

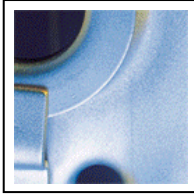
# JSSI S-Controls

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presented by

**Alex Romanzow**





# About JSSI and Me

- **The Company**

- **Jet Support Services Inc. (aka: JSSI)**

- **80+ employees worldwide**

- **Provide our clients with “Protection from the High Cost of Maintenance” for turbine engine aircraft.**

- **Adopted the Enterprise Edition of Salesforce.com in September of 2005**

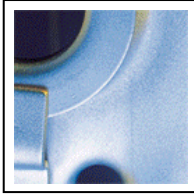
- **Currently have 71 users**

- **About Me**

- **Alex Romanzow**

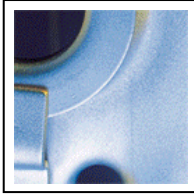
- **Systems Analyst**

- **Salesforce.com Administrator and assist with various IT projects**



# The Sforce Challenge

- **Users needed to record maintenance events as Cases.**
- **Maintenance Event Cases contain information found on the Asset object, such as Serial Number and Asset Name.**
  - **By linking the Asset to the Case, we would have a historical record of all maintenance done to a particular aircraft, no matter who owned the aircraft.**
- **Needed to auto populate the following fields in a new Case from Asset fields with the click of a Custom Link:**
  - **Contract Number**
  - **Asset Id and Name**
  - **Contact Id and Name**
- **By linking the Id's in addition to the names, sfdc references the Asset and Contact objects on the saved Case instead of just recording the text names.**



# Create Custom S-control

**Personal Setup**

- My Personal Information
- Email
- Mobile Users
- Import
- Desktop Integration

**App Setup**

- Customize
- Build
  - Custom Apps
  - Custom Objects
  - Custom Tabs
  - Custom S-Controls
- Exchange
- Integrate

**Administration Setup**

- Manage Users

## Custom S-Controls

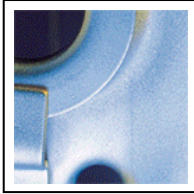
Custom s-controls provide a flexible, open means of extending the Salesforce user interface to display your own custom data forms with the application. For example, you could define a custom s-control that provides access to data unique to your users and business processes. Custom s-controls are implemented like Java and Active-X, rather than server modifications, to provide this capability.

Below are the custom s-controls available for custom links. To upload a custom s-control, click the **New Custom S-Control** button below.

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V |

**New Custom S-Control**

Action	Name ▲	Description	Filename
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Attachment Archive</a>		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Buy-In Case from Oppty</a>		



# The Script

Activities Contacts Accounts Contracts Cases Documents Reports Dashboards Campaigns Solutions ▶

Create Maintenance Event from Asset

[Help for this Page](#) 

custom s-control Detail

[Edit](#) [Delete](#)

**Name** Create Maintenance Event from Asset

**File**

**Description**

**HTML Body**

```
<script language=Javascript>
function redirect() {

parent.frames.location.replace("/500/e?retURL=%2Fhome%
2Fhome.jsp&RecordType=012300000000Q4N&00N30000000tVhM={!Asset_Contract_Number}
&Asset_lkid={!Asset_ID}&Asset={!Asset_Name} &cas3_lkid= {!Asset_Contact_ID}&cas3={!Asset_Contact}")

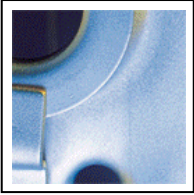
}
redirect();

</script>
```

**Created By** [Alex Romanzow](#), 4/19/2006 10:50 AM

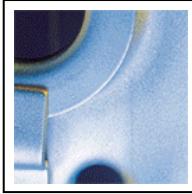
**Modified By** [Alex Romanzow](#), 4/19/2006 10:50 AM

[Edit](#) [Delete](#)



# Script Breakdown

- `<script language=Javascript>`  
`function redirect() {`  
`parent.frames.location.replace("/500/e?retURL=%2Fhome%2Fhome.jsp`
  - From whatever page you're on, redirect your browser to a new Case
- `&RecordType=012300000000Q4N`
  - New Case will be a Maintenance Event Record Type
- `&00N30000000tVhM={!Asset_Contract_Number}`
  - Case field "Contract #" will be whatever is in Asset Contract Number field
- `&Asset_lkid={!Asset_ID} }&Asset={!Asset_Name}`
  - Asset will be linked by Asset Id and the name will appear in the Case's Asset field
- `&cas3_lkid= {!Asset_Contact_ID}&cas3={!Asset_Contact}"`
  - Case Contact will be linked by Asset Contact Id and the name will also appear.
- `}redirect();`  
`</script>`
  - Finishes the script



# To Find the New Maintenance Event Case URL

The screenshot shows the Salesforce CRM interface. At the top, there is a navigation bar with tabs for Home, MyJSSI, Leads, Opportunities, Contacts, Accounts, Contracts, **Cases**, Documents, Reports, and Dashboards. Below the navigation bar, there is a search bar and a 'Go!' button. The main content area is titled 'New Case Select Case Record Type'. A dropdown menu is open, showing the following options: Maintenance Event (highlighted), Buy-In Case, CSC Case, Maintenance Survey, PIDS, Salesforce.com Change Request, Special Rate, Standard, Tech Visit, and Trend/SOAP Annual Membership. The 'Record Type Name' column is visible in the table below the dropdown.

Address: [https://na1.salesforce.com/setup/ui/recordtypeselect.jsp?retURL=%2F500%2Fo&rt=Case&save\\_new\\_url=%2F500%2Fe%3FretURL%3D%252F500%2Fo&rt=Case&save\\_new\\_url=%2F500%2Fe%3FretURL%3D%252F500%2Fo](https://na1.salesforce.com/setup/ui/recordtypeselect.jsp?retURL=%2F500%2Fo&rt=Case&save_new_url=%2F500%2Fe%3FretURL%3D%252F500%2Fo&rt=Case&save_new_url=%2F500%2Fe%3FretURL%3D%252F500%2Fo)

Search: Search All

Create: New...

Recent Items:

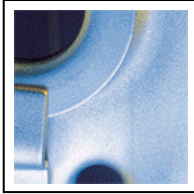
- 00000969
- Credit Suisse Leasing AG
- 00000718
- 00000409
- 00000314

**New Case**  
Select Case Record Type

Select a record type for the new case. To skip this page in the future, change your record type setting.

**Select Case Record Type**

Record Type of new record	Record Type Name
Maintenance Event	Standard
Buy-In Case	Tech Visit
CSC Case	Trend/SOAP Annual Membership
Maintenance Survey	
PIDS	
Salesforce.com Change Request	
Special Rate	



# New Case URL Found

Address <https://na1.salesforce.com/500/e?retURL=%2F500%2Fo&RecordType=01230000000004M&rt=Case&cancelURL=%2F500%2Fo>

**JSSI** salesforce.com

Home MyJSSI Leads Opportunities Contacts Accounts Contracts **Cases** Documents Reports Dashboards

**Search**  
Search All  
Go! Advanced Search...

**Create**  
New...

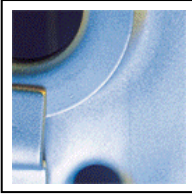
**Recent Items**  
00004148  
00000969  
Credit Suisse Leasing AG  
00000718

**Case Edit**  
New Case

**Case Edit** Save Save & Close Save & New Check Spelling

**Case Information**

Case Owner	Alex Romanzow	Case Record Type	Maint
Contact Name	<input type="text"/>	Status	New
Client Type	--None--	Completed Date	<input type="text"/>
Contract #	<input type="text"/>	Priority	Mec
		Event Type	--No
		Maintenance Event Category	--No
		Maintenance Detail	--No
		Case Origin	--No



# Where Are Custom Field Names?

Address <https://na1.salesforce.com/p/setup/field/CustomFieldPage?p1=Case&setupid=CaseFields&id=00N300000000tVhM>

**JSSI.** salesforce.com

Home MyJSSI Leads Opportunities Contacts Accounts Contracts Cases Documents Reports Dashboards Campaigns

**Personal Setup**

- My Personal Information
- Email
- Mobile Users
- Import
- Desktop Integration

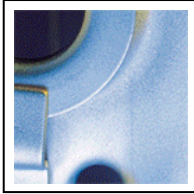
**App Setup**

- Customize
  - Home
  - Activities
  - Campaigns
  - Leads
  - Accounts
  - Contacts
  - Opportunities
  - Cases
    - Fields
    - Page Layouts
    - Search Layouts

**Custom Field**  
Contract #

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

<b>Field Label</b>	Contract #	<b>Field Name</b>	Contract
<b>Data Type</b>	Text	<b>Length</b>	50
<b>Description</b>			
<b>Created By</b>	<u>Jim Stroka</u> , 9/7/2005 9:41 AM	<b>Modified By</b>	<u>Jim Stroka</u> , 9/7/2005 9:41 AM



# Find Standard Field Names in the Source Code

Case Edit: New Case ~ Salesforce - Enterprise Edition - Microsoft Internet Explorer provided by Jet Support Services, Inc

File Edit View Favorites Tools Help

Back Status Bar Explorer Bar

Address Bar: [0/e?retURL=%2F500%2Fo&RecordType=012300000000Q4N&rt=Case&cancelURL=%2F500%2Fo](#)

Search Search Advanced Search...

Home Text Size Encoding Source Privacy Report... Full Screen F11

SSL

opportunities Contacts Accounts Contracts **Cases** Documents Reports Dashboards Campaigns

Case Edit New Case

Case Edit Save Save & Close Save & New Check Spelling Cancel

**Case Information**

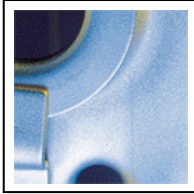
Case Owner	Alex Romanzow	Case Record Type	Maintenance Event
Contact Name	<input type="text"/>	Status	New
Client Type	--None--	Completed Date	<input type="text"/>
Contract #	<input type="text"/>	Priority	Medium
		Event Type	--None--
		Maintenance Event Category	--None--
		Maintenance Detail	--None--
		Case Origin	--None--

Recent Items

- 00004148
- 00000969
- Credit Suisse Leasing AG
- 00000718







# Once S-Control is Complete, Add Custom Link to Page

## Personal Setup

- My Personal Information
- Email
- Mobile Users
- Import
- Desktop Integration

## App Setup

- Customize
  - Home
  - Activities
  - Campaigns
  - Leads
  - Accounts
  - Contacts
  - Opportunities
  - Cases
  - Self-Service
  - Contracts
  - Solutions
  - Products
  - Assets
    - Fields
    - Page Layouts
    - Search Layouts
    - Custom Links
- Users

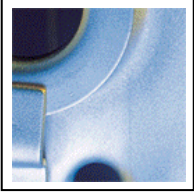
## Custom Links Asset

Below are the custom links for Assets. To add these links to the Custom Links section of the Assets detail page, page layout.

### Custom Links

[New](#)[Default Custom Links](#)

Action	Label	Type	Content
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Create CSC Case</a>	Custom S-Control	<a href="#">Create CSC Case from Contact</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Create CSC Case</a>	Custom S-Control	<a href="#">Create CSC Case from Assets</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Create Maintenance Event</a>	<a href="#">Custom S-Control</a>	<a href="#">Create Maintenance Event from Asset</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Create PIDS Case</a>	Custom S-Control	<a href="#">Create PIDS Case</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Create Tech Visit Case</a>	Custom S-Control	<a href="#">Create Tech Visit Case</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Trend Monitoring</a>	Custom S-Control	<a href="#">Create Trend Monitoring Case</a>



# Questions?

