

# **Jpetto Form Builder User Guide**

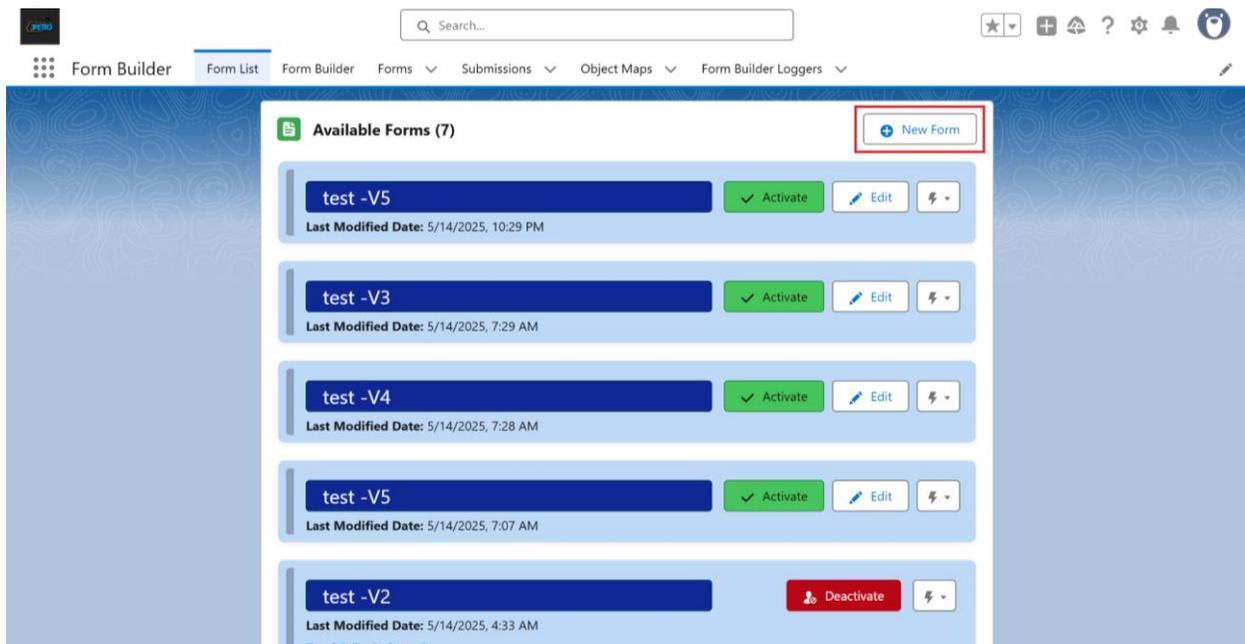
User Guide

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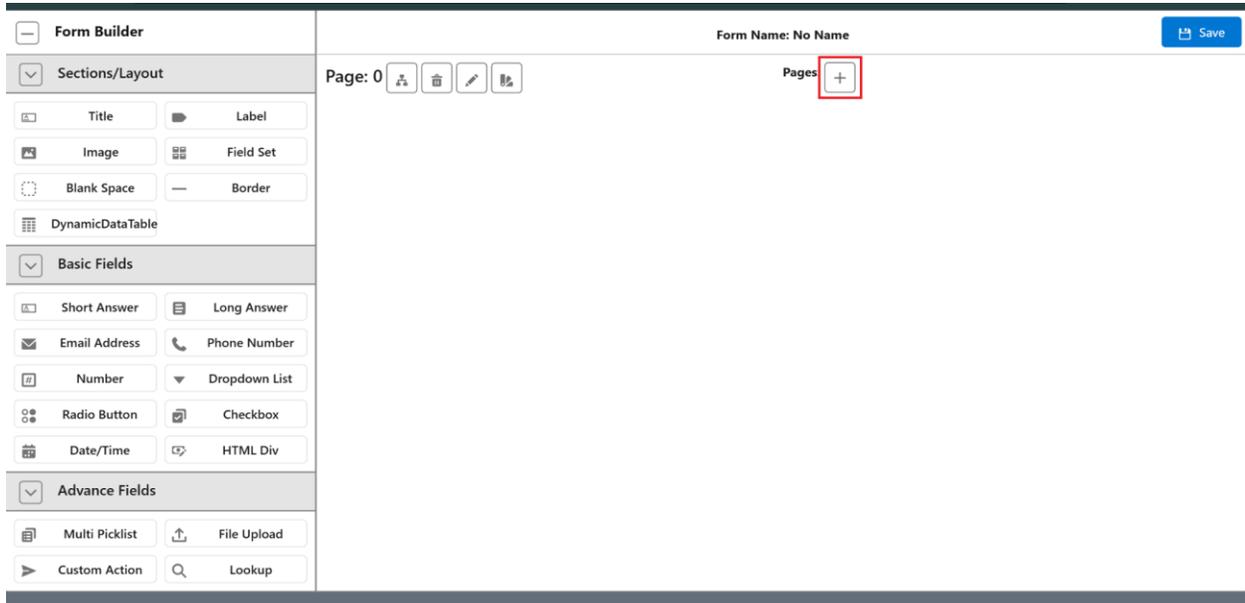
## Step 1: Access Form Builder

- Log in to your Salesforce account.
- Navigate to the Form Builder app by entering the URL or selecting it from the app launcher.
- Click on **Form List** from the navigation menu to view available forms.



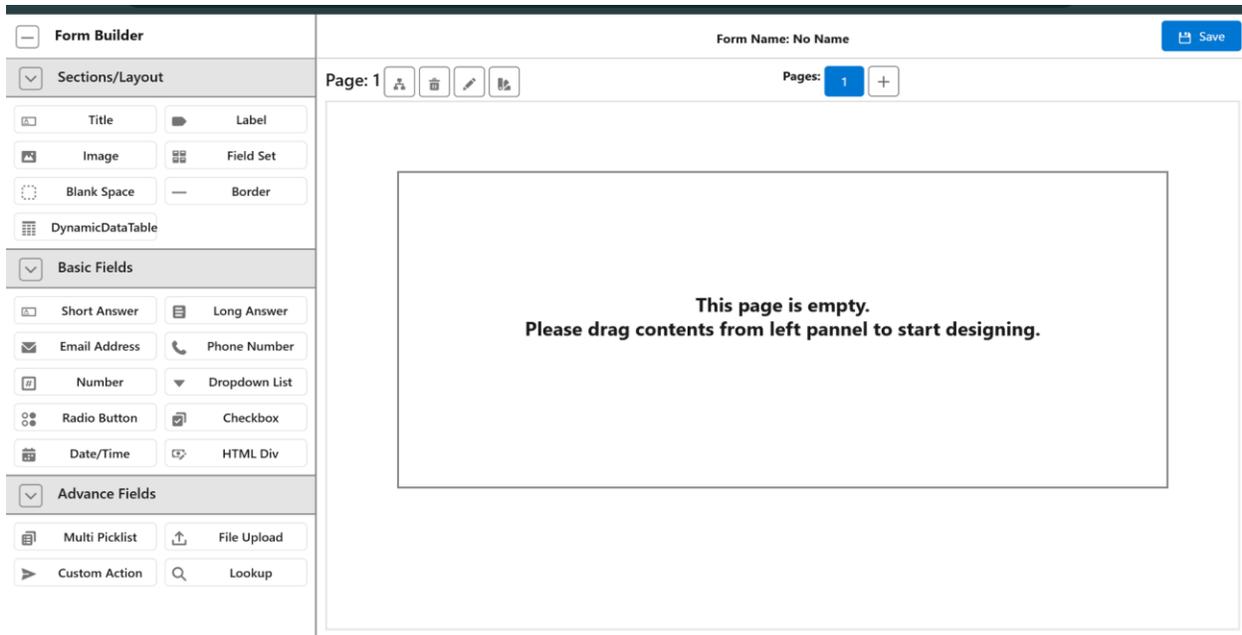
## Step 2: Create a New Form

- On the **Form List** page, click the **+ New Form** button located at the top right.
- A new form creation interface will open.



### Step 3: Add a New Page

- Locate the "Pages:" section on the right side of the interface.
- Click the "+" icon next to "Pages" to add a new page.
- The interface will update to show "Page: 1" with an empty page, Please drag content from the left panel to start designing.



## Step 4: Adding Fields to the Form

### 1. Drag and Drop Fields:

- From the left panel, select a field (e.g., Short Answer, Long Answer, Email Address, Phone Number, etc.).
- Drag the chosen field into the empty page area.
- Example: Drag "Short Answer", "Long Answer", "Email Address", "Phone Number" to create a form as shown in the below screenshot.

The screenshot displays the Form Builder interface. On the left is a sidebar menu with the following sections:

- Form Builder** (main title)
- Sections/Layout**
  - Title
  - Image
  - Blank Space
  - DynamicDataTable
  - Label
  - Field Set
  - Border
- Basic Fields**
  - Short Answer
  - Email Address
  - Number
  - Radio Button
  - Date/Time
  - Long Answer
  - Phone Number
  - Dropdown List
  - Checkbox
  - HTML Div
- Advance Fields**
  - Multi Picklist
  - Custom Action
  - File Upload
  - Lookup

The main canvas shows a form titled "Form Name: No Name" with a "Save" button. The form is on "Page: 1" and contains the following fields:

- Label**: A text input field.
- Short-Answer**: A text input field.
- Long Answer**: A large text area.
- Email-Address**: A text input field.
- Phone-Number**: A text input field.

Each field has a pencil icon for editing and a trash icon for deletion.

## 2. Edit Fields in Form Builder:

- After designing your form (e.g., "Customer Form"), locate the field you wish to edit (e.g., "Customer Name", "Address", "Email", "Phone-Number") on the form page.
- Click the pencil icon next to the field to open the edit options.
- In the "General" or "Logic" section, modify the field properties such as Field Label, URL Param Name, or other settings like "Do not clear existing value" or "Placeholder" as needed.
- Use the "Show Builder" or "Show Formula Editor" buttons under the "Logic" section to add or adjust logic for the field if required.
- Click the "Save Changes" button to apply the changes to the field and update the form design.

**Logic**

Add Logic to: Customer Name

Show Builder

Show Formula Editor

**General**

shortAnswer

Field Label

Customer Name

URL Param Name

Do not clear existing value

Fiscal Year Field

Holding Submission Type

Dispatch for Response only?

Show spinner when input change?

Listen to hide event?

Select an Option

Placeholder

Supporting text (Help)

Form Name: No Name

Page: 1

Pages: 1 +

Short-Answer

Long Answer

Email-Address

Phone-Number

Supporting text (Help)

Merge Field

None

Required

Read Only

Hidden

Hide Label

Auto Populate

Shown Help Icon

Layout

1-of-1

1-of-2

1-of-3

Save Changes

**Field Specific**

Field Size

Min Length

0

Max Length

0

Default Value

Get Values from Dynamic Table Results

Form Name: No Name

Page: 1

Pages: 1 +

Customer Name

Long Answer

Email-Address

Phone-Number

## Step 5: Save Form

### 1. Initiate Save

- Click the "Save" button located at the top right of the Form Builder interface.

The screenshot shows the 'Form Builder' interface. On the left is a sidebar with categories: 'Sections/Layout' (Title, Label, Image, Field Set, Blank Space, Border, DynamicDataTable), 'Basic Fields' (Short Answer, Long Answer, Email Address, Phone Number, Number, Dropdown List, Radio Button, Checkbox, Date/Time, HTML Div), and 'Advance Fields' (Multi Picklist, File Upload, Custom Action, Lookup). The main area displays a form titled 'Form Name: No Name' with a 'Save' button in the top right. Below the title are 'Page: 1' and 'Pages: 1 +' controls. The form contains four fields: 'Customer Name' (text input), 'Long Answer' (text area), 'Email-Address' (text input), and 'Phone-Number' (text input). Each field has edit and delete icons.

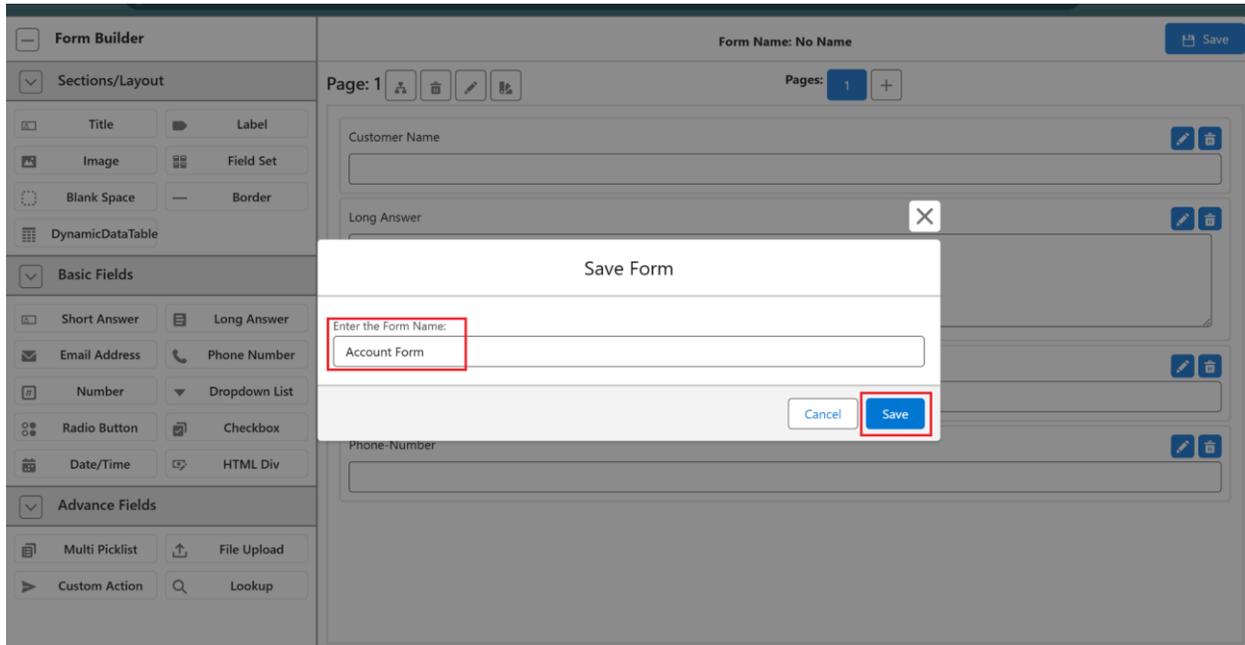
## 2. Enter Form Name

- A "Save Form" dialog box will appear.
- In the "Enter the Form Name" field, type a unique name for your form (e.g., "Account Form").

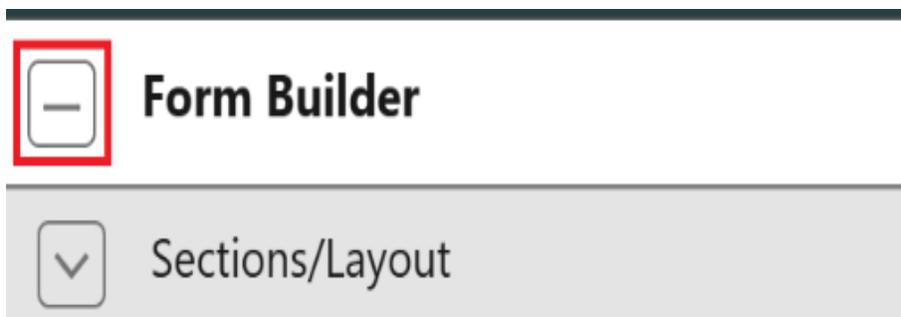
This screenshot shows the same 'Form Builder' interface as above, but with a 'Save Form' dialog box open in the center. The dialog box has a title bar with a close button (X) and the text 'Save Form'. Below the title bar is a text input field labeled 'Enter the Form Name:'. At the bottom of the dialog box are two buttons: 'Cancel' and 'Save'. The background form is dimmed.

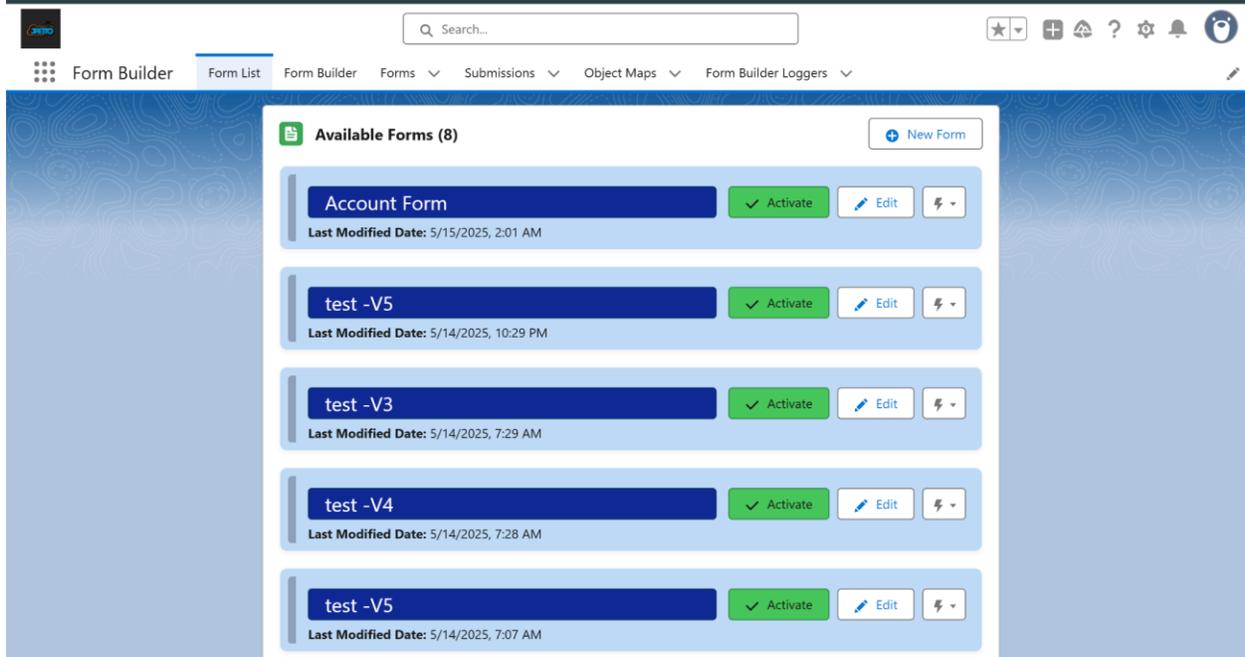
### 3. Confirm and Save

- Click the "Save" button in the dialog box to save your form.
- Click "Cancel" if you wish to discard the save action and return to the design interface.



After saving, click the "Form Builder(-)" icon to redirect to the Form List page, where you can view the created form along with other available forms.

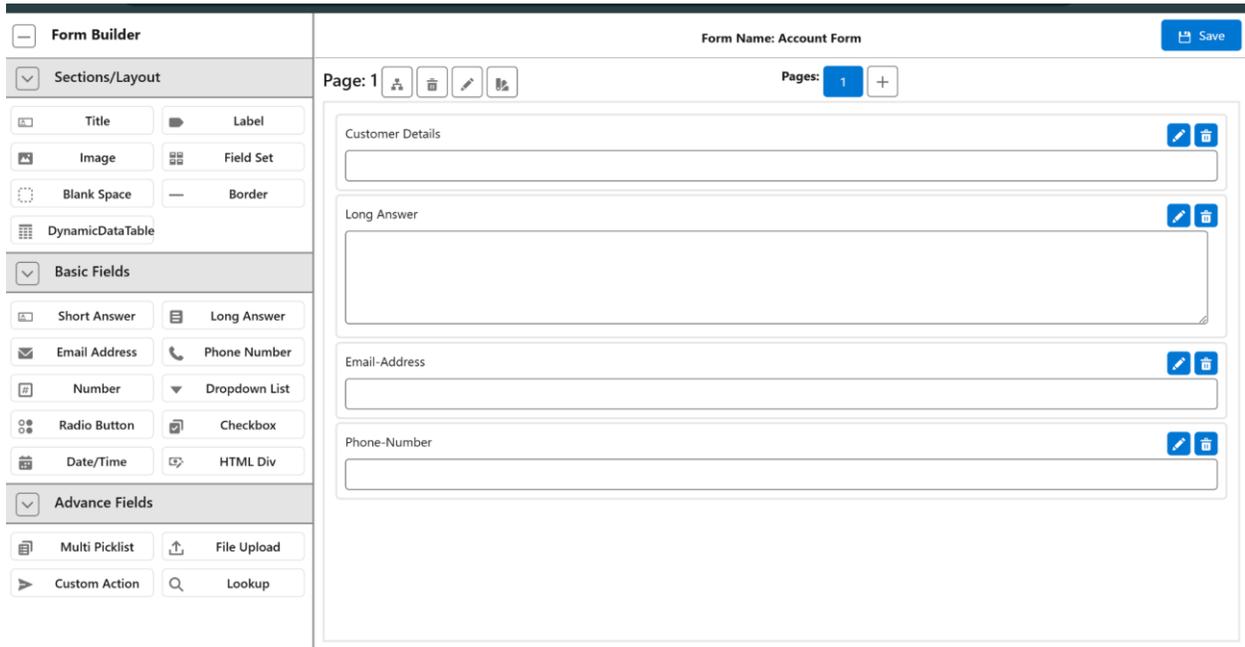
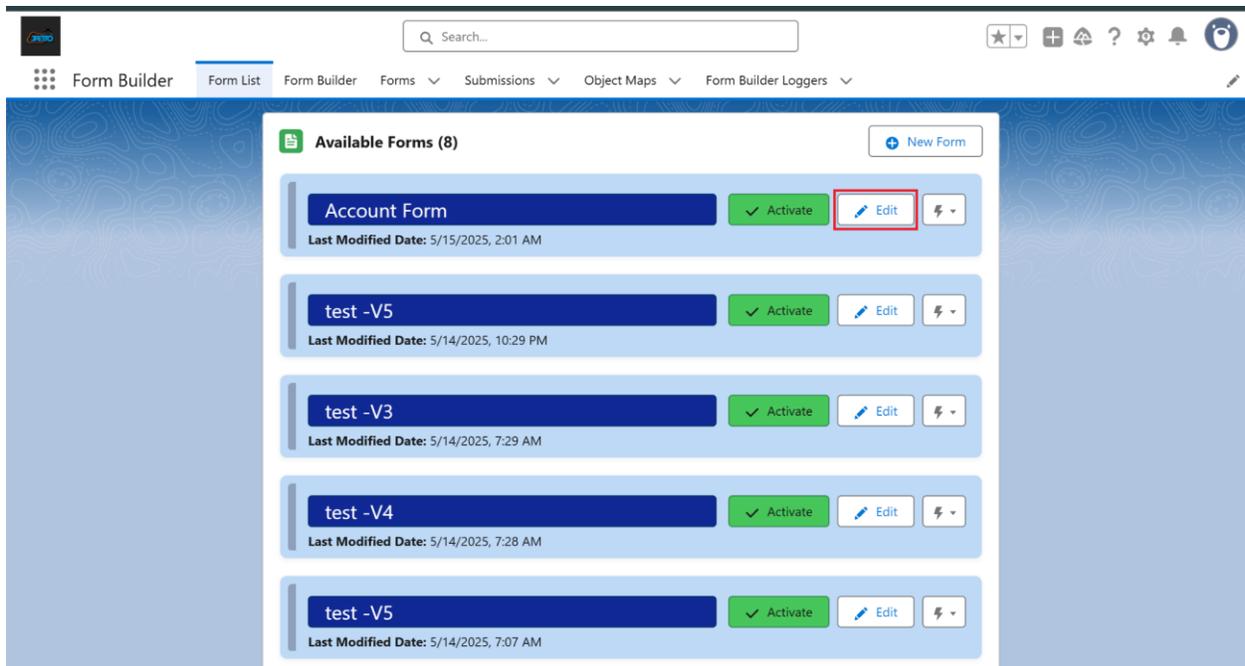




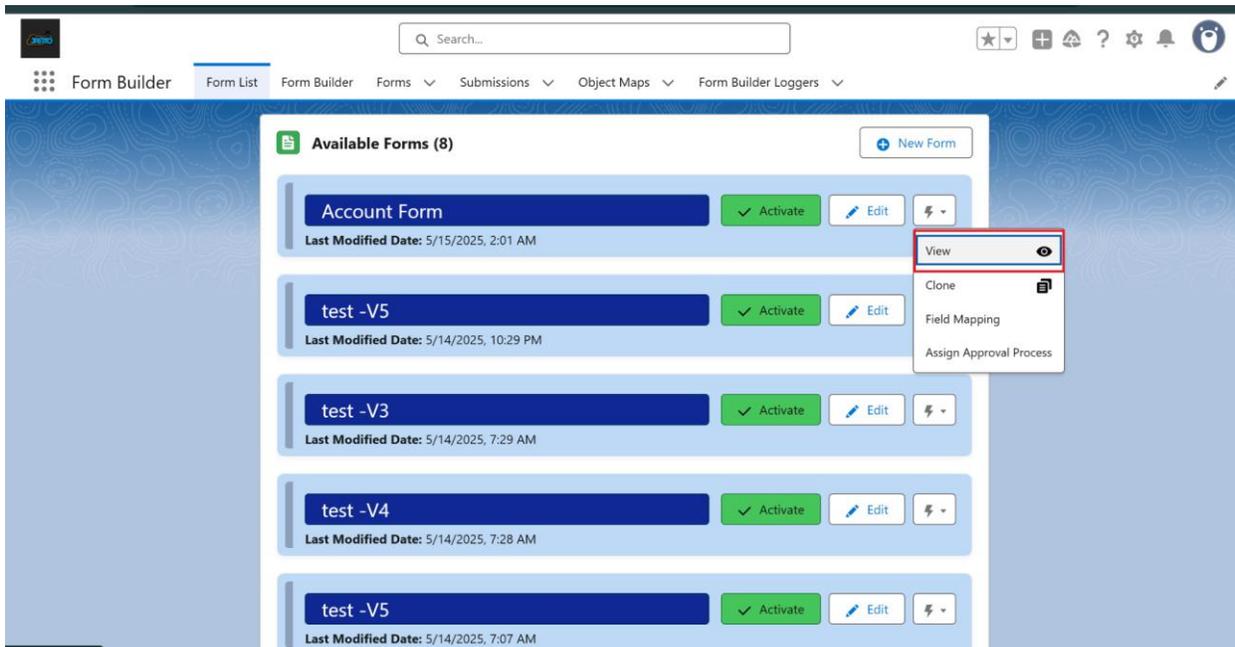
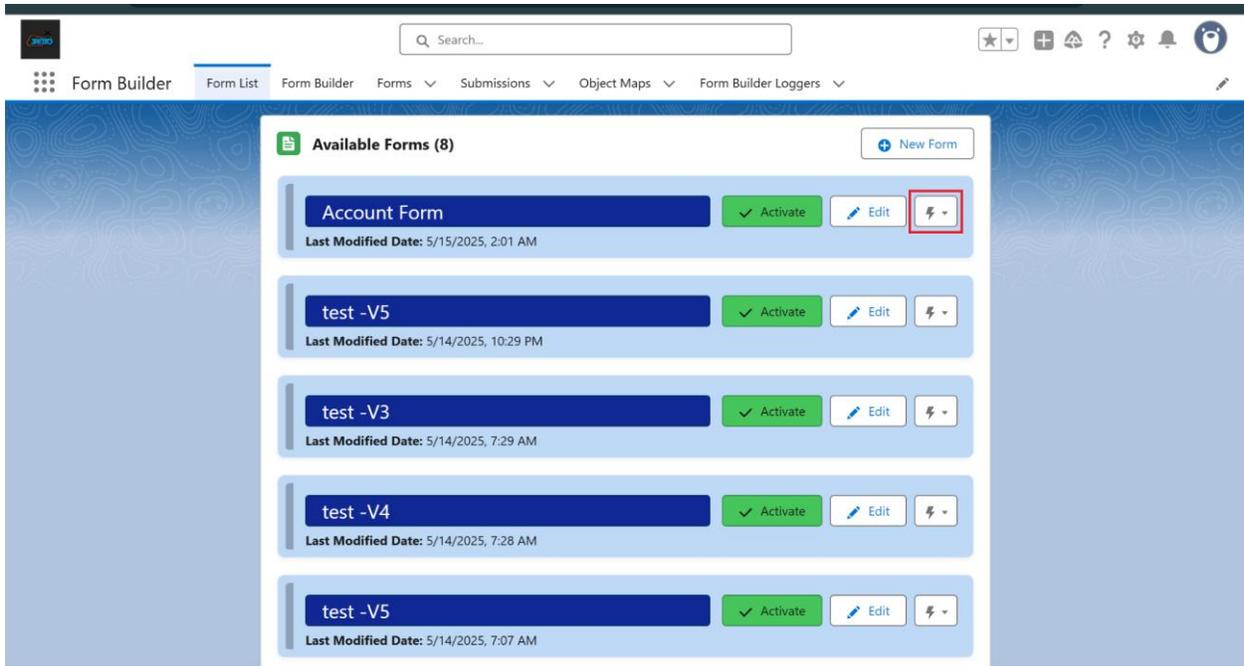
## Step 6: Edit and View the form

### Edit an Existing Form:

- After saving your form, locate it in the Form List page.
- To edit your form, click the "Edit" button next to the desired form (e.g., "Account Form").
- This will redirect you to the Form Builder interface, where you can modify the form design and settings.



After that, **For View** go back to Form List, Click on dropdown and the "View" option from the dropdown menu next to the form (accessible by clicking the three-dot icon or right-clicking the form).



This will display the form details for review.

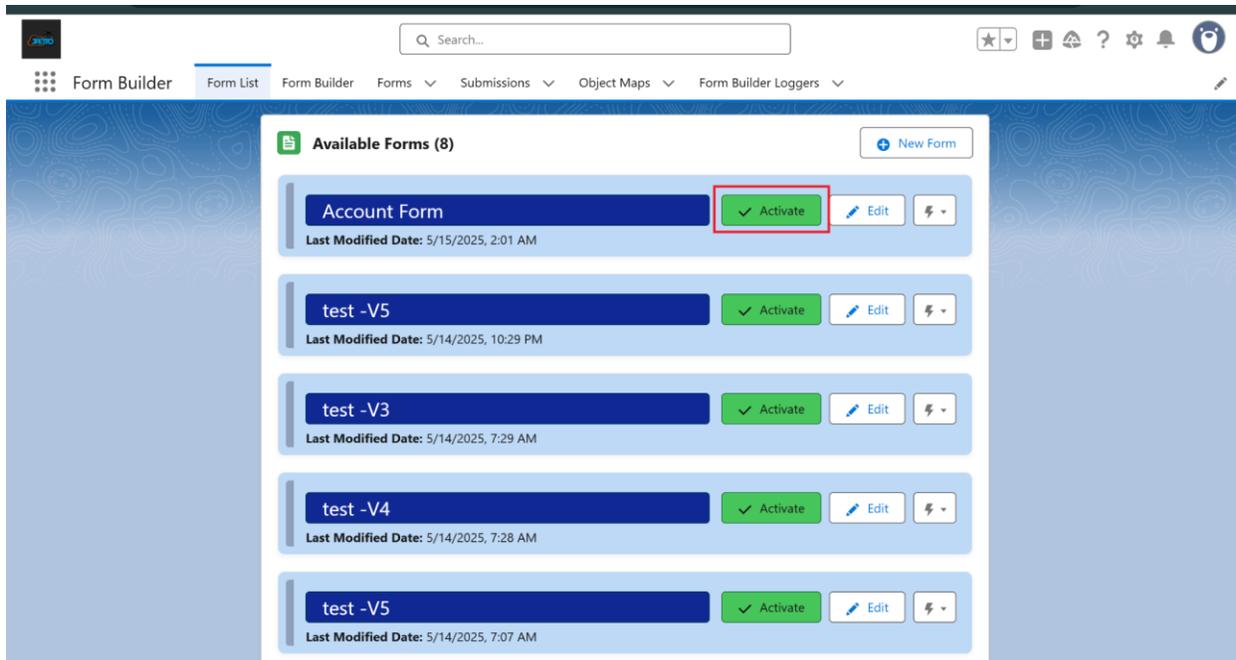
The screenshot displays the Form Builder application interface. At the top, there is a search bar and a navigation menu with items: Form Builder, Form List, Form Builder, Forms, Submissions, Object Maps, and Form Builder Loggers. The main content area features a form with the following fields:

- Customer Details**: A single-line text input field.
- Long Answer**: A multi-line text area with a scrollable bottom edge.
- Email-Address**: A single-line text input field with a red "x" icon on the right side.
- Phone-Number**: A single-line text input field.

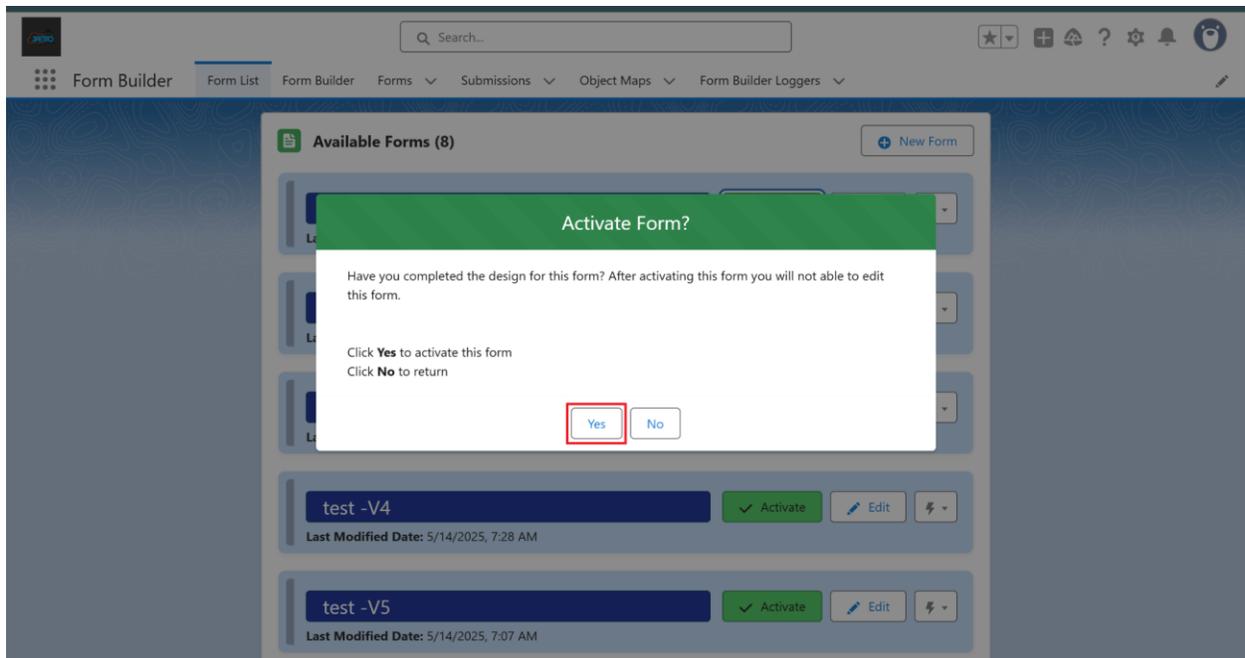
At the bottom of the form, there are two blue buttons: "Submit" and "Save".

## Step 7: Activate a Form from Form List

- After reviewing the form data, return to the Form List page by navigating back.
- Locate the desired form (e.g., "Account Form") in the list of Available Forms.
- Click the "Activate" button next to the form.

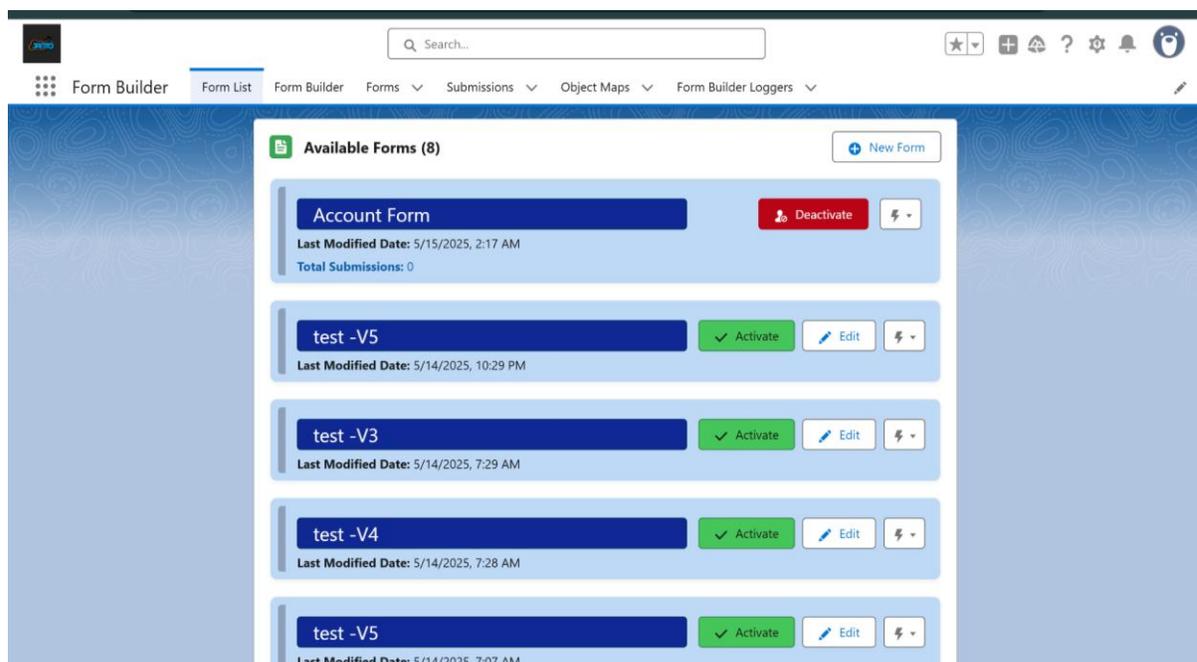


- A confirmation dialog will appear asking, "Have you completed the design for this form? After activating this form you will not be able to edit this form".
- Click "Yes" to activate the form, or "No" to return without activating.



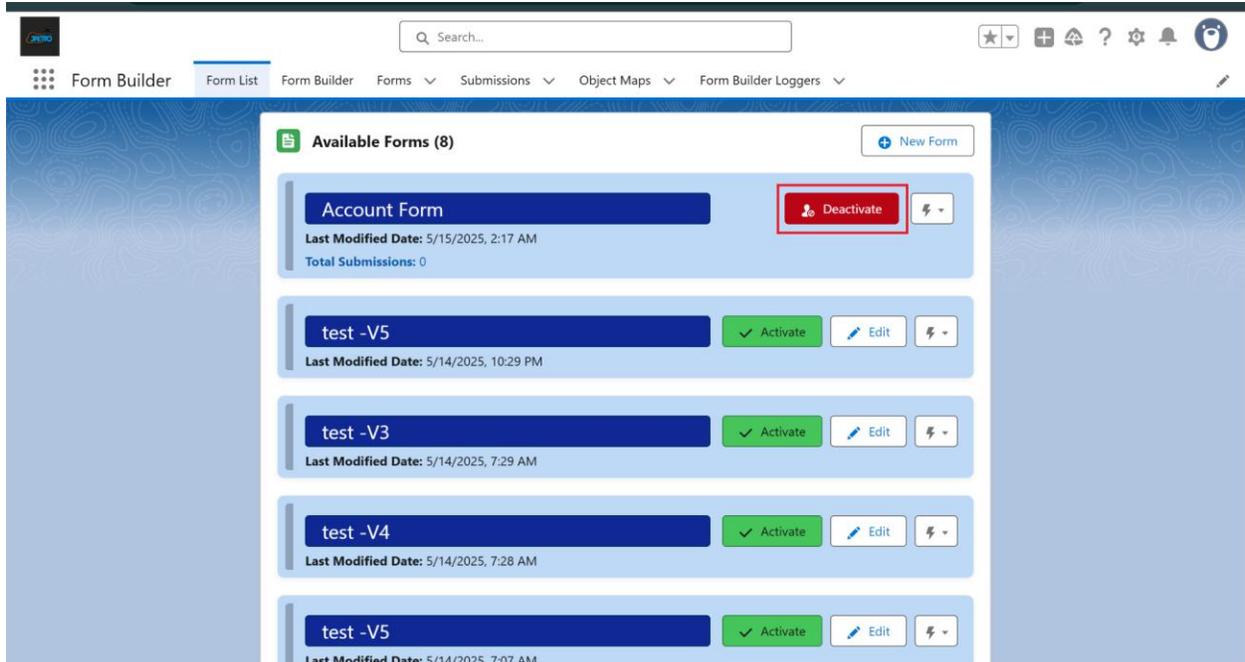
After clicking “Yes”,

Once the form is activated, the “Activate” button is replaced with a “Deactivate” button for that specific form.

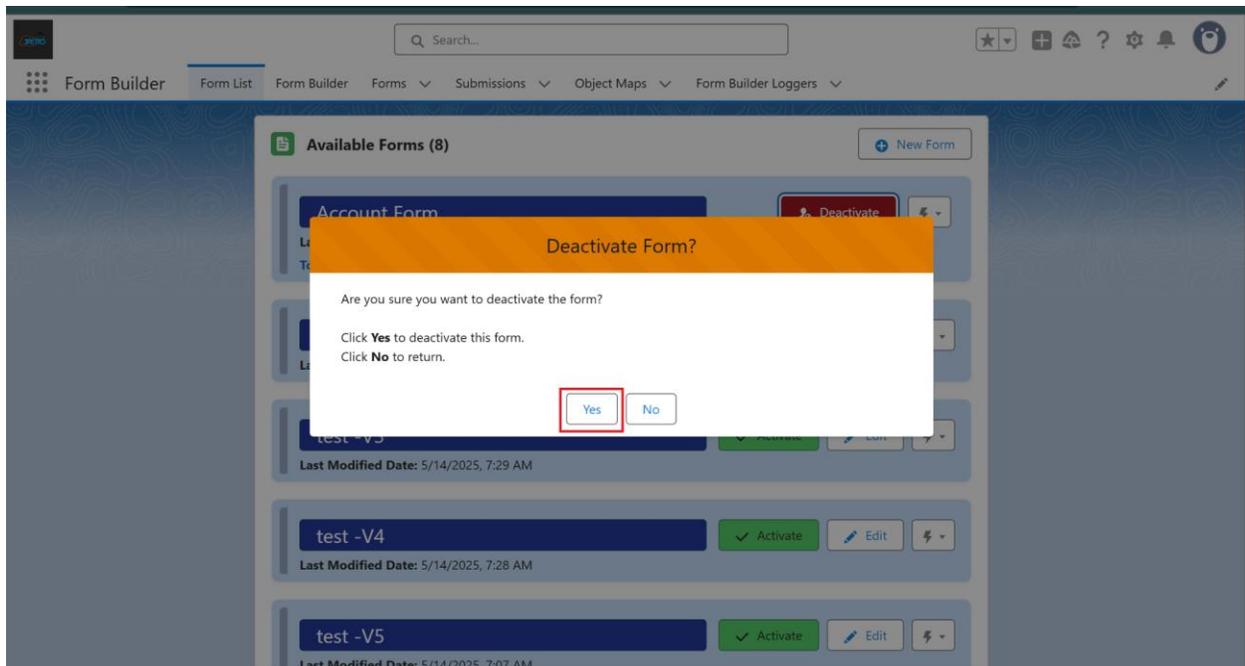


## Step 8: Deactivate a Form from Form List

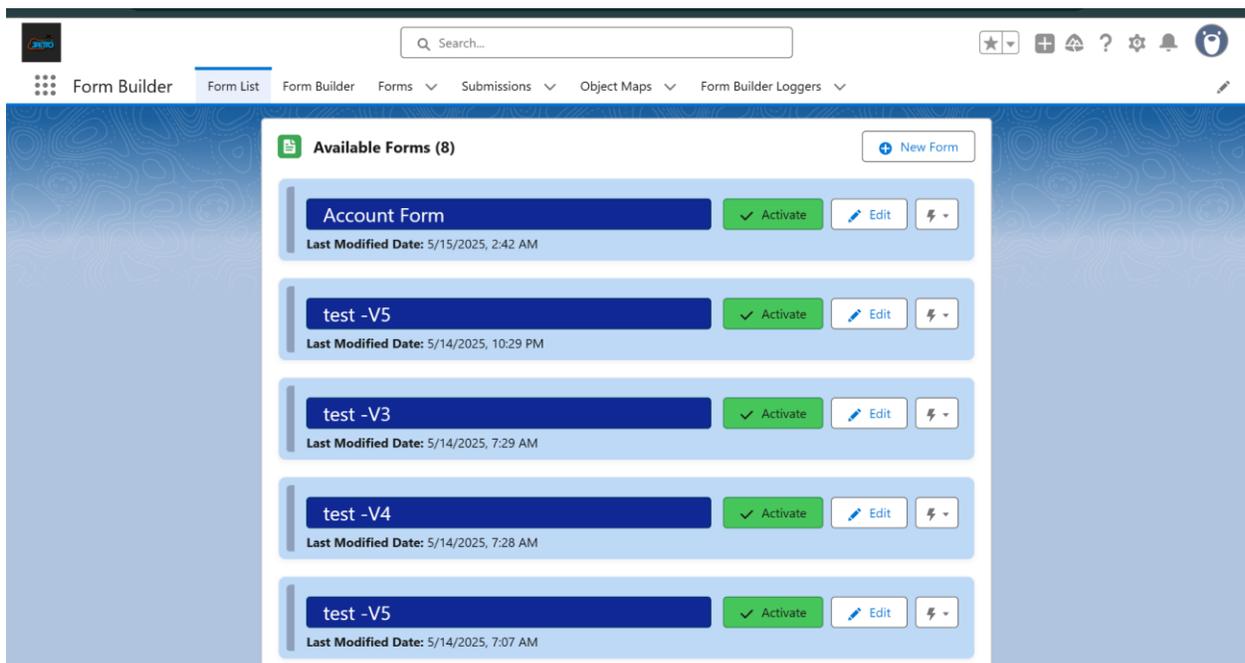
- Locate the form you want to deactivate in the Forms list.
- Click the “Deactivate” button next to the dropdown.



- A confirmation dialog will appear asking,  
Are you sure you want to deactivate the form?  
Click "Yes" to deactivate the form, or "No" to return without deactivating.



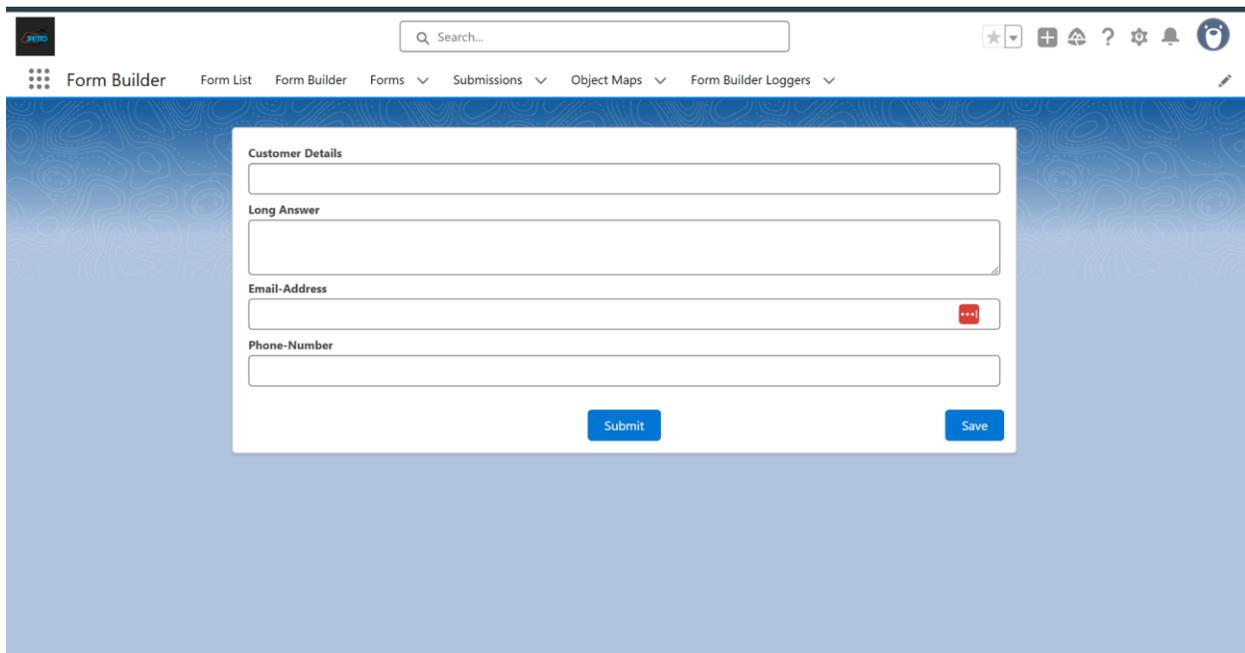
- After Deactivate, the form will return to its editable state.
- The “Activate”, “Edit”, “Dropdown” buttons will reappear.
- Once you are done reviewing or modifying the form, you can activate it again



Again, View the form from the dropdown for Submit and Save the data.

## Step 9: Submit and Save Form Data

- Enter the required data into the respective fields of the form (e.g., "Customer Details", "Address", "Email", "Phone-Number") as shown.
- Review the entered information to ensure accuracy.
- Click the "Submit" button to process the form data.
- Click the "Save" button to save the form with the entered data and return to the Form Builder interface.



The screenshot displays the Form Builder interface. At the top, there is a search bar and a navigation menu with options: Form Builder, Form List, Form Builder, Forms, Submissions, Object Maps, and Form Builder Loggers. The main content area shows a form with the following fields:

- Customer Details**: A single-line text input field.
- Long Answer**: A multi-line text input field.
- Email-Address**: A single-line text input field with a red "x" icon on the right.
- Phone-Number**: A single-line text input field.

At the bottom of the form, there are two blue buttons: "Submit" and "Save".

The screenshot shows a web application interface for a form builder. At the top, there is a search bar and a navigation menu with items like 'Form Builder', 'Form List', 'Form Builder', 'Forms', 'Submissions', 'Object Maps', and 'Form Builder Loggers'. The main content area displays a form with the following fields:

- Customer Details:** A text input field containing 'John Deo'.
- Long Answer:** A text area containing 'Apt 58', 'Springfield, IL 62704', and 'USA'.
- Email-Address:** A text input field containing 'john@gmail.com'.
- Phone-Number:** A text input field containing '+1(415)555-2671'.

At the bottom of the form, there are two buttons: a blue 'Submit' button (highlighted with a red box) and a blue 'Save' button.

Next,

- After clicking on the Submit button.
- The form will enter Preview Mode, displaying the entered data for verification with a message: "PREVIEW MODE - PLEASE VERIFY YOUR RESPONSES BEFORE THE FINAL SUBMISSION."
- Review the data to ensure accuracy.
- Click the "Final Submission" button to submit the form data permanently.

Alternatively, click the "Edit" button to make changes if needed before final submission.

Customer Details  
John Deo

Long Answer  
Apt 58  
Springfield, IL 62704  
USA

Email-Address  
john@gmail.com

Phone-Number  
+1(415)555-2671

PREVIEW MODE - PLEASE VERIFY YOUR RESPONSES BEFORE THE FINAL SUBMISSION.

Final Submission Edit

Customer Details  
John Doe

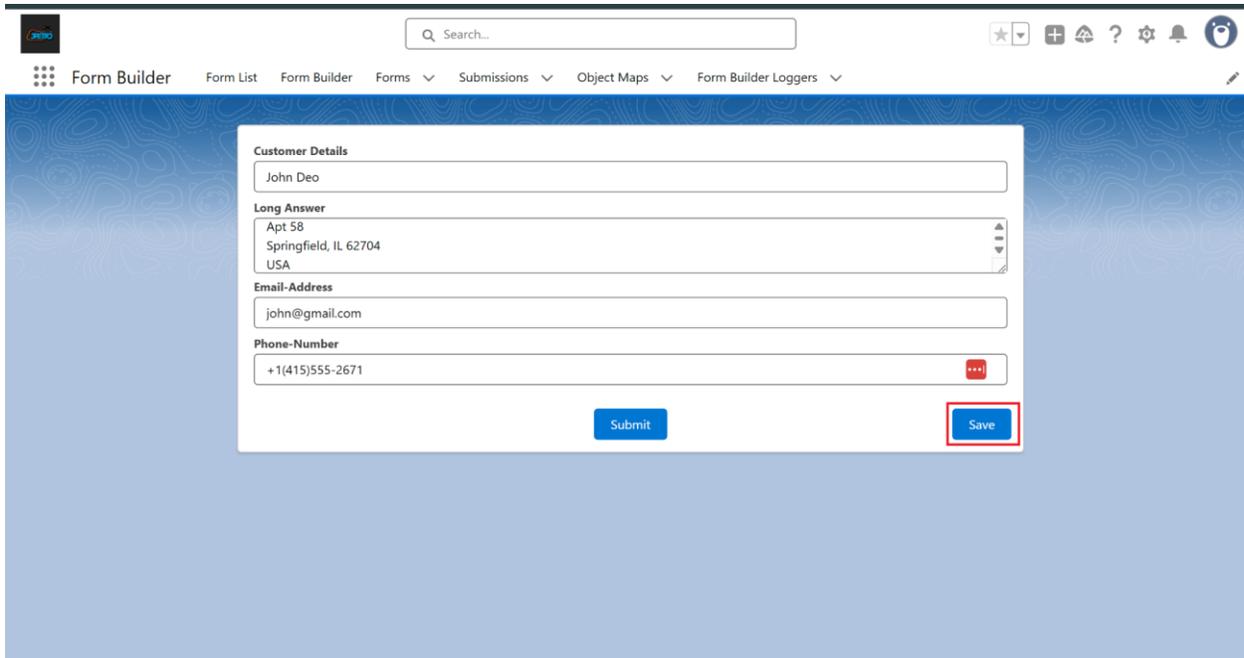
Long Answer  
Apt 5B  
Springfield, IL 62704  
USA

Email  
john@gmail.com

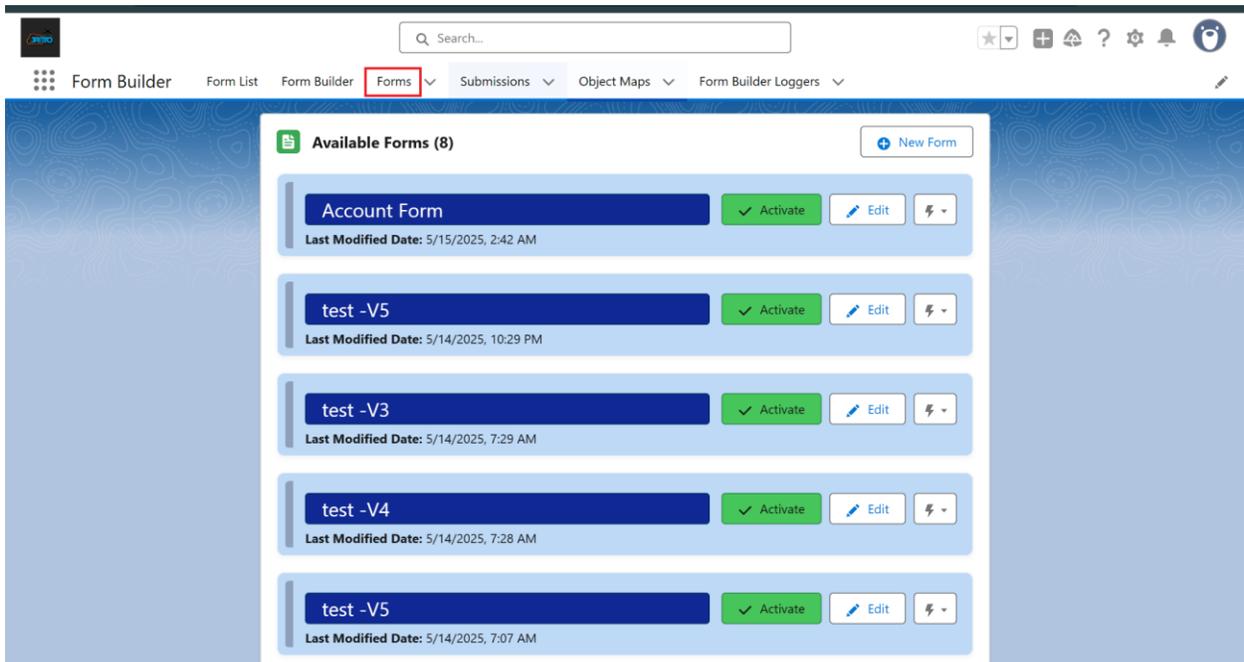
Phone-Number  
+1 (415) 555-2671

Submit Save

After that, submitting click on save and it will save the data in the form object.



Click on Forms Object,



Form Builder Form List Form Builder Forms Submissions Object Maps Form Builder Loggers

Forms **Recently Viewed** New Import Change Owner Assign Label

6 items • Updated a few seconds ago Search this list...

	Forms Name	
1	Account Form	
2	test -V5	
3	test -V3	
4	test -V4	
5	test -V5	
6	test -V2	

Click on the Account form to view its details.

Form Builder Form List Form Builder Forms Submissions Object Maps Form Builder Loggers

Forms **Account Form** New Contact Edit New Opportunity

Related **Details**

Forms Name: Account Form Owner: User User

Forms Id: 0000008

Status: Inactive

Form Data: [{"pageId": "1", "fieldList": [{"URLParamName": "null", "isDispatchForCurrentResponse": "false", "hasFiscalYearField": "false", "hasSubmissionTypeField": "false", "myId": "7192935", "parentId": "null", "actionType": "Short-Answer", "doNotClear": "false", "actionLabel": "Customer Details", "dataSourceRefresh": "null", "itemsFullLayout": "None", "placeholder": "undefined", "dataSourceConfig": {}}, {"myId": "6076829", "parentId": "null", "actionType": "LongAnswer", "doNotClear": "false", "actionLabel": "Long"}]}]

**Activity**

Filters: All time • All activities • All types Refresh • Expand All • View All

**Upcoming & Overdue**

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.