BUILDING SALESFORCE CUSTOM LINKS

Summary

Use custom links to integrate your organization's Salesforce data with external websites, your company's intranet, or other back-end office systems. You can also use custom links to provide quick access to relevant or frequently-used Salesforce pages, such as the Sales by Rep report.

User Permissions

Administrators and users with the "Customize Application" permission can create custom links.

Custom Link Lengths

- The link label of a custom link cannot exceed 1,024 characters.
- The link URL you enter can be up to 3,000 bytes. When data is substituted for the tokens in the URL, the link may exceed 3,000 bytes. Your browser may enforce additional limits for the maximum URL length.

What are Custom Links?

Custom links are hyperlinks that can include Salesforce fields as tokens within a URL or on Visualforce pages. For example, you could include an account name in a URL that searches Yahoo:
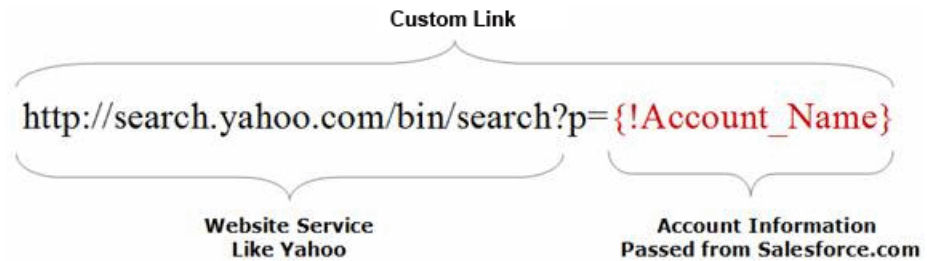
Best Practices

Pass Session IDs with SSL

Session IDs should never be passed to an "http" URL. Instead, pass session IDs with a secure sockets layer (SSL) "https" URL. Any data that is passed to other applications hosted on the Internet should always use SSL since it may contain sensitive customer information.

Use Relative Links to Salesforce Pages

When creating a custom link to a page within Salesforce, do not include the domain portion of the URL. For example,
`https://na1.salesforce.com/00Oz0000000EVpU&pv0={!Account_ID}` should *not* include `https://na1.salesforce.com`. Instead, use
`/00Oz0000000EVpU&pv0={!Account_ID}`.

Use Merge Fields to Pass Salesforce Data

You can add merge fields to a custom link to pass data from your Salesforce records, user information, or company information to another website or application.

Use ampersands to pass multiple merge fields in a custom link. For example:
`http://maps.yahoo.com/py/maps.py?cn={!Account_BillingCountry}&`

`csz={!Account_ShippingCity}+{!Account_ShippingState}+{!Account_ShippingPostalCode}+&`
`addr={!Account_ShippingAddress}.`

Substitute Symbols for Certain Characters

Due to URL encoding standards set forth by the World Wide Web Consortium (W3C), some characters cannot be passed through a URL. For example, the space and newline character. Instead, use %2D for a space and %0D for a newline. For more information on URL encoding and what characters cannot be passed through a URL, see W3C.

Linking to Documents

Use custom links to reference documents from any Salesforce record detail page:

1. Create a folder on the Documents tab to which all users have access.

2. Upload the document to that folder.

3. From the Documents tab, choose the folder and click **Go**.

4. Click **View** next to the document.

5. Copy the document's URL from the browser. For example,
`https://na1.salesforce.com/servlet/servlet.FileDownload?file=015300000000xvU`.

6. Use the URL to create the custom link. Remember to omit the domain portion,
`https://na1.salesforce.com`.

Linking to Reports

Use custom links to run reports with filtered results from any Salesforce record detail page. For example, if you frequently run a mailing list report for the contacts related to an account, create a custom link for accounts that links directly to a report that is automatically filtered to the account you are viewing. To do this, your custom link needs to pass the account's unique record ID to the report.

1. First, you will need an ID for the type of record by which you want to filter your report (in this example, an account). View any record of the right type and copy the 15 character ID from the last part of the URL. For example, `https://na1.salesforce.com/`**`001200030012j3J`**.

2. From the Reports tab, create the report you want by either customizing a standard report or creating a new custom report.

3. On the Select Criteria page of the wizard, filter the report by the record ID you previously copied. For example, "Account ID equals 001200030012j3J". See the sidebar on the left for tips on setting other report options.

4. Run the report to verify that it contains the data you expect.

5. Click **Customize** and navigate to the Select Criteria page of the wizard.

6. Delete the record ID from the report filter, but leave the field and operator values intact. Note the order of your filter, for example, first, second, third, etc.

7. Click **Save** or **Save As** to save the report to a public folder accessible by the appropriate users. **Save** does not create a new custom report, whereas **Save As** does.

8. Run the report and copy the report's URL from the browser.

9. Begin creating your custom link. In the `Link URL` field, paste the report URL you copied. Remember to omit the domain portion, `https://na1.salesforce.com`.

10. At the end of the URL add the following text: **?pv0=**. Use pv0 if your filter is in the first position, pv1 if second, pv2 if third, and so on. Then use the merge field drop-down lists to add the appropriate ID merge field (in this example, {!Account_ID}). For example,
`/00O30000000dS8u?pv0={!Account_ID}`.

11. Add the custom link to the appropriate page layouts.

12. Verify that the new custom link works correctly.

Setting Report Options

- When creating a report for use in a custom link, set date ranges and report options generically so that report results include a variety of data that can be useful for multiple users.

- For example, if you set a date range using the "Created Date" of a record, set the Start Date far enough in the past to not exclude any relevant records and leave the End Date blank.

- For example, if you scope the report to just "My" records, the report may not include all records that a user can see. Try setting the report options to "All visible" records.

Best Practices for Advanced Users

Using Field Names

Salesforce has no plans to change field names; however, that does not guarantee that field names will not change in the future. Therefore, custom links that include Salesforce fields may change how they are mapped.

Pre-Populate Fields

Create custom links that pre-populate fields with default values. For example, by default give new contracts 12–month terms that start today.

Get the names of the fields you want to pre-populate by opening the detail page where the custom link will display. Click **New** from the appropriate related list.

For example, to add a custom link that creates contracts on the account detail page, click **New** from the Contracts related list of an account detail page. If the Contracts related list is not visible on the account detail page, add it to the related list section of the account page layout; see "Customizing Page Layouts" in the online help.

Copy the URL from the address bar of your Web browser. For example:

```
https://na1.salesforce.com/003/e?retURL=%2F001D0000003qFmB&
accid=001D0000003qFmB
```

In your browser, view the source of the contract edit page. In Internet Explorer, select **View** > **Source**; in Mozilla Firefox, select **View** > **Page Source**.

Search the page source for the label of the fields you want to pre-populate. For example, to pre-populate the `Contract Term` field on contracts, search for "Contract Term."

For each field, locate the relevant `<input>` tag—usually within the immediate `<td>` (table cell) tag. Copy the text after `name=`. For example, from `<input name="ctrc40"/>`, copy `ctrc40`. See the sidebar for more information about these field names.

From the object management settings for accounts, find Buttons, Links, and Actions to begin creating your custom link.

- If you're using Salesforce Classic, from Setup, enter `Accounts` in the `Quick Find` box, then select **Buttons, Links, and Actions**.

- If you're using Lightning Experience, from Setup, enter `Object Manager` in the `Quick Find` box, then select **Object Manager**. Next, click **Account**, and then scroll down to the Buttons, Links, and Actions section.

Name the new link appropriately, such as "New 12–Month Contract." In the field entry area, paste the URL you copied from the address bar of your Web browser.. Remember to omit the domain portion, `https://na1.salesforce.com`.

Delete the 15-character ID from the URL after "acc_id". Use the merge field drop-down lists to add the appropriate ID merge field. For example, `{!Account_ID}`.

Insert the link parameters using the following syntax: "&{*field input name*}=*desired field value*." For example, the following link sets the contract term to 12 months with a start date of today:

```
/800/e?retURL=%2F001D0000003pmTi&accid={!Account.Id}&
ctrc40=12&ctrc5={!Today}
```

Add the custom link to the appropriate page layouts.

Verify that the new custom link works correctly. Note that custom links can alternatively be configured as custom buttons; see "Defining Custom Buttons and Links" in the online help.

Custom Links Do Not Support Data Type Conversion

When creating custom links to pass data from one Salesforce field to another, the data must match the data type of the fields in which you are placing it. For example, if you have numeric data, you must pass it to a numeric field.

Single Sign-On

Use custom links to pass a session ID to support Single Sign-On (SSO), so users can avoid multiple logins to web applications that your organization hosts to manage Force.com data. To do this, construct your custom link to pass the {!User_Session_ID} merge field. This allows users to access all authorized resources during a single authentication. External systems can access Salesforce resources using a web service, which allows organizations to communicate data without intimate knowledge of each other's IT systems behind a firewall.

Send the Server Date in the URL

Some integration projects may need custom links to include a server date to know the Salesforce initiation date. The Salesforce server date can be passed to external systems using custom links. For example, `http://someurl.com/somepath?current_date={!Today}`. Dates use the Pacific time zone.

Avoid Double Sets of Tabs in a Browser

Enterprise, Unlimited, and Performance Edition users can build a custom link to perform an action that keeps users in the same browser window and does not display a double set of tabs. Create a Visualforce page that contains the following code, replacing <REGULAR_WIL> with your regular or existing custom link.

```
<script language="JavaScript">
function redirect() {
parent.frames.location.replace("<REGULAR_WIL>")
}
redirect();
</script>
```