

Lightning Field Sets Admin Guide

ZennLabs

Installation & Setup

1. Install the Lightning Field Sets package from the AppExchange

- a. Navigate to <https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FYDVoUAP>
- b. Click Get It Now
- c. If prompted, login to the environment you want to install the package in. If already logged in proceed to the next step.
- d. Click on install in production or install in sandbox as appropriate
- e. Review the installation details and click Confirm and Install
- f. Login to the environment you want to install the package in to confirm
- g. Choose to install for admins and click done
- h. You should receive an email when the installation is complete

2. Create a Field Set

- a. Navigate to the object you want to use the component on in Object Manager
- b. Click Field Sets on the left navigation pane
- c. Create a field set with the fields you would like to display

3. Configure the Field Set Form component

- a. Navigate to the Lightning Record Page you want to add the component to, or create a new one
- b. Drag the Field Set Form component under Custom - Managed onto the canvas
- c. Configure the following settings
 - i. **Fieldset Name** - Choose the Field Set you created in step 2 above
 - ii. **Form Title** - Give your component a title so users can easily see what kind of information is in this section. You can also provide the name of a Custom Label to display (see "Use Custom Label" option).
 - iii. **Icon Name** - Type in the category and icon name from the lightning design system library (<https://www.lightningdesignsystem.com/icons/>). The format is "category:iconname". For example if you want to use the add contact action icon enter *action:add_contact*.
 - iv. **Starting Mode** - This will tell the component if it should be in edit mode or view mode when a user first navigates to the record.
 - v. **Columns** - Choose how many columns you would like to display the data in
 - vi. **Read Only** - Make the fields in this component read only by checking this box

- vii. **Use Custom Label** - Select this option to load Form Title as a Custom Label. The value of Form Title must match the name of a local Custom Label. This is recommended for multilingual environments to provide appropriate translations for the configured title of the form.
- d. Save and Activate the Lightning Record Page.

Usage Considerations

Permissions

Lightning Field Sets will automatically respect any field-level security and record-level security that you have in place. No additional configuration is required.

Field Types

The following field types are supported.

- Address: Displays the input address fields, without Google address search capability.
- Checkbox: Displays a checkbox input.
- Currency: Displays an input field for entering monetary data. The user's Salesforce locale determines the currency symbol and separator characters used to format the number. Specifying a different locale is currently not supported for currency.
- Date: Displays an input field for entering a date. The date format is automatically validated against the user's Salesforce locale format.
- Date/Time: Displays input fields for entering a date and time. The date and time formats are automatically validated against the user's Salesforce locale format.
- Email: Displays an input field for entering an email address. The email pattern is automatically validated.
- Geolocation: Displays input fields for entering latitude and longitude in decimal degrees. The latitude field accepts values within -90 and 90, and the longitude field accepts values within -180 and 180.
- Lookup: Displays an input field for creating a relationship between two objects, for example, the account associated to a contact record. For this field type to work in Lightning Field Sets the lookup needs to be on the page layout for the record. The Owner, CreatedBy, and LastModifiedBy fields are not supported for lookups. Creating new records from a lookup field is not supported.
- Name: Displays one or more input fields for setting the name of a record. Input fields can include a single name field or multiple fields. For example, accounts might have a single name while contacts might have a salutation, first name, and last name.
- Number: Displays an input field for entering a number and formats it based on the user's locale.
- Password: Displays an input field for entering a password. Characters you enter are masked.
- Percent: Displays an input field for entering a percentage.
- Phone: Displays an input field for entering a phone number.



- Picklist and multi-select picklist: Displays a picklist or multi-select picklist. Dependent picklists must be defined in your org before you can use them with Lightning Field Sets. Both controlling and dependent fields must be included in your component.
- Text: Displays text input, accepts up to 255 characters.
- Text (Encrypted): Displays the encrypted text input for up to 175 characters.
- Text Area: Displays multi-line text input for up to 255 characters.
- Text Area (Long): Displays multi-line text input for up to 131,072 characters.
- Text Area (Rich): Displays rich text input for bold or underline text, and lists for up to 131,072 characters including the formatting and HTML tags. Unsupported tags and attributes are removed and only their text content is displayed. Images and links are not supported.
- URL: Displays a URL input field which checks for a protocol such as http:// or ftp://.
- Time: Allows users to enter a local time.

The following field types **are not** supported

- Address Compound Field: Allows users to use google search and see all address fields grouped together. Lightning Field Sets does support adding each individual address field such as Street, City, State, etc..

Language Translations

Lightning Field Sets supports multilingual environments and automatically includes native translations for the following languages:

- Chinese (Traditional)
- French
- German
- Hindi
- Italian
- Japanese
- Spanish

Additional languages can be added by creating custom translations for the following custom labels included by the package (Note: Translation Workbench must be enabled):

- Field Set Form Button Cancel
- Field Set Form Button Create
- Field Set Form Button Save
- Field Set Form Missing Fields

The Form Title that is configured for a given instance of the component on a Lightning Page can be set to use a Custom Label that is created within your org. This is recommended, along with creating custom translations for your label, to provide full language support on your configured pages.

Purchasing the App

To purchase the app you will need to login to the AppExchange and install the package in your production org. Once installed in production, you can re-visit the AppExchange listing and you will be presented with a Buy Now option to initiate the AppExchange Checkout process.

Permissions Required: Checkout Enabled (User checkbox) and Manage Billing (System permission).