JustClick
User Guide

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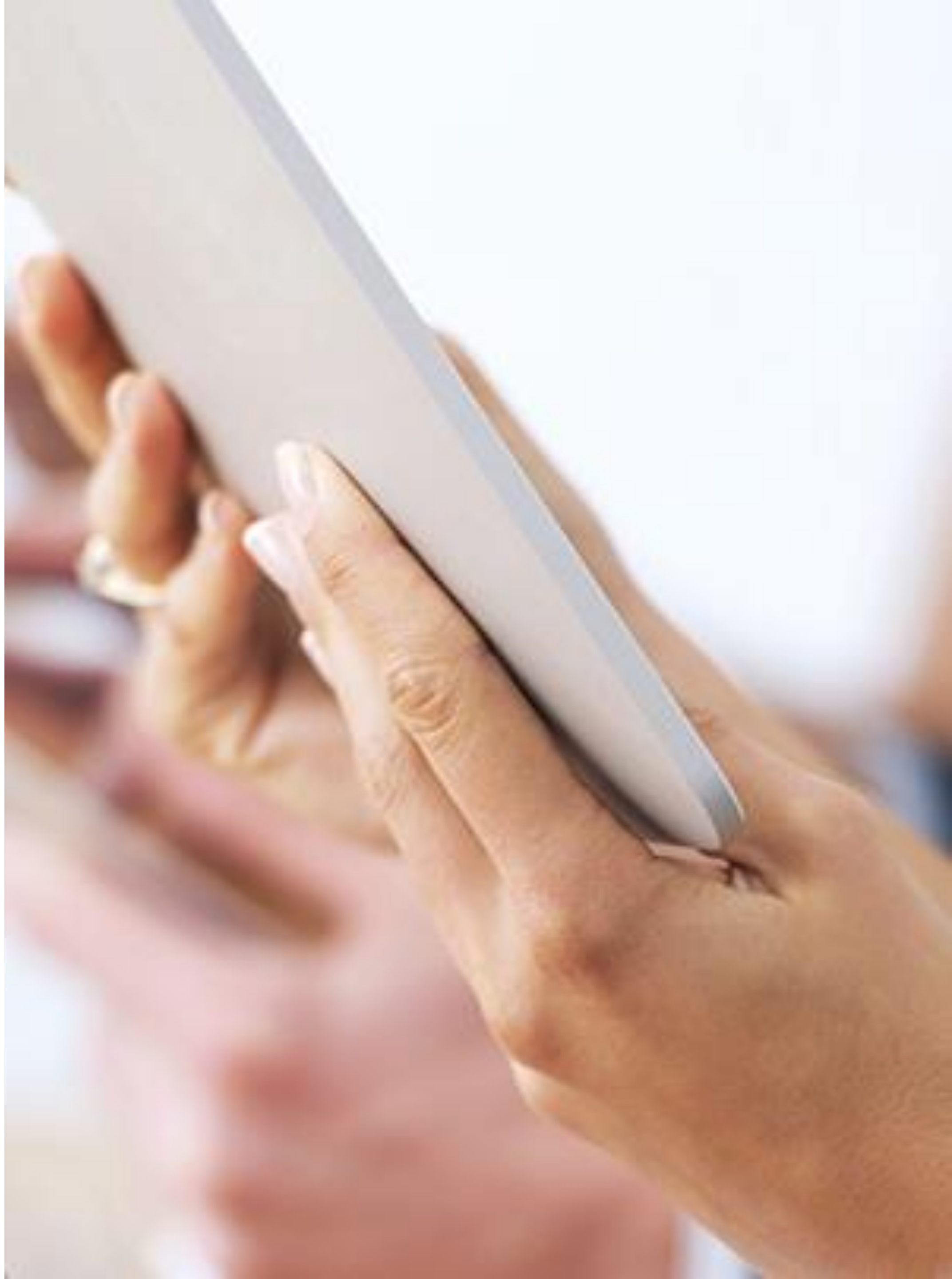


Introduction

Just Click helps Salesforce users to create and update records faster by populating predefined values / data selecting from available template. It ensures increase in productivity and saves lots of typing time.

Helps you to create records much faster with predefined values and Users can change the values on the fly before saving them

Helps you to update records much faster and update the records with template predefined values as well as from the record

Templates can be grouped with most relevant fields for a department as far as most of the times fields which they update are scattered across the page layout

Templates can be viewed in a single column or two column or three column layout based on the spacing availability on the page. Admin can be able to configure the number of columns while adding the component to the page

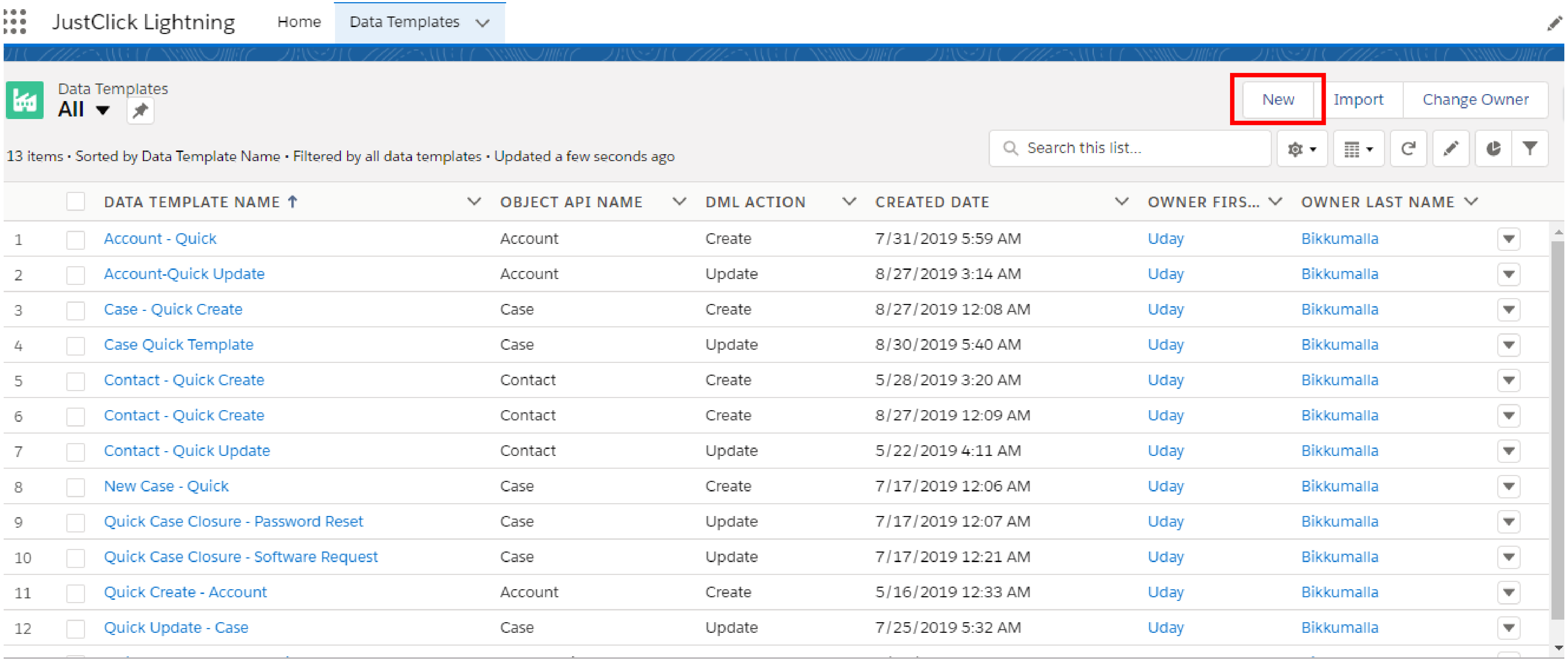
Templates can be created for all standard and custom objects

Easy creation of the templates using the mapping builder

Preview of your templates before you use them on the object record pages and home pages

Creation of New Template

1. Launch **JustClick** from App Launcher and open **Data Templates Tab**
2. Click **New** button



	DATA TEMPLATE NAME	OBJECT API NAME	DML ACTION	CREATED DATE	OWNER FIRS...	OWNER LAST NAME
1	Account - Quick	Account	Create	7/31/2019 5:59 AM	Uday	Bikkumalla
2	Account-Quick Update	Account	Update	8/27/2019 3:14 AM	Uday	Bikkumalla
3	Case - Quick Create	Case	Create	8/27/2019 12:08 AM	Uday	Bikkumalla
4	Case Quick Template	Case	Update	8/30/2019 5:40 AM	Uday	Bikkumalla
5	Contact - Quick Create	Contact	Create	5/28/2019 3:20 AM	Uday	Bikkumalla
6	Contact - Quick Create	Contact	Create	8/27/2019 12:09 AM	Uday	Bikkumalla
7	Contact - Quick Update	Contact	Update	5/22/2019 4:11 AM	Uday	Bikkumalla
8	New Case - Quick	Case	Create	7/17/2019 12:06 AM	Uday	Bikkumalla
9	Quick Case Closure - Password Reset	Case	Update	7/17/2019 12:07 AM	Uday	Bikkumalla
10	Quick Case Closure - Software Request	Case	Update	7/17/2019 12:21 AM	Uday	Bikkumalla
11	Quick Create - Account	Account	Create	5/16/2019 12:33 AM	Uday	Bikkumalla
12	Quick Update - Case	Case	Update	7/25/2019 5:32 AM	Uday	Bikkumalla

Creation of New Template

3. Fill fields in the New Data Template screen and Click Save

Data Template Name:

Name of the template, with which it will be displayed

Note: Give the name which specifies functionality so that you can distinguish between them.

Eg: Account-Quick Update, Contact-Quick Create

Object API Name:

API Name of the object. If you do not know the object api name, please contact your System Administrator for help

Note: It should match exactly with the Object API Name.

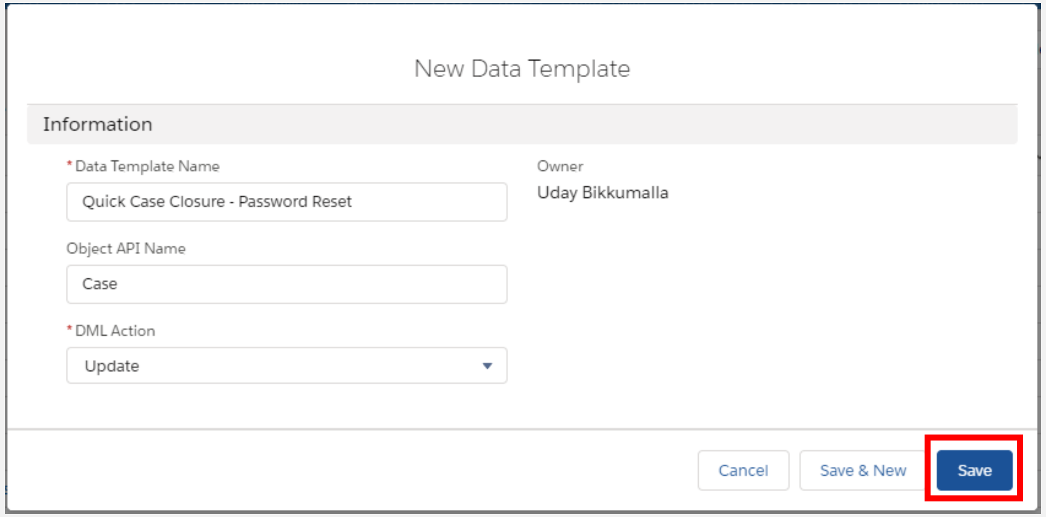
Eg: Account , Favorite__c etc.,

DML action:

Choose Insert/Update from the picklist.

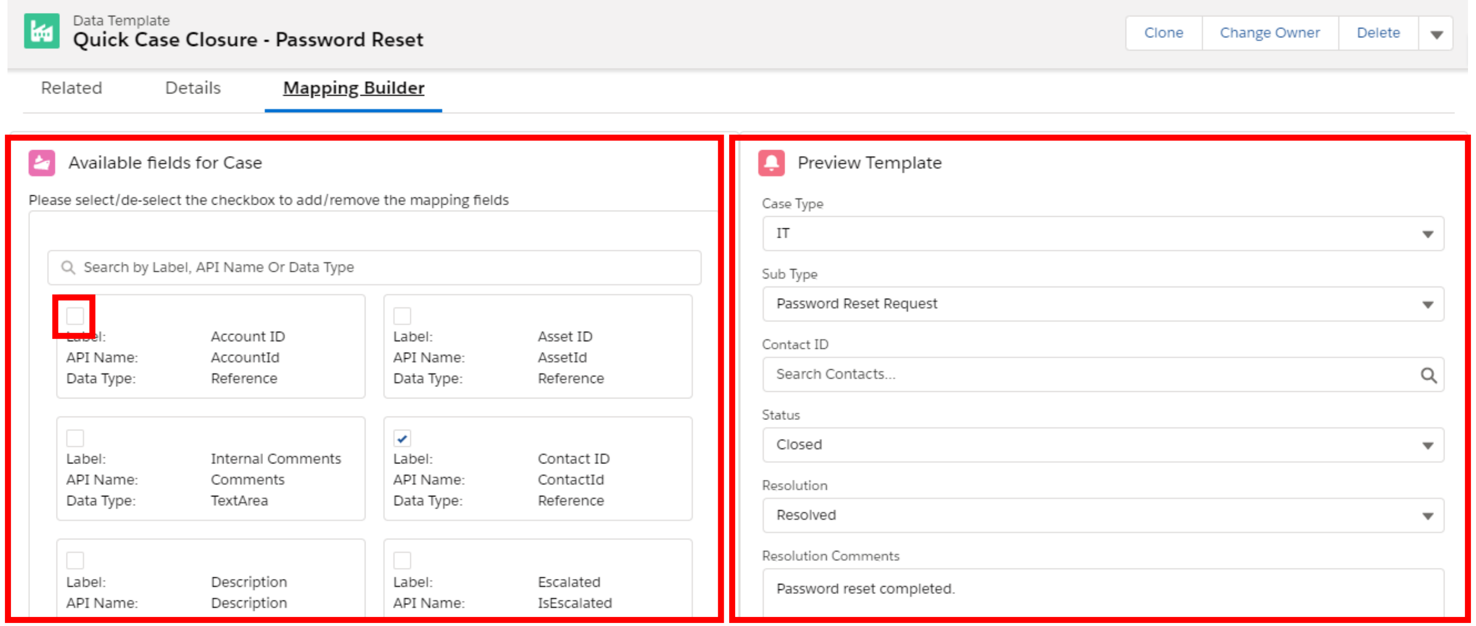
Insert: Templates selected with this value is available on Home page record pages.

Update: Templates selected with this value is available on object record pages.



Mapping Builder

1. Click on **Mapping builder** in data template to add the fields to the templates
2. Search for the field which you wish to add to the template
3. Select the checkbox to add the field to the layout. You can notice the preview of your template changes as you check the checkbox. Uncheck the checkbox to remove the field from the template. Preview the template updates automatically based on your selections in left panel



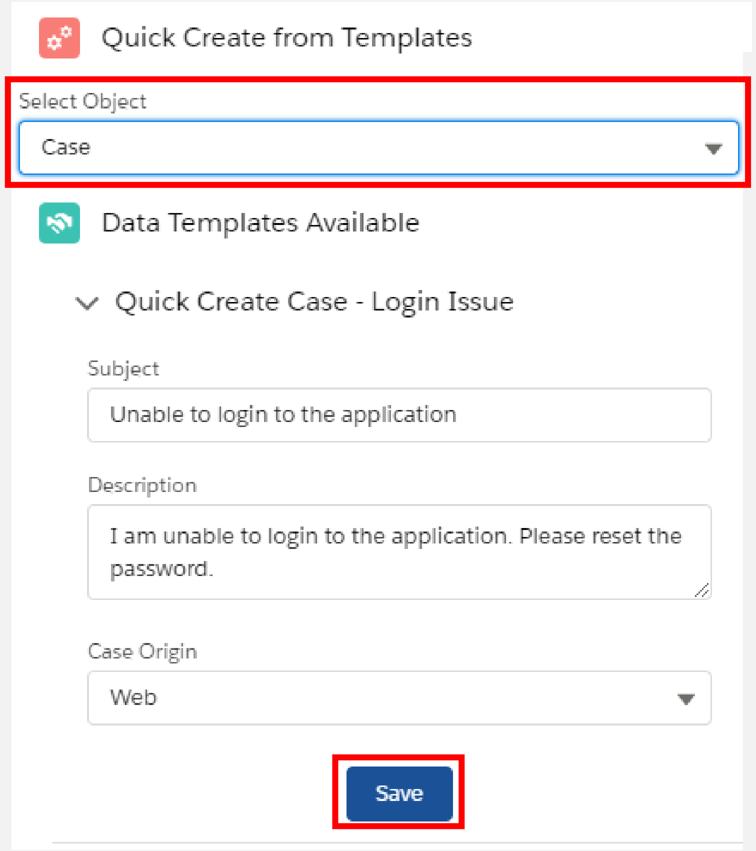
4. Provide the values for the fields added to template on the right-side panel. The values are saved to the field automatically. You can change the field values anytime from this screen. It will not have any impact on any of your original records
5. Now this template is ready for use. If you selected the DML Action as ‘Update’, Template will be available for use on respective object record page. If you selected the DML Action as ‘Create’, Template will be automatically available on record home pages

Note: *Mapping Builder automatically adds required fields to template. You can uncheck the fields if you want to remove the fields from the template.*

Create Records Using Templates

Templates with DML action ‘Create’ are available on Home Page. User can select the object from the ‘Select Object’ dropdown. Templates available for the selected object will shown below the drop down.

- Select the template which you would like to create a record. Notice the fields values are automatically fetched from the template
- Review the data from template and change the field values as per your need. Changing the data in the template will not impact the template field values
- Click ‘Save’ button to save the changes to record then you will be navigated to the newly created record



Update Records Using Templates

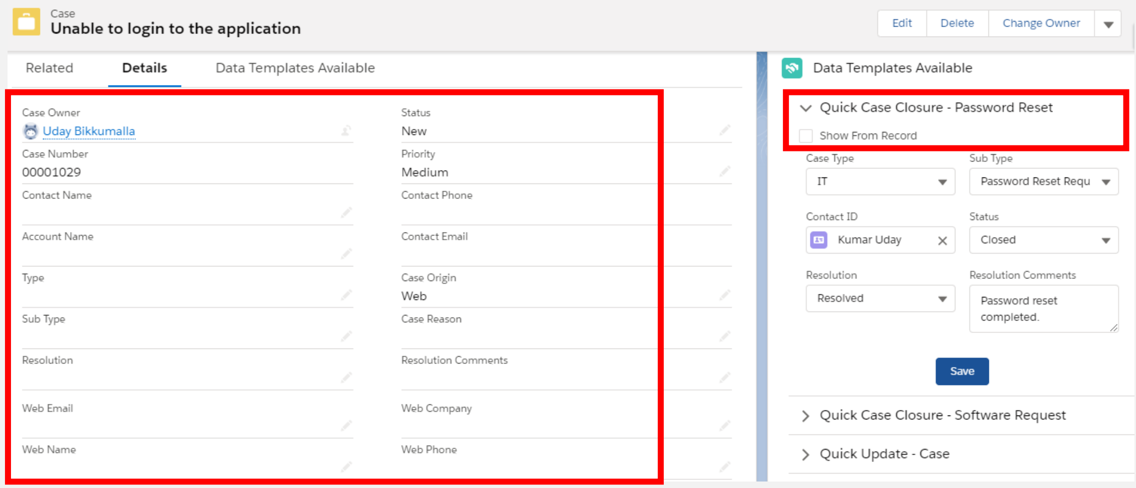
Templates with DML action ‘Update’ are available on object record page. Users can select the template and apply it to the template page.

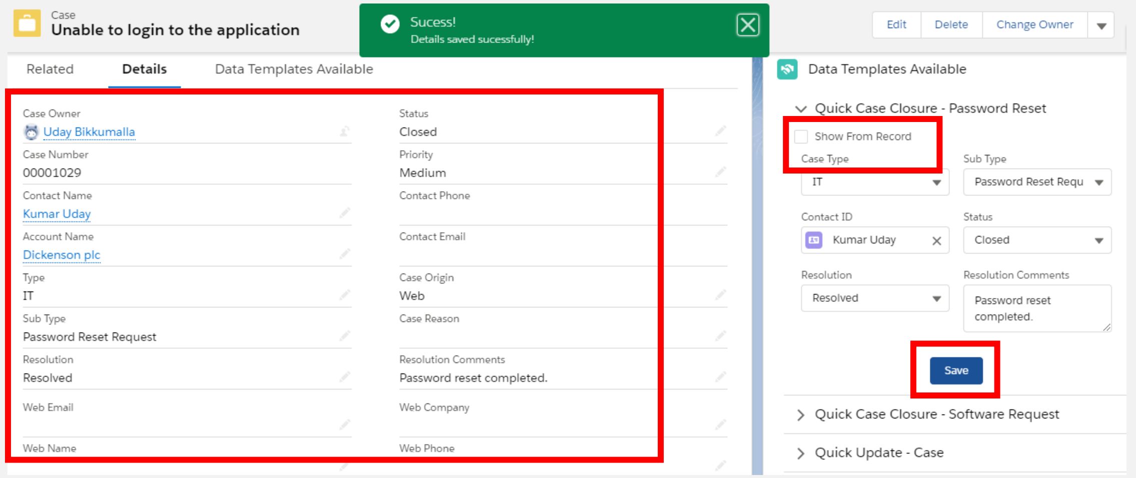
- Select the template which you would like apply to the record

Notice the fields values are automatically fetched from the template.

- Review the data from template and change the field values on the fly as per your need before you click Save button
- Click ‘Save’ button to save the changes to the record and the fields values will be reflected on record detail page automatically

There are instances where you need to update the record using the values from the record instead of the values from the template. You can select the template and select ‘Show From Record’, The field values will be updated with record values and User can review the field values and update them as needed





Thank You!