



Forms Fusion

— QR-Based No-Code Form Builder —



FormFusion

User Installation Manual

Table of Contents

Page

1. Logging in and Installing the Package.....	3
2. Installing the FormFusion Package.....	4
3. Accessing the FormFusion App.....	5
4. Configuring Site Settings.....	7
5. Updating Custom Settings.....	12
6. Assigning Permission Set to Guest User.....	14
7. Configuring Sharing Settings.....	17

1. Logging in and Installing the Package

1.1 Salesforce Login

- **Production URL:** <https://login.salesforce.com>
- **Sandbox URL (Recommended):** <https://test.salesforce.com>

On the login page, enter your Salesforce **Username** and **Password**, then click **Login**.

1.2 Installing the Package

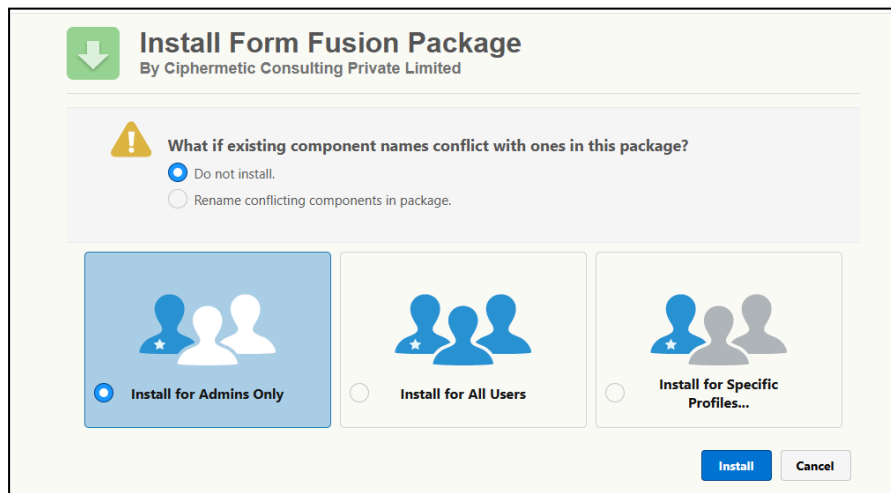
1. On the **Install Company Page**, select the required option:
 - **Install for Admin Only**
 - **Install for All Users**
 - **Install for Specific Users** (based on requirement)
2. Click the **Install** button.
3. The installation process will begin (see image below).
4. Once completed, click **Done**.
5. You will receive a **confirmation email** after successful installation.

1.3 Verifying the Installed Package

1. Go to **Setup** → In the **Quick Find** box, type **Installed Packages**.
2. Click **Installed Packages**.
3. The **Installed Packages page** opens.
4. Verify that the installed package shows the correct version (e.g., **1.0**).

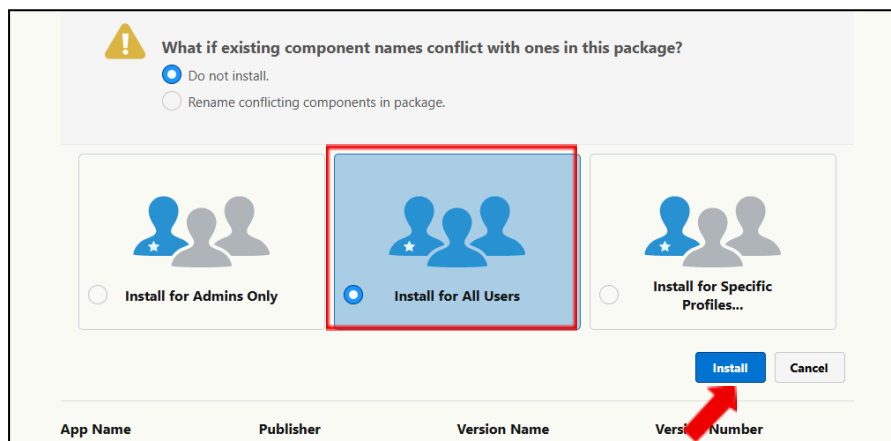
2. Installing the FormFusion Package

2.1 Click on “Install” to begin installing the FormFusion package.

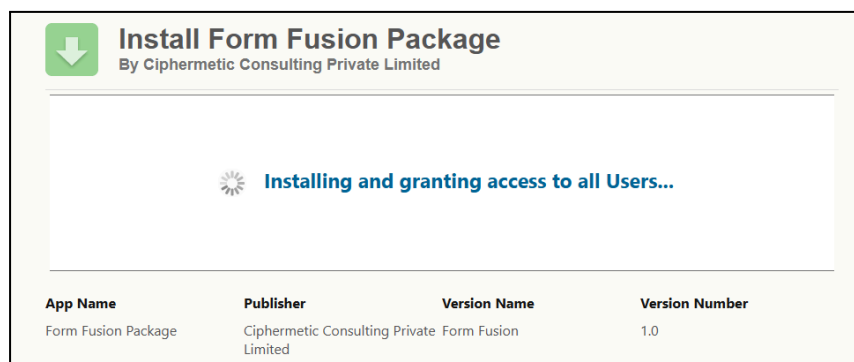


2.2 Click on the "Install for All Users" option to proceed with the application installation.

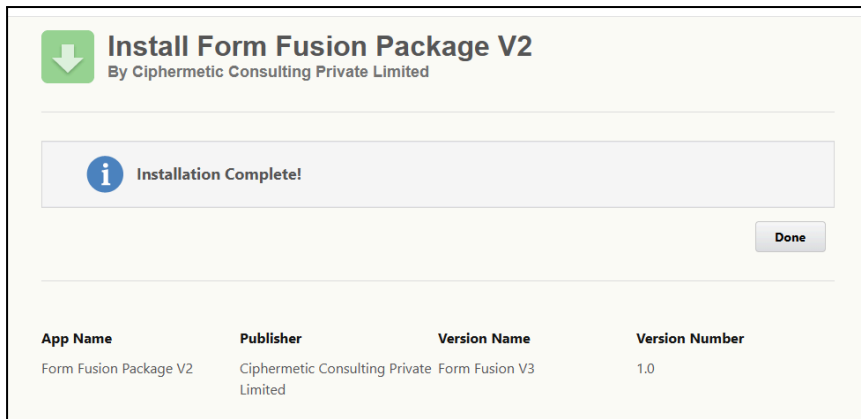
Step - 1



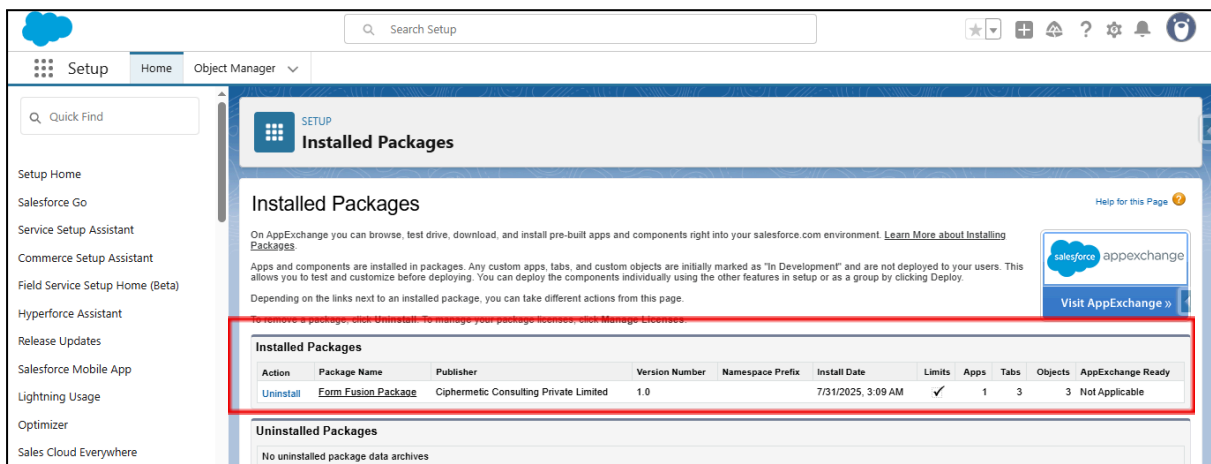
Step - 2



Step - 3

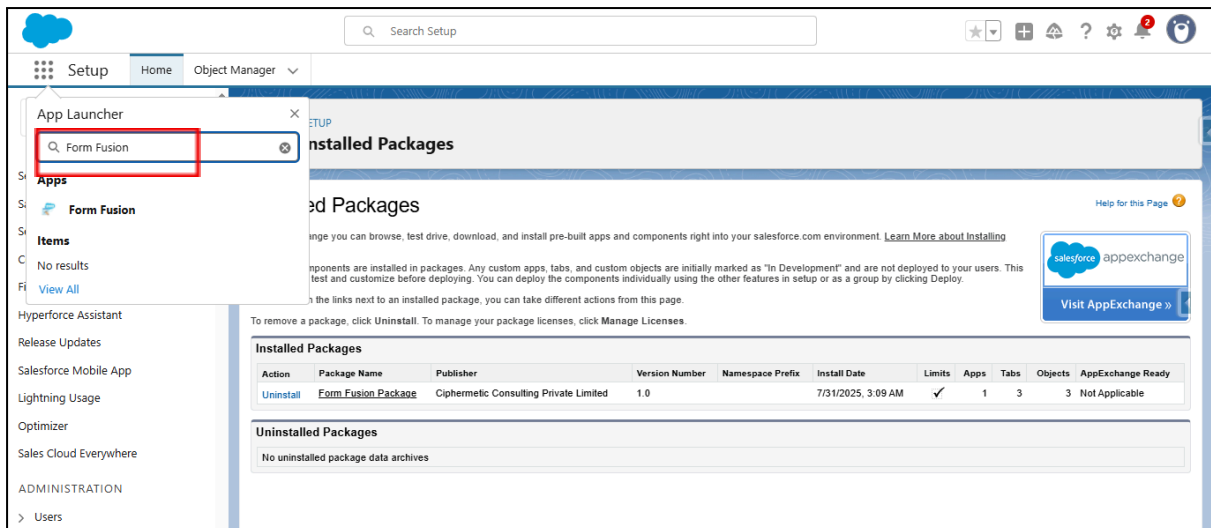


2.3 The package will be installed on the system

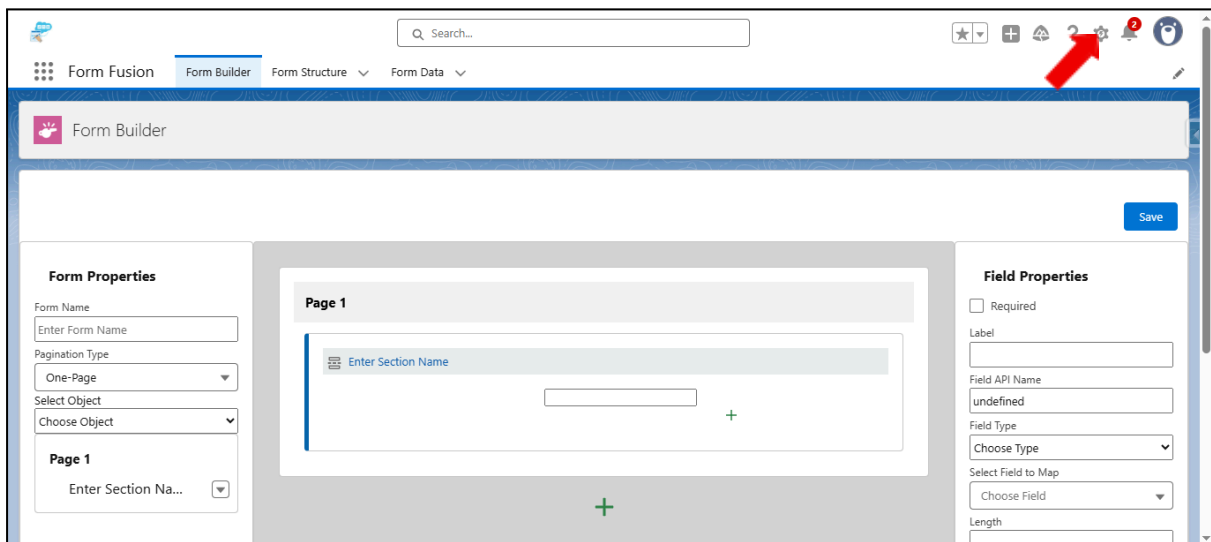


3. Accessing the FormFusion App

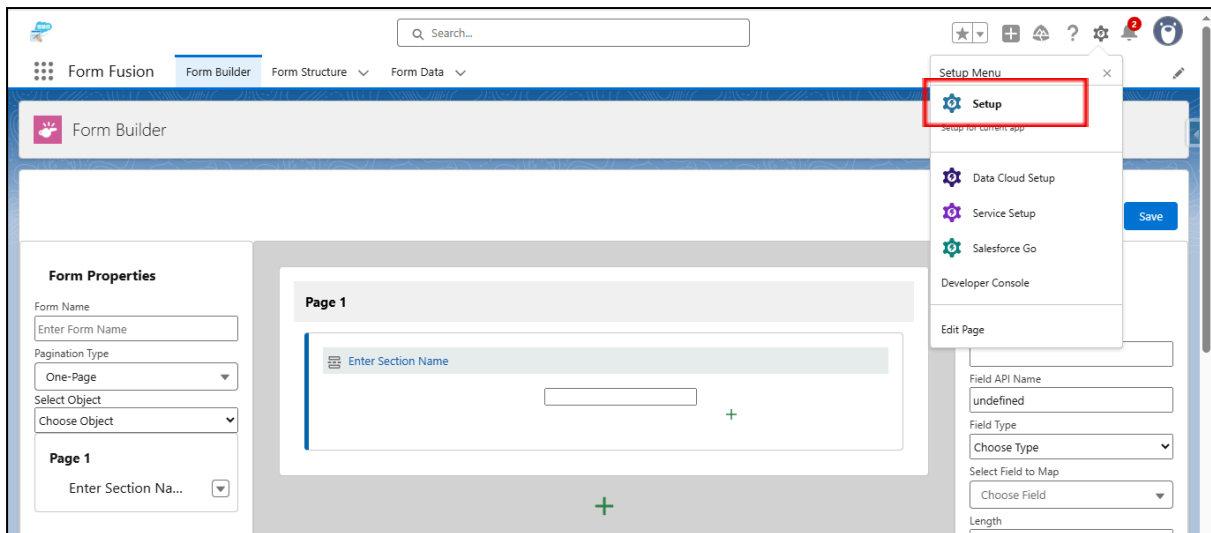
3.1 User can search for the “Form Fusion app” in the App Launcher and open it



3.2 The app will open, and the user will see the Form Builder to create a new form. Before that, the user needs to configure the app settings in the system click on **“Gear Icon”**

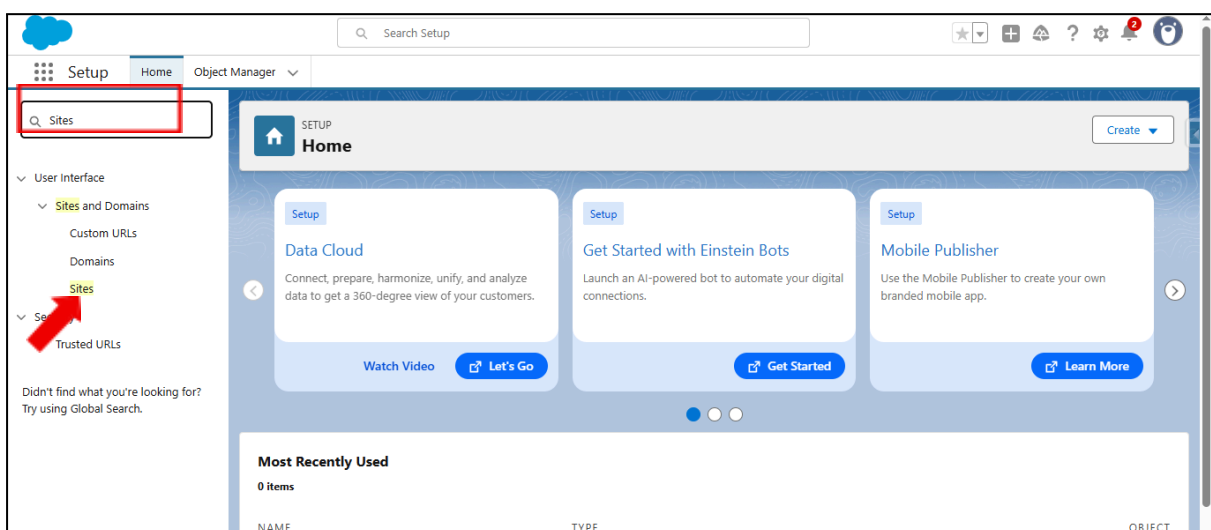


3.3 Go to the gear icon and click on the **“Setup option”**



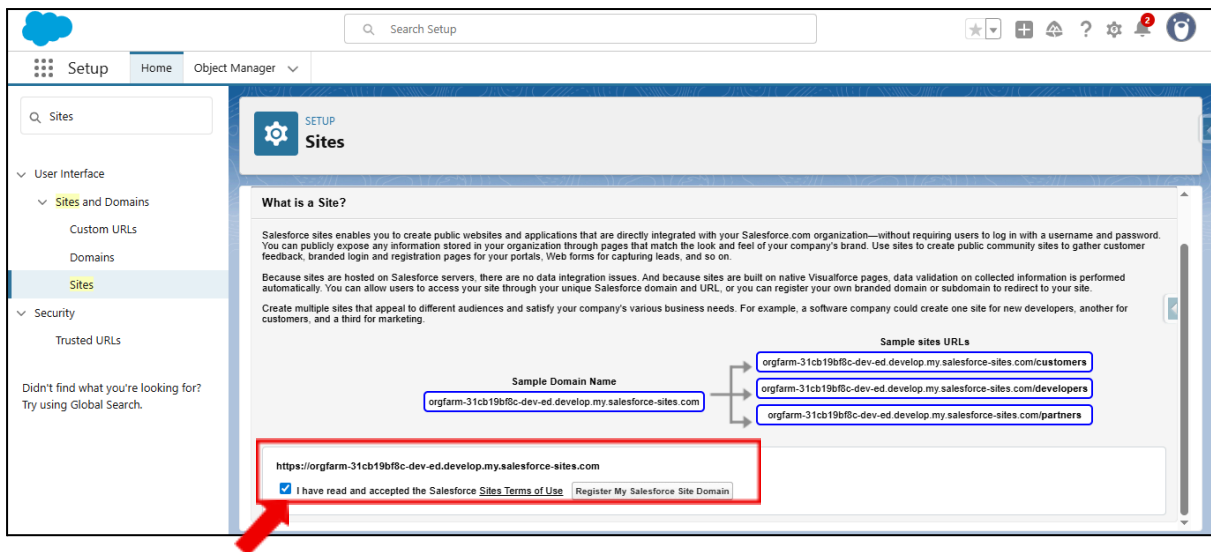
4. Configuring Site Settings

4.1 Click on the search icon and search for “Sites” to configure the site settings.

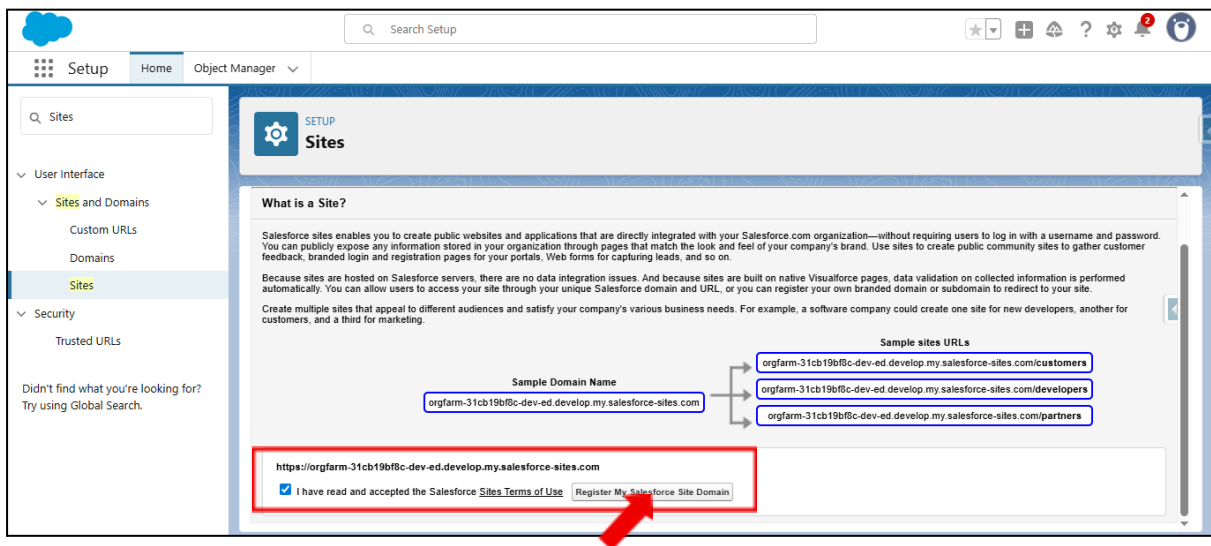


4.2 In the Sites setup, go to the sample domain name and check the box for “I have read and accepted the Salesforce Sites Terms of Use”

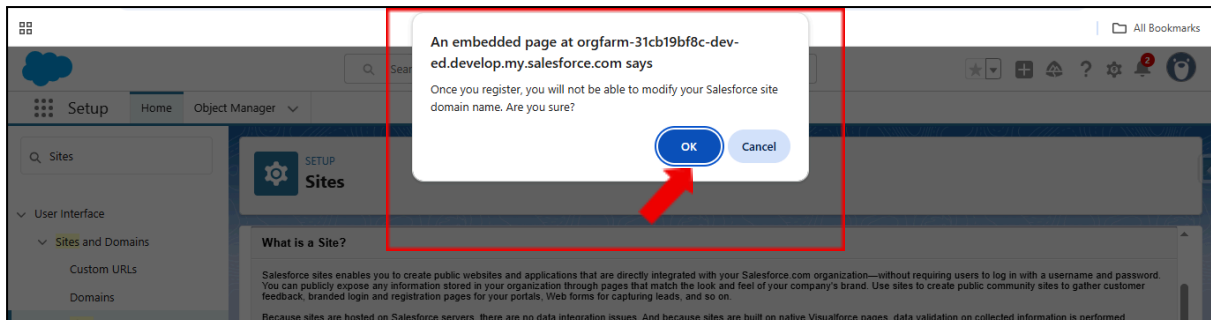
Step - 1



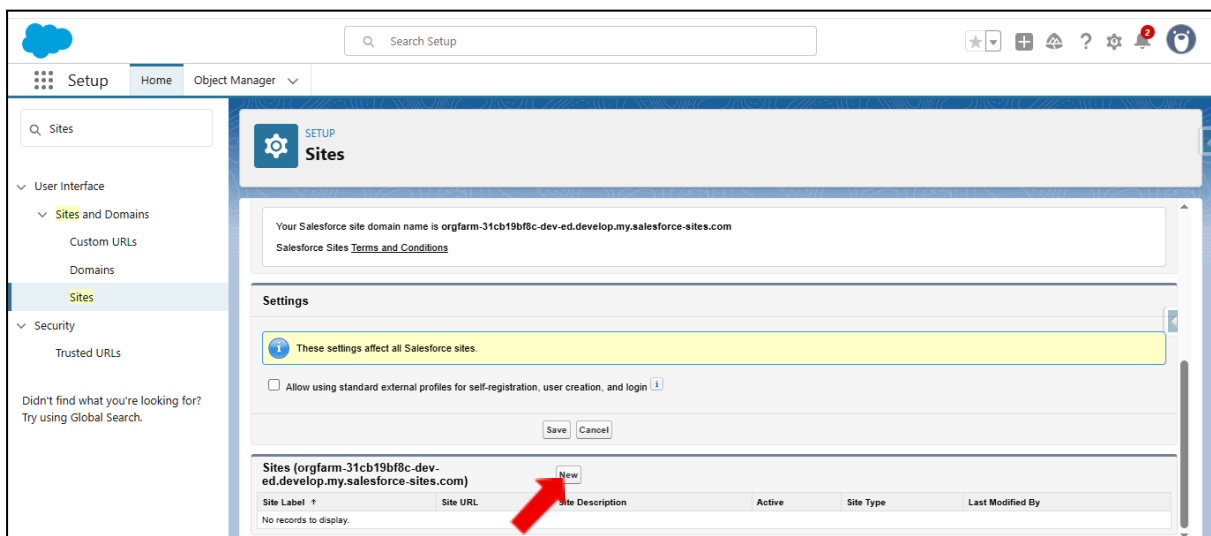
Step - 2



4.3 Click “OK” on the pop-up box to accept it

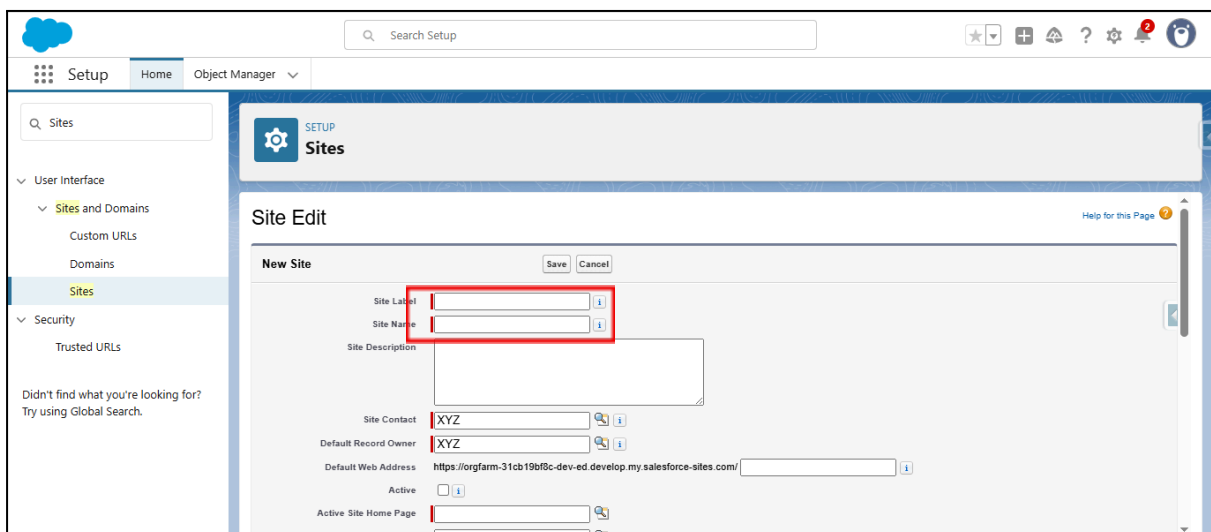


4.4 Click the “New” button to create a new Site.



4.5 The Site Edit page will open. Enter the Site Label (e.g., Form Fusion Site URL); the Site Name (API Name) will be generated automatically.

Step - 1



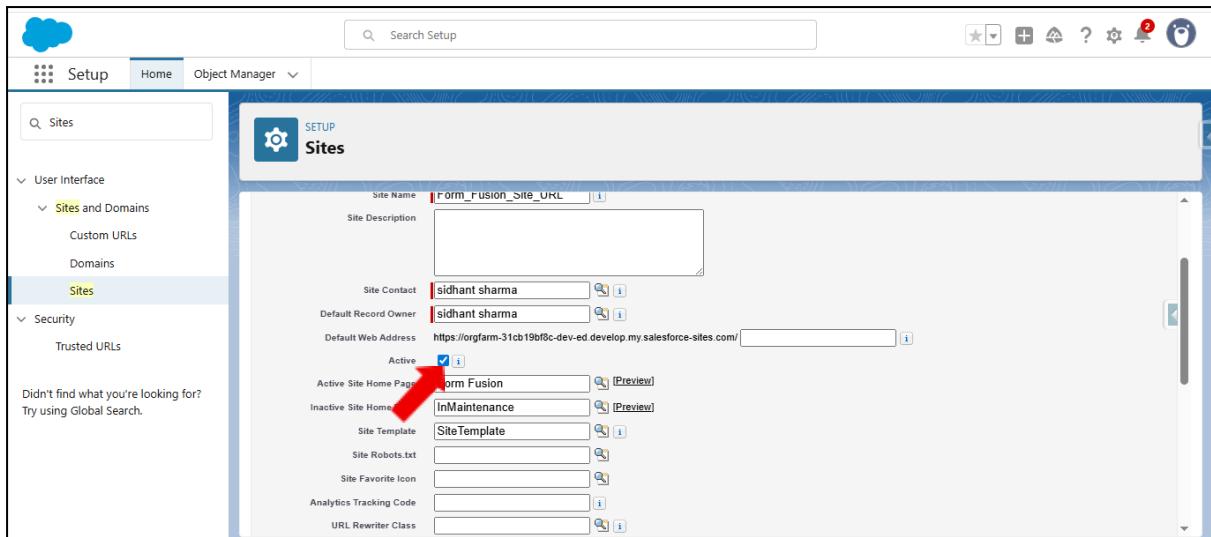
Step - 2

The screenshot shows the Salesforce Setup interface. On the left, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. The 'Sites' section is selected under 'User Interface'. The main content area is titled 'Site Edit'. Below this, the 'New Site' section is highlighted with a red box. The fields in this section are: Site Label (Form Fusion Site URL), Site Name (Form Fusion Site URL), Site Description (empty), Site Contact (XYZ), Default Record Owner (XYZ), Default Web Address (https://orgfarm-31cb19bf8c-dev-ed.develop.my.salesforce-sites.com/), Active (checkbox), and Active Site Home Page (empty). The 'Save' and 'Cancel' buttons are at the top right of the 'New Site' section.

4.6 Site Contact and Default Record Owner will be selected automatically; no manual configuration is needed

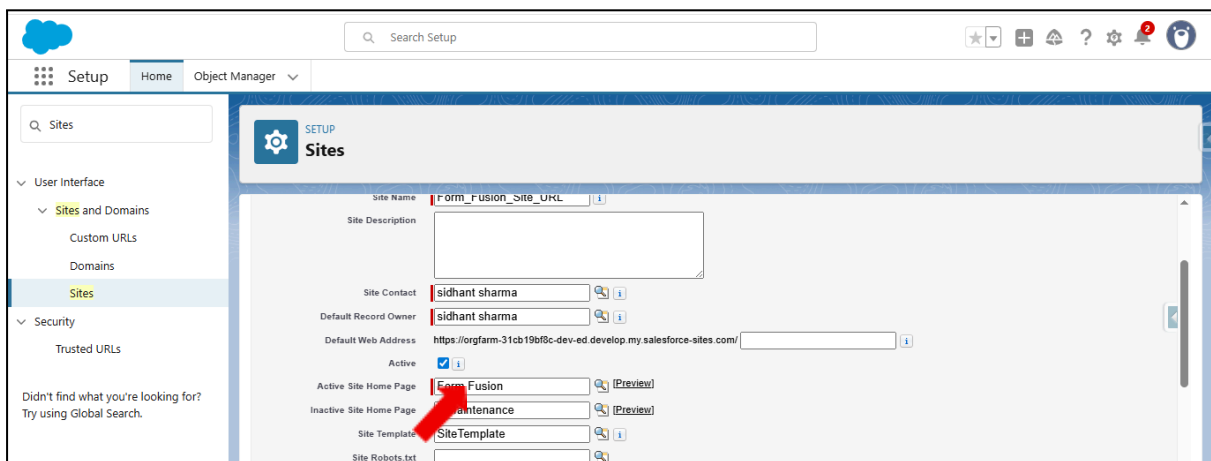
The screenshot shows the Salesforce Setup interface. On the left, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. The 'Sites' section is selected under 'User Interface'. The main content area is titled 'Site Edit'. Below this, the 'New Site' section is highlighted with a red box. The fields in this section are: Site Label (Form Fusion Site URL), Site Name (Form Fusion Site URL), Site Description (empty), Site Contact (XYZ), Default Record Owner (XYZ), Default Web Address (https://orgfarm-31cb19bf8c-dev-ed.develop.my.salesforce-sites.com/), Active (checkbox), Active Site Home Page (empty), Inactive Site Home Page (InMaintenance), Site Template (Site Template), Site Robots.txt (empty), Site Favorite Icon (empty), Analytics Tracking Code (empty), URL Rewriter Class (empty), and Enable Feeds (checkbox). The 'Save' and 'Cancel' buttons are at the top right of the 'New Site' section.

4.7 Set the Active status to "Yes" (✓)

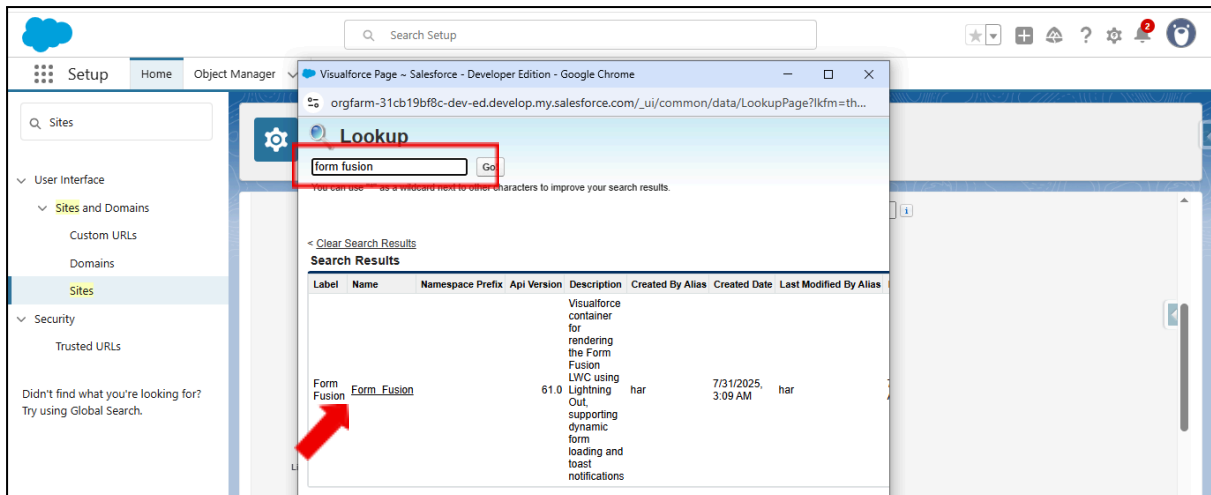


4.8 In the Active Site Home Page section, select the Visualforce page and choose the “Form Fusion page”

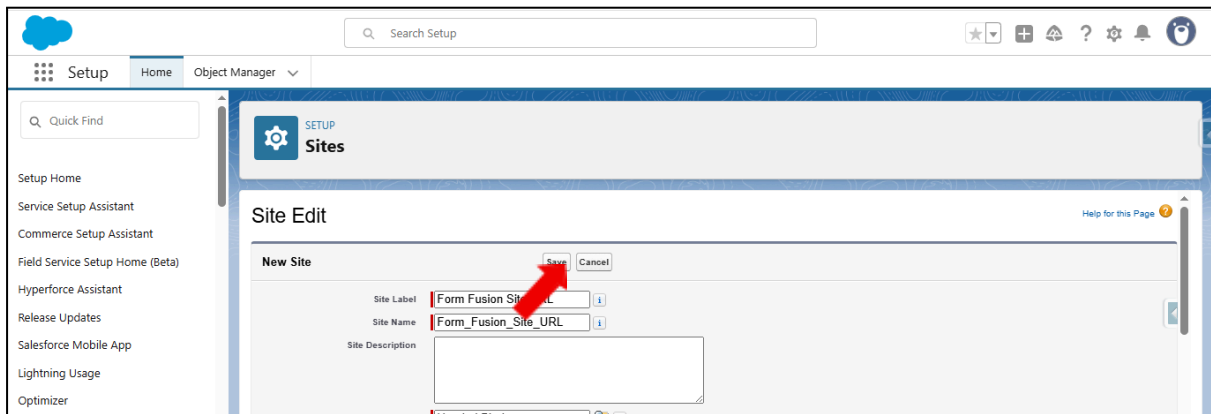
Step - 1



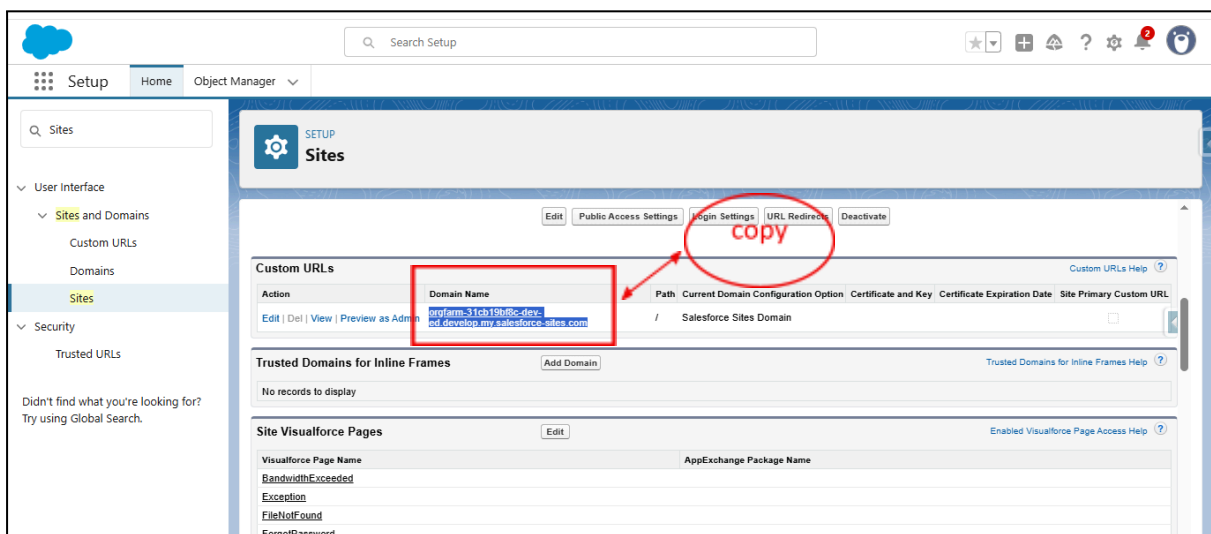
Step - 2



Step - 3

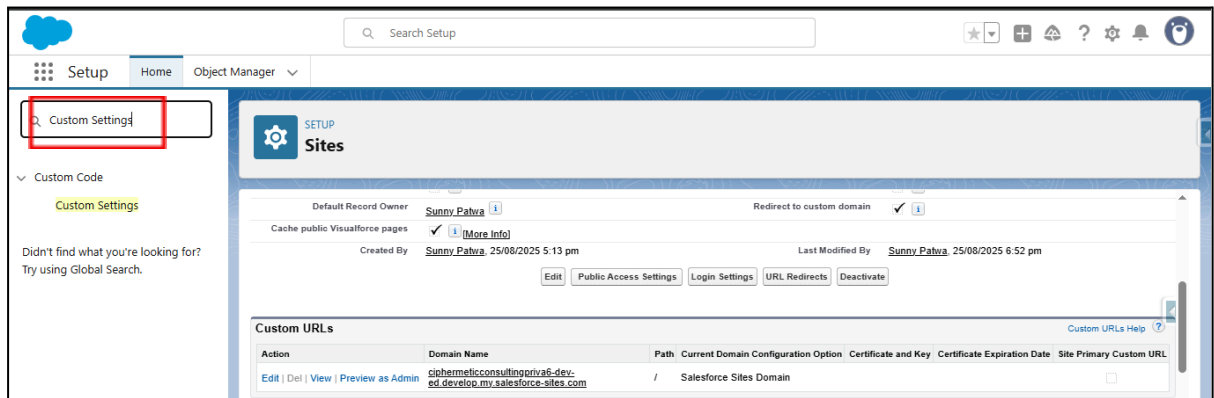


4.9 Copy the domain name from the Sites settings.

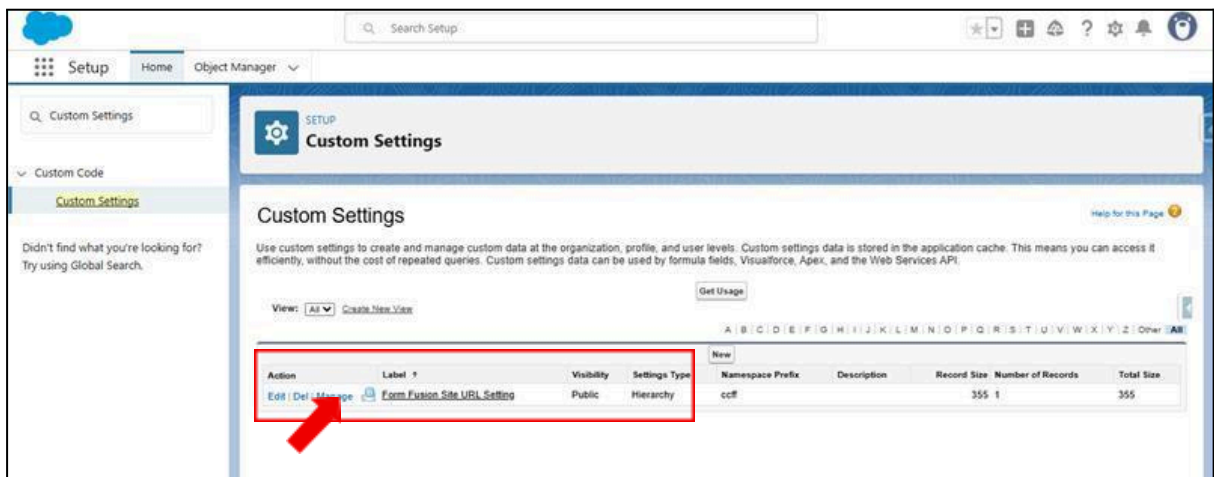


5. Updating Custom Settings

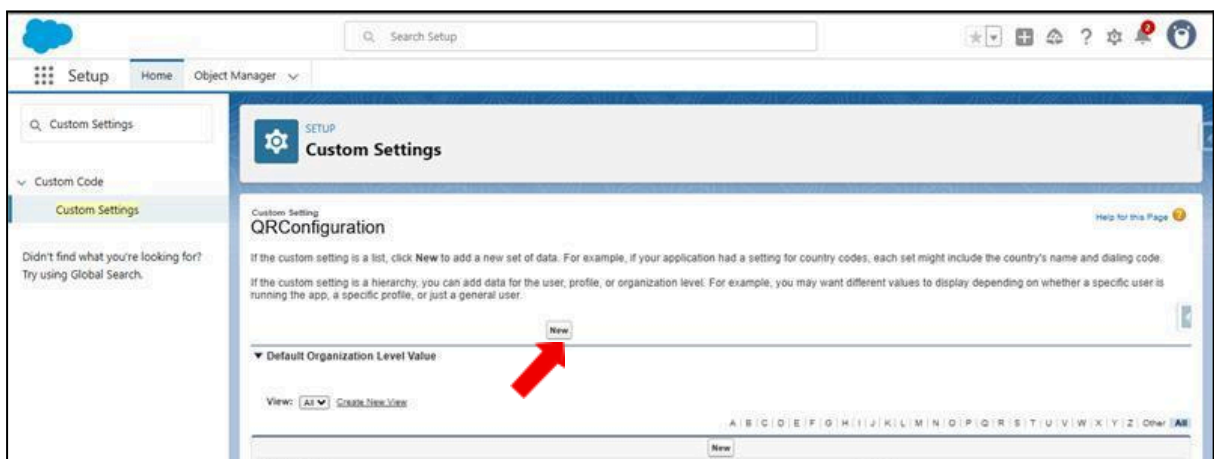
5.1 Select 'Custom Settings' from the search and open



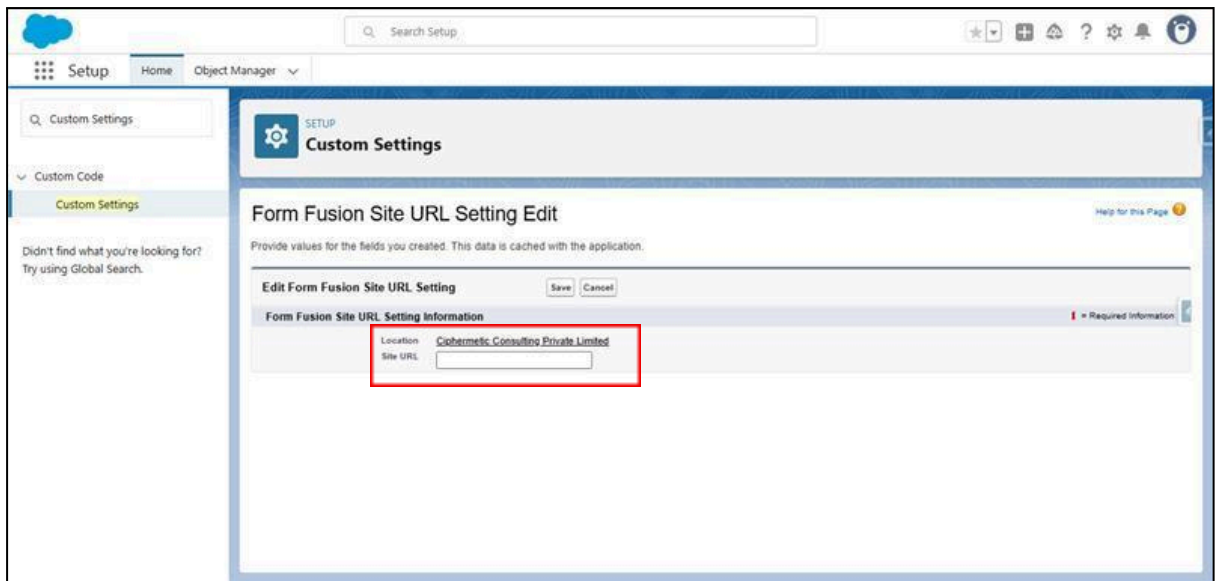
5.2 In Custom Settings, locate 'Form Fusion Site URL Settings' and click on 'Manage' to open



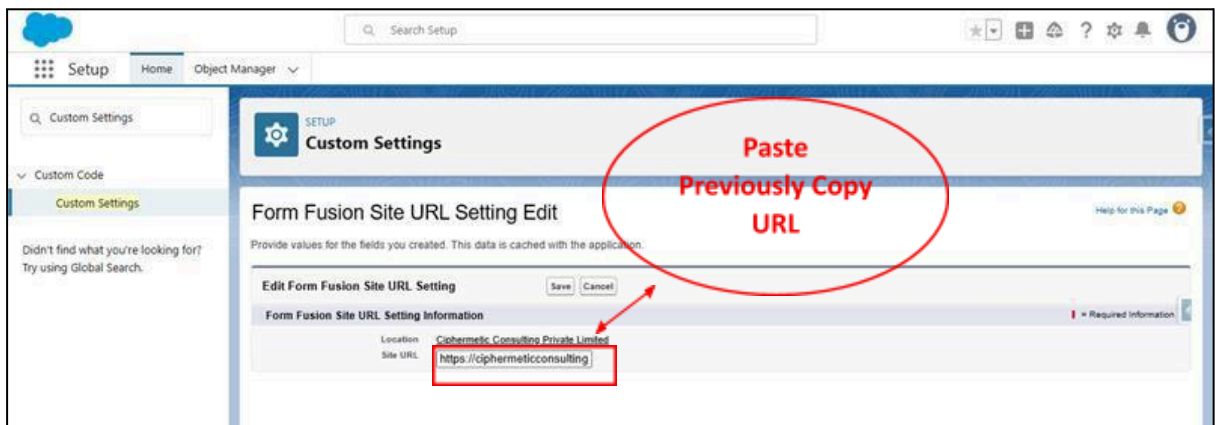
5.3 Select 'New' to create a new value



5.4 The Form Fusion Site URL Settings Edit page will open



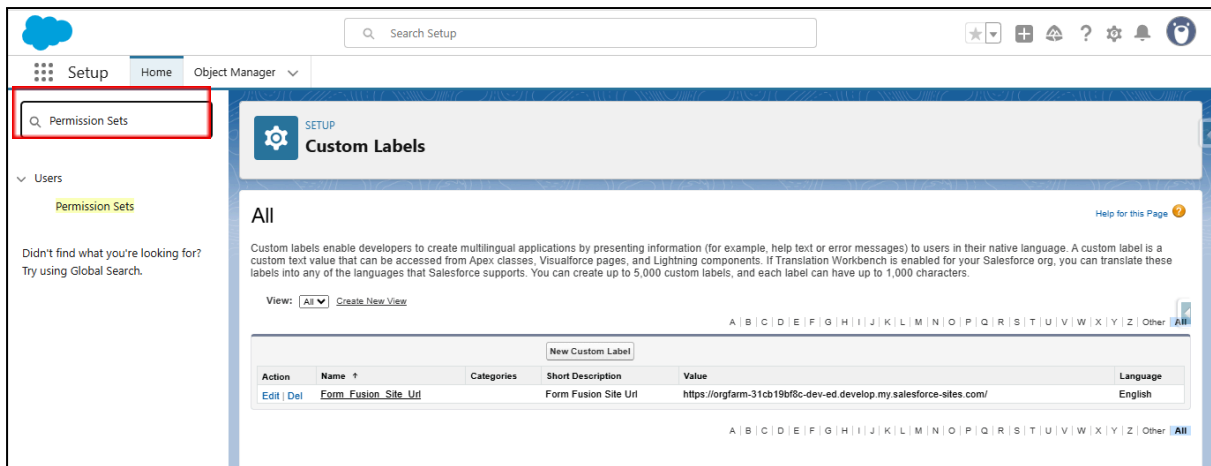
5.5 Paste the previously copied URL into the Site URL field



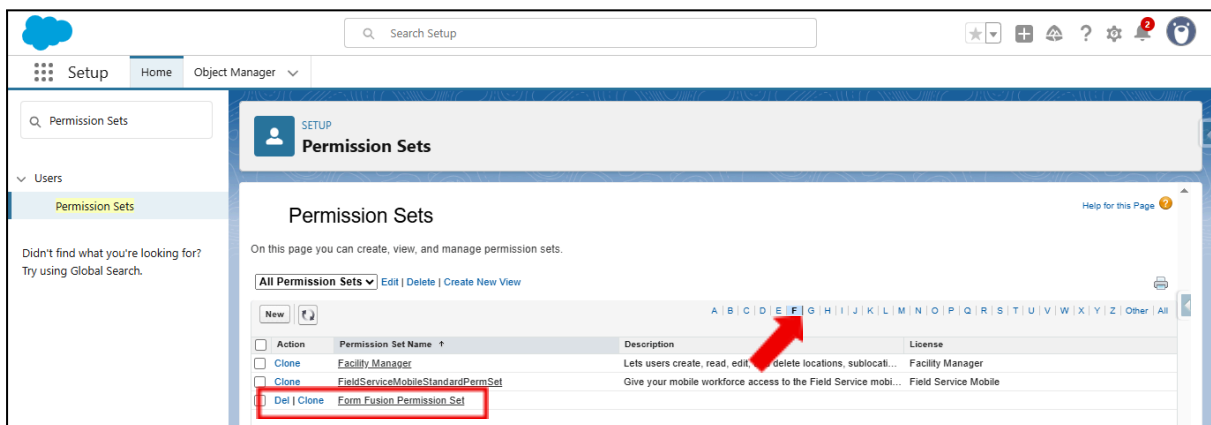
6. Assigning Permission Set to Guest User

6.1 The **Form Fusion Permission Set** must be assigned to the Guest User who will be submitting the form through the application

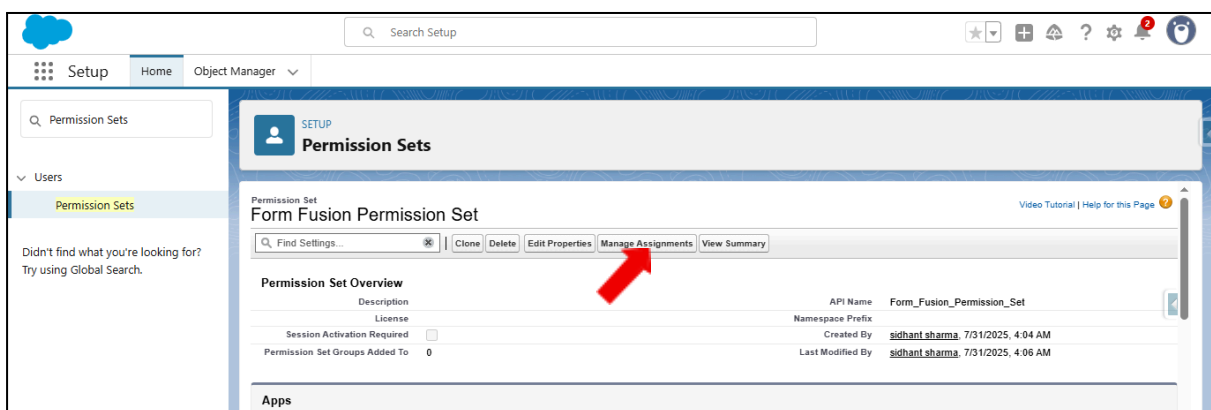
Go to the **Permission Set**



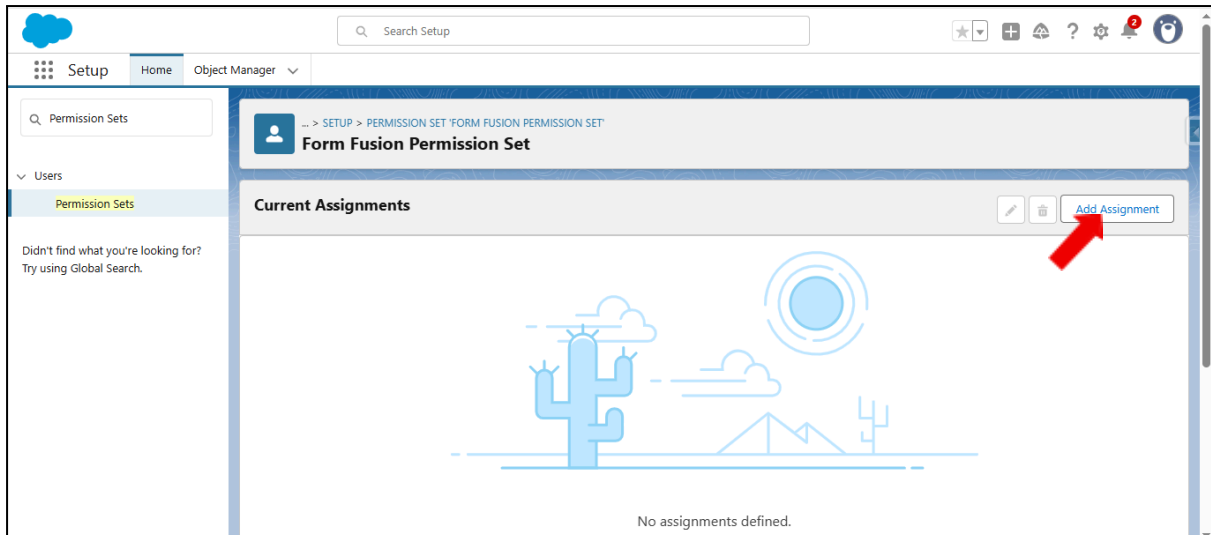
6.2 Go to Setup, search for '**Permission Sets**', search for the '**Form Fusion**' Permission Set and open it



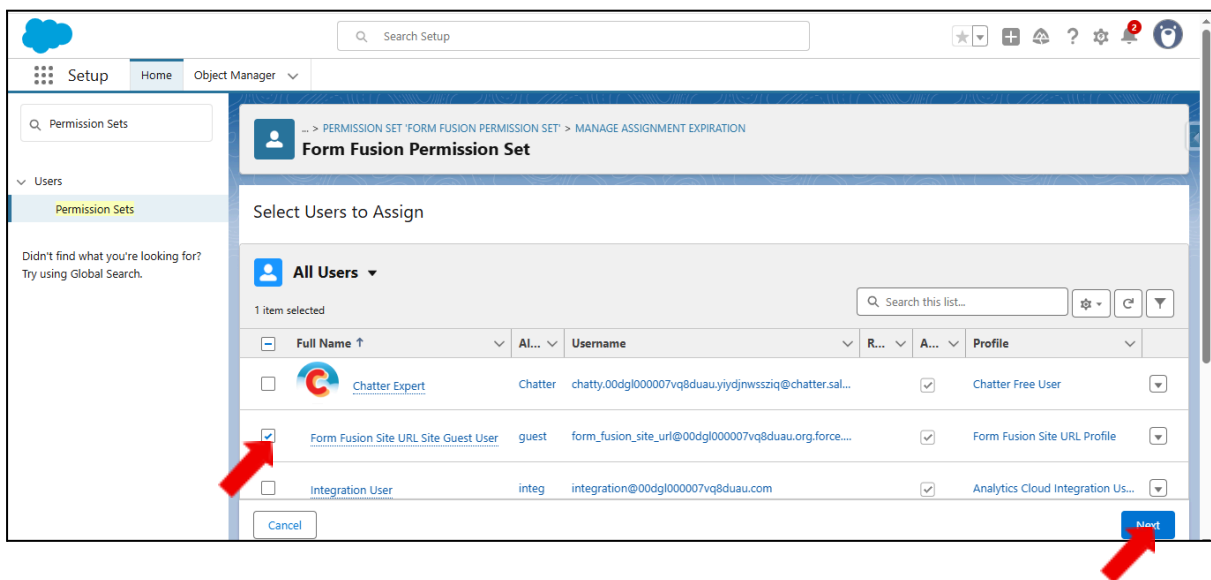
6.3 Go to the '**Manage Assignments**' option to assign this permission set



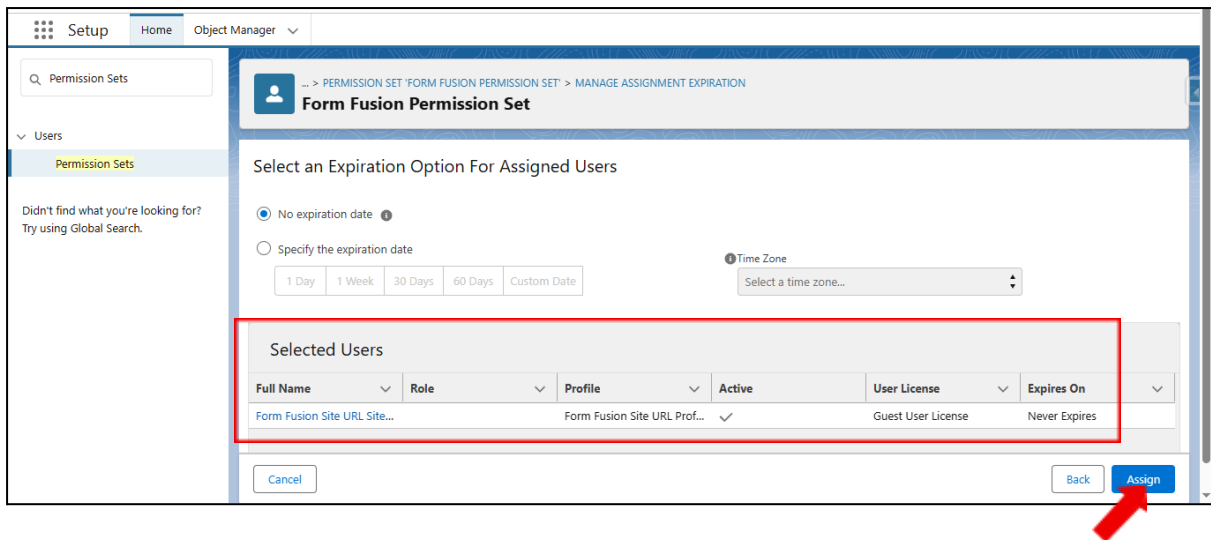
6.4 Click on the '**Add Assignment**' button to assign the permission set to the user



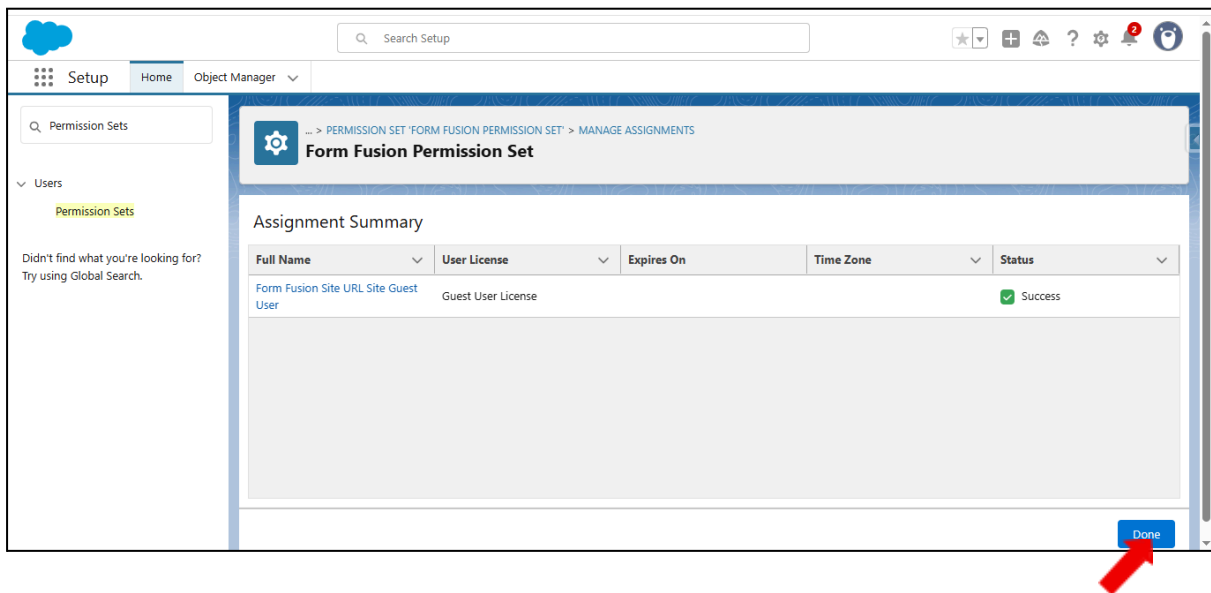
6.5 Select the checkbox (✓) next to 'Form Fusion Site URL Site Guest User' and click the Next button



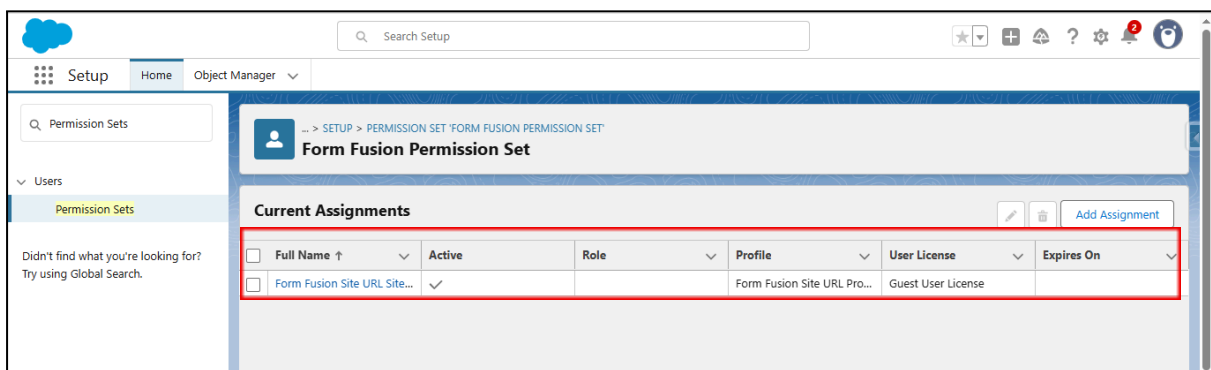
6.6 Now that the Guest User is selected, click on the 'Assign' button



6.7 Click on the 'Done' button



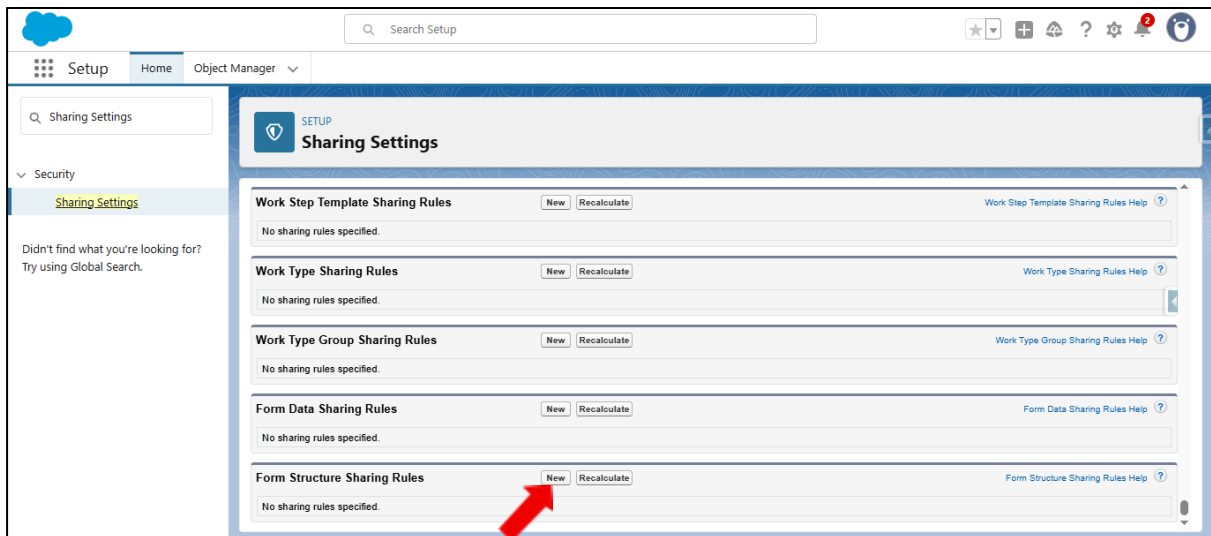
6.8 Now you can see the currently assigned user



7. Configuring Sharing Settings

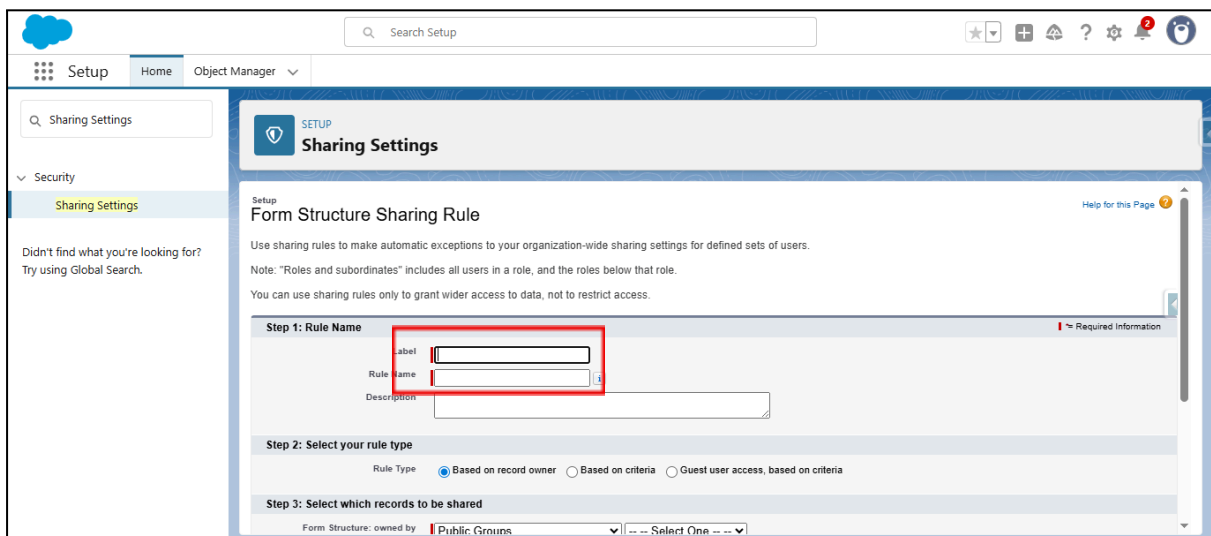
7.1 You need to configure sharing rules to grant access to the Guest User

- Search and select "**Sharing Settings**"
- Scroll to the '**Form Structure Sharing Rules**' section
- Click on '**New**' to create a new sharing rule



7.2 Enter the Label Name: **Form Fusion Sharing Settings** The Rule Name (API Name) will be auto-populated

Step - 1



Step - 2

Setup Home Object Manager

Sharing Settings

Security

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

SETUP Sharing Settings

Rule Name: Form Fusion Sharing Setting

Rule Name: Form_Fusion_Sharing_Setting

Description:

Step 2: Select your rule type

Rule Type: ☒ Based on record owner ☐ Based on criteria ☐ Guest user access, based on criteria

Step 3: Select which records to be shared

Form Structure: owned by members of Public Groups

7.3 Select the “Rule Type” as “Guest user access based on criteria” for the guest user

Setup Home Object Manager

Sharing Settings

Security

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

SETUP Sharing Settings

Rule Type: ☐ Based on record owner ☐ Based on criteria ☒ Guest user access, based on criteria

Step 3: Select which records to be shared

This sharing rule grants access to guest users without login credentials. By modifying the default settings in accordance with these criteria, you're allowing immediate and unlimited access to all records matching these criteria to anyone accessing the site, even without logging in. To secure your site and its data from guest users, consider all the use cases and implications, and implement security controls that you think are appropriate for the sensitivity of your data. Salesforce isn't responsible for any exposure of your data to guest users related to this change from default settings.

Criteria	Field	Operator	Value	
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		

7.4 Select the criteria for the rule.

Setup Home Object Manager

Sharing Settings

Security

Sharing Settings

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SETUP Sharing Settings

Rule Type: ☐ Based on record owner ☐ Based on criteria ☒ Guest user access, based on criteria

Step 3: Select which records to be shared

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Criteria	Field	Operator	Value	
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		

Add Filter Logic...

Additional Options: ☐ Include records owned by high-volume users

Step 4: Select the users to share with

7.5 In the Criteria Field, select “Form Structure Id”

Setup Home Object Manager

Sharing Settings

Security

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

Step 3: Select which records to be shared

This sharing rule grants access to guest users without login credentials. By modifying the default settings in accordance with these criteria, you're allowing immediate and unlimited access to all records matching these criteria to anyone accessing the site, even without logging in. To secure your site and its data from guest users, consider all the use cases and implications, and implement security controls that you think are appropriate for the sensitivity of your data. Salesforce isn't responsible for any exposure of your data to guest users related to this change from default settings.

Criteria

Field	Operator	Value	
Form Structure Id	starts with		AND
--None--	--None--		AND
Created By ID	--None--		AND
Form Name	--None--		AND
Form Structure Id	--None--		
Last Modified By ID	--None--		
Owner ID	--None--		
Page link	--None--		

Additional Options

Include records owned by high-volume users

Step 4: Select the users to share with

7.6 For the operator, select “Starts With.”

Setup Home Object Manager

Sharing Settings

Security

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

Step 3: Select which records to be shared

This sharing rule grants access to guest users without login credentials. By modifying the default settings in accordance with these criteria, you're allowing immediate and unlimited access to all records matching these criteria to anyone accessing the site, even without logging in. To secure your site and its data from guest users, consider all the use cases and implications, and implement security controls that you think are appropriate for the sensitivity of your data. Salesforce isn't responsible for any exposure of your data to guest users related to this change from default settings.

Criteria

Field	Operator	Value	
Form Structure Id	starts with		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	equals		AND
--None--	not equal to		AND
--None--	contains		AND
--None--	does not contain		AND
--None--	starts with		

Additional Options

Include records owned by high-volume users

7.7 In the Value field, enter “FS”

Setup Home Object Manager

Sharing Settings

Security

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

Step 3: Select which records to be shared

This sharing rule grants access to guest users without login credentials. By modifying the default settings in accordance with these criteria, you're allowing immediate and unlimited access to all records matching these criteria to anyone accessing the site, even without logging in. To secure your site and its data from guest users, consider all the use cases and implications, and implement security controls that you think are appropriate for the sensitivity of your data. Salesforce isn't responsible for any exposure of your data to guest users related to this change from default settings.

Criteria

Field	Operator	Value	
Form Structure Id	starts with	FS	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

7.8 Click on the “Save” button to save the sharing settings

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar labeled "Search Setup", and various utility icons. The left sidebar shows the "Setup" menu with "Home" and "Object Manager" options. The "Sharing Settings" page is active, displaying a table of criteria and a section for sharing settings. A red arrow points to the "Save" button at the bottom of the page.

Criteria Table:

Criteria	Field	Operator	Value	
	Form Structure Id	starts with	FS	AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

Additional Options:

☐ Include records owned by high-volume users

Step 4: Select the users to share with

Share with: Form Fusion Site URL Site Guest User

Step 5: Select the level of access for the users

Access Level: Read Only

Buttons: Save, Cancel