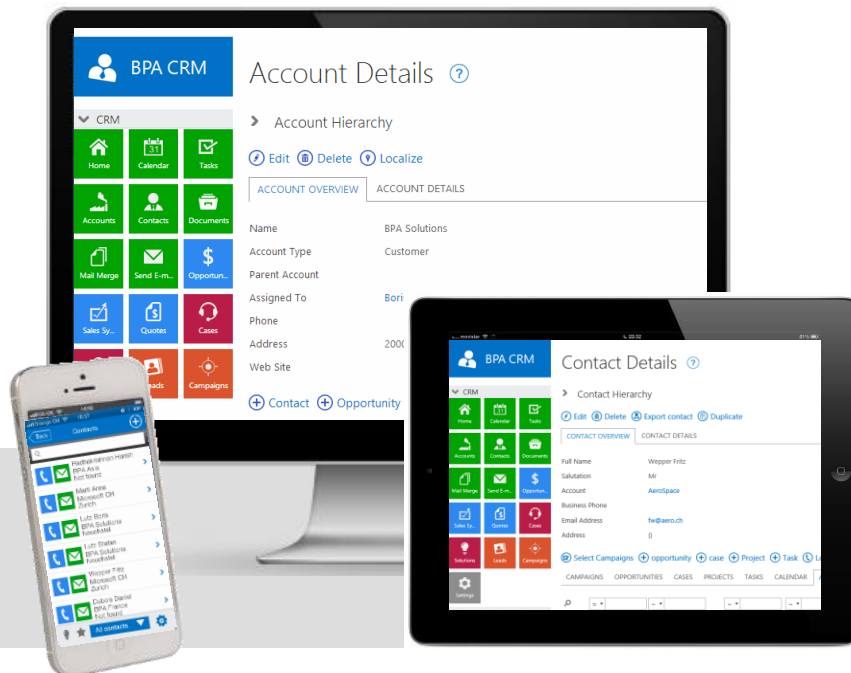


BPA CRM 365 – A Universal Code Base for On premise & App Solutions

European SharePoint Community Awards 2014 – Best SharePoint App



The Next Generation Solutions!

This paper provides the historical perspective and architectural process BPA went through in developing a “universal code base” for our on premise solutions and the new BPA CRM 365 app for the Microsoft Office365 platform.

Overview

BPA CRM 365 Lite is a simple tool directed to empower front line workers to help them be more productive. The BPA CRM 365 Lite solution lets you track Contacts and your team’s daily interactions and activities with them. The solution provides your sales team with a powerful opportunities tracker tool that ties contacts and activities together. Additionally, the solution includes help desk ticket tracking, marketing campaign management and project management capabilities.

The BPA CRM 365 Premium version is a feature rich, powerful and fully configurable upgrade to BPA CRM 365 Lite. The Premium version is soon to be released (Summer 2014) to Office 365 with an easy upgrade from the Lite version to Premium.

The Challenge

When we started the project in early 2012, no one was developing enterprise solutions with the new Office 365 app model. BPA’s on premise SharePoint based business solutions – CRM, Quality, Risk...- had been available for years for the standard SharePoint market.

We set some big expectations for the project:

- We wanted the same features as our on premise with the Office 365 version
- We were looking for the most efficient technologies in terms of speed and capabilities
- The objective was to have as much of the same code (90%) for the on premise and cloud deployments
- Pricing needed to be competitive for the new app model paradigm

In order to achieve these goals, BPA became a part of Microsoft’s PAB and Office 15 SDR programs. As part of our design, we also included the future SP15 possibilities in our analysis. As part of our joint collaboration with Microsoft’s Redmond office, we had weekly status and architecture calls and twice sent resources from Switzerland to Redmond.

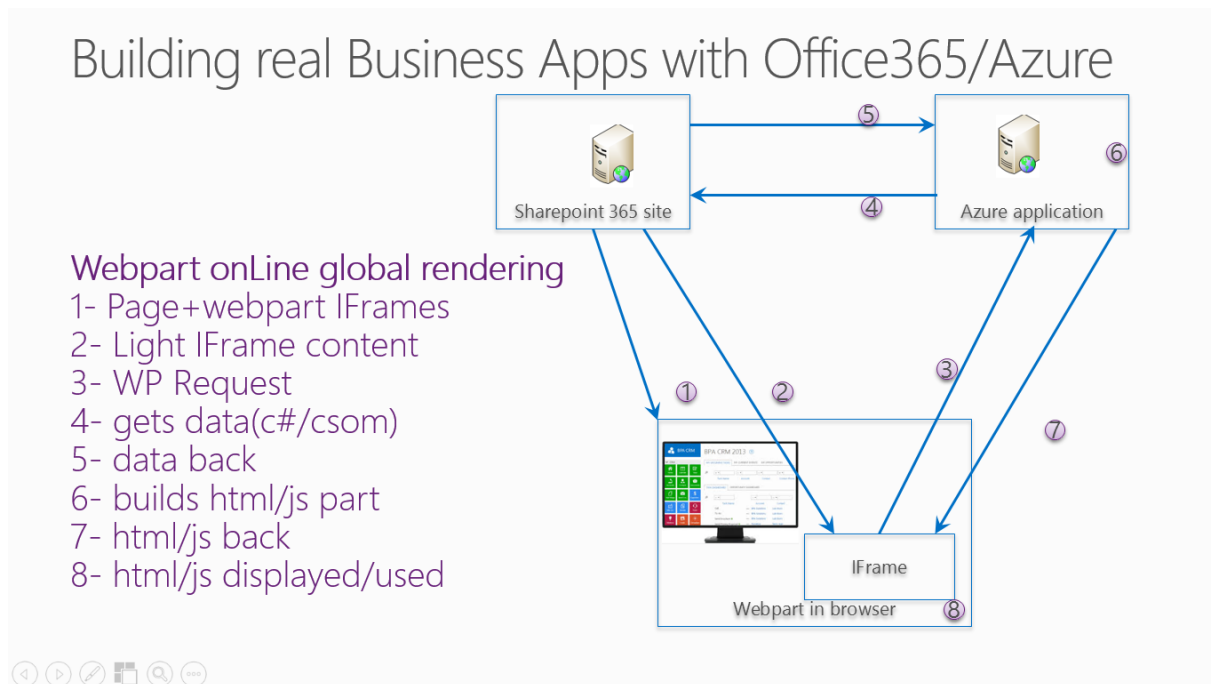
Designing the App

The new Microsoft App model has several constraints and is quite different from the on premise model.

In this new model, html, java script, style sheets and web parts (with no c# code) run on SharePoint servers or client’s devices and the web pages with code (aspx pages) run on Azure servers.

We decided against the scenario where most of the code was on the client side for security reasons. Also, developing the whole solution on Azure with a SQL Server instead of SharePoint was not an option.

The solution was to design the online app with c# code running on Azure – instead of the traditional web parts for our on premise version. Data is handled with a client side object model, CSOM, instead of the server side object model with our on premise version (SSOM.)



BPA CRM 365 information flows

The “central engine” of the app is called the Data Kernel. The Data Kernel handles data with CSOM or SSOM and caches the needed SharePoint lists, views and items to deliver the performance users expect. This was the breakthrough in design BPA needed to deliver the product we wanted.

Because the Apps needs to be configurable by super users, we had to store web part properties in SharePoint lists. In order to do this, we developed a web part properties editor to manage this information.

With our traditional on premise version, we have c# web parts with SSOM access. The new online app model contains java script web parts calling Azure where c# code and CSOM access is handled.

The key to this design and what differentiates BPA, is that even through the web parts are clearly different between the two models, the c# code executed in the background is almost the same!

Thanks to our amazing Data Kernel, we were able to keep the features very similar for both the on premise and online deployments.

In conclusion, our expectations were met and we succeeded with our challenge. A single solution for any deployment is possible with 90% of the code being the same.

List of Features and Screen Captures

BPA CRM 365 contains enhanced ergonomics compared to a standard SharePoint site. Navigation is intuitive. The powerful data viewer feature allows displaying data with column filters and the selected actions (buttons).

BPA Solutions

The BPA CRM 365 Premium edition will come with additional features already existing with on premise editions, like sending emails, mail merging documents, displaying charts (30+ grade web parts).

CRM Navigation:

- Home, Calendar, Tasks
- Accounts, Contacts, Documents
- Opportun..., Cases, Solutions
- Leads, Campaigns

Reporting: Dashboard

MY UPCOMING TASKS

Task Name	Account	Contact	Contact Phone	Contact Email
Call for closing	BPA Solutions	Lutz Boris		

MY CURRENT EVENTS

MY OPPORTUNITIES

TASK DASHBOARD

Task Name	Account	Contact	Assigned To	Task Status
Send quote	BPA Solutions	Schöni Belinda	Info BPA	Not Started
Call for closing	BPA Solutions	Lutz Boris	Info BPA	Not Started

OPPORTUNITY DASHBOARD

Home page: View your dedicated important items, like tasks, events, etc

CONTACT OVERVIEW

Full Name: Lutz Boris
 Salutation: Dr
 Account: BPA Solutions
 Business Phone:
 Email Address:
 Address:

CONTACT DETAILS

SEARCH ALL CONTACTS

Full Name	Account	Star
Schöni Belinda	BPA Solutions	
Lutz Boris	BPA Solutions	

OPPORTUNITIES

Title	Account	Contact	Stage Status	Assigned To	Expected Revenue	Close Date
BPA CRM 365	BPA Solutions	Lutz Boris			Fr. 14'670	2/27/2014

Contact detail page: Have a 360° view on your contacts, like linked opportunities, projects or activities

The screenshot shows the Office 365 interface for BPA CRM. At the top, there's a blue header with 'Office 365' and 'Outlook Ca'. Below it is a 'BROWSE' bar. The main content area is divided into a left sidebar and a main workspace. The sidebar includes a 'BPA CRM' header, a 'CRM' section with 'Reporting' and 'Dashboard' options, and a 'Projects' section with 'Home', 'Projects', and 'Calendar' icons. The main workspace shows a 'PROJECT OVERVIEW' tab with details for 'BPA CRM implementation', including 'Assigned To: Info BPA', 'Status: Not Started', and 'Start Date: 2/12/2014'. There are also buttons for 'Edit', 'Delete', 'Version History', and 'Project'. A search bar is visible on the right. At the bottom, there are tabs for 'PROJECT TASKS', 'PROJECT CALENDAR', and 'PROJECT ATTACHMENTS'.

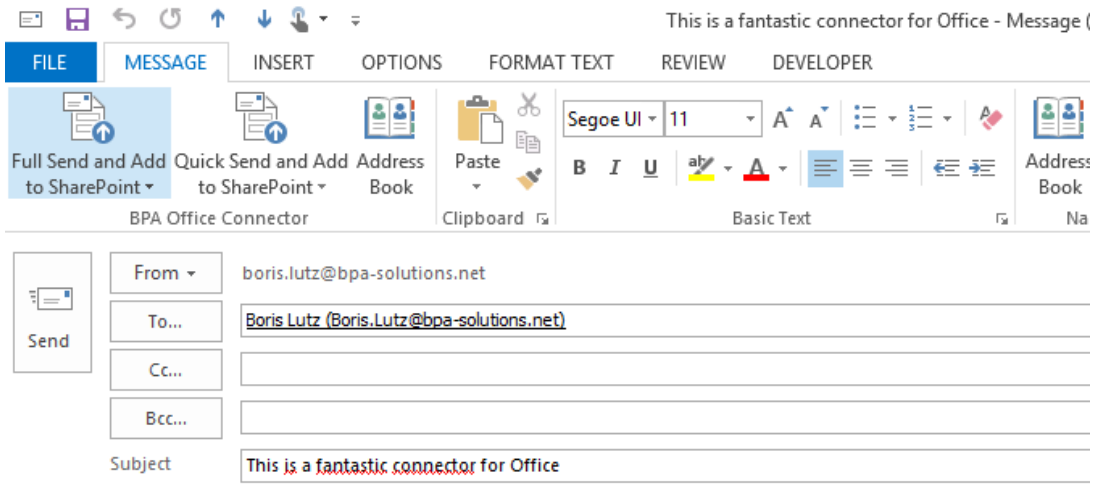
Project detail page: Easy project management embedded with your CRM tool

BPA CRM 365 can be easily accessed using BPA's native mobile solutions for iPhone, iPad or Android. With BPA CRM 365 mobile solutions you can easily and efficiently navigate, edit or add items to your CRM while on the go, even when offline.

The image shows two screenshots of the BPA CRM mobile application. The left screenshot is from an iPhone, displaying a contact card for 'BPA Solutions' with a phone icon, a checkmark icon, and the phone number '+41 32 731 00 00' and location 'Neuchatel'. Below the card are sections for 'Details', 'Contacts', and 'Attachments', with a list of document attachments. The right screenshot is from an iPad, showing a contact list with 'Lutz Dr. Boris' selected. The contact details include his phone number '41327101707' and location 'Bern Area'. Below the details are sections for 'Tasks' (with call logs) and 'Attachments' (with document and image files).

View a CRM account/contact with all related items using an iPhone/iPad

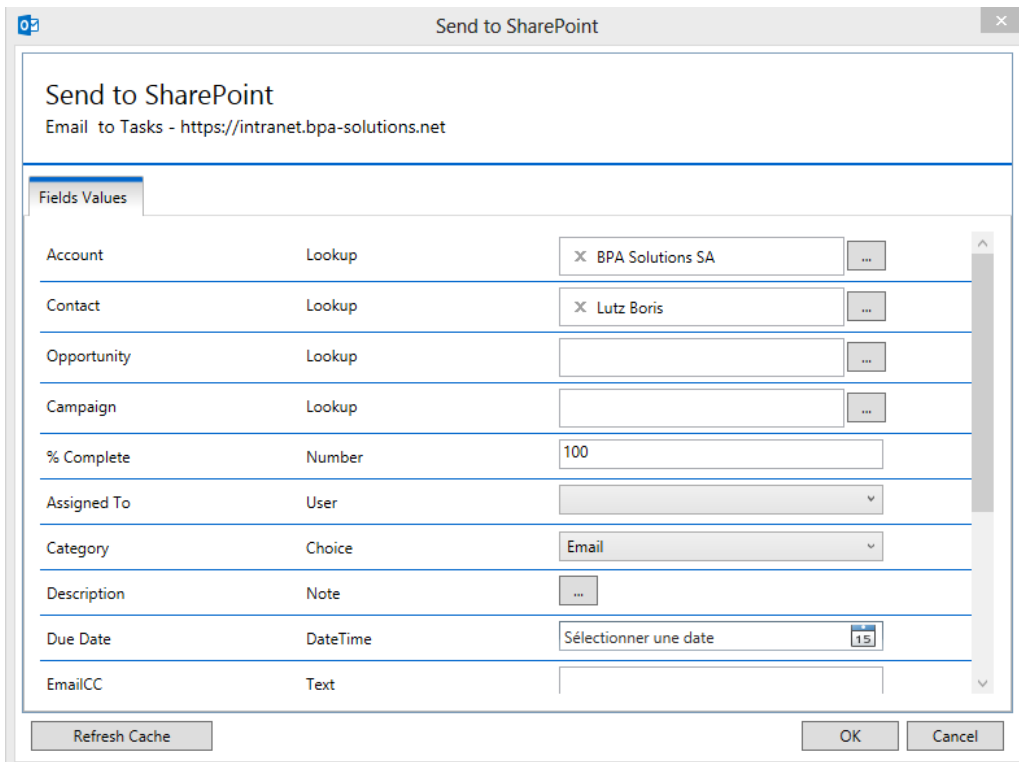
BPA CRM 365 lets you track all important Outlook emails, tasks, events or contacts. The BPA CRM 365 Outlook plugin makes it easy to copy important emails in your CRM while keeping the context. Incoming or outgoing emails will be copied in your CRM and linked automatically with the right account and contact.



BPA Office Connector is a great tool to add Outlook items in BPA CRM 365 and contacts, tasks or events.

Learn more on www.bpa-solutions.net

Additional buttons make it easy to copy an email into BPA CRM 365



Account and contact information are automatically preselected.

CONTACT OVERVIEW

CONTACT DETAILS

Full Name	Lutz Boris
Account	BPA Solutions SA
Email Address	boris.lutz@bpa-solutions.net
Business Phone	+41 32 710 17 07
Country	
Product interest	
Origin	BPA-Partner

⊕ opportunity
⊕ Trial site
⊕ Task
☎ Log a Call
✉ Send E-Mail
⊕ Event
⊞ Select Camp

OPPORTUNITIES

TRIAL SITES

TASKS

CALENDAR

CAMPAIGNS

ATTACHMENTS

🔍

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Task Name
Assigned To
Task Status
Dur

▾ **Completed : Yes**

This is a fantastic connector for Office ✳ ...	Completed
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Email was added as a completed task in BPA CRM 365



BPA CRM

CRM

Home

Calendar

Tasks

Accounts

Contacts

Documents

Opportun...

Cases

Solutions

Leads

Campaigns

BPA CRM 2013

MY UPCOMING TASKS

MY CURRENT EVENTS

MY OPPORTUNITIES

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Task Name
Account
Contact

Call for closing ...

TASK DASHBOARD

OPPORTUNITY DASHBOARD

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Title
Assigned To
Stage

BPA CRM 365	... Boris Lutz	50% Propo
BPA Quality on premise	... Stefan Lutz	25% Colle

FREE

Add

VERSION

AVERAGE RATING

RELEASED

PRODUCT

SUPPORTED LANGUAGES

TAGS

BPA CRM 365 Lite in the Microsoft SharePoint store

Supporting the App

The new BPA CRM 365 Lite app was released in February 2014 to the SharePoint store. This Lite version, while full featured, has limited configuration capabilities. It is available for FREE and provides an amazing feature set for smaller organizations or business units that have adopted Office 365 and need out of the box CRM functionality.

By mid-summer 2014, BPA will release a configurable full featured Premium version that will be competitively priced for the app store. Upgrading from the Lite version to this Premium version will be a simple process.

Customers can access our SharePoint help desk solution 7X24 to submit requests or gain access the online documentation and knowledge base.

Contact & References

Since preview app was launched in 2013, we had more than 200 downloads.

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