

Form

CRM: Sales Force Automation

Sales Force Automation

Logout

Home

Welcome

Accounts

Account List (6)

New Account

Contacts

Contact List (5)

New Contact

Opportunities

Opportunity List (0)

New Opportunity

Proposal Process

Task Inbox (2)

New Proposal Approval

Account Details

Photo

Browse...

Account ID *

Account Name *

Address Details

Address

City

State

Country

Submit

Cancel

Print

Figure 1: Form in a Userview

Userview Form is one of Userview Builder's basic elements and a very important one. It allows one to integrate forms into the Userview, allowing users to interact with each other via forms.

Edit Form

Edit Form > Redirection > UI > Advanced

Custom ID

account_new

Label *

New Account

Form *

Account Form

Show in popup dialog?

Readonly?

Display field as Label when readonly?

Figure 2: Form Properties - Edit Form

Custom ID	Link name to be used as part of the URI constructed (e.g.,http://localhost:8080/jw/web/userview/crm/crm_userview_sales//account_new)
Label	Name of the element
Form	Form to be loaded for the element

Show in popup dialog?	Loads the form in a popup dialog when checked
Readonly?	Enables readonly for the form when checked
Display field as Label when readonly?	Displays input fields as plain text in readonly mode

Redirection

Edit Form > Redirection > UI > Advanced

Message Shown After Form Submission

Account Updated

URL Redirect After Form Submission

account_list

URL Redirect on Cancellation

account_list

Redirect Target on Cancellation

Top Window

Field Name For URL Redirect Value Passover

Field Value Passover Method

Append to URL

Request Parameter Name

Figure 3: Form Properties - Redirection

Message Shown After Form Submission	Message confirming that form has been successfully submitted
URL Redirect After Form Submission	Performs redirection to defined path (possibly a relative path) after form submission (e.g., "http://www.example.com/page/")
URL Redirect on Cancellation	Performs redirection to defined path (possibly a relative path) after form cancellation
Redirect Target on Cancellation	Behavior when handling a redirection on cancellation. Available options: <ul style="list-style-type: none">• Top Window• Current Window
Field Name for URL Redirect Value Passover	Defines which form field value will be used as part of the redirection URL (e.g., "id")
Field Value Passover Method	Defines how the redirect URL will be constructed. Available options: <ul style="list-style-type: none">• Append to URL (e.g., "http://www.example.com/page/123" where "123" is the value of the field defined in "Field Name for URL Redirect Value Passover")• As URL Request Parameter (e.g., "http://www.example.com/?page=123")
Request Parameter Name	If "As URL Request Parameter" is chosen as the "Field Value Passover Method", the request parameter name must be defined in this field (e.g., "page").

UI

Edit Form > Redirection > **UI** > Advanced

Submit Button Label

Cancel Button Label

Custom Header

Custom Footer

Figure 4: Form Properties - UI

Submit Button Label	Defines custom Submit Button name
Cancel Button Label	Defines custom Cancel Button name
Custom Header	Defines custom HTML to be appended at the top of the form
Custom Footer	Defines custom HTML to be appended at the bottom of the form

Advanced

Edit Form > Redirection > UI > **Advanced**

Userview Key Name

Load Data Using Userview Key?

☐ Yes

Figure 5: Form Properties - Advanced

Userview Key Name	Defines the field ID to pre-populate the form with
Load Data Using Userview Key?	