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Live, Eat, and breathe Salesforce

- Salesforce **Certified Veteran**
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- Salesforce **Evangelist, Speaker** at multiple Salesforce and Product Events
- Upcoming **Author** of *"11 Blunders of Bleeding Money with Salesforce Partners"*
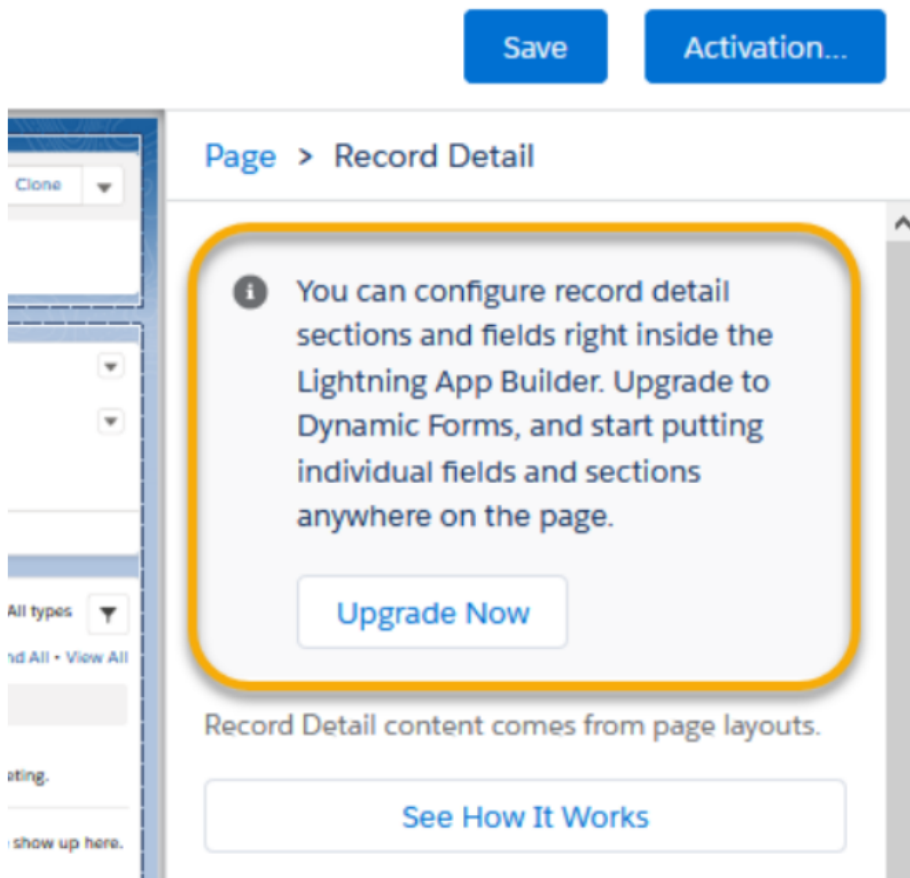
About Us

How to Set Up Dynamic Forms

Let's move further to understand the steps to set up Dynamic Forms for your Salesforce platform.
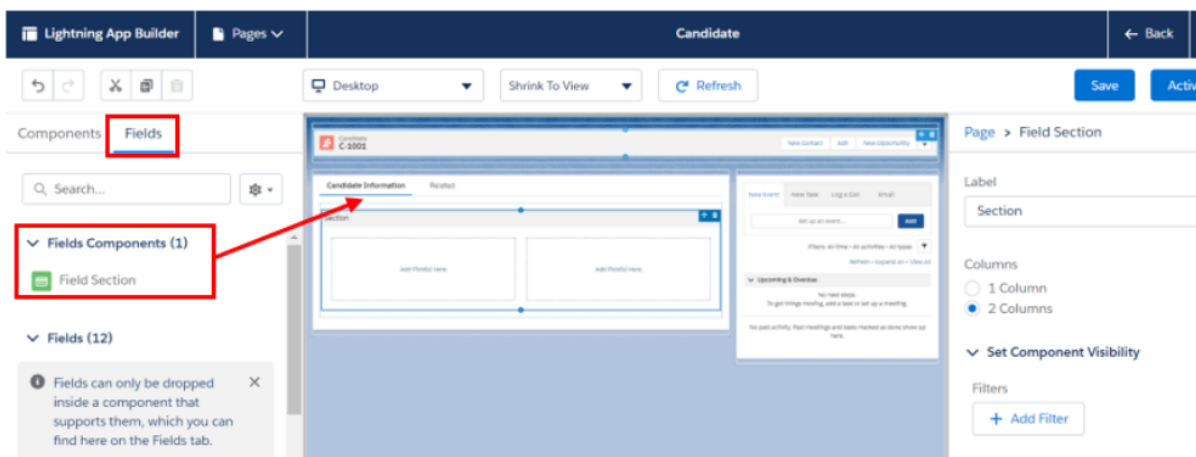
1. **Create or migrate a page**

Open the Lightning page you wish to upgrade for any custom object. Select the "Record Detail" or "Highlights Panel" component.

Then you have to click "Upgrade Now".

You can even create a new page. To do so, go to your custom object, select "Lightning Record Pages", and then click "New".
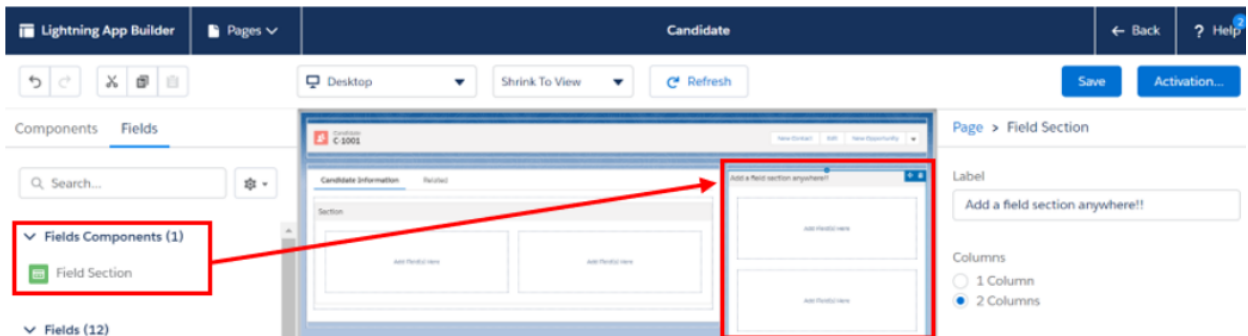
After migrating or creating a new Lightning record page, you will see the option to add a "Field Section" component. This option will enable you to add fields directly to the Lightning record page.
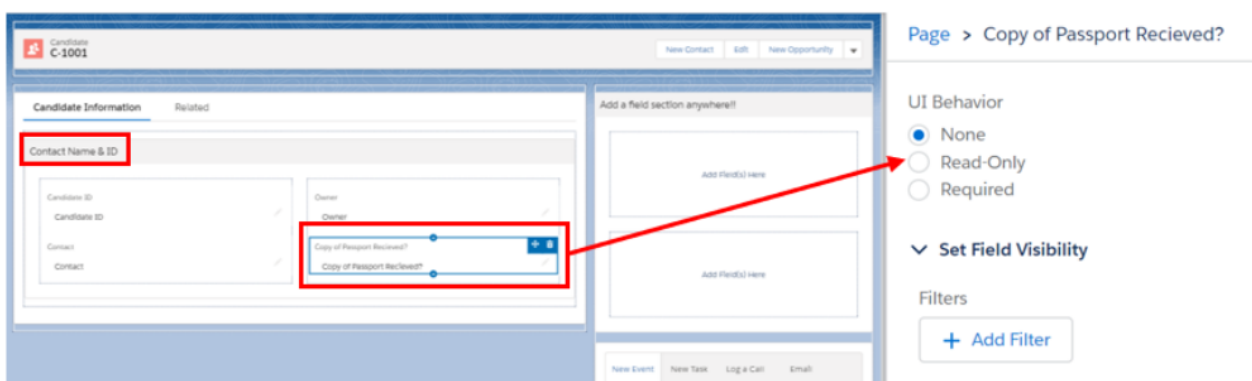
2. Add fields to a component

After adding the "Field Section" to your page, you can add individual fields.

You can add a "Field Section" in many places, not just in tabs.

Now, let's add some fields, considering they should be visible to anyone who views the record.
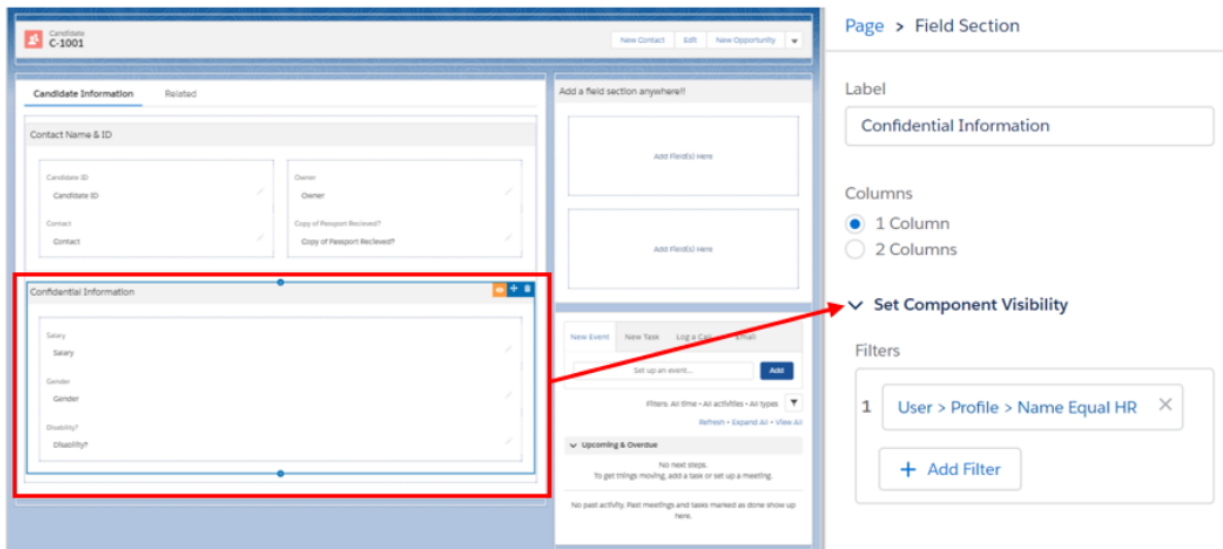
- Remember to name each field section.
- You can choose the UI behavior such as "Read Only" or "Required" with a selected field.

3. Make your fields and components conditionally visible

You can make both fields and field components conditionally visible.
In the example below, a new "Fields Section" component is added titled "Confidential Information", and made visible only to users that have the Profile name "HR":

You should note that Field visibility and Field Section visibility behave differently.

Even though both are dynamic, Fields are super dynamic as they get evaluated live (as a user makes changes).

This means that it is possible that a field may appear/disappear while a user is editing a record. But on the contrary, Field Sections are only evaluated after clicking Save. This means that a new section won't appear/disappear until the user saves the record.
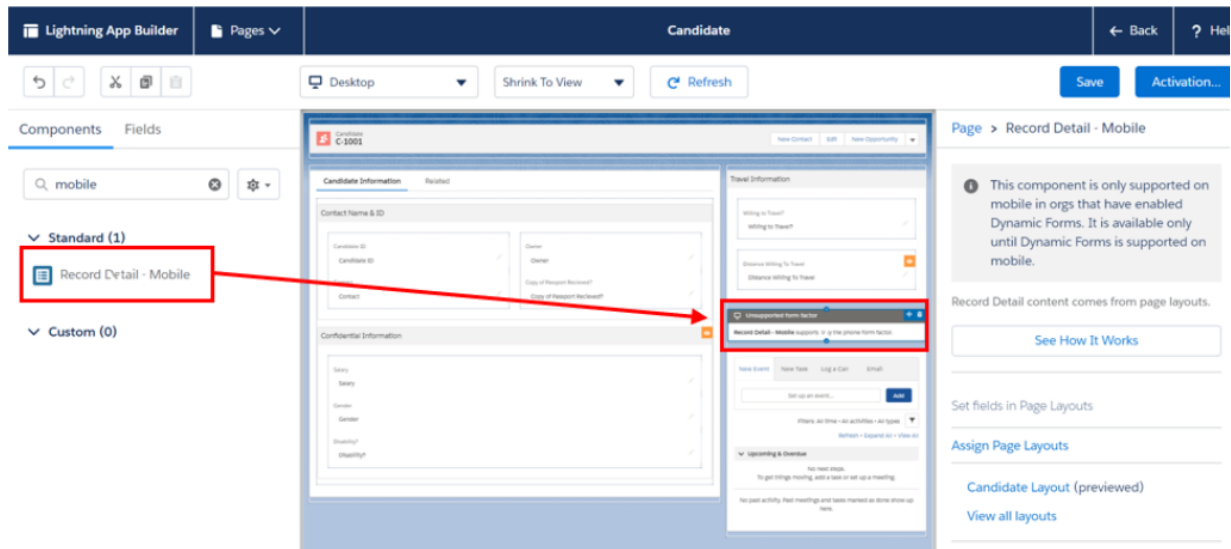
4. Plan page performance

You should remember that tabs and accordions load when selected. That's why, instead of adding lots of "Field Section" components to the initial page, consider using tabs or the accordion for improved performance and load speed.

5. Add a mobile component

You have to add the "Record Detail – Mobile" component to the pages you create to allow mobile users to see the "Details" fields.

You have to follow this step as the new "Field Section" component is not available on mobile. Any page that has been migrated will include this component automatically.

Remember that while setting the Dynamic Forms, you'll still need to maintain the standard page layout as the mobile interface uses the page layout – not Dynamic Forms!

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Thank You

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