



# CG Deloitte. Foxit

















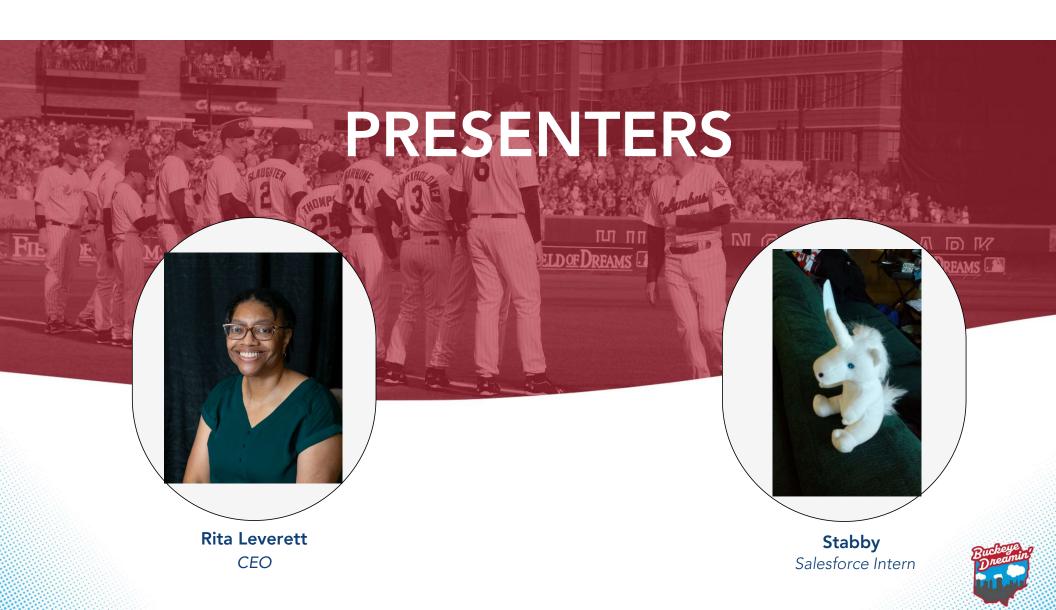












### **CONTACT**

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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.

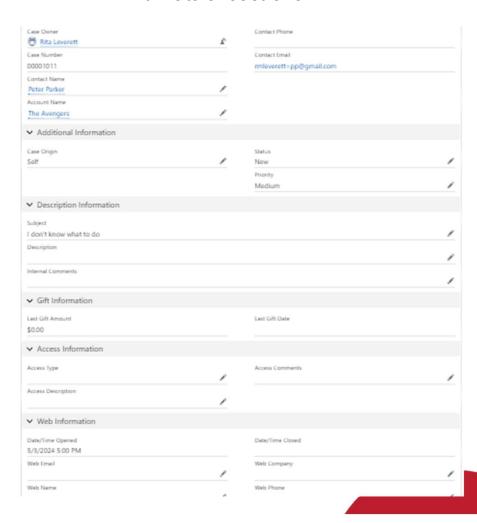


### **SOLUTION 2**

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.





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

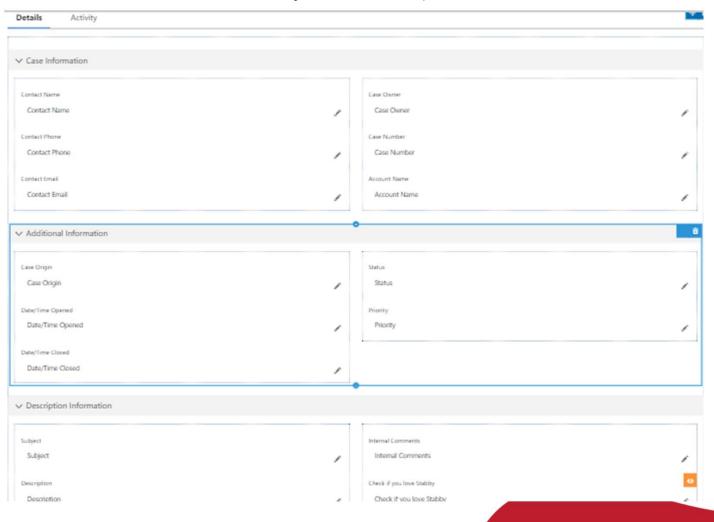
Detail - Mobile component to the page along with the fields and sections from the page layout.

- On'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.

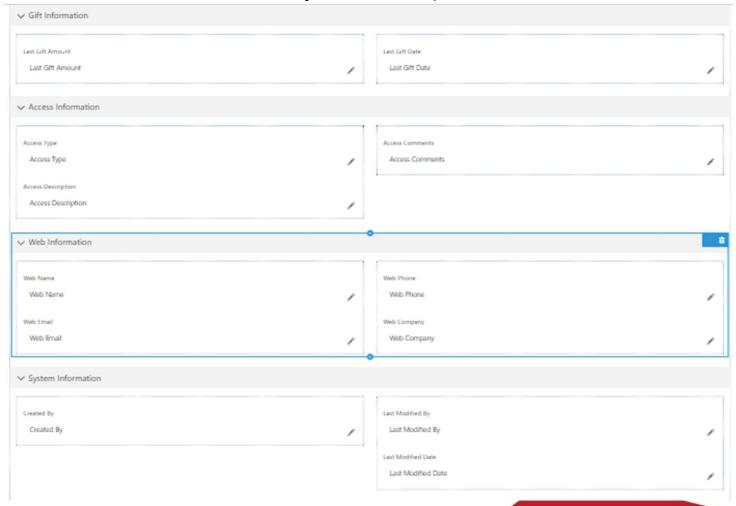
LAYOUT NAME $\vee$	LAST MODIFIED USER V	LAST MODIFIED DATE V	~
Case Layout	Rita Leverett	Jul 8, 2024, 04:15:48 PM	View Layout



#### Dynamic Form (part 1)

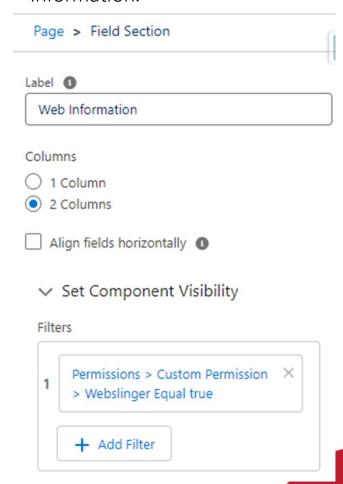


#### Dynamic Form (part 2)





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





# DEMO



# A & D



## RESOURCES

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

Quick Start: Dynamic Forms -

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



