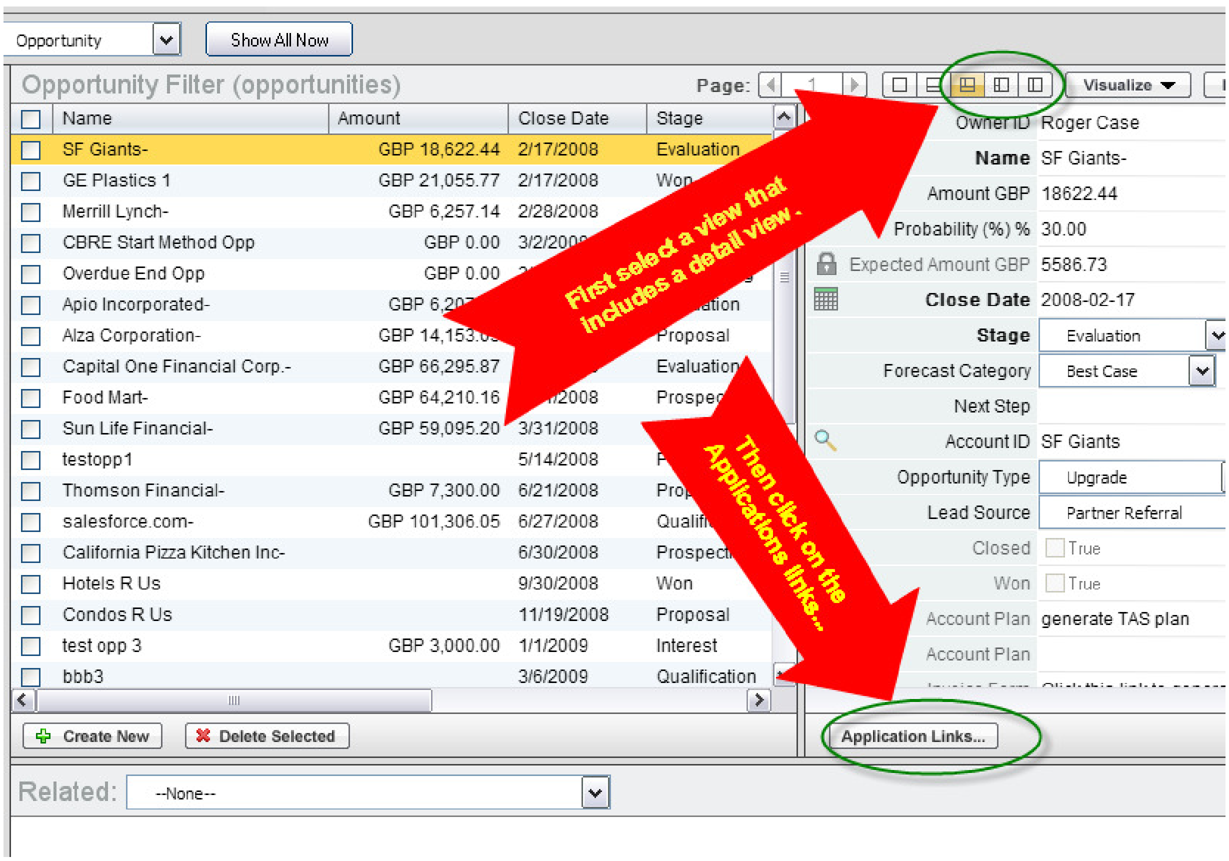
Using FormFactory Links in TableTop

TableTop now enables you to easily launch links to forms directly from the Entity records detail view. Launching FormFactory forms that are automatically populated by TableTop detail views can be accomplished in a few easy steps as described below.

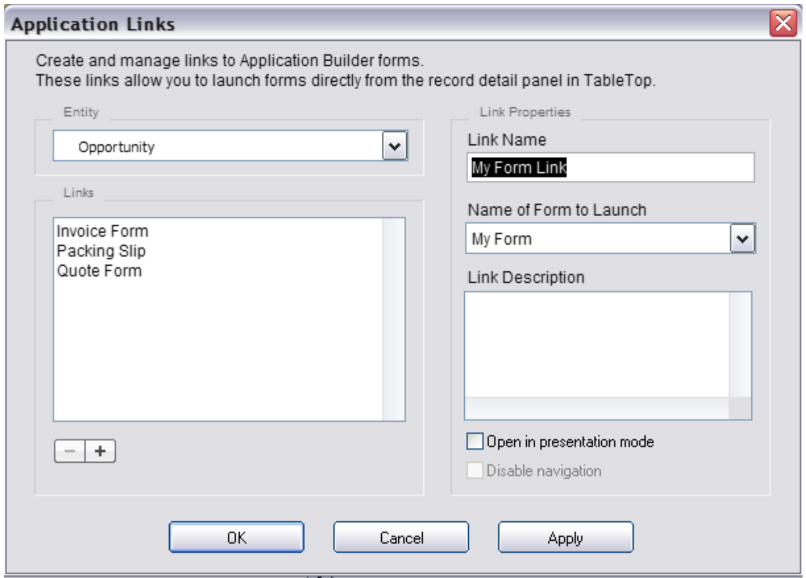
Creating a link to FormFactory

When in TableTop, select the desired entity from the Quick search drop down menu in the top left of the screen to generate a list of entity records. Once the entity list appears, select a view layout from the icons on the top of the dialog box that includes a detail view as shown below. Any of the rightmost 3 views will work. Then simply select a specific entity record and click on the "Application Links…" button in the lower corner of the detail view.



The Application Links dialogue allows you to link any FormFactory Form in your ORG to a detail view in TableTop When the link is launched the selected record in the detail view will automatically populate the linked form.

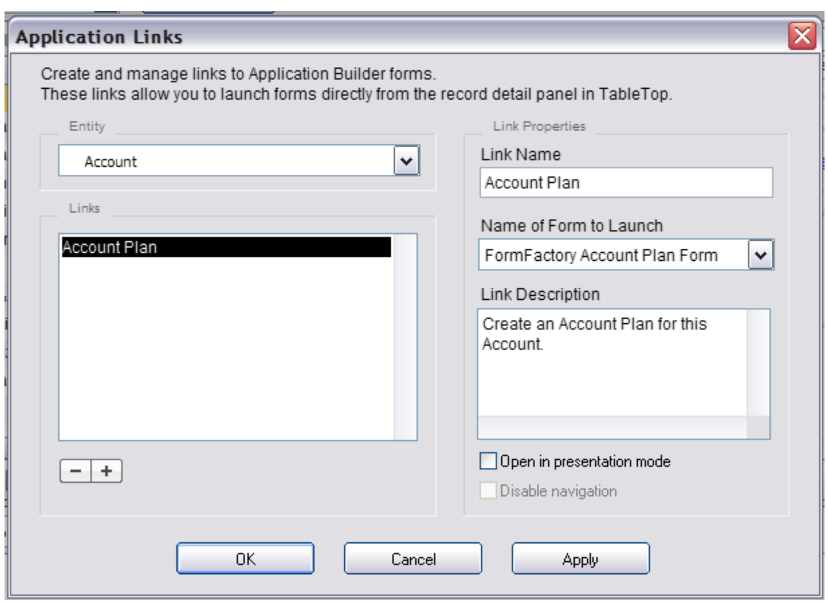
Using the Application Links dialogue



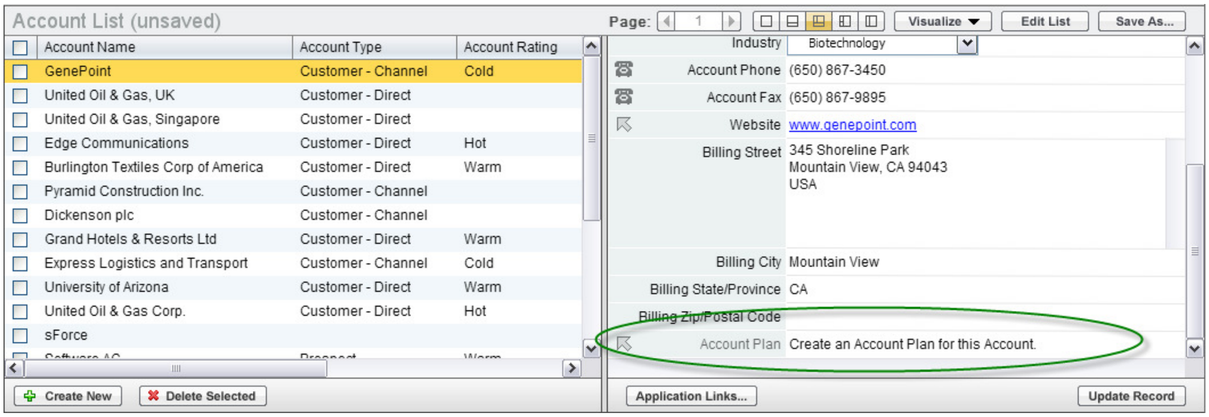
After clicking on the Application Links button, the Application Links dialogue box will appear. Here you select the desired entity from the drop down list in the top left. Then a list of currently linked live forms will appear in the Links box on the left side of the dialogue. This list automatically defaults to the business entity of your TableTop detail view. In the use case displayed in the screen shot above, we are filtering on Opportunities. Here you can select from the existing list of links.

To create a new link, simply click on the "+" button and provide a Link Name and Link Description. Select the new Link from drop down list called "Name of Form to Launch". This will list all available forms as shown below.

Note: You can also create a new form at this point by providing a name and hitting ok.



Select the desired form and then click the "Ok" button and the link will be created. Links are always shown in the lower portion of the detail views. Furthermore they are only shown for the entities that apply. In this example, all forms that can be auto populated by Opportunity records are shown in the detail view below.

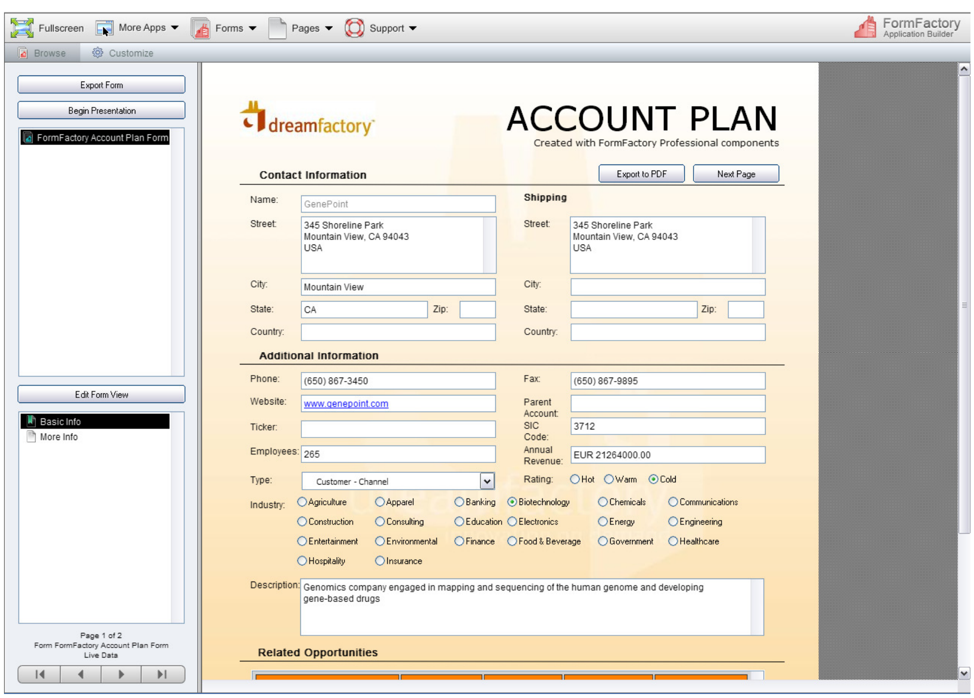


Launching a Linked Form.

Once the forms have been selected, to launch the form simply scroll down to the bottom of the detail view and you will see the selected forms. To launch the form, simply click on the arrow next to the desired form. Continuing with the example use case discussed above; from the entity detail view, simply click the arrow in the account plan label. 

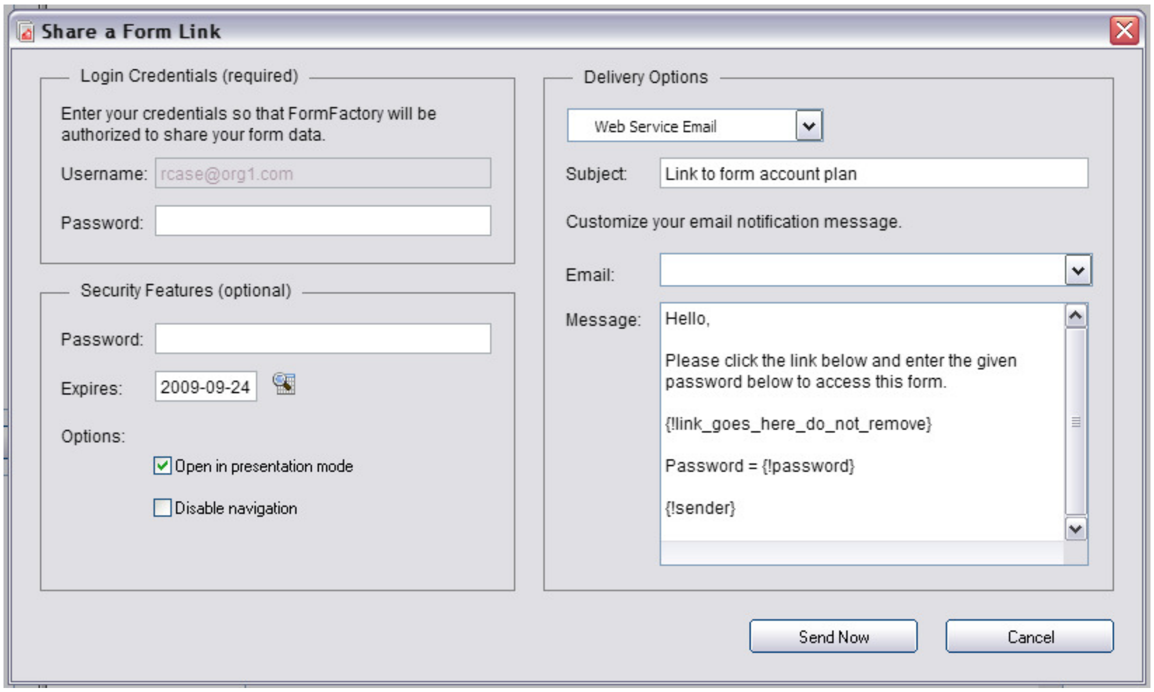
. This will launch FormFactory in a new browser tab, and pre-populate the linked form with the selected detail record.

Note: (*When you click the launch arrow to open FormFactory, if it does not open, it might be because your browsers popup blocker is turned off. In order for the link to open, the browser popup blocker must be turned on.)*



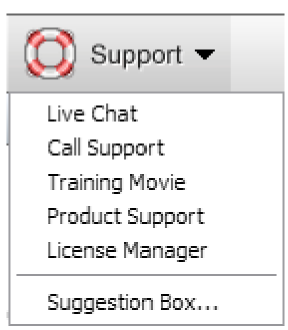
Sharing a Linked Form.

Once you have launched the form in FormFactory, you are able to share that form with anyone using the Active Links feature. To share a form, you must first click on the link in the details box and FormFactory will open displaying the desired link. You must then click on the Forms menu and select the Share Form Link command. Enter your password into the Login Credentials box in the top left. (**Note:** *if you are using the Salesforce platform, you must paste your security token immediately after your password.*) Next, you may add security features if desired including a password, expiration date and other options in the Security features box. Select your desired delivery method and enter the email address(s) of whom you want to share the link with and then click send.



Support Options

For assistance and support, contact DreamFactory Support by either initiating a Live Chat or using the Call Support options through the Support Menu.



You can also obtain product information through the DreamFactory Support Wiki at http://dreamfactory.pbworks.com.