


Compress implementation time, eliminate manual data entry. App to app integration with clicks, not code.


FinancialForce ClickLink

ClickLink™ is your implementation team's best friend. Business analysts and administrators get a point and click definition of business rules to easily transform data between objects on the Salesforce platform and from external data sources without coding. Your team can focus on identifying efficient workflows across the business, instead of getting bogged down in repetitive coding, testing and packaging efforts.

- Define field mapping from standard, custom and external objects
- Transform master and related details in a single operation
- Deploy rule changes without recompilation or packaging
- Transfer rules between development and production orgs via export/import


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 **ClickLink Rule**
Case to Sales Invoice


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ClickLink Rule Detail [Edit](#) [Delete](#) [Clone](#)

ClickLink Rule Name	Case to Sales Invoice	Owner	 Beth Fairchild [Change]
Source Object	Case	Target Object	c2g__codalInvoice__c
Source Object Name Field	CaseNumber	Target Object Name Field	Name
Source Object Process Field		Sync Enabled	<input type="checkbox"/>
Source Object Processed Field	Invoice_Raised__c		
Created By	Beth Fairchild, 8/1/2012 1:06 PM	Last Modified By	Beth Fairchild, 3/1/2013 10:57 AM


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ClickLink Mappings [New ClickLink Mapping](#) [New ClickLink Basic Mapping](#) [ClickLink Mappings Help](#) 

Action	Mapping ID	Target Record Type	Target Record Created From	Mapping Type	Mapping Literal	Source Field	Target Field	Source Value Is ID	Source Sync
Edit Del	00000149	Default	Source Record	Source Field		Account_As_Text__c	c2g__Account__c	<input type="checkbox"/>	<input type="checkbox"/>
Edit Del	00000152	Default	Source Record	Source Field		Id	Case__c	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Edit Del	00000153	Default	Source Record	Source Field		ClosedDate	c2g__InvoiceDate__c	<input type="checkbox"/>	<input type="checkbox"/>
Edit Del	00000159	Default	Source Record	Literal	Billable Support Hours		c2g__InvoiceDescription__c	<input type="checkbox"/>	<input type="checkbox"/>

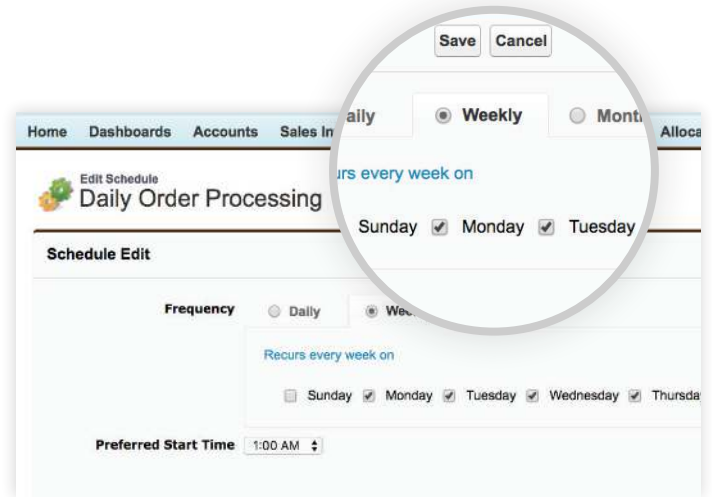
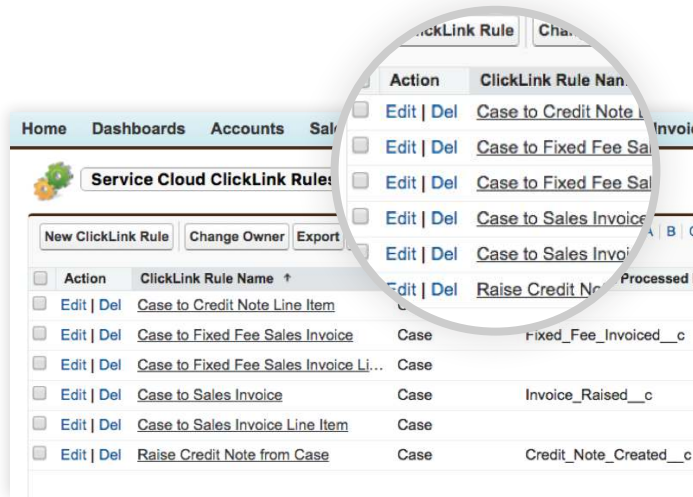
ClickLink Relationships (Master ClickLink) [New ClickLink Relationship](#) [ClickLink Relationships \(Master ClickLink\) Help](#) 

Action	Description	Source Relationship Name	Detail ClickLink Rule	Source Relationship Object	Target Relationship Object	Target Relationship Field
Edit Del	Sales Invoice Lines to Header		Case to Sales Invoice Line Item	Case	c2g__codalInvoiceLineItem__c	c2g__Invoice__c

ClickLink Buttons [New ClickLink Button](#) [ClickLink Buttons Help](#) 

Action	Description	Visualforce Page	List Object
Edit Del	Create FF Sales Invoice	createSINVfromCase	
Edit Del	Create FF Sales Invoices	createSINVfromCases	

FINANCIALFORCE CLICKLINK



Eliminate re-keying

Wherever there is a requirement to take data in Salesforce objects and turn them into FinancialForce transactions, then ClickLink™ is your secret weapon. So whether you need to raise sales invoices from orders, generate employee reimbursements from expense reports, load journals from a 3rd party app on the AppExchange or generate accounting transactions from your own custom or external objects, ClickLink rules will ensure you don't have to rekey or import/export ever again.

- Supports standard CRM, managed package, custom and external objects
- Supports creation of all FinancialForce accounting document types
- Maintains drill back links to originating source records

Fits the way you work

Once you've defined your field mapping rules, ClickLink™ also gives you a choice of how and when those rules are invoked. So whether it's a simple action from within your chatter feed, a button on a page layout, selecting sets of data from a list view, or "lights out" processing via a scheduled batch job, ClickLink lets you choose the method that best suits the way you work.

- System generated code for page layout and list view buttons
- Schedule rules for recurring, unattended operation
- Built-in logging mechanism for audit trails and error reporting
- Run rules as actions from mobile devices or your chatter feed
- Automatically fire rules as actions within Process Builder



To find out more about FinancialForce solutions, please contact us at:

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