link rel="stylesheet" type="text/css" href="../JSLibrary/css/jquery-ui-
1.9.1.min.css"/>

  </head>
  <body>
    <!-- content -->
  </body>
</html>
```

For more information about available widgets, refer to Creating a Widget.

Default Gestures

Consider these gestures when implementing embedded interactions in a slide markup. For example, do not call custom action double tapping on the bottom of a slide.

Gesture	Action
Left/right double-finger swipe	Use keyboard arrows or this default gesture for swiping slides. The gesture may be reconfigured to one-finger swipe in **the Swipe gesture type** attribute of the CLM presentation. **Important!** One-finger swipe may interfere with embedded interactions in slides.
Up/down double-finger swipe	Use to like (up) or dislike(down) a slide.
Double tap the right/left side	Display sidebar with action menu. • The action menu width is 120 px. • For more information about action menu, refer to CLM Presentation Controls.
Double tap on the bottom	Display the navigator bar with the selected scenario and preview of slides. • Tap a slide to open it. • Double tap the navigation bar to hide it. • The navigation bar displays the preview of the slides with resolutions of 100×75 px. • The navigation bar resolutions are 1024×120 px.

Navigation

Important! DO NOT use navigation frameworks to avoid overlap with CT Presenter navigation methods.

Branches—sets of CLM presentation slides—single scenarios that run depending on the user's choice. To navigate among scenarios, restrict default gestures on slides:

- Activate the **Fixed** attribute of a **Slide** object to disable a default gesture to swipe a slide to the next one.
- Default gestures are not in use to switch the last slide in a branch.

To switch a slide:

- Use keyboard arrows or default gestures for switching slides within a branch
- Add in a slide markup one of the following methods to start a branch and switching among branches:
  - <a href="#slide[k]">Text</a>, where [k] is a slide order.
  - <a href="[n][k]_start_slide.html">Home</a>, where [n] is the number of a branch and [k] is the number of a slide in the appropriate branch. The start_slide is a name of a file that represents a slide. **Important!** Only for browsers.
- Use the CTAPPgoTo… methods or a library to process a default gesture, for example, hammer.js, to switch the last or fixed slide.

CTAPPgoTo… Methods

Use these methods in a slide markup to switch among slides and branches, including the fixed and last slides.

Method	Action
CTAPPgoToSlide(slideNum)	Jump to a specific slide.
CTAPPgoToPrevious()	Jump to the previous slide.
CTAPPgoToNext()	Jump to the next slide.
CTAPPgoToFirst()	Jump to the first slide.

To use CTAPPgoTo… methods:

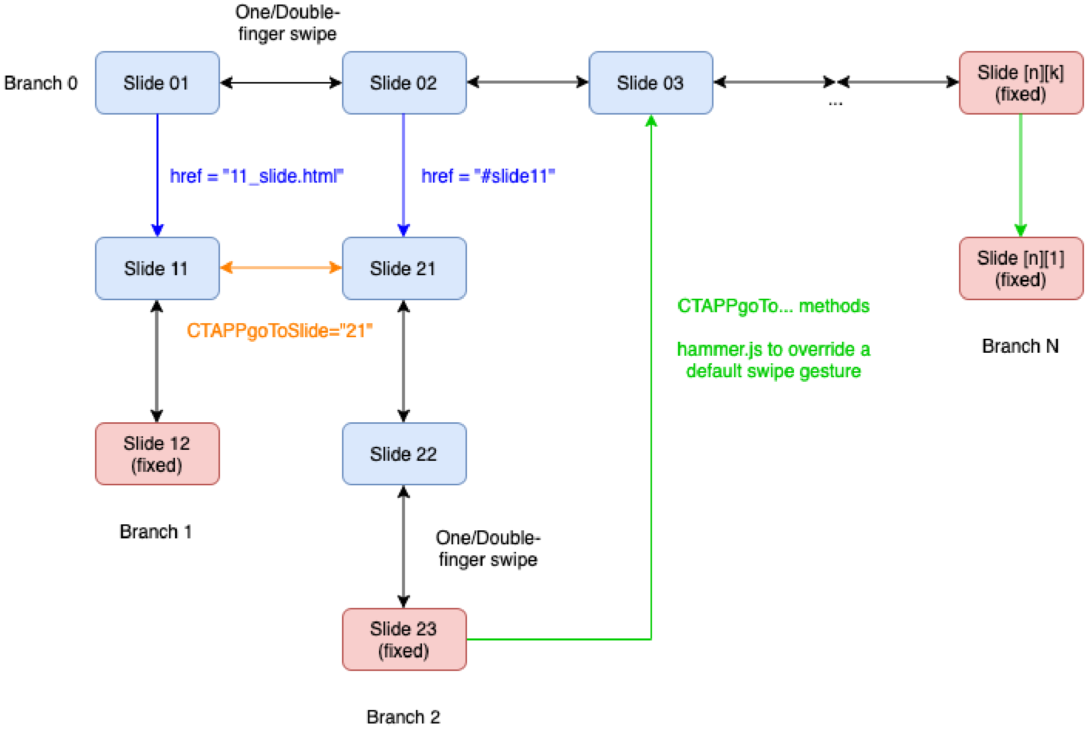
1. Create a slide-name.html with the following markup and upload it to Salesforce:

```
<!DOCTYPE html>
<html>
 <head>

   <script type="text/javascript" src="../JSLibrary/js/app.js"></script> <!—
the required JS library for each slide -->

 </head>
  </div>
     <!-- content -->
     <div class="brand_catalog">

       <div class="brand_catalog__item" data-brand=“category_A”>
          Lorem ipsum dolor sit amet
       </div>
       <div class="brand_catalog__item" data-brand=“ category_B”>
          Lorem ipsum dolor sit amet
       </div>
       <div class="brand_catalog__item" data-brand=“ category_C”>
          Lorem ipsum dolor sit amet
       </div>
       <div class="brand_catalog__item" data-brand=“ category_D”>
         Lorem ipsum dolor sit ame
       </div>

    </div>

  </body>
</html>
```

2. Create a script with the CTAPPgoTo… methods:

```
<script>

$(document).ready(function () {

        //  brands
$(“. brand_catalog__item”).on("click", function(e){

        var brandName = this.getAttribute("data-brand");

        switch (brandName) {
            case "category_A":
                  CTAPPgoToSlide('11');
                   break;
            case "category_C":
                  CTAPPgoToSlide('31');
                  break;
            default:
                CTAPPgoToNext();
          };
});

</script>
```

Example of Transitions between Slides



Data on Slides

Display CRM Data

CT Presenter allows displaying CRM data from the related records of offline objects on a slide.

Use the following format in a slide markup: {!$ObjectName.FieldAPIName}. In case of blank value of the displayed field, marker is set to space.

For example:

- {!$Contact.FirstName} {!$Contact.LastName}
- {!$Account.Name}

Data Storage

CT Presenter allows recording and passing different information to Salesforce during the CLM presentation demonstration.

Users can fill out a form or add some information to placeholders on a slide. But when a user switches to other slides, data will be erased. To avoid this, in the slide markup, specify sessionStorage for keeping data for the current CLM presentation demonstration.

Example:

```
var statsData = JSON.parse(localStorage.getItem('storage_statsData'));
   function slTime(){
    var start = new Date();
    var oldtime = statsData[2].time;
    setInterval( function(){
     var mlsec = (new Date() - start);
     statsData[2].time = oldtime + mlsec;
     sessionStorage.setItem('storage_statsData', JSON.stringify(statsData));
    } , 3000);
   };
```

Open Files

To open files within CLM presentations, add one of the following in a slide markup:

- to open a Name.pdf file added to the **Notes & Attachments** section of the CLM presentation: <a href="Name.pdf">Open a file</a>. Also, you can open files added to the Libraries module
- to open a Name.pdf file added to sources.zip: window.open("[path]/Name.pdf")
- to open external links (including WebView within the CT Mobile app when online): <a href="https://...">Open a file</a>

Open Video Files

To play a video, the file may be uploaded to sources.zip. The video cannot exceed **25 MB**.

```
<video>
  <source src="video.mp4">
</video>
```

To play a YouTube video or a video from the **Libraries** module within CLM presentation:

- We suggest you upload videos on YouTube selecting the **Unlisted** value in the **Visibility** option to avoid public dissemination.
- The size of a video can exceed 25 MB.
- During synchronization, the CT Mobile app downloads the video into its local repository for offline access.
- To add a video on a slide markup, use the **Video** widget. **Important!** To add a widget, use templates and placeholders. Placeholders must be marked as {!POSITION_n}, where n is a position number. An associated widget has the corresponding position number in {!POSITION_n} will be added to the slide.

To add a YouTube video:

```
<iframe class="youtube-player" type="text/html" width="643" height="402"
src="https://www.youtube.com/embed/GhpE_7cBu44?autohide=1&autoplay=1"
frameborder="0" id="player">
</iframe>
```

To add a video from the **Libraries** module:

```
<script type="text/css" src="{!$Resource.video_js_css}"></script>
<script type="text/javascript" src="{!$Resource.video_js}"></script>
<video class=“content-player video-js-vjs-defult-skin” width="1024" height="768"
Data-setup==‘{“controls”:true, “autoplay”:1, “preload”:auto}’>
  <sorce src=“Video_ID_from_Libraries” type=‘video/mp4’ />
</video>
```

Application 1 Useful Links

Recommended Media Formats

JS Bridge API and Methods

Remote Detailing and Self-Detailing

The Application module

Home Screen: Carousel of CLM presentations

Mobile Layout: Carousel of CLM presentations