Bringing External Data into a Progress Rollbase Application Using Progress DataDirect Cloud

You can integrate data from an external source into a Rollbase Web App in a variety of ways. Using DataDirect Cloud enables you to expose an external data source as a Rollbase application object without having to write any integration code.

In this video, I'll demonstrate how to use DataDirect Cloud to bring data from my SaaS based Salesforce application into a Rollbase Web App. I already have a DataDirect Cloud data source definition configured. Now I'll modify my Rollbase web application to pull data about sales leads from Salesforce.

From within Rollbase, I open myCustomApp. I built this app to manage Account and Contact information. Now I want lead data from my Salesforce application to appear as prospect data in my Rollbase application.

First, I need to create an external object to represent the prospect data.

I can do this by clicking **New** and selecting the option **A new Object (with Tab) from an External Metadata**. Then click **Create**.

I select **DataDirect Cloud** and click **Next**.

Now I enter my DataDirect Cloud access credentials and the name of the Salesforce **Data Source**.

Rollbase makes the connection to DataDirect Cloud which, in turn, connects to Salesforce. The Salesforce tables are available from the **Select Table** drop-down list. I select the **Leads** table.

I enter Prospect as the name for the **Object** and Rollbase automatically fills in the **Plural**, **Record Name**, and **Integration Name** fields. I change the Integration name to identify it as a Salesforce object. The rest of these values are acceptable, so I'll leave them as is.

Notice the option **Do you want to create a new Tab for this object now?** is selected by default. I'll leave this so that Rollbase will automatically create the Prospect tab in my application.

Finally, I can set the **Permissions** for this object to control read and write access. I'll leave the default settings as they are.

Rollbase maps the columns in the data source table to create fields in the new object. Rollbase requires each object to have a primary key. This can be a field or combination of fields that form a unique value. In this case, Rollbase automatically identifies the **Primary Key** as defined in Salesforce, which is RowID.

In the **New Object** section, you can choose the field type, label, and integration name for each of the identified fields. I set the Email and Phone field type for the corresponding fields.

Once they are mapped correctly, I click **Create Fields**.

Rollbase displays the SQL Query to obtain the data. You can modify the SQL query if needed. I can preview the query to ensure that it will return data correctly.

I accept the default queries and click **Save**.

Rollbase creates the Prospect object and displays its data in a new tab. Now I can use lead records just

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like my other Rollbase object records. Refer to the Progress Rollbase help documentation for details.

Note that the Email and Phone fields are formatted properly, based on the field types set.

I can also **Edit the View** or **Design This Page** as needed to display the data to the end user in a different way.

This completes our look at how to bring objects into Rollbase using DataDirect Cloud in order to access external data. For other helpful videos on Rollbase, check out the list of videos on the Progress user assistance page.