

Wed July 24 10AM

ONE PAGE TO RULE THEM ALL

Rita Leverett

JULY 22-24, 2024





CGI

Deloitte.

foxit



OneMerge



celigo



PRESENTERS



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USE CASE

A nonprofit organization is creating a Case Management system using Salesforce, centering around the Case object.



USE CASE (cont.)

The teams supporting the Cases are:

- Access
- Donor Care
- Donor Management
- General Triage
- Gift Processing
- Operating Systems
- Reporting
- Research



USE CASE (cont.)

In the interest of security and ease of use, instead of having a Case details page displaying potentially non-relevant fields, the business wants to restrict field access based on the functionality of each team.



SOLUTION 1

It was suggested that multiple lightning record pages be developed for each team. This requires each team to have its own profile. Since the Salesforce instance has reduced the number of profiles in favor of permission set groups and permissions, this solution was rejected.




SOLUTION 2

Another suggestion was to use a Dynamic Form on the Case object and control visibility with filters and permissions. This solution would provide ease of maintenance as well as more flexible and granular control over visibility.




This is the original page with lots of sections.

Case Owner  Rita Leverett	Contact Phone
Case Number 00001011	Contact Email rmleverett+pp@gmail.com
Contact Name Peter Parker	
Account Name The Avengers	
▼ Additional Information	
Case Origin Self	Status New
	Priority Medium
▼ Description Information	
Subject I don't know what to do	
Description	
Internal Comments	
▼ Gift Information	
Last Gift Amount \$0.00	Last Gift Date
▼ Access Information	
Access Type	Access Comments
Access Description	
▼ Web Information	
Date/Time Opened 5/3/2024 5:00 PM	Date/Time Closed
Web Email	Web Company
Web Name	Web Phone



Upgrade to Dynamic Forms

Page > Record Detail

-  You can configure record detail sections and fields right inside the Lightning App Builder. Upgrade to Dynamic Forms, and start putting individual fields and sections anywhere on the page.

[Upgrade Now](#)




Dynamic Forms

Choose the page layout that contains the fields and sections that you want to migrate. If your page supports both desktop and phone, we add a Record Detail - Mobile component to the page along with the fields and sections from the page layout.

- 1 Don't worry, we won't change the page layout. We're simply grabbing the fields and section information from it. If you have more fields and sections than we can handle, we migrate up to the first 100 sections in each region and the first 100 fields in each column. The rest are dropped, even if they're required fields. If you change your mind after you make the switch, you can click the undo arrow to roll back the changes.

Migrate fields and sections into an Accordion component to improve page performance. 1

LAYOUT NAME	LAST MODIFIED USER	LAST MODIFIED DATE	
 Case Layout	Rita Leverett	Jul 8, 2024, 04:15:48 PM	View Layout



Dynamic Form (part 1)

Details Activity

▼ Case Information

Contact Name Contact Name	Contact Owner Case Owner
Contact Phone Contact Phone	Case Number Case Number
Contact Email Contact Email	Account Name Account Name

▼ Additional Information

Case Origin Case Origin	Status Status
Date/Time Opened Date/Time Opened	Priority Priority
Date/Time Closed Date/Time Closed	

▼ Description Information

Subject Subject	Internal Comments Internal Comments
Description Description	Check if you love Stabby Check if you love Stabby



Dynamic Form (part 2)

Gift Information	
Last Gift Amount Last Gift Amount	Last Gift Date Last Gift Date
Access Information	
Access Type Access Type	Access Comments Access Comments
Access Description Access Description	
Web Information	
Web Name Web Name	Web Phone Web Phone
Web Email Web Email	Web Company Web Company
System Information	
Created By Created By	Last Modified By Last Modified By
	Last Modified Date Last Modified Date

Set Component Visibility for a field section, for example, Web Information.

Page > Field Section

Label ⓘ

Web Information

Columns

- 1 Column
- 2 Columns

Align fields horizontally ⓘ

∨ Set Component Visibility

Filters

1

Permissions > Custom Permission ×
> Webslinger Equal true

+ Add Filter



DEMO



Q & A



RESOURCES

Slide Deck - <https://timbilamusicco.com/timbilaforce/>

Quick Start: Dynamic Forms -

<https://trailhead.salesforce.com/content/learn/projects/quick-start-dynamic-forms>



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THANK YOU

