

## 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 screenshot displays the TableTop interface for an Opportunity. At the top, there is a search dropdown set to 'Opportunity' and a 'Show All Now' button. Below this is a table titled 'Opportunity Filter (opportunities)' with columns for Name, Amount, Close Date, and Stage. The first row, 'SF Giants-', is highlighted in yellow. To the right of the table is a detail view for the selected record, showing fields like Owner ID, Name, Amount, Probability, Expected Amount, Close Date, Stage, Forecast Category, Next Step, Account ID, Opportunity Type, Lead Source, and Account Plan. At the bottom of the interface, there are buttons for 'Create New' and 'Delete Selected', and a 'Related:' dropdown menu. Two red arrows with text are overlaid on the image: one pointing to the view icons at the top right, and another pointing to the 'Application Links...' button at the bottom right.

Opportunity

Opportunity Filter (opportunities) Page: 1

<input type="checkbox"/>	Name	Amount	Close Date	Stage
<input type="checkbox"/>	SF Giants-	GBP 18,622.44	2/17/2008	Evaluation
<input type="checkbox"/>	GE Plastics 1	GBP 21,055.77	2/17/2008	Won
<input type="checkbox"/>	Merrill Lynch-	GBP 6,257.14	2/28/2008	
<input type="checkbox"/>	CBRE Start Method Opp	GBP 0.00	3/2/2008	
<input type="checkbox"/>	Overdue End Opp	GBP 0.00		
<input type="checkbox"/>	Apio Incorporated-	GBP 6,207.00		
<input type="checkbox"/>	Alza Corporation-	GBP 14,153.00		Proposal
<input type="checkbox"/>	Capital One Financial Corp.-	GBP 66,295.87		Evaluation
<input type="checkbox"/>	Food Mart-	GBP 64,210.16		Prospect
<input type="checkbox"/>	Sun Life Financial-	GBP 59,095.20	3/31/2008	
<input type="checkbox"/>	testopp1		5/14/2008	
<input type="checkbox"/>	Thomson Financial-	GBP 7,300.00	6/21/2008	Prop
<input type="checkbox"/>	salesforce.com-	GBP 101,306.05	6/27/2008	Qualif
<input type="checkbox"/>	California Pizza Kitchen Inc-		6/30/2008	Prospect
<input type="checkbox"/>	Hotels R Us		9/30/2008	Won
<input type="checkbox"/>	Condos R Us		11/19/2008	Proposal
<input type="checkbox"/>	test opp 3	GBP 3,000.00	1/1/2009	Interest
<input type="checkbox"/>	bbb3		3/6/2009	Qualification

Owner ID Roger Case  
Name SF Giants-  
Amount GBP 18622.44  
Probability (%) % 30.00  
Expected Amount GBP 5586.73  
Close Date 2008-02-17  
Stage Evaluation  
Forecast Category Best Case  
Next Step  
Account ID SF Giants  
Opportunity Type Upgrade  
Lead Source Partner Referral  
Closed  True  
Won  True  
Account Plan generate TAS plan  
Account Plan  
Application Links...

First select a view that includes a detail view.

Then click on the Application Links...

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

The screenshot shows the 'Application Links' dialog box. At the top, it says 'Create and manage links to Application Builder forms. These links allow you to launch forms directly from the record detail panel in TableTop.' Below this, there are two main sections: 'Entity' and 'Link Properties'. The 'Entity' section has a dropdown menu with 'Opportunity' selected. The 'Link Properties' section has a 'Link Name' field with 'My Form Link', a 'Name of Form to Launch' dropdown with 'My Form', and a 'Link Description' text area. There are also two checkboxes: 'Open in presentation mode' and 'Disable navigation', both of which are unchecked. At the bottom, there are three buttons: 'OK', 'Cancel', and 'Apply'. On the left side, there is a 'Links' list box containing 'Invoice Form', 'Packing Slip', and 'Quote Form', with a '-' and '+' button below it.

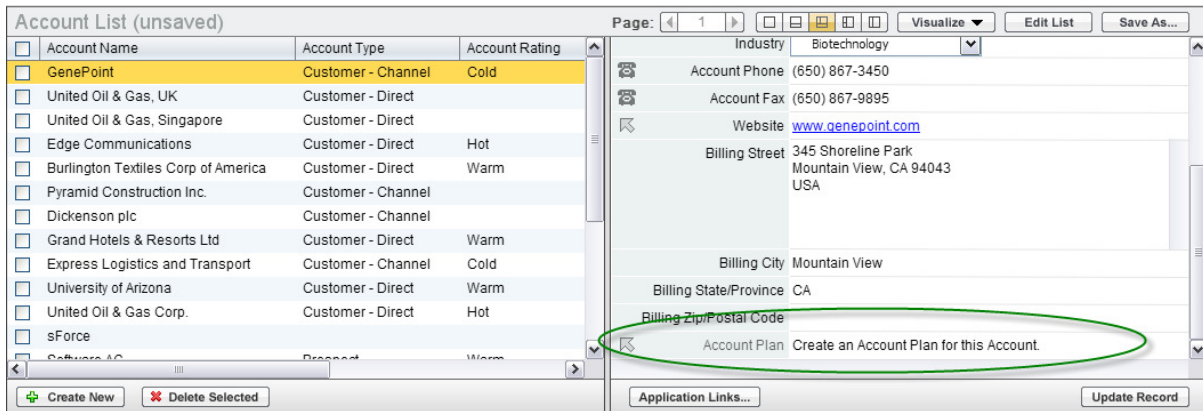
After clicking on the Application Links button, the Application Links dialogue box will appear. Here you select the desired entity from the drop down list in the top left. Then a list of currently linked live forms will appear in the Links box on the left side of the dialogue. This list automatically 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.*

The screenshot shows the 'Application Links' dialog box with a new link being created. The 'Entity' dropdown is set to 'Account'. The 'Link Name' field contains 'Account Plan'. The 'Name of Form to Launch' dropdown is set to 'FormFactory Account Plan Form'. The 'Link Description' text area contains 'Create an Account Plan for this Account'. The 'Links' list box on the left now contains 'Account Plan'. The 'Open in presentation mode' and 'Disable navigation' checkboxes are still unchecked. The 'OK', 'Cancel', and 'Apply' buttons are at the bottom.

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.

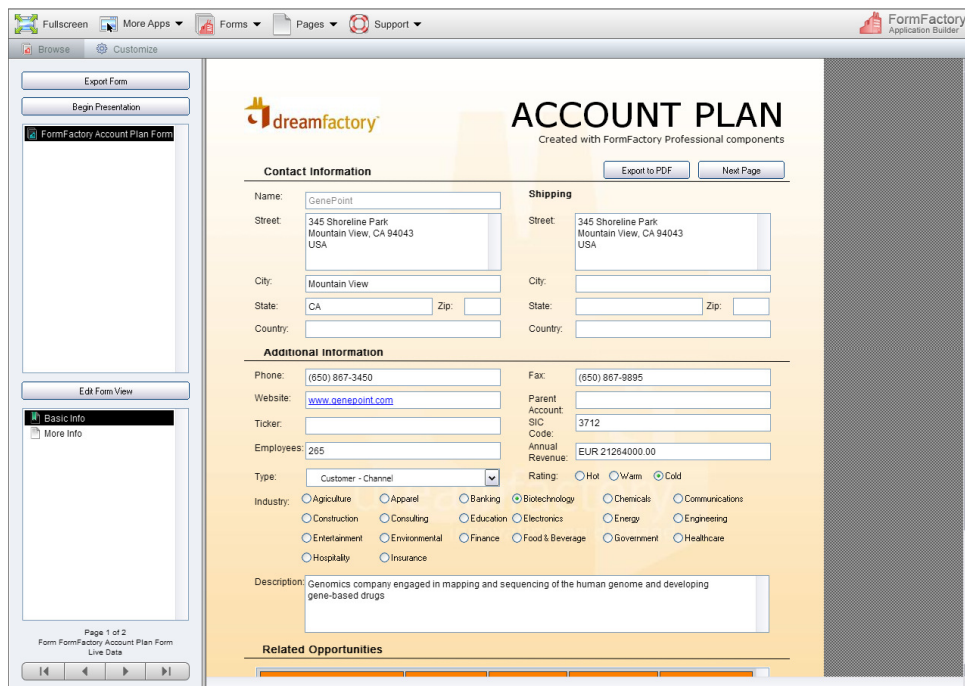


### Launching a Linked Form.

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

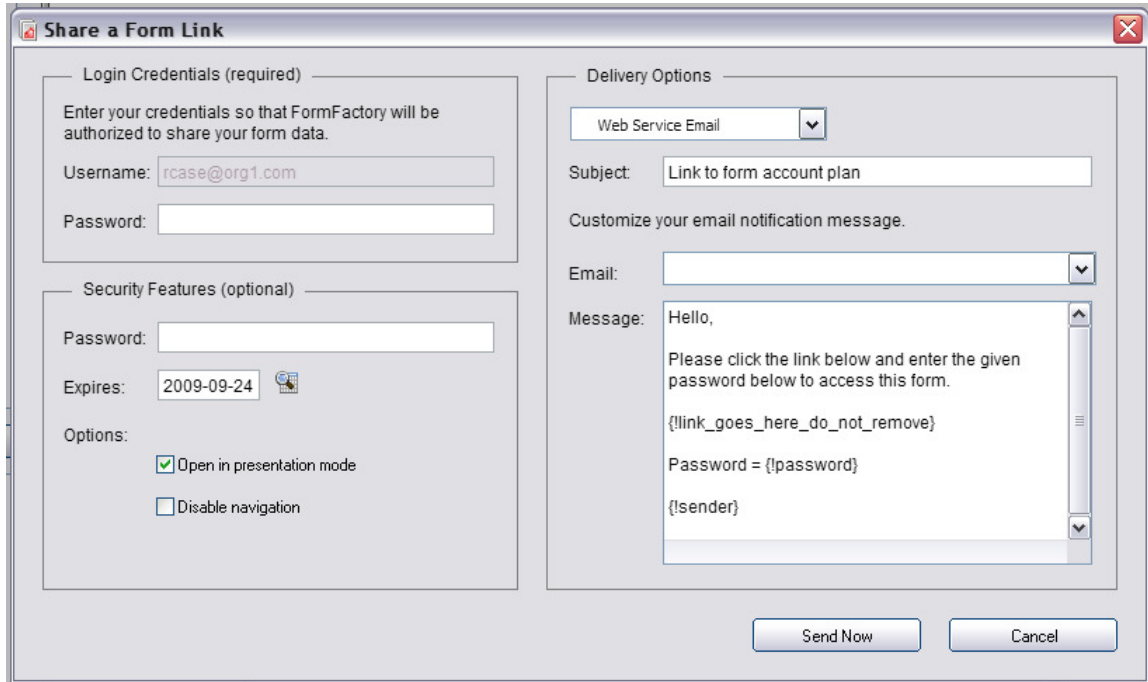
label.  **Account Plan**. This will launch FormFactory in a new browser tab, and pre-populate the linked form with the selected detail record.

**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.



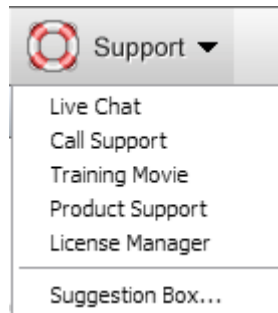
The screenshot shows a dialog box titled "Share a Form Link" with a close button in the top right corner. The dialog is divided into several sections:

- Login Credentials (required):** A text area with the instruction "Enter your credentials so that FormFactory will be authorized to share your form data." Below it are fields for "Username:" (containing "rcase@org1.com") and "Password:".
- Security Features (optional):** A section containing a "Password:" field, an "Expires:" field (set to "2009-09-24" with a calendar icon), and "Options:" with two checkboxes: "Open in presentation mode" (checked) and "Disable navigation" (unchecked).
- Delivery Options:** A dropdown menu set to "Web Service Email", a "Subject:" field (containing "Link to form account plan"), and a section titled "Customize your email notification message." containing an "Email:" dropdown and a "Message:" text area. The message text is: "Hello, Please click the link below and enter the given password below to access this form. {link\_goes\_here\_do\_not\_remove} Password = {!password} {!sender}"

At the bottom of the dialog are two buttons: "Send Now" and "Cancel".

## 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>.