Dynamic Form Installation Guide

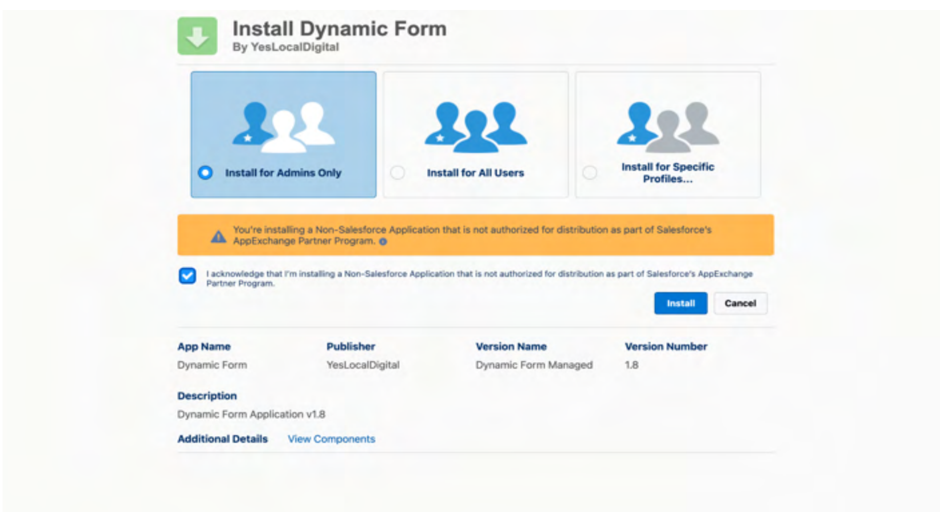
Version 1.21

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

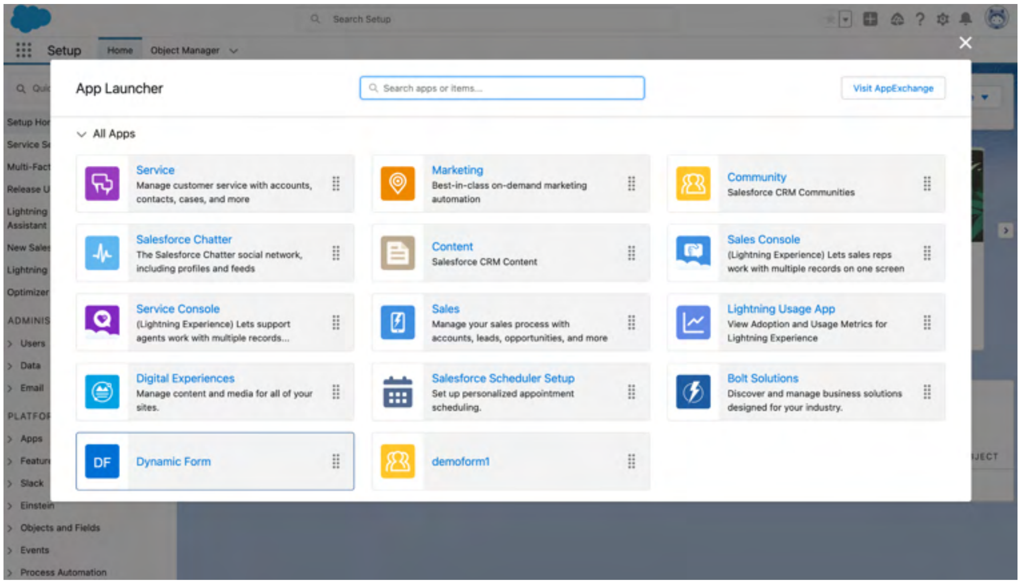
The Dynamic Form package allows users to create dynamic forms with conditional logic on Salesforce Experience Cloud. With the user-friendly ‘drag & drop’ interface, business users can create the forms quickly.
V1.0 enabled the user to create dynamic forms for both Standard & Custom objects
V1.9 added 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.

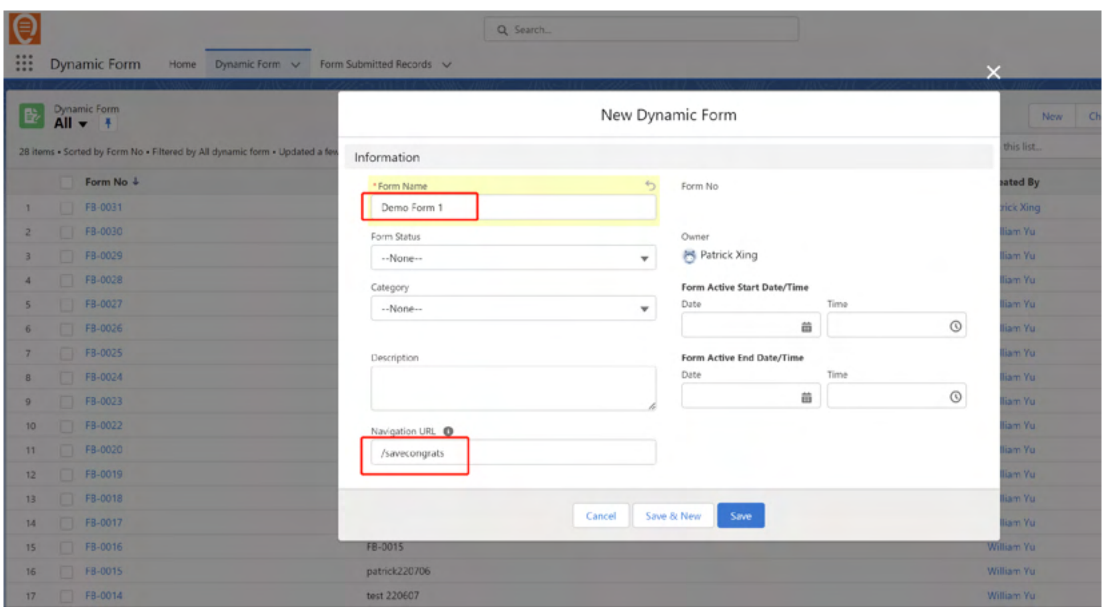
1. Install the package for admin users or specific users who need to create the form.



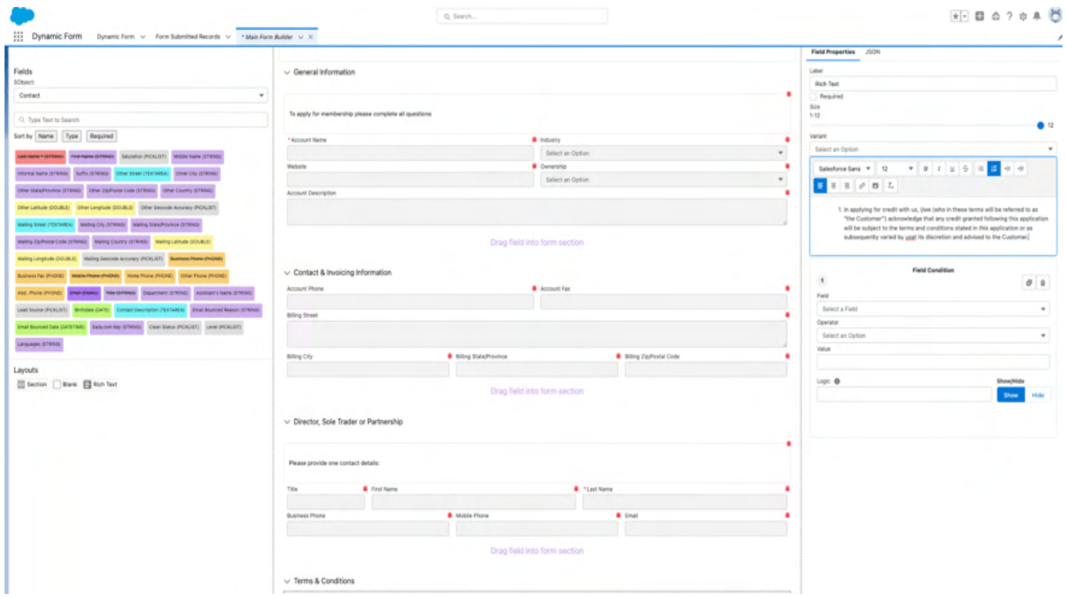
2. After the installation is complete, select the ‘Dynamic Form’ app from App Launcher.



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).

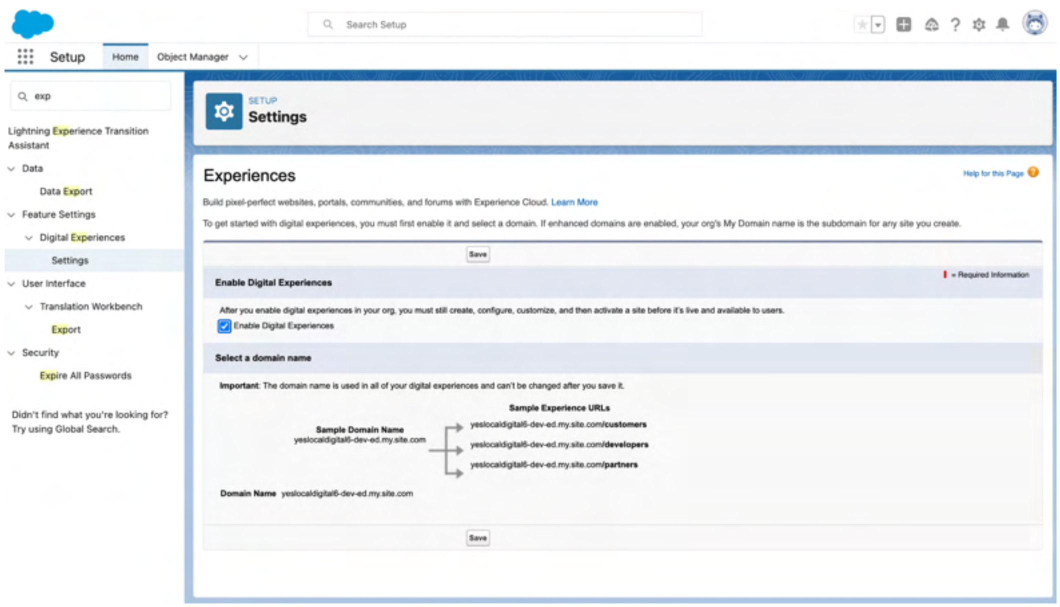


Save and click the ‘Form Builder’ button to get onto the ‘drag & drop’ user screen.

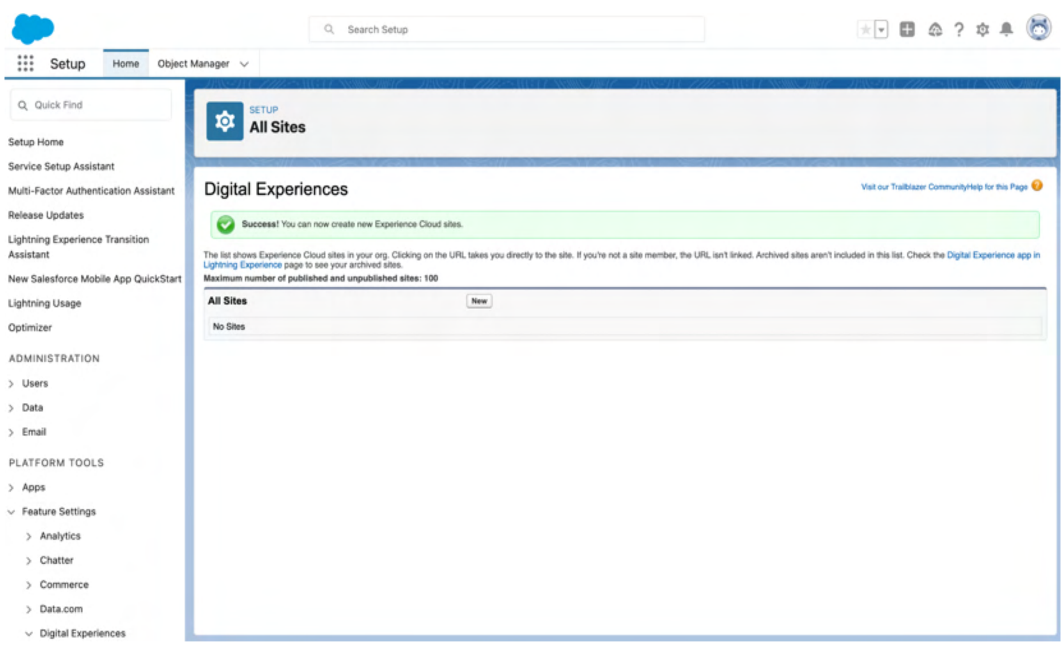


On the Form Builder page, you can select objects, fields and layout elements from the left panel. The middle panel is the main form panel. On the right panel, there are a set of attributes you can set, such as label, size, predefined value and also the field display conditions to make the form dynamic.

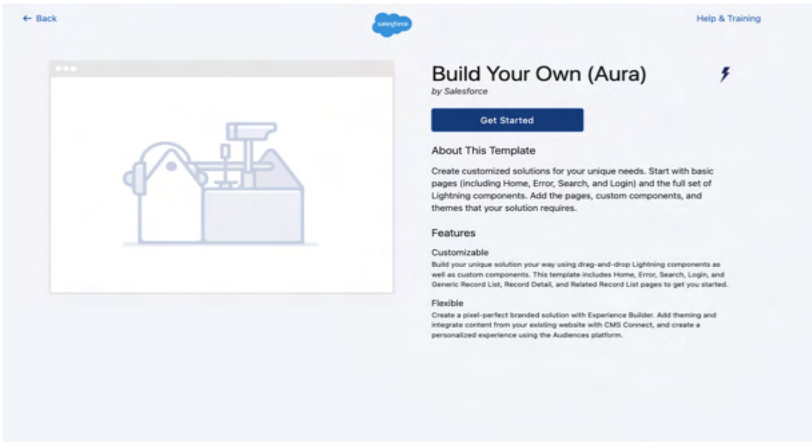
4. If Salesforce Digital Experience Site hasn't been enabled for your org, go to Setup-> Digital Experiences -> Settings screen. Tick 'Enable Digital Experience' and Save.



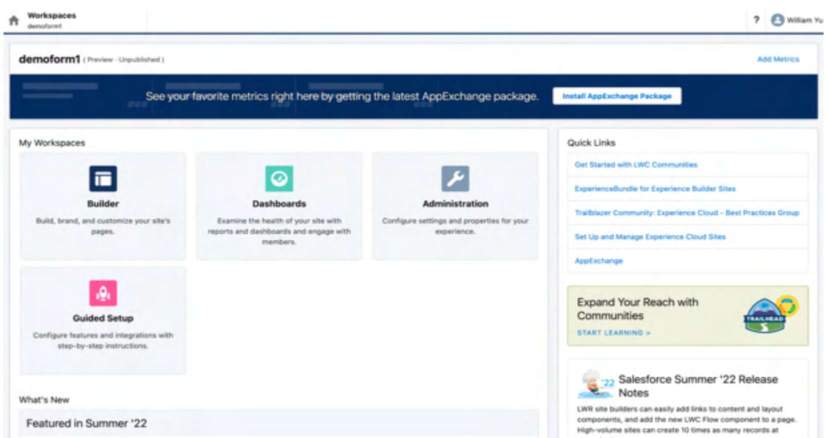
Refresh the screen, you will be able to see the 'All sites' page and create a new Site.



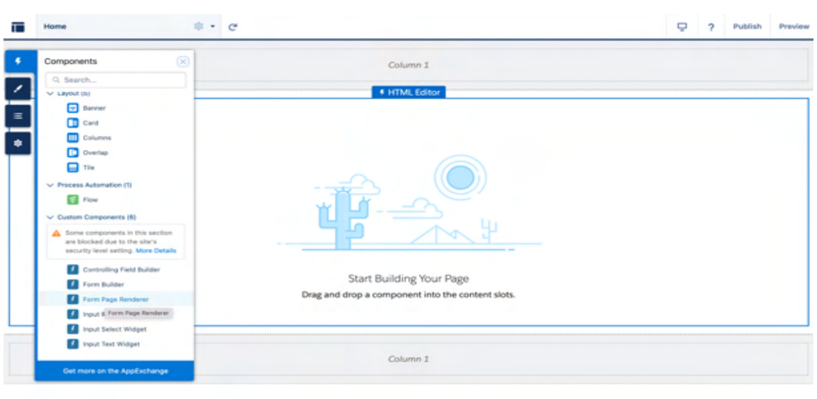
5. Create a new site and choose ‘Build Your Own(Aura)’ site template.



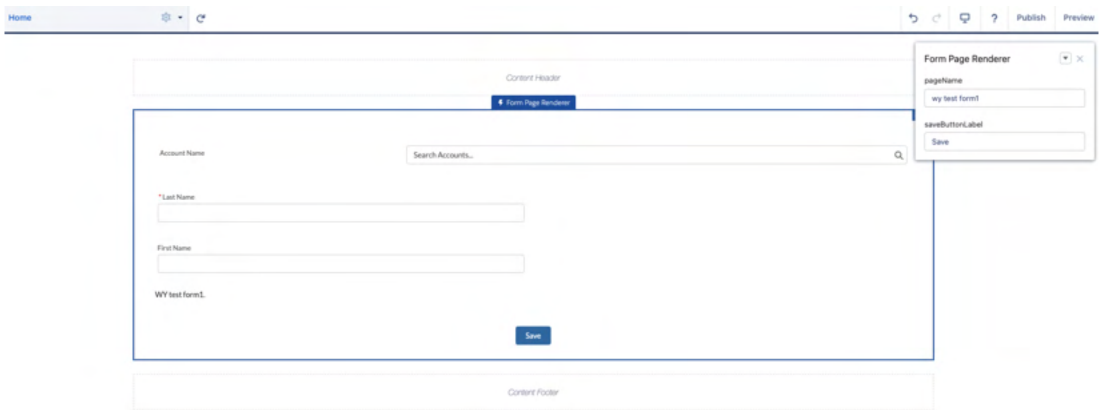
6. Add the form to the Site page. Click ‘Builder’ to start building the site.



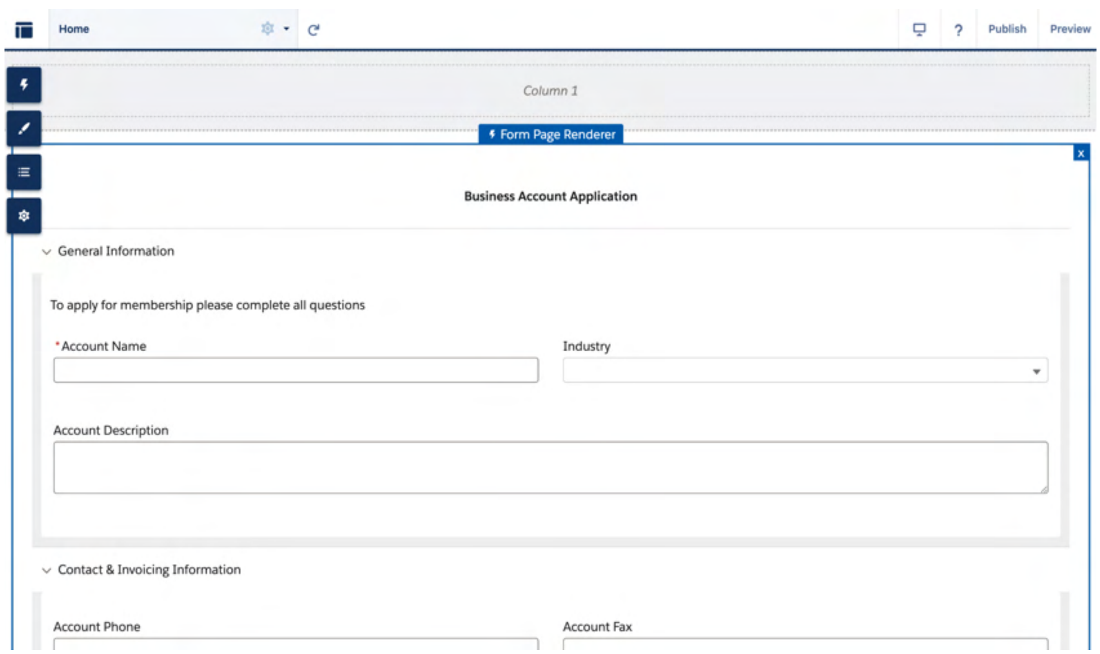
On the Home page, add the new custom component ‘Form Page Renderer’ to the page.



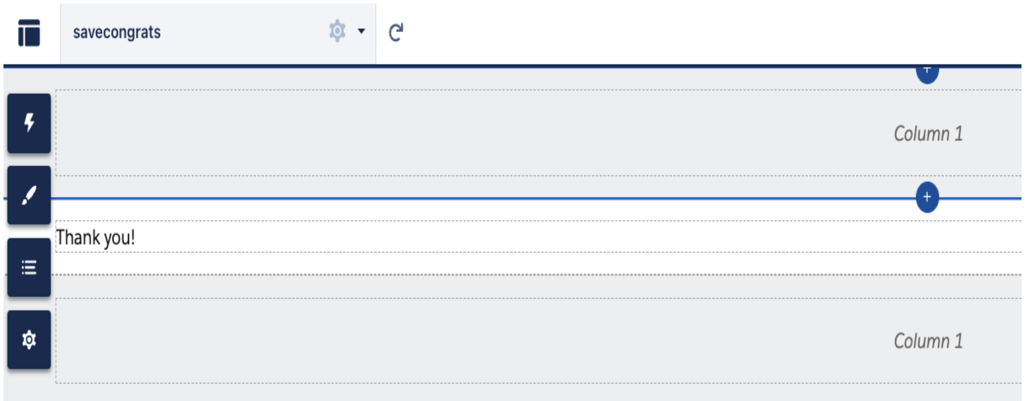
7. Fill in the form name created in Step 3. You can also define the ‘save’ button label.



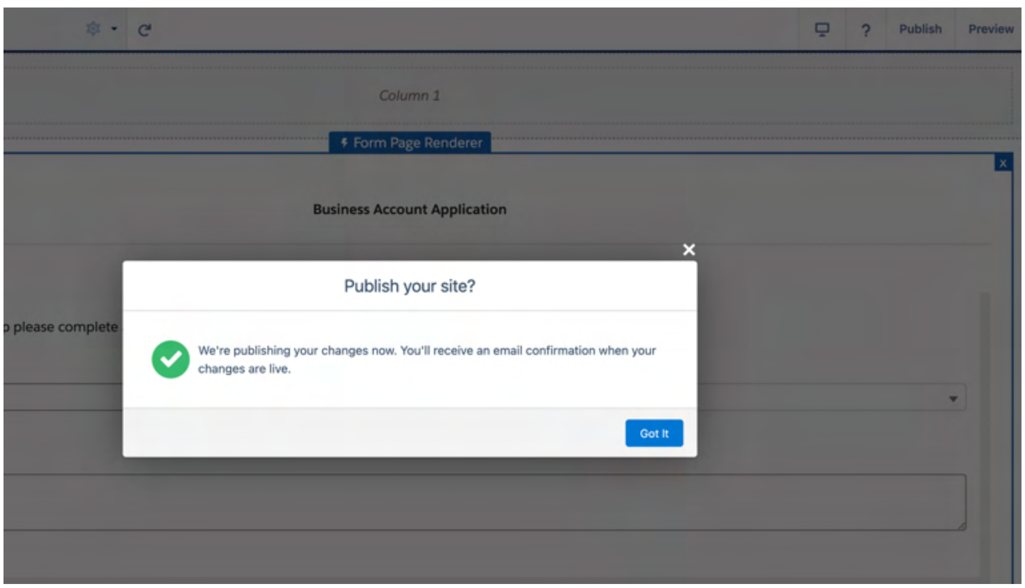
The form created will show up on the digital experience site.



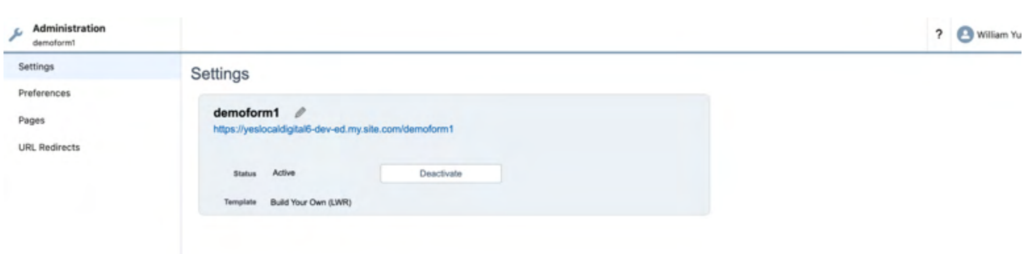
8. Create a form submission confirmation page, for example: ‘savecongrats’.



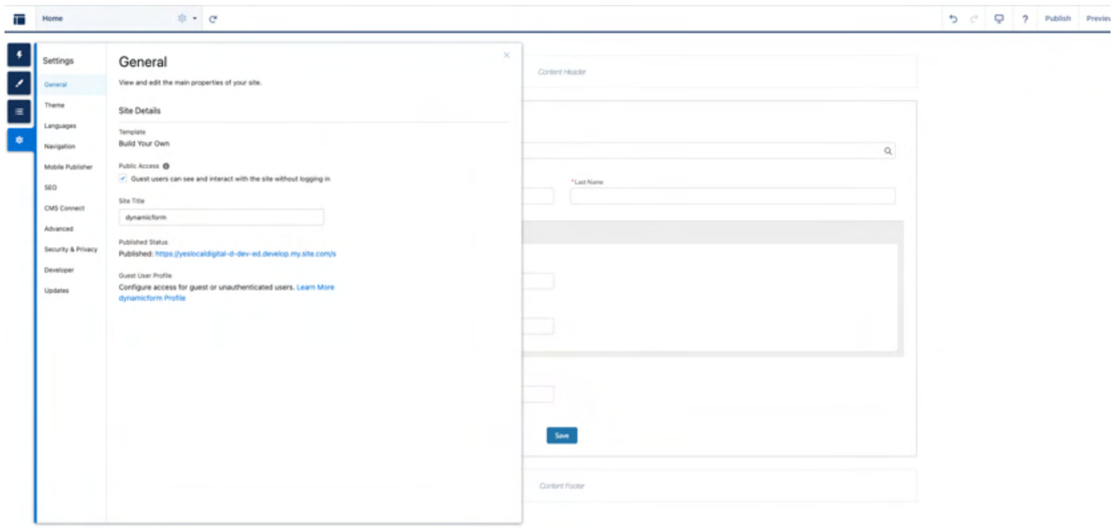
9. Publish the site.



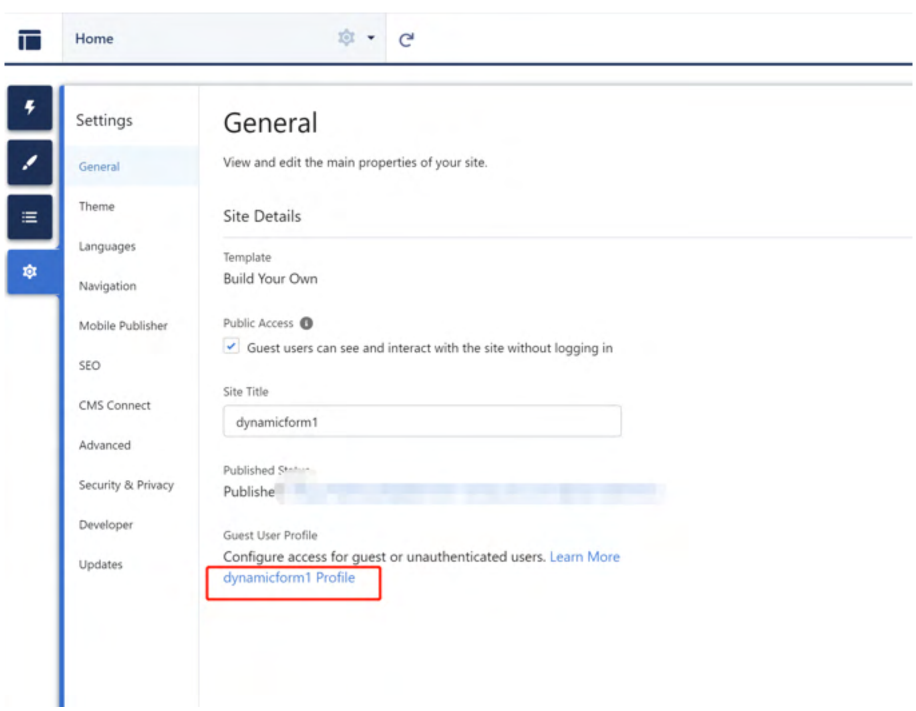
Go to ‘Administration’ of the site, activate the site.



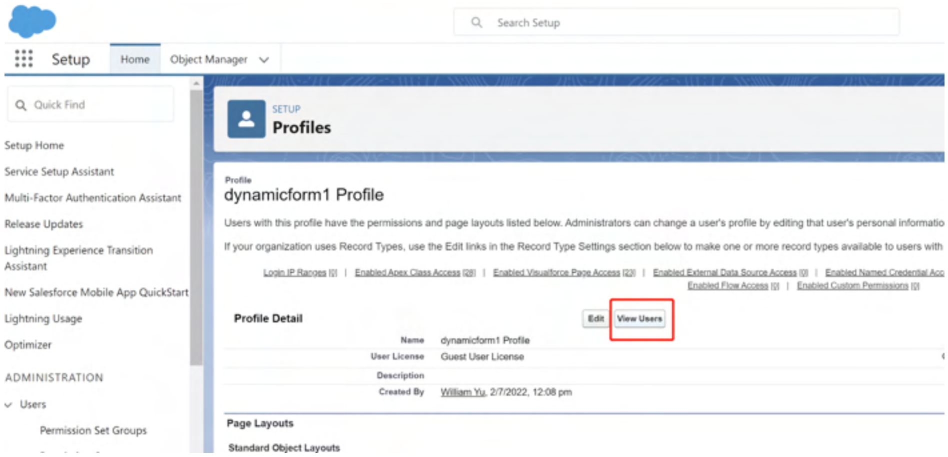
10. When a new site is created, it must enable ‘Public Access’ and assign the permission set ‘Dynamic Form Community User’ to the site’s guest user.
    In Experience builder, Settings->General->Public Access, tick the ‘Guest Users can see and interact with the site without logging in’ option.



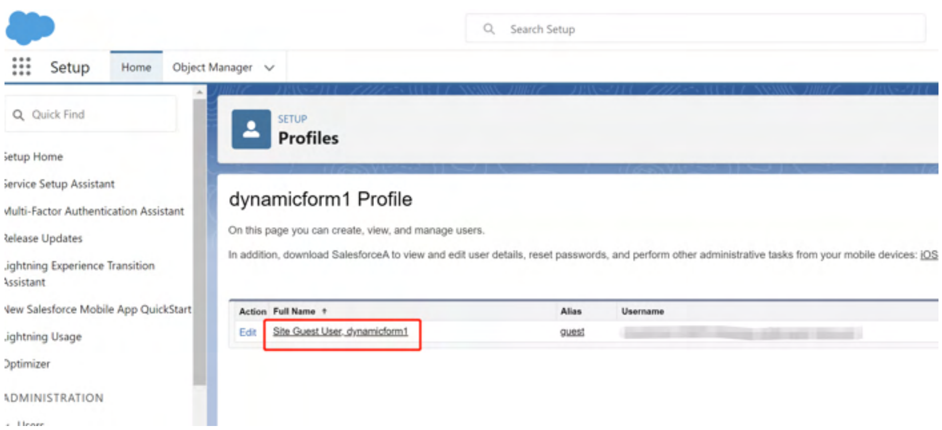
Go to Site Settings->General->Click on the guest user profile link



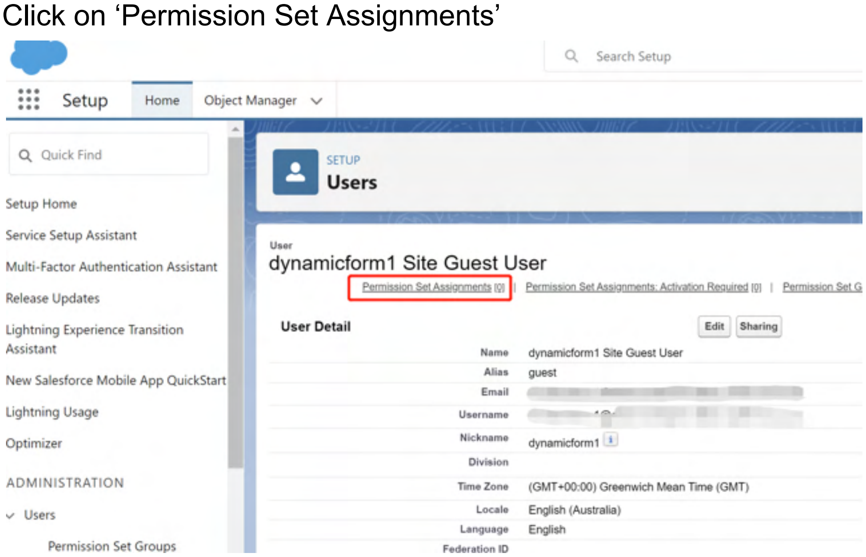
Click on ‘View Users’



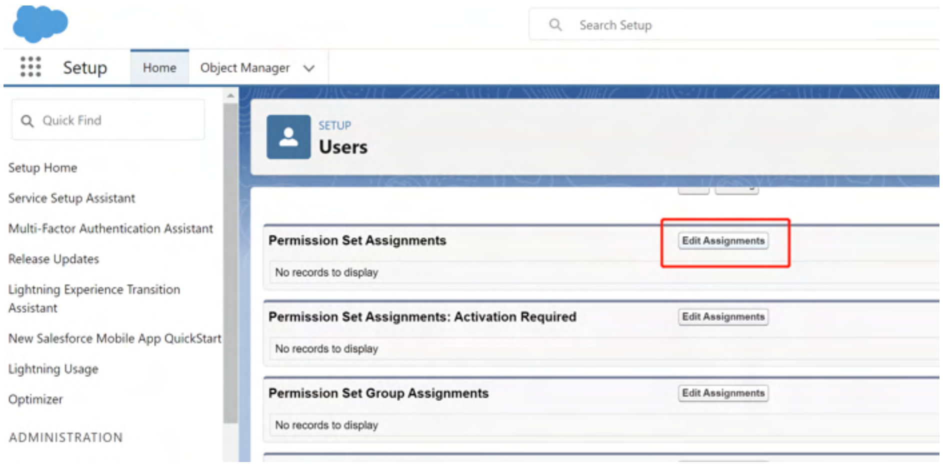
Click on the link on guest user name ‘Site Guest User, dynamicform1’



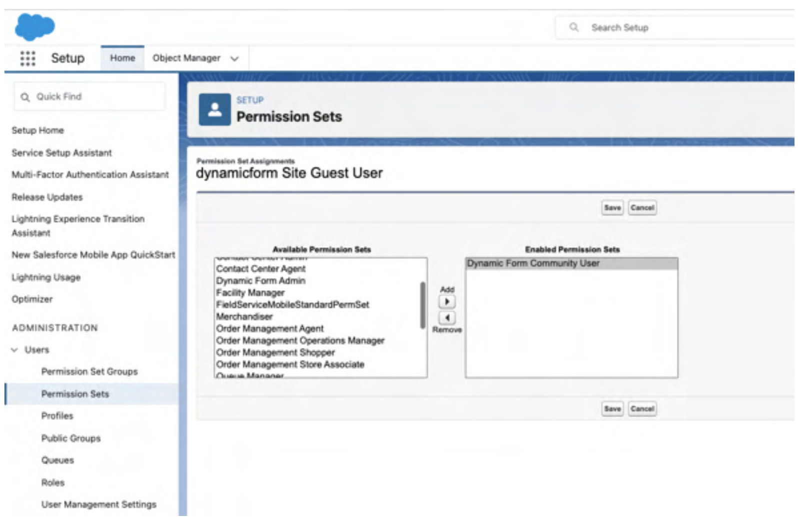
Click on ‘Permission Set Assignments’



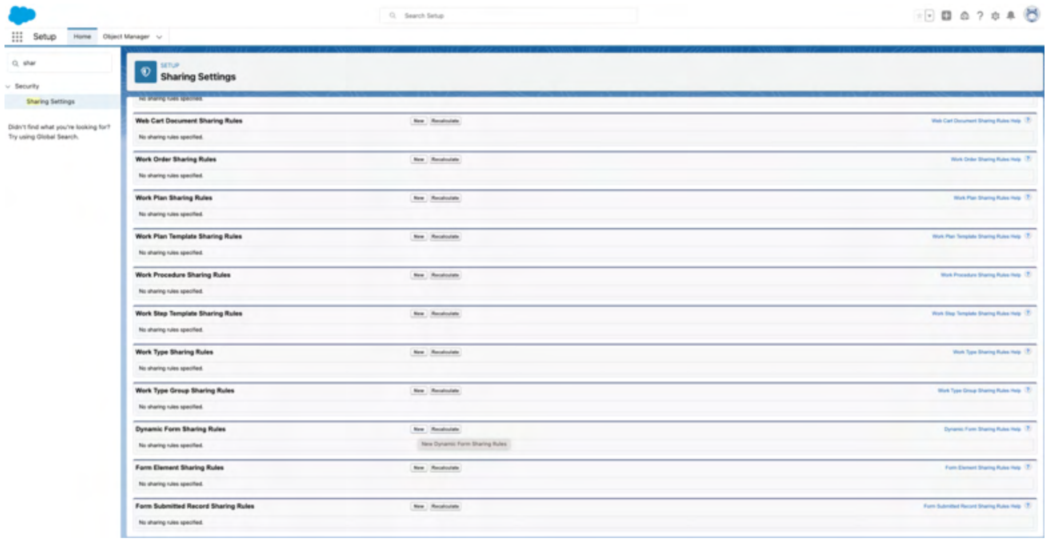
Click on ‘Edit Assignments’



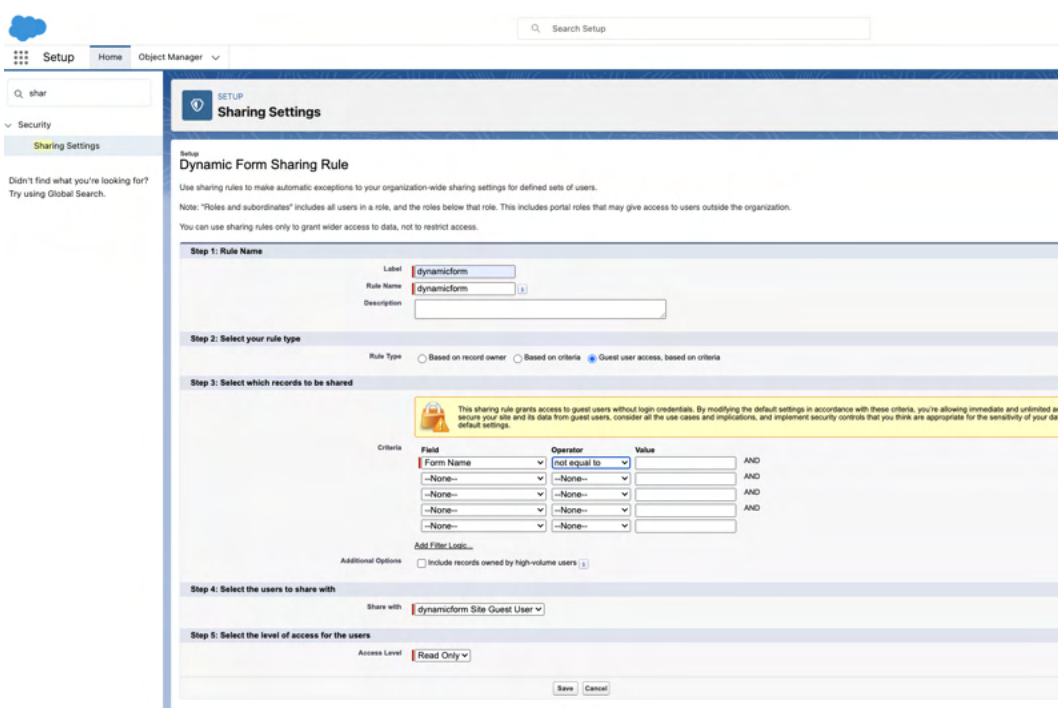
Assign ‘Dynamic Form Community User’ permission set to Site guest User, and click on ‘Save’



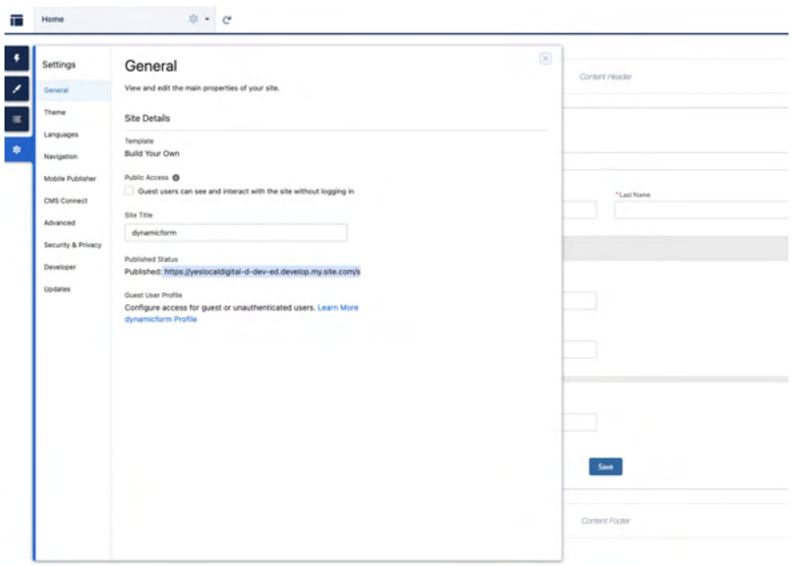
11. Add Dynamic Form sharing rules.
    Go to admin Setup->Sharing Settings



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

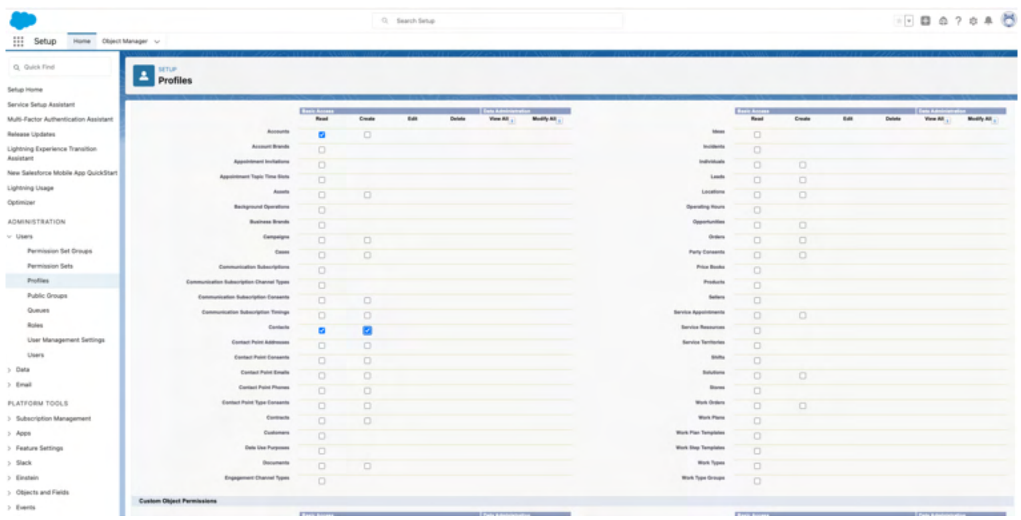


12. Get the form published URL in Experience builder, Setup->General> Published Status:

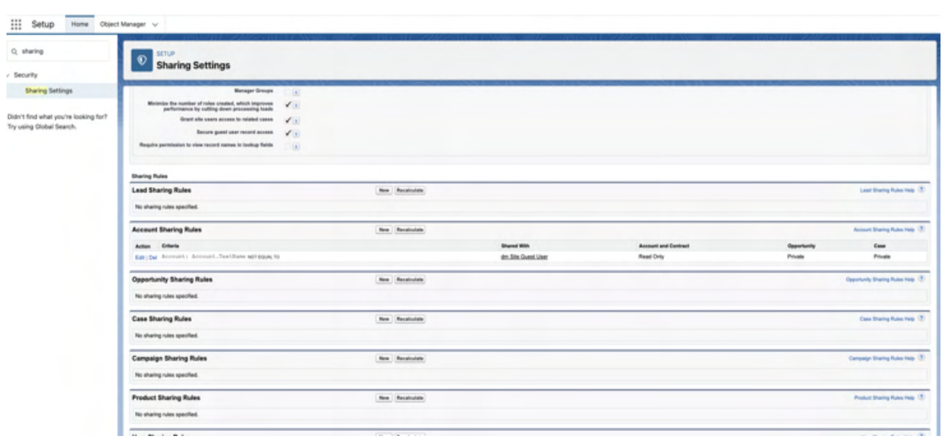


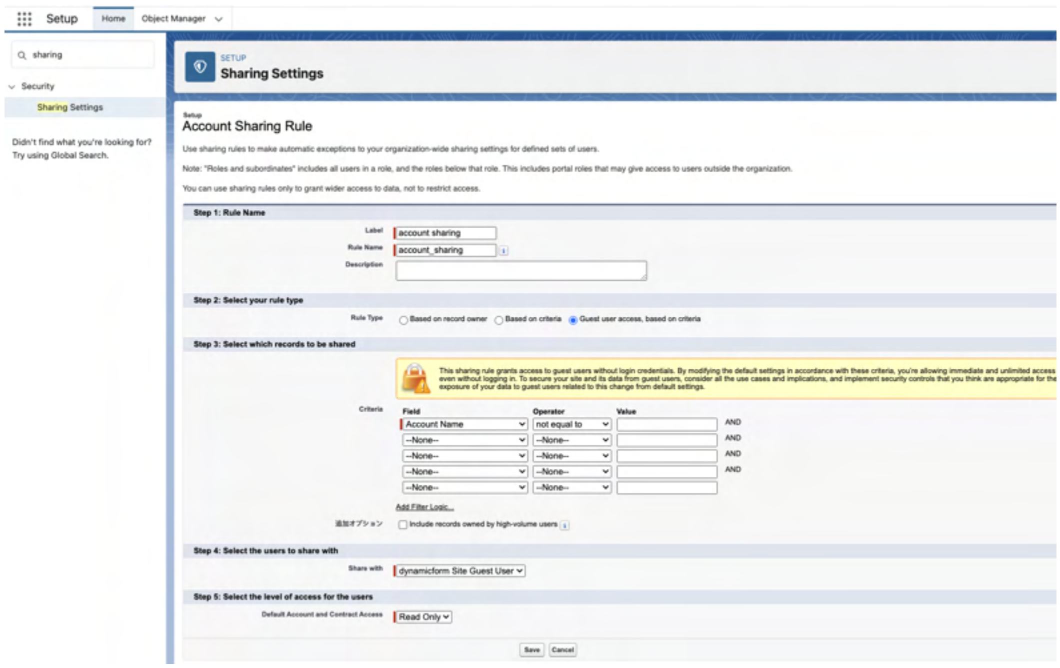
The form is ready to be used.

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.

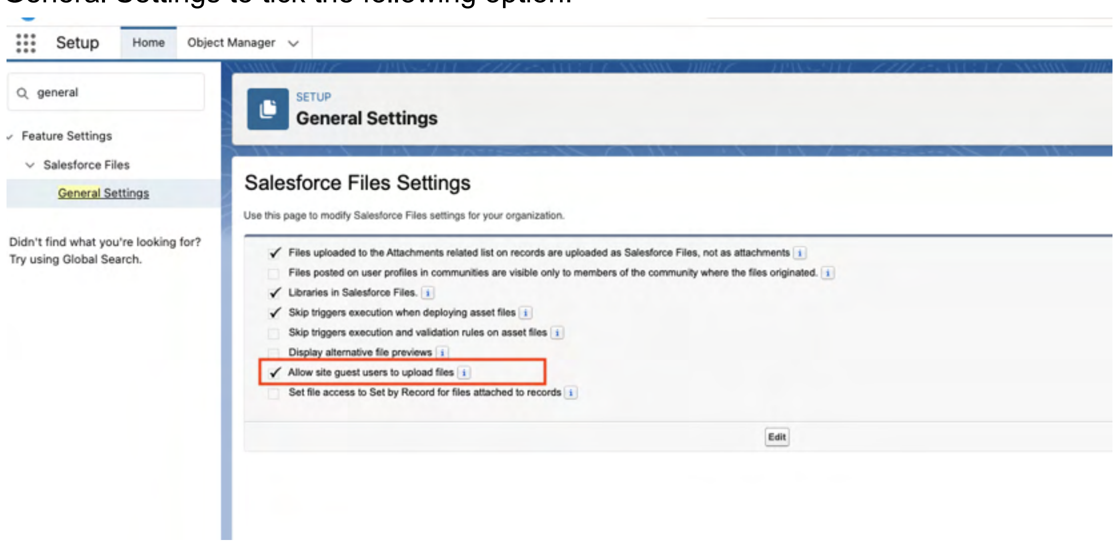


14. If you are using reference fields for the user to select the record in the form, make sure you define the corresponding sharing rules and modify the guest user profile so the end user is able to view or create the records. For example, to let the end user select an account from the account lookup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

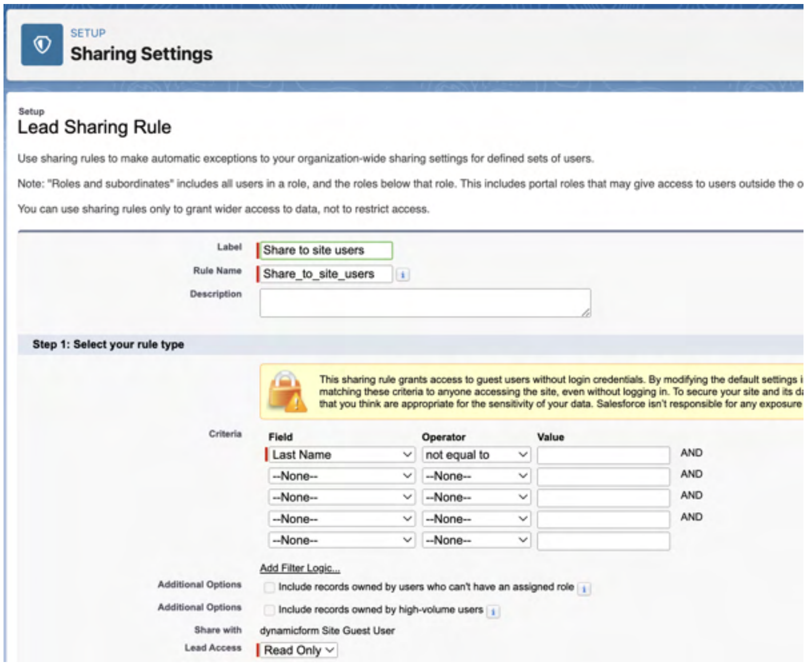


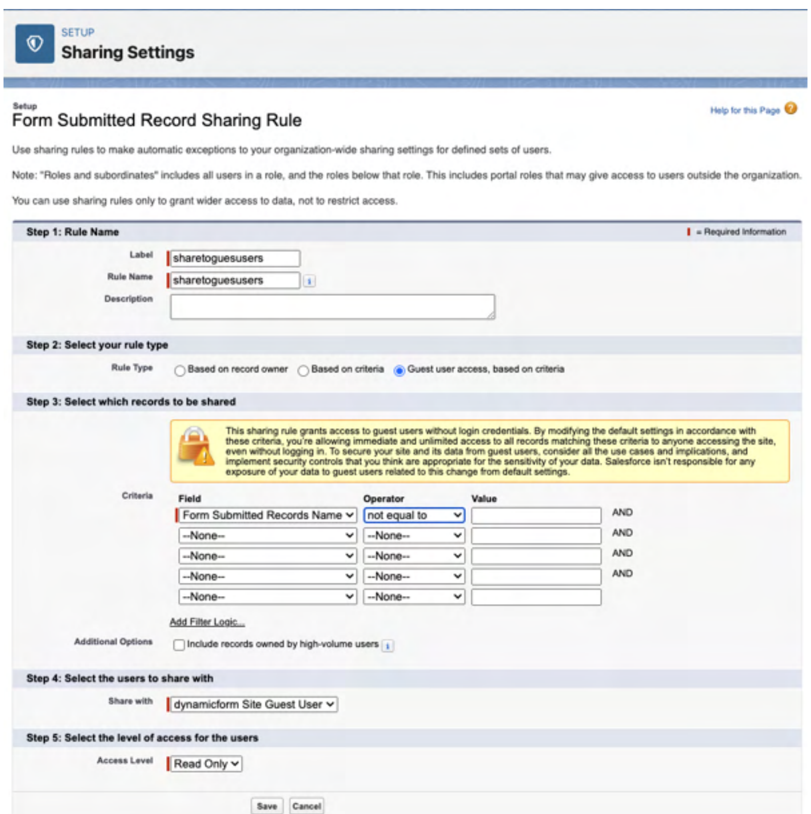


15. If you'd like to enable attachment upload, please go to Settings-> Salesforce Files-> General Settings to tick the following option:



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

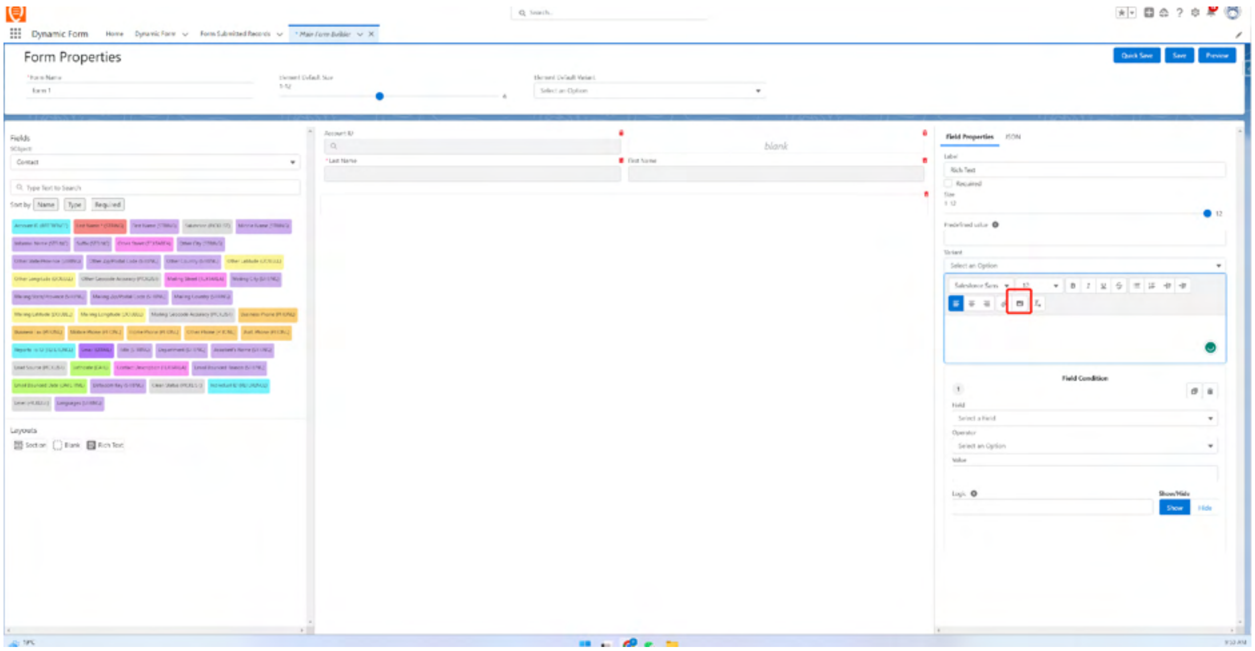




If the guest user has read access to the submitted records and attaches a file, this file will be linked to this specific record. If the guest user does not have read access to the submitted records and attaches a file, this file will be linked to the Form Submitted Records.

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 attemption 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