



IGNA Forms – Native Form Builder

User Manual

Salesforce-Native Form Builder · No-Code · Metadata-Driven

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Application Description

IGNA Forms is a Salesforce-native, no-code application that allows admins to create dynamic, intelligent forms using a metadata-driven approach. It supports conditional logic, validations, and reusable components.

1. Create Form

The **Create Form** section is used to create a form by defining rules and applying styles.

1.1 Create New Form

Navigate to the **Create Form** section and click on the **Start** button.

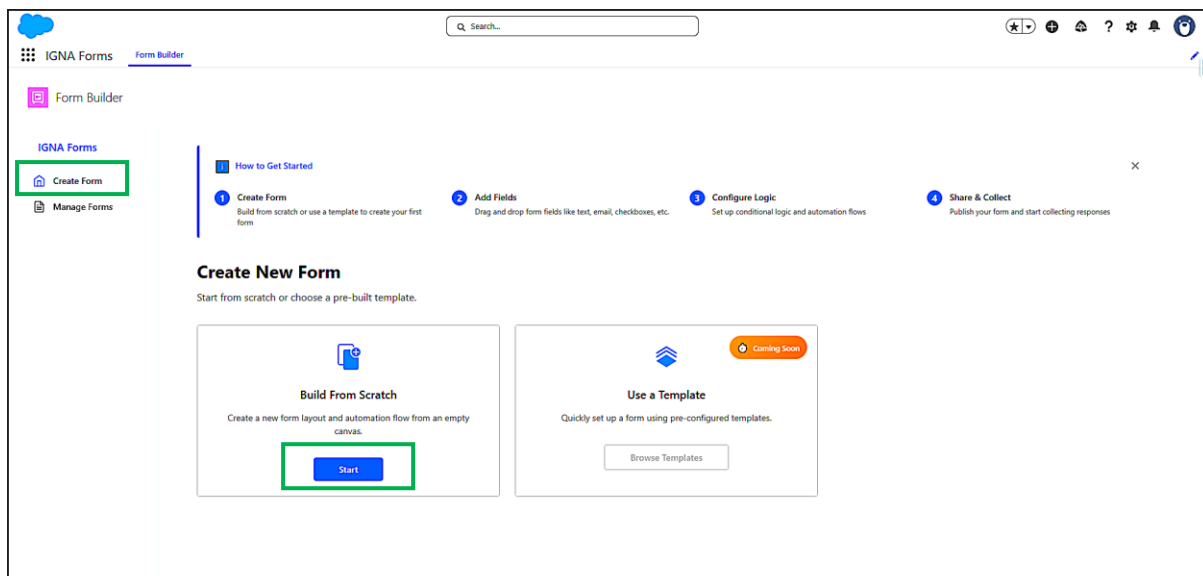


Figure 1 — Create Form landing page showing the Start button

1.2 Fill Required Fields

Complete all mandatory fields in the **Create New Form** window, including a unique form name, and click the **Proceed** button.

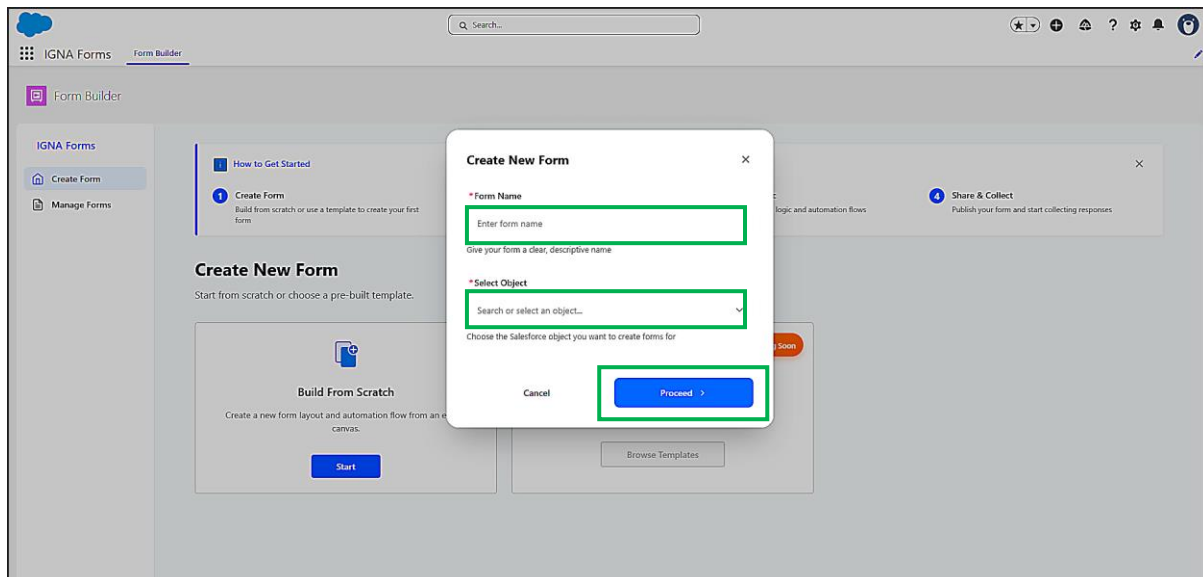


Figure 2 — Create New Form dialog with required fields

1.3 Design Form

Design the form using the drag-and-drop field functionality, apply styles, create form rules, set communication rules, apply field settings, customize the layout of the form, and click the **Save** button.

There are four features available in the Design Form view:

a. Preview

The **Preview** feature allows you to preview the form while creating it, so you can verify layout and logic before saving.

b. Style

The **Style** feature is used to apply color themes, fonts, and branding options to the form.

c. Form Rules

Form Rules are used to create and apply conditional logic — show, hide, require, or disable fields based on specific input values.

d. Communication Rules

Communication Rules are used to create rules that send automated email notifications to assigned email addresses based on form activity.

2. Manage Forms

The **Manage Forms** section provides a centralized view of all forms in your org. From here you can create, search, filter, and perform lifecycle actions on any form.

2.1 Create New Form

You can also create a new form directly from the Manage Forms section. Click the **New Form** button at the top of the list — this launches the same Create New Form dialog described in Section 1.

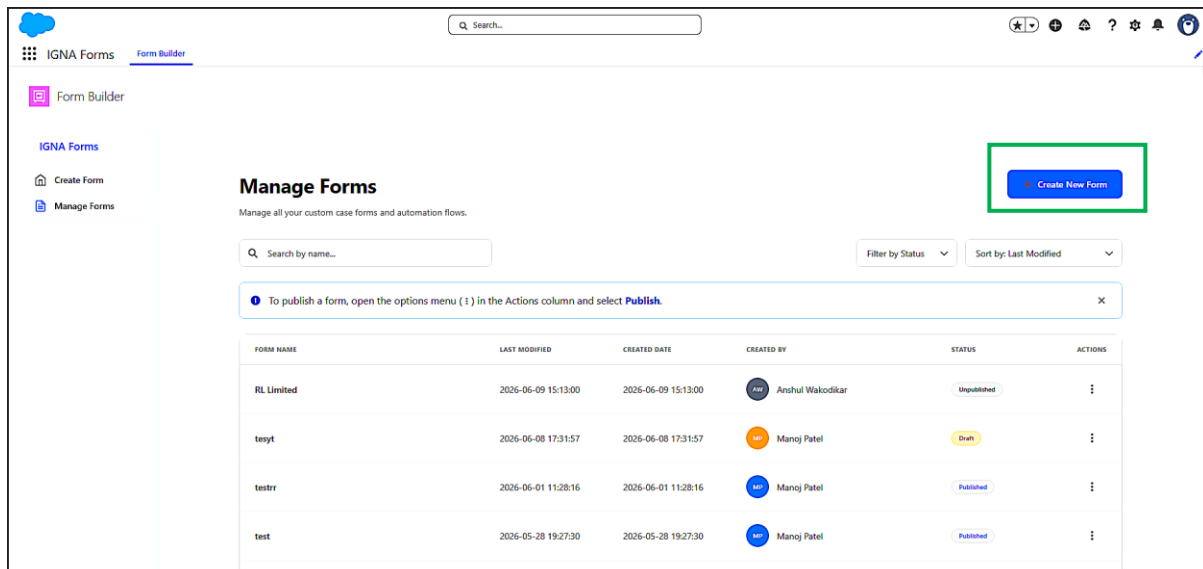


Figure 4 — Manage Forms list view with New Form button

2.2 Search and Filter Functionality

The **Search** and **Filter** functionality allows you to quickly locate forms by name, status, or creation date:

- **Search** — type a form name or keyword to filter results in real time.
- **Filter by Status** — narrow the list to Draft, Published, or Unpublished forms.
- **Sort by Date** — order forms by creation date, newest or oldest first.

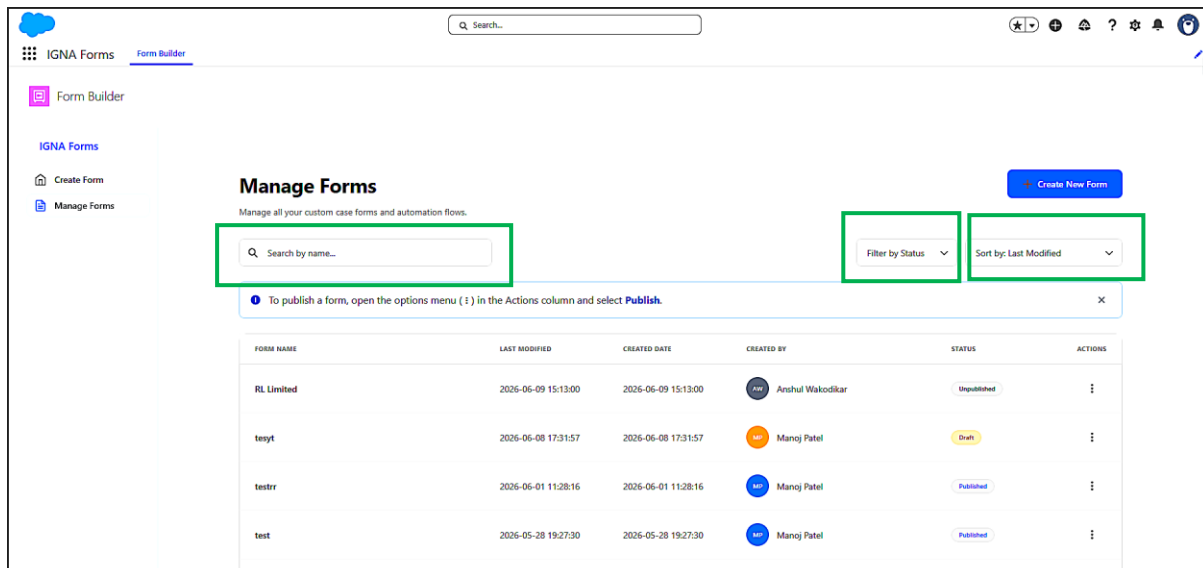


Figure 5 — Search and Filter controls in Manage Forms

2.3 Manage Form Actions

Each form in the list has an **Actions** menu with the following options:

a. Edit

The **Edit** action opens the Form Designer, allowing you to modify fields, styles, rules, or layout.

b. Duplicate

The **Duplicate** action creates an identical copy of the form — including all fields and rules — ready for further customization.

c. Preview

The **Preview** action displays a read-only view of the form exactly as it appears to end users, with all applied functionalities.

d. Publish

The **Publish** action makes the form live and accessible to both internal (Salesforce) users and external users via a shared link.

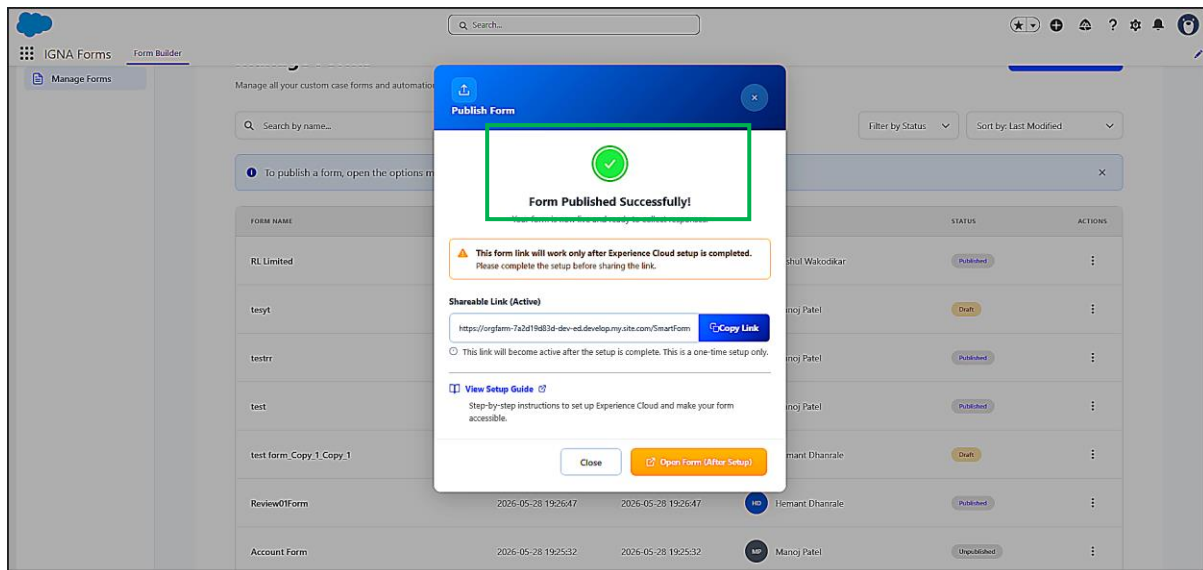
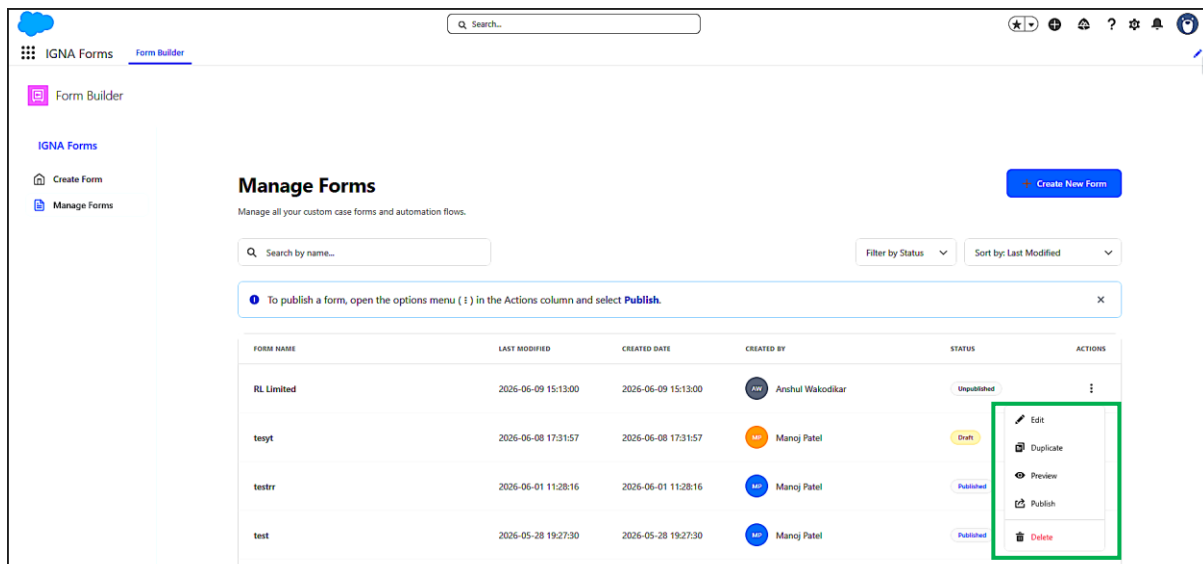


Figure 6 — Actions menu showing Publish and other form management options

e. Unpublish

The **Unpublish** action takes the form offline, preventing all access until it is republished.

f. Copy Link

The **Copy Link** action copies the direct URL of a published form to your clipboard for sharing with internal or external users.

Note: Copy Link is only available for forms in Published status. Sharing an unpublished form URL will show an access error to recipients.

g. Delete

The **Delete** action permanently removes the form and all associated data. **This action cannot be undone.**

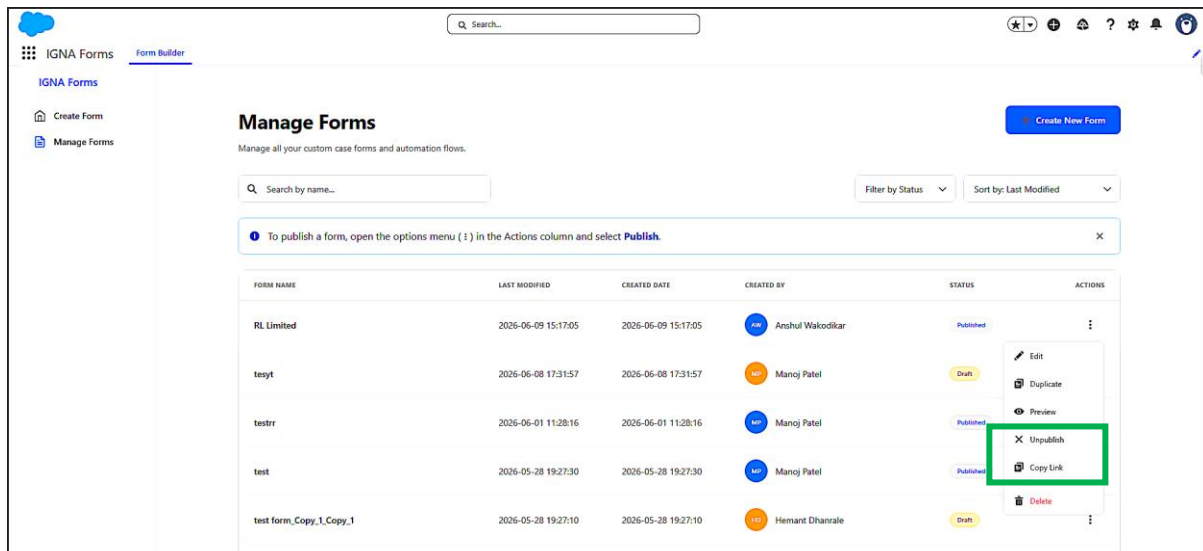


Figure 7 — Manage Forms list showing all available form actions