

## Linking from crystalreports.com to Salesforce.com

Many of our crystalreports.com customers use our Salesforce appexchange offering of crystalreports.com to report from Salesforce.com. This post will only apply to those of you that use crystalreports.com in this way.

Many of our Salesforce.com customers want a way to link from within reports on crystalreports.com back to Salesforce.com. Crystal Reports gives you a fairly easy way to accomplish this task by creating dynamic hyperlinks within the report.

Hyperlinking in Salesforce uses the ID field from Salesforce objects. However, the URL typically only has the first 15 characters of an ID field. So, what we do in Crystal Reports is to use the ID field in the construction of dynamic URL.

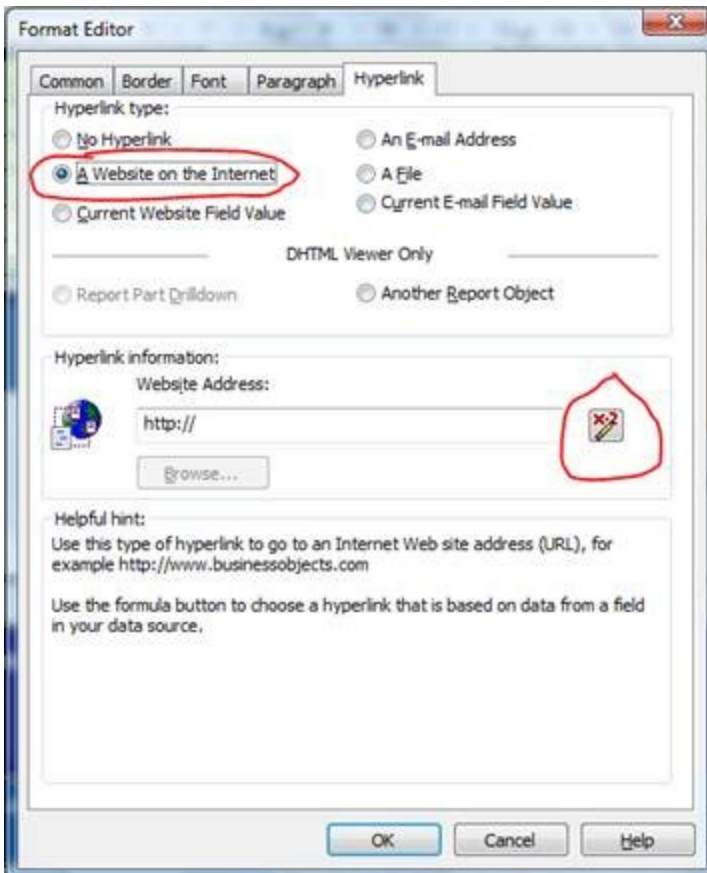
Here is the work flow:

In your web browser, go to a screen that is the screen you want to hyperlink to – it doesn't matter what data is at this screen. Copy the address in the browser bar to just past the first "/". For example, from the screenshot below, the address would be "https://na1.salesforce.com/"




Right click on the field that you want to hyperlink (note: this field has to have a relationship to where you want to link to in Salesforce). Select "Format Field".

Then choose the "Hyperlink" tab.



Select the "A Website on the Internet" radio button (circled above).

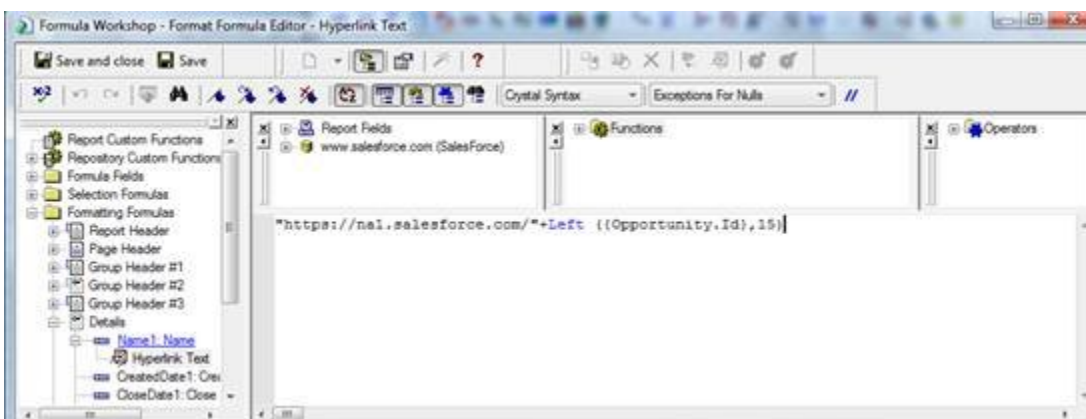
Click on the  button beside the website address (circled above).

This opens the formula editor so that you can build a dynamic hyperlink based on your report information.

Now, using the url from the first step create a formula that looks like this:

"https://na1.salesforce.com/"+Left ({Opportunity.Id},15)

See screenshot below.



Save and close.

You can close out of the “Format Editor” as well to go back to the report to try the hyperlink. However, you might also want to further format the field so it looks like a link – perhaps underline the field, make the text blue, and give it some tool tip text (so when the user hovers over it, it tells the user where the link goes).

When you click on the hyperlink, if you don’t have a Salesforce session, it will prompt you to log in.

When you upload this report to crystalreports.com and use this report directly from within a Salesforce tab, you would never be prompted to log in.