



# Dynamic Form Installation Guide

Version 1.21

Dear customer, thanks for choosing Dynamic Form with Yeslocal Digital.

The Dynamic Form package allows users to create dynamic forms with conditional logic on Salesforce Experience Cloud. With the user-friendly 'drag & drop' interface, business users can create the forms quickly.

V1.0 enabled the user to create dynamic forms for both Standard & Custom objects

V1.9 added reference fields (lookup fields) support

V1.11 enhanced the security, added permission set to simplify the installation process and custom form submission confirmation URL support.

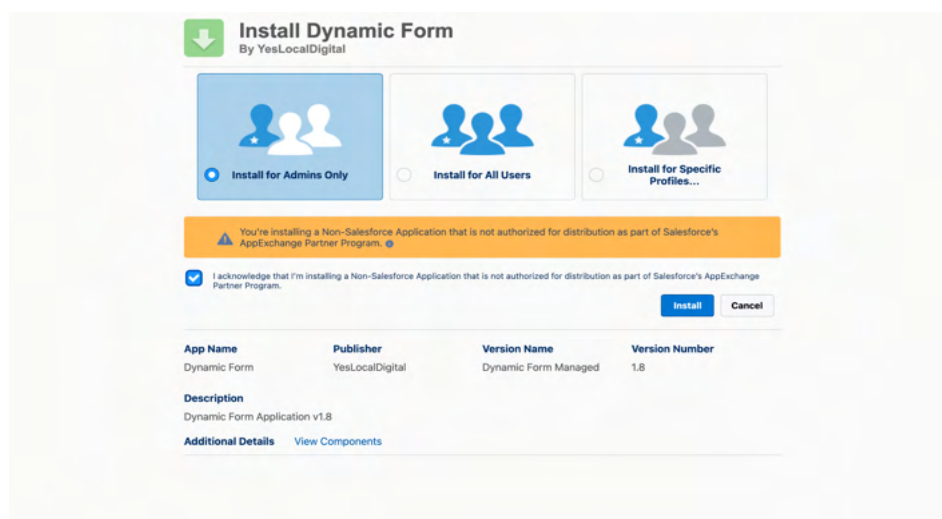
V1.12 added image support in the Rich text field.

V1.15 added 'conditional required' capability and bug fixes.

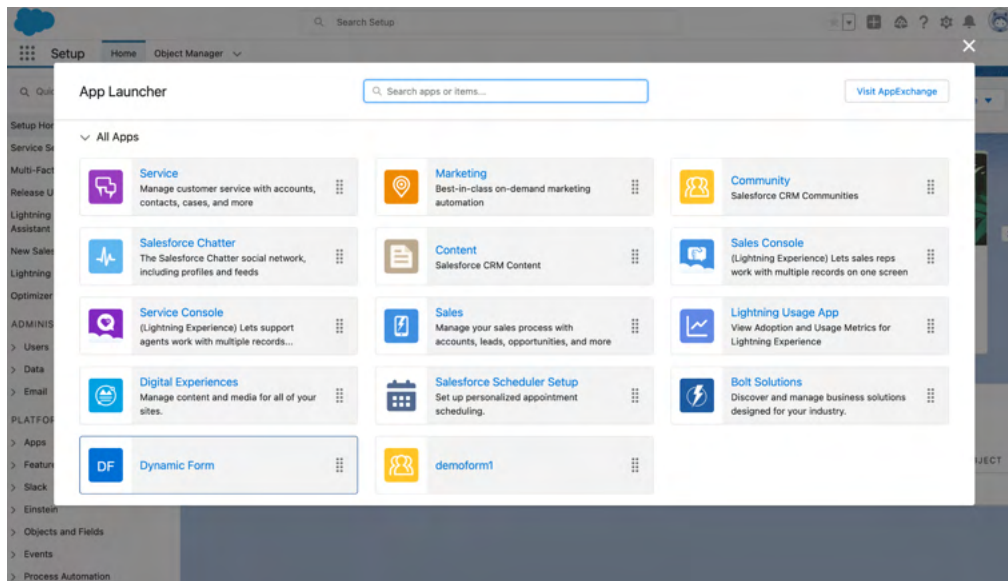
V1.21 bug fixes and added support for attachment upload.

Here are the installation steps. Salesforce administrator access is required to complete the following steps.

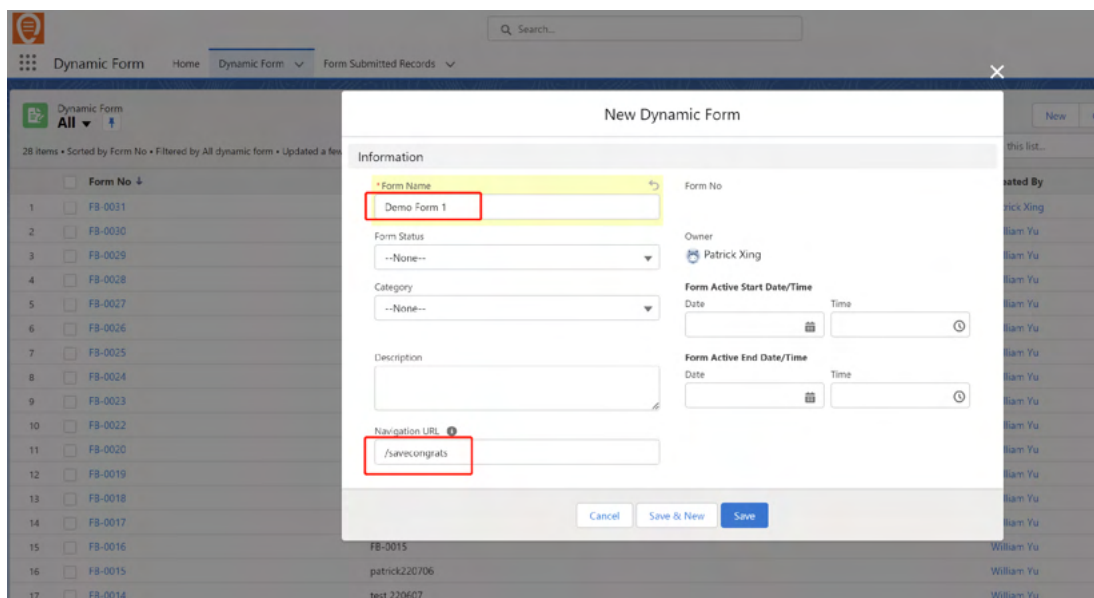
1. Install the package for admin users or specific users who need to create the form.



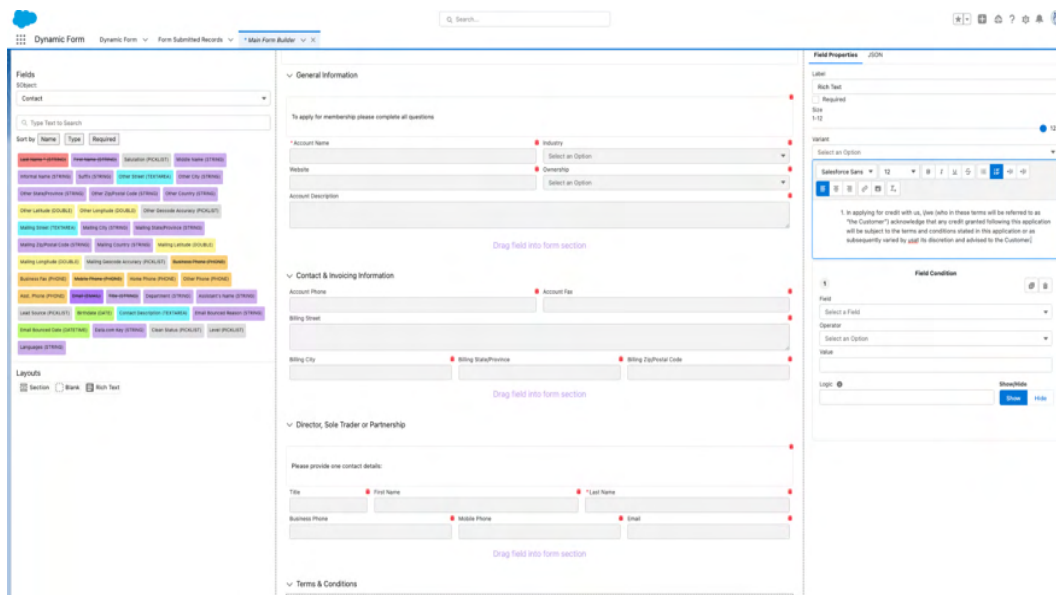
2. After the installation is complete, select the 'Dynamic Form' app from App Launcher.



3. Create the form. Form name should be unique, however, no restricted configurations was implemented for preventing duplicate values as of now. Navigation URL is the form submission confirmation URL where the user would be redirected after the form was submitted. It can be a community page, for example: 'communityname/s/savecongrats'(which will be covered at Step 8), or an external website URL, for example: 'https://www.google.com' (Quotes are not needed).

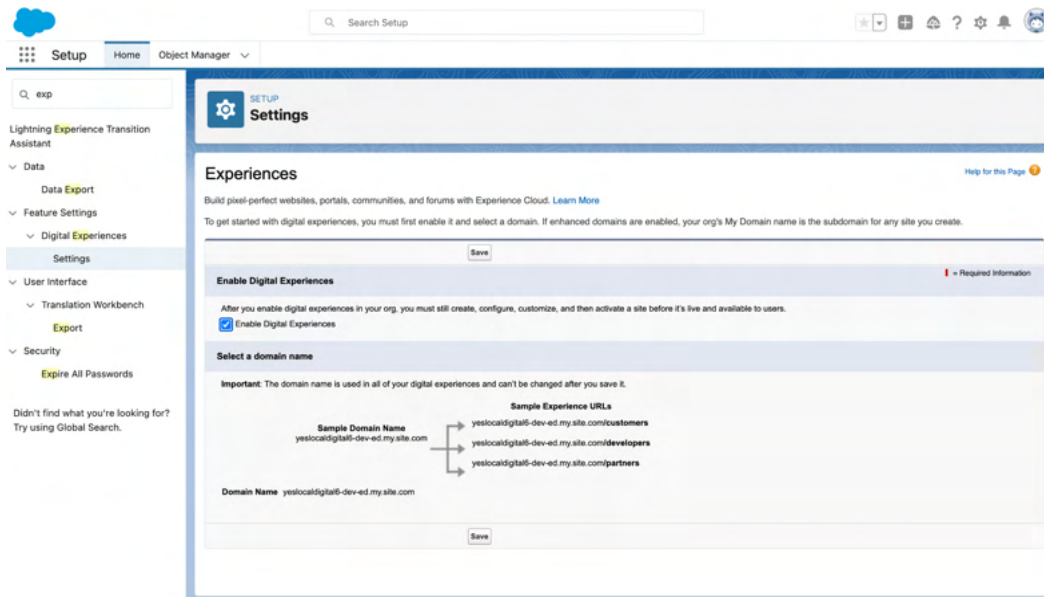


Save and click the 'Form Builder' button to get onto the 'drag & drop' user screen.

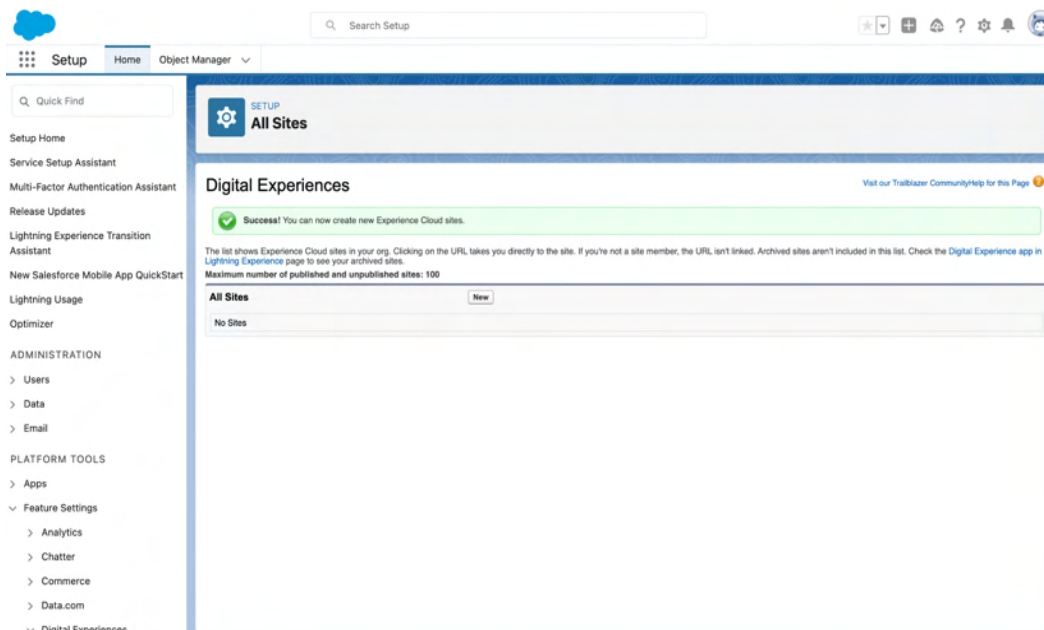


On the Form Builder page, you can select objects, fields and layout elements from the left panel. The middle panel is the main form panel. On the right panel, there are a set of attributes you can set, such as label, size, predefined value and also the field display conditions to make the form dynamic.

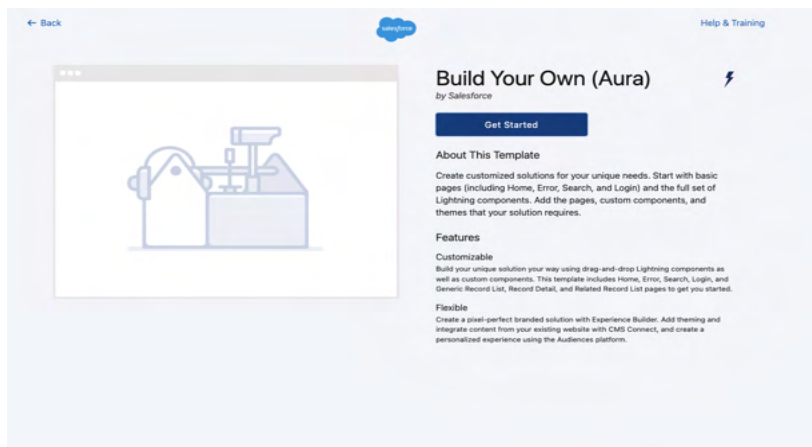
4. If Salesforce Digital Experience Site hasn't been enabled for your org, go to Setup-> Digital Experiences -> Settings screen. Tick 'Enable Digital Experience' and Save.



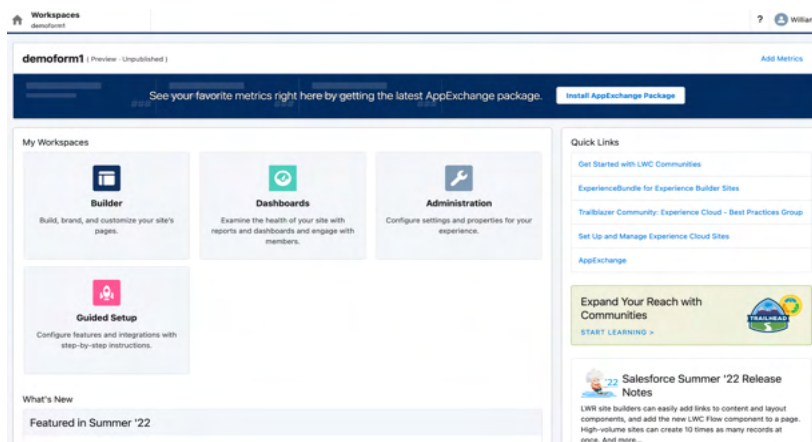
Refresh the screen, you will be able to see the 'All sites' page and create a new Site.



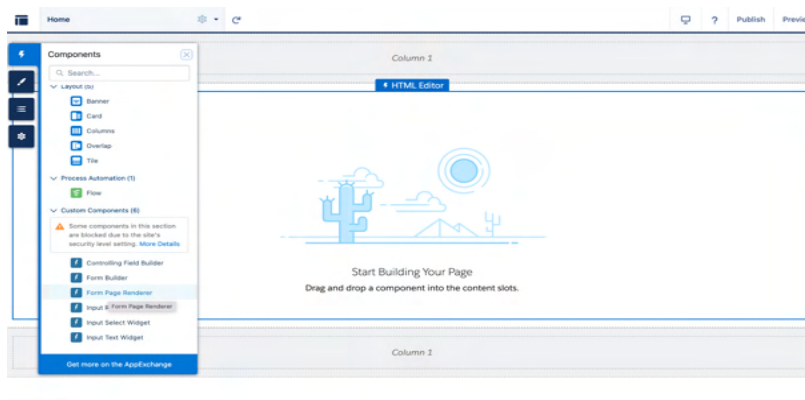
5. Create a new site and choose 'Build Your Own( Aura)' site template.



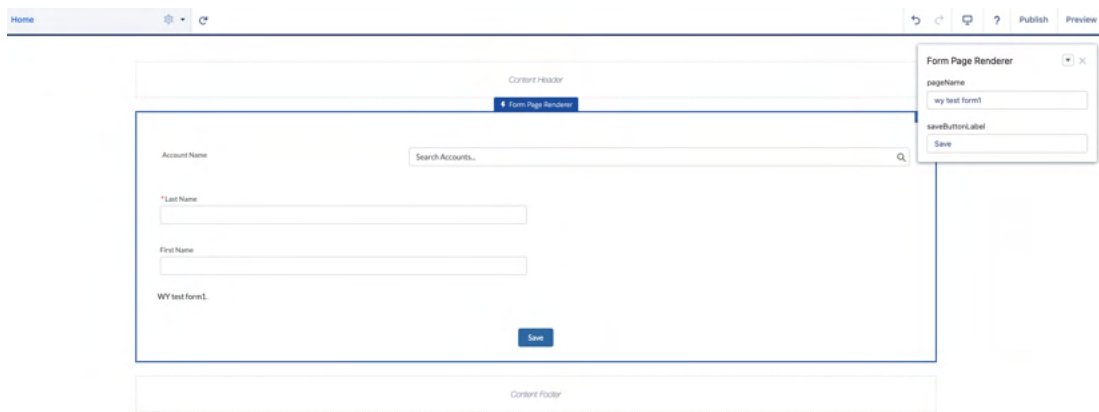
6. Add the form to the Site page. Click 'Builder' to start building the site.



On the Home page, add the new custom component 'Form Page Renderer' to the page.

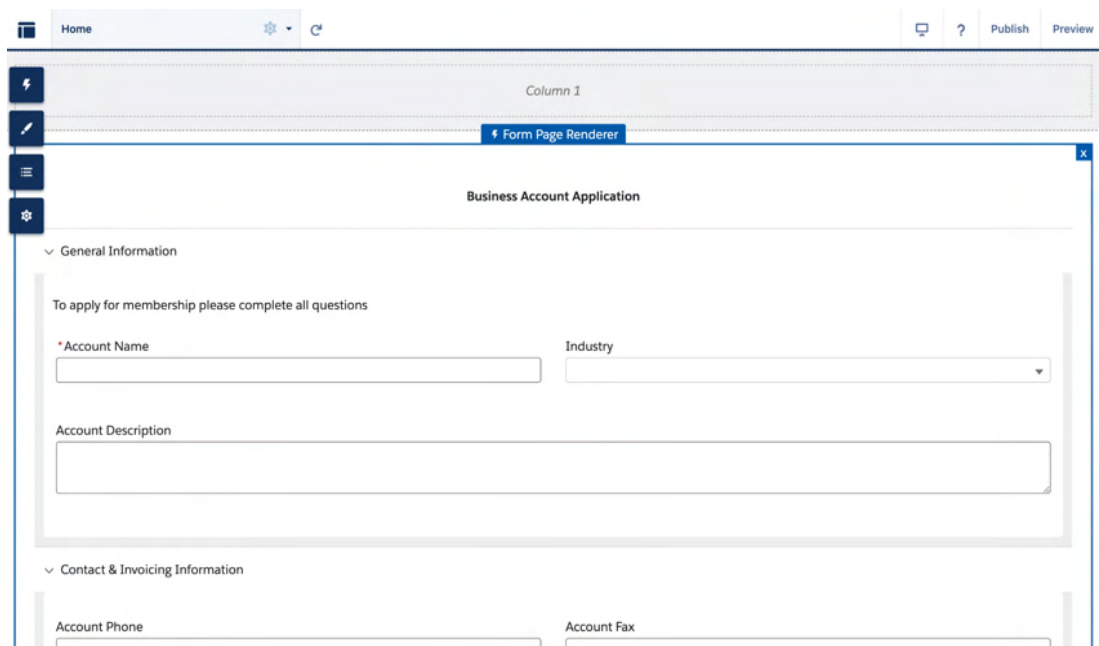


7. Fill in the form name created in Step 3. You can also define the 'save' button label.



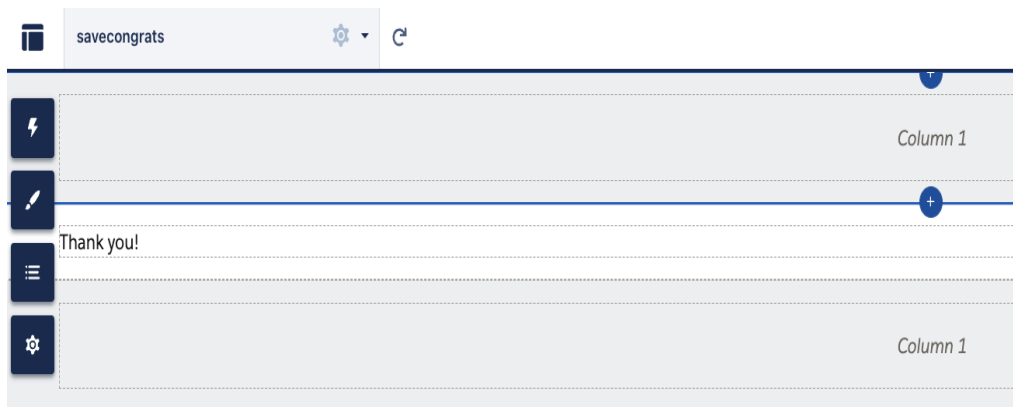
The screenshot shows the Dynamic Form editor interface. The main form layout includes a 'Content Header' section, a 'Form Page Renderer' section, and a 'Content Footer' section. The 'Form Page Renderer' section contains a search bar labeled 'Search Accounts...', a 'Last Name' field, a 'First Name' field, and a 'Save' button. A configuration panel titled 'Form Page Renderer' is open on the right, showing fields for 'pageName' (set to 'my test form!') and 'saveButtonLabel' (set to 'Save').

The form created will show up on the digital experience site.

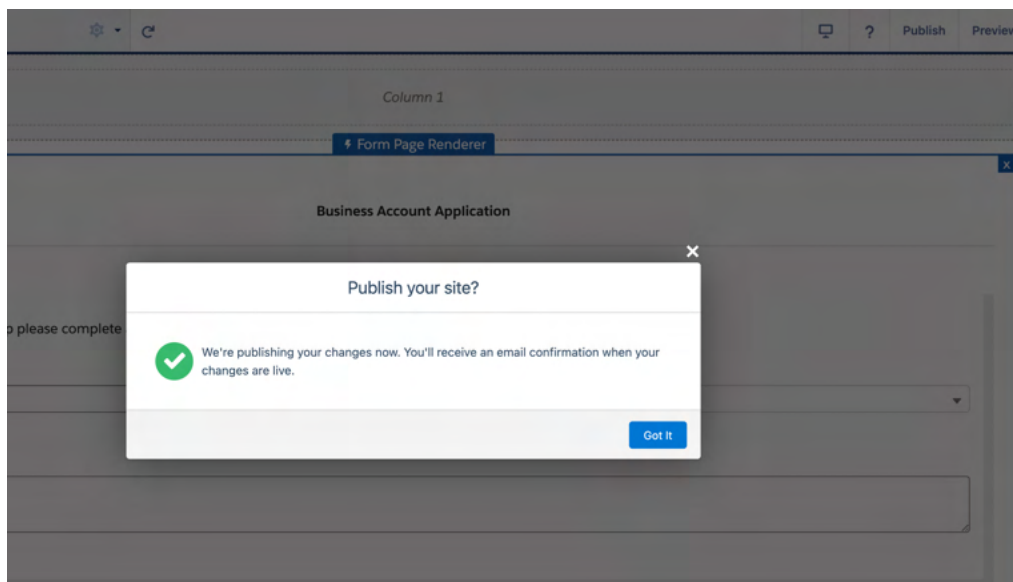


The screenshot shows the Digital Experience Site with the 'Business Account Application' form. The form is titled 'Business Account Application' and is divided into two sections: 'General Information' and 'Contact & Invoicing Information'. The 'General Information' section includes a message 'To apply for membership please complete all questions' and fields for 'Account Name', 'Industry', and 'Account Description'. The 'Contact & Invoicing Information' section includes fields for 'Account Phone' and 'Account Fax'.

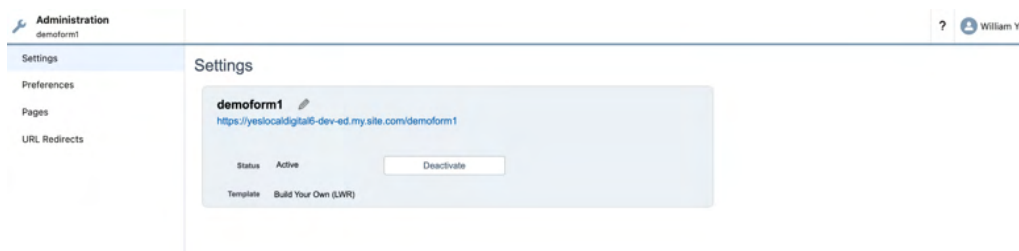
8. Create a form submission confirmation page, for example: 'savecongrats'.



9. Publish the site.



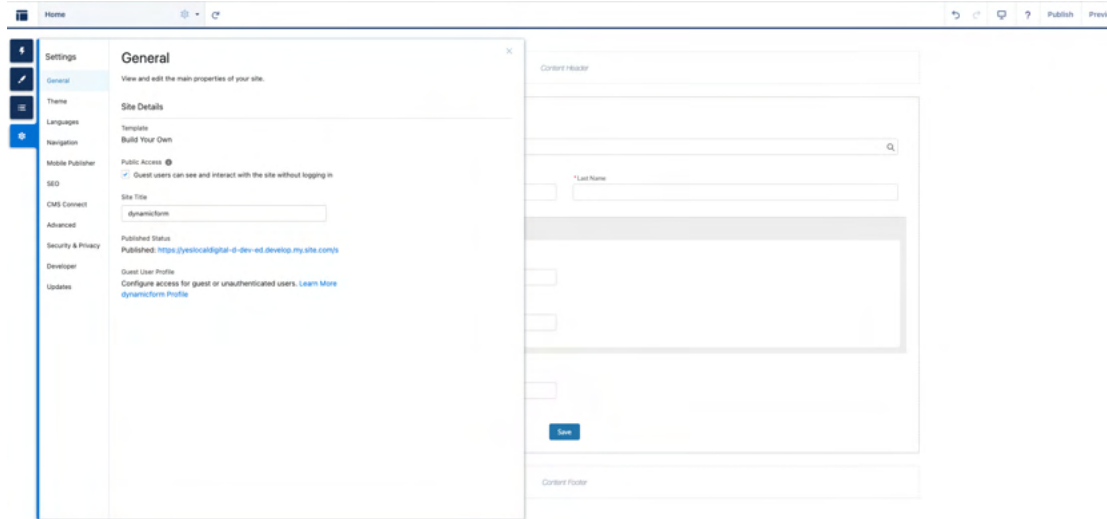
Go to 'Administration' of the site, activate the site.



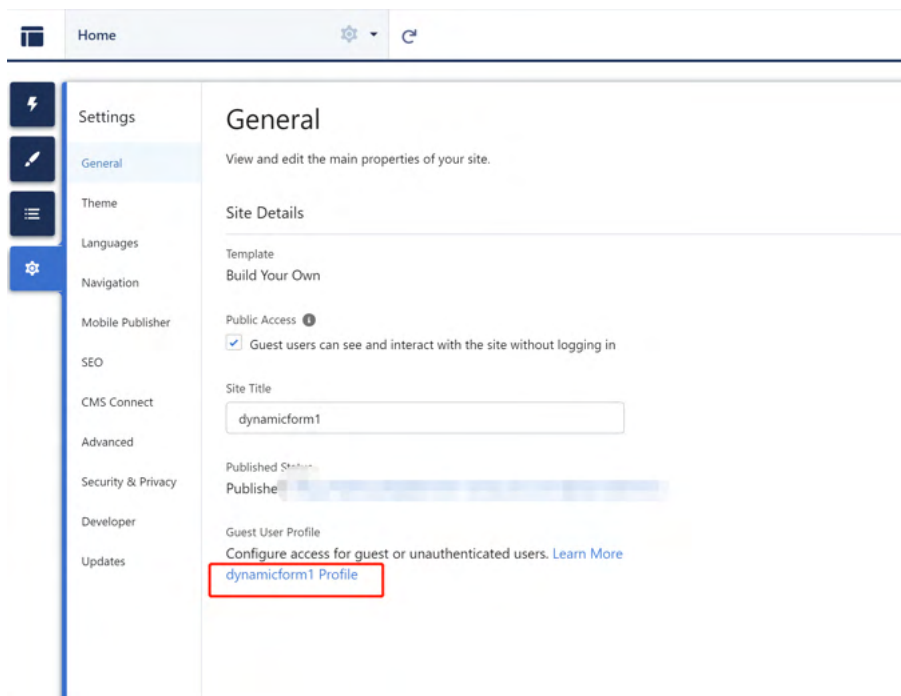


10. When a new site is created, it must enable 'Public Access' and assign the permission set 'Dynamic Form Community User' to the site's guest user.

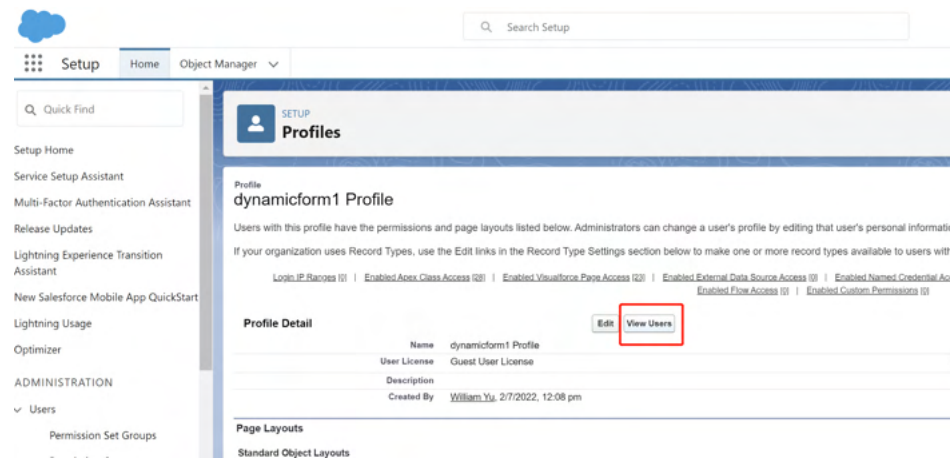
In Experience builder, Settings->General->Public Access, tick the 'Guest Users can see and interact with the site without logging in' option.



Go to Site Settings->General->Click on the guest user profile link



Click on 'View Users'

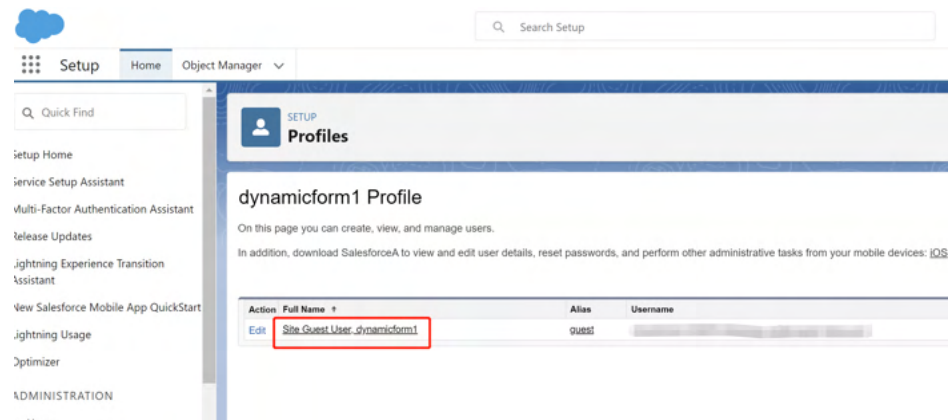


The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is visible with 'Users' selected. The main content area shows the 'dynamicform1 Profile' page. The 'Profile Detail' section includes a table with the following data:

| Name         | dynamicform1 Profile           |
|--------------|--------------------------------|
| User License | Guest User License             |
| Description  |                                |
| Created By   | William Yu, 2/7/2022, 12:08 pm |

The 'View Users' button is highlighted with a red box.

Click on the link on guest user name 'Site Guest User, dynamicform1'

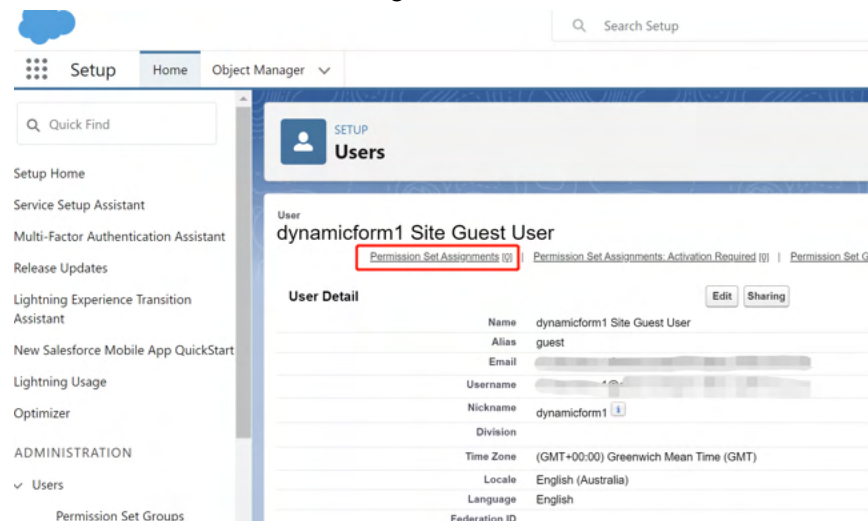


The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is visible with 'Users' selected. The main content area shows the 'dynamicform1 Profile' page. The 'Users' section includes a table with the following data:

| Action | Full Name                     | Alias | Username |
|--------|-------------------------------|-------|----------|
| Edit   | Site Guest User, dynamicform1 | guest |          |

The 'Site Guest User, dynamicform1' link is highlighted with a red box.

Click on 'Permission Set Assignments'

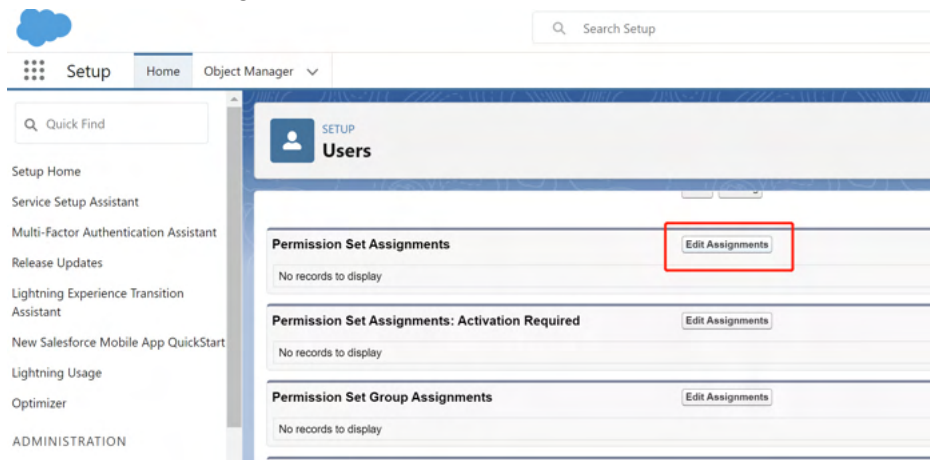


The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is visible with 'Users' selected. The main content area shows the 'dynamicform1 Site Guest User' page. The 'Permission Set Assignments' link is highlighted with a red box.

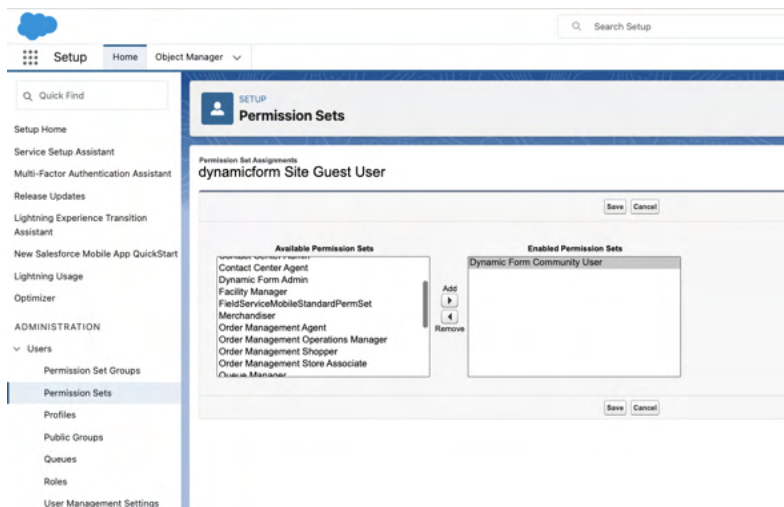
The 'User Detail' section includes a table with the following data:

| Name          | dynamicform1 Site Guest User          |
|---------------|---------------------------------------|
| Alias         | guest                                 |
| Email         |                                       |
| Username      |                                       |
| Nickname      | dynamicform1                          |
| Division      |                                       |
| Time Zone     | (GMT+00:00) Greenwich Mean Time (GMT) |
| Locale        | English (Australia)                   |
| Language      | English                               |
| Federation ID |                                       |

Click on 'Edit Assignments'



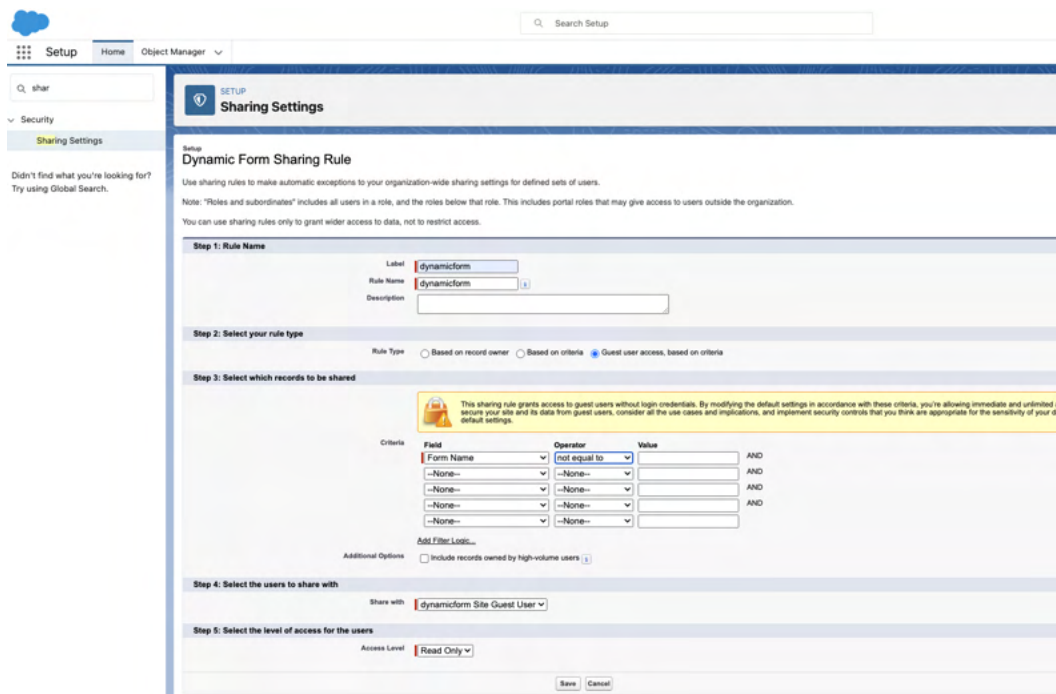
Assign 'Dynamic Form Community User' permission set to Site guest User, and click on 'Save'



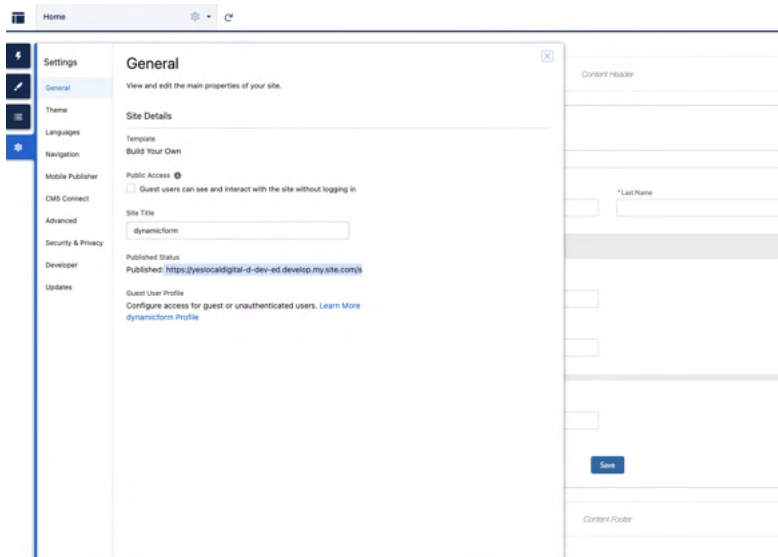
## 11. Add Dynamic Form sharing rules. Go to admin Setup->Sharing Settings



Click 'New' button in the Dynamic Form Sharing Rules section. Add the following rules to share the dynamic form elements.

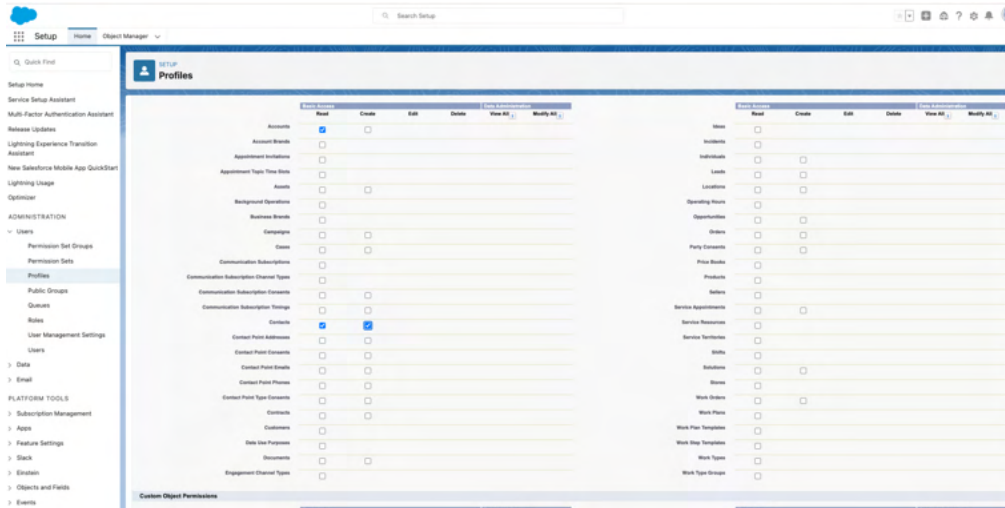


12. Get the form published URL in Experience builder, Setup->General> Published Status:

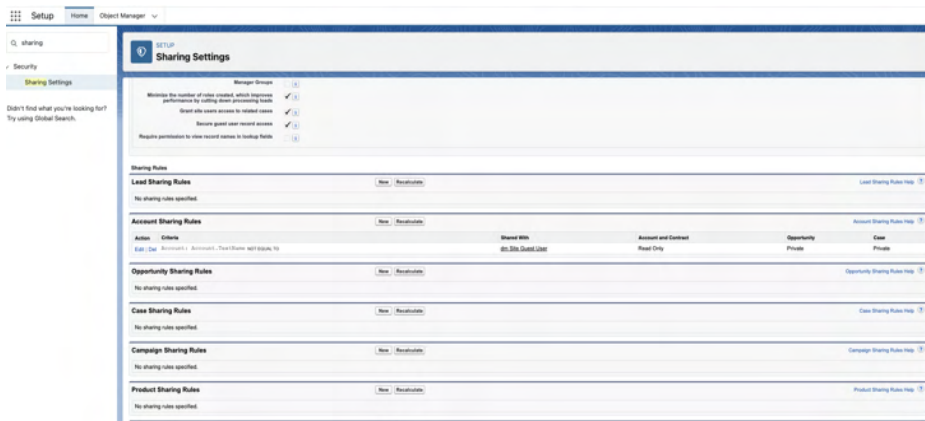


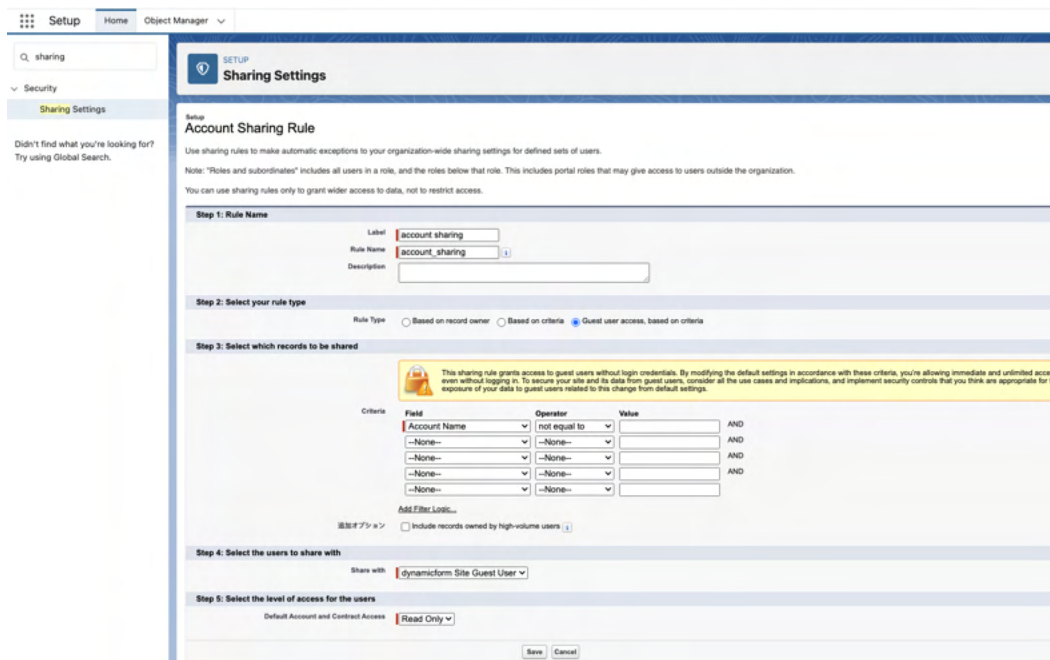
The form is ready to be used.

13. If you are using a Standard/Custom object to store the form data, make sure you give object access permission in Site's guest user profile.
- Go to the Guest user profile to add 'Read' and/or 'Create' permission for any objects used in the form, such as 'Accounts', 'Contacts', etc. Only give create permission when it requires the user to fill in the information.

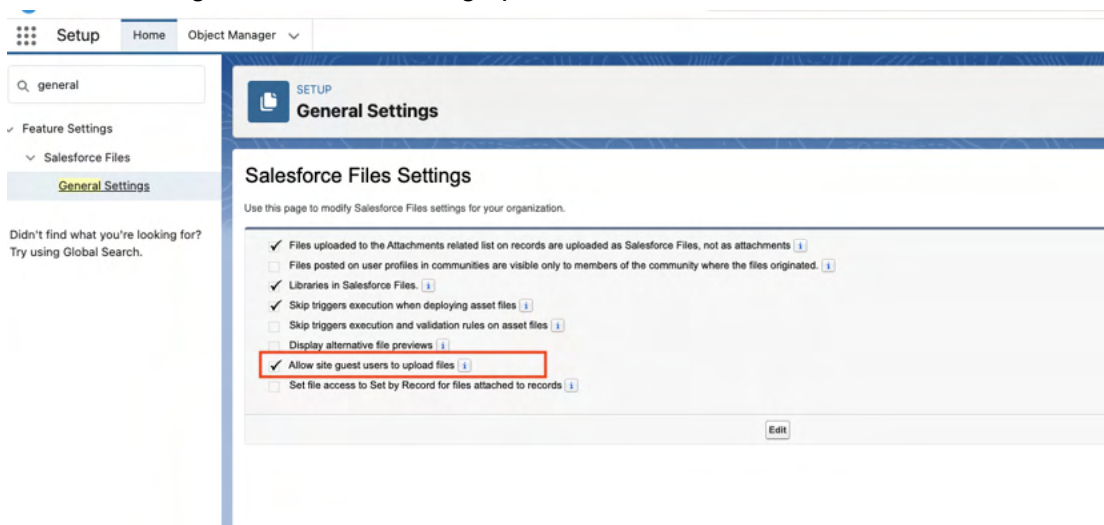


14. If you are using reference fields for the user to select the record in the form, make sure you define the corresponding sharing rules and modify the guest user profile so the end user is able to view or create the records. For example, to let the end user select an account from the account lookup field, the end user needs to view accounts. Go to Setup->Sharing Settings





15. If you'd like to enable attachment upload, please go to Settings-> Salesforce Files-> General Settings to tick the following option:



Please also make sure to create a Sharing Rule for both **related objects** and **Form Submitted Records** like below:




**SETUP**  
**Sharing Settings**

Setup

## Lead Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the organization. You can use sharing rules only to grant wider access to data, not to restrict access.

Label 
Rule Name 
Description

**Step 1: Select your rule type**



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, 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 |     |
|----------|-----------|--------------|-------|-----|
|          | Last Name | not equal to |       | AND |
|          | --None--  | --None--     |       | AND |
|          | --None--  | --None--     |       | AND |
|          | --None--  | --None--     |       | AND |
|          | --None--  | --None--     |       | AND |

[Add Filter Logic...](#)

Additional Options ☐ Include records owned by users who can't have an assigned role

Additional Options ☐ Include records owned by high-volume users

Share with

Lead Access


**SETUP**  
**Sharing Settings**

Setup

## Form Submitted Record Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the organization. You can use sharing rules only to grant wider access to data, not to restrict access.

**Step 1: Rule Name**

Label

Rule Name

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**



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 Submitted Records Name | not equal to |       | AND |
|          | --None--                    | --None--     |       | AND |
|          | --None--                    | --None--     |       | AND |
|          | --None--                    | --None--     |       | AND |
|          | --None--                    | --None--     |       | AND |

[Add Filter Logic...](#)

Additional Options ☐ Include records owned by high-volume users

**Step 4: Select the users to share with**

Share with

**Step 5: Select the level of access for the users**

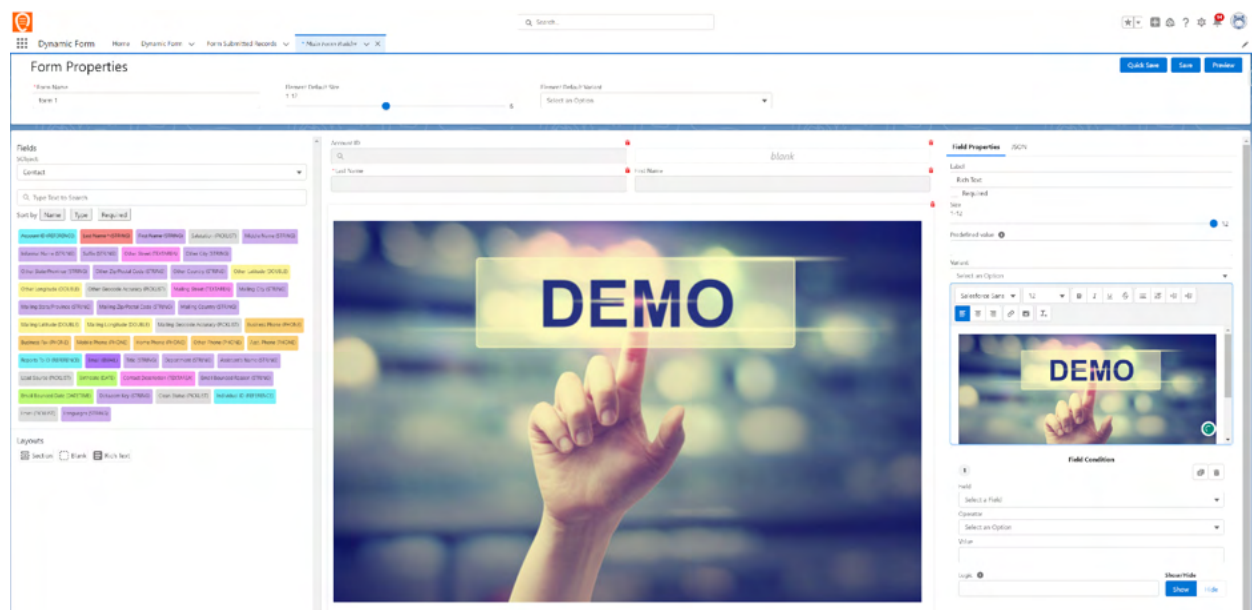
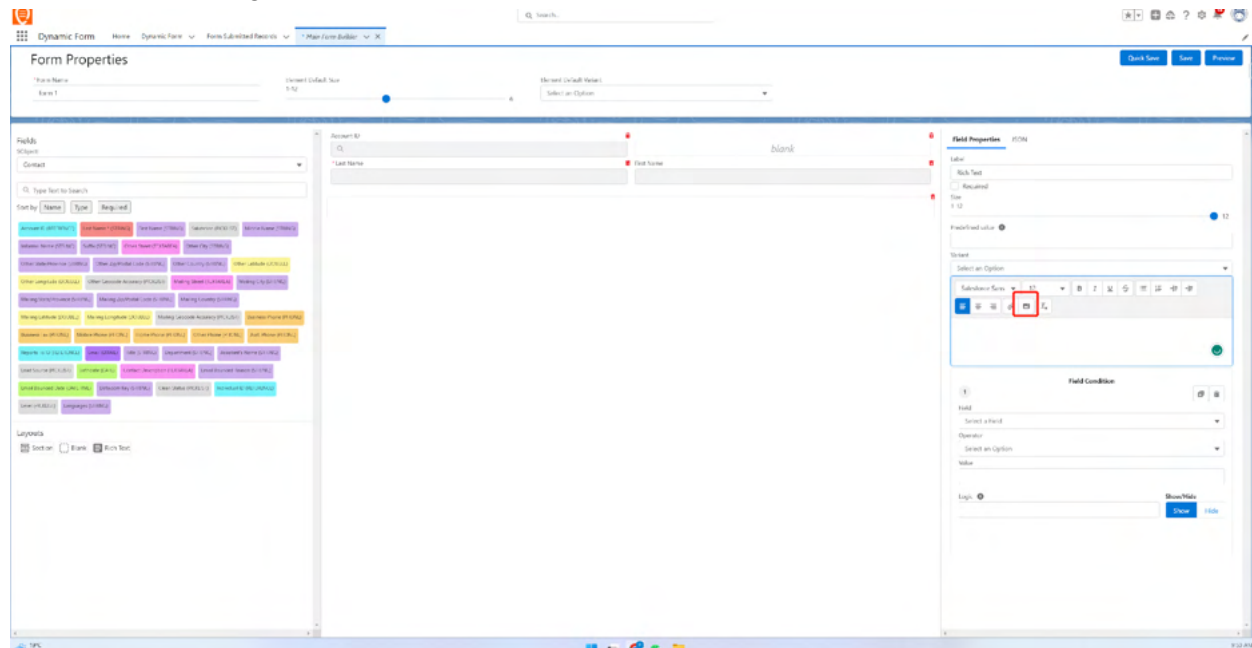
Access Level

If the guest user has read access to the submitted records and attaches a file, this file will be linked to this specific record. If the guest user does not have read access to the submitted records and attaches a file, this file will be linked to the Form Submitted Records.



This guide will provide step-by-step instructions on how to add images to a form.

Step1. Upload images via Rich Text components.



Step 2. Save the form

Step 3 (Optional). Every save attempt will create a new ContentDocument, please feel free to clear the historical ContentDocument regularly.

# Yay! All Done!

Hope you enjoy our application!  
Please let us know your thoughts.  
[contact@yeslocaldigital.com.au](mailto:contact@yeslocaldigital.com.au)