

Use the FormAssembly Lightning Component in Salesforce Experience Cloud (Previously Communities)

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Related Articles

Prior To Setup

The following steps will walk you through using FormAssembly's Lightning Component to publish a form within your Salesforce Experience Cloud Site.

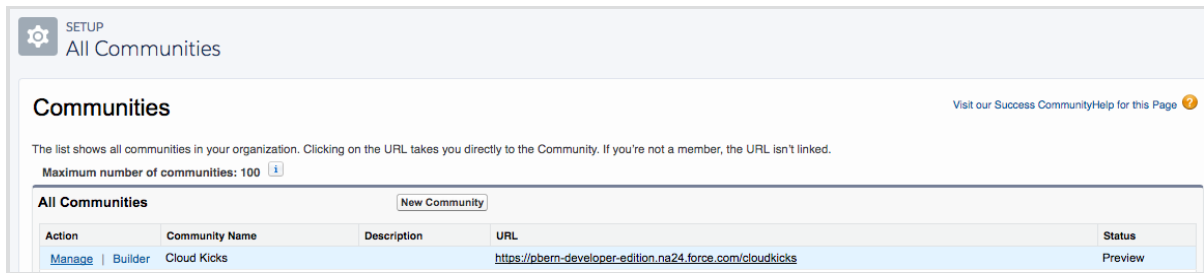
Before starting these steps, please ensure you have installed [FormAssembly for AppExchange](#). Follow the steps outlined [here](#) to install and set up the application.

Things to Note:

- You do **not** need to use the [Salesforce Community Authentication](#) (available for Team plan customers and up) to use our Lightning component and embed a form on your Experience Cloud Page. This is an option if you would like to restrict your forms to your Experience Cloud Users only, and it is not required.
- If you are a Team plan user and have the Salesforce Add-on, you may use the [Salesforce Prefill Connector](#) with the Salesforce Communities Authentication enabled (although it is not required) to prefill Experience Cloud Users' information.
- You do **not** need to set up [Single Sign-On \(SSO\)](#) between Salesforce and FormAssembly to use the FormAssembly Lightning component.
- The Lightning component can be installed in a sandbox by using this [link](#).
- Support for Experience Cloud varies across device types and browsers. Please refer to [Salesforce for information about their browser support requirements for communities](#).

Configuration Steps

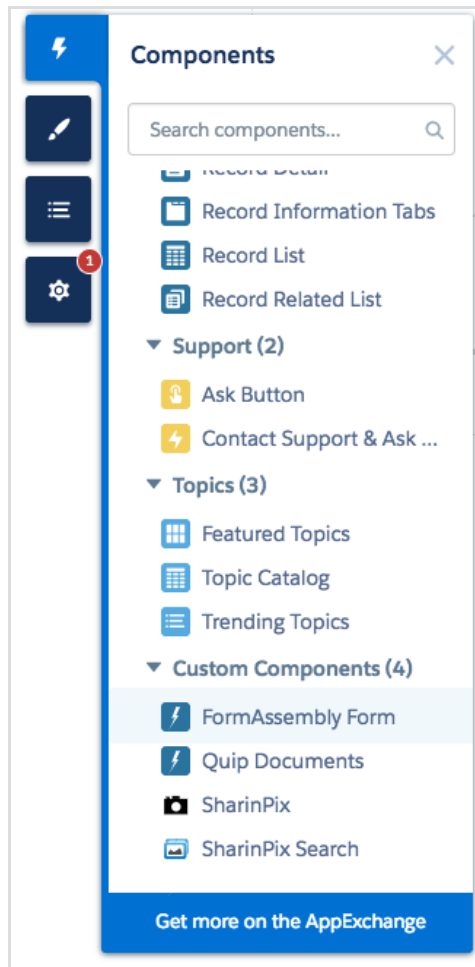
1. Go to **Setup → Feature Settings → Digital Experiences → All Sites** and click **Builder** for the Experience Cloud Site where you plan to publish your form.



2. Go to the **Experience Cloud Builder**, find the page where you want to publish the form, and select **Components**.



3. Next, select **FormAssembly Form** under **Custom Components**. If you do not see this option, ensure you have [installed FormAssembly from the AppExchange](#) and have updated it to at least version 2.34.



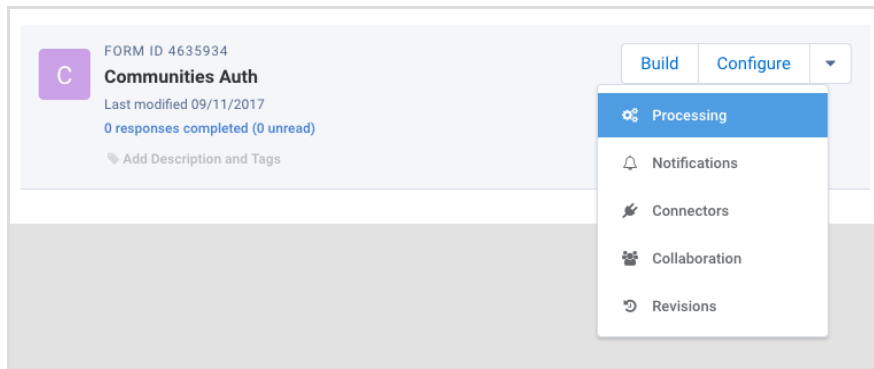
4. Drag the form to the place on your page where you would like it. Then, **open a new tab or browser window** and log in to your FormAssembly account.

5. Within FormAssembly, find the form you would like to publish and copy the Form ID of the form you would like to publish.

6. Return to the Experience Cloud Builder page and paste the Form ID into the Lightning Component dialog box.

Note: If you are not using the [Salesforce Communities Authentication](#), you do not need to complete the remaining steps. You only need to add the Form ID (found on the Publishing page in FormAssembly) to the component dialog box. If you are using Communities Authentication, please continue with the following steps.

7. Return to your FormAssembly account, find the form you would like to publish, and go to **Configure → Processing**.



8. Under **Allow Responses From** select **Salesforce Community User**.

COMMUNITIES AUTH ▾

Processing Options

FORM AVAILABILITY:

STATUS:

☒ Active

☐ Archived (no processing)

ALLOW RESPONSES FROM:

Salesforce Community User ▾

[configure](#)

9. Click **Configure** and then enter your Portal Login URL and Salesforce Org ID. Additional information and details on this process can be found on our [Salesforce Communities Authentication page](#).

COMMUNITIES AUTH (FORM ID: 4635934) ▾

Salesforce Community Authentication

This feature restricts access to your form by only allowing in users who have successfully logged into your Salesforce customer portal.

STEP 1. PORTAL ADDRESS

Enter your Portal Login URL and your Salesforce Organization ID. Unauthenticated visitors will be redirected to the portal login page when they try to access the form.

PORTAL LOGIN URL:

Example: https://na6.salesforce.com/secur/login_portal.jsp?orgId=12345678&portalId=123456

ORGANIZATION ID:

Example: 00D80000000bABC. Your Organization ID can be found on Salesforce.com, on the Company Information page at Your Name | Setup | Company Profile | Company Information.

10. Next, scroll down to **Step 2. FormAssembly Lightning Component**. Copy and paste these two values to the Lightning Component dialog box on your Experience Cloud Builder page.

STEP 2. FORMASSEMBLY LIGHTNING COMPONENT

Please [refer to the documentation](#) to install the latest FormAssembly for AppExchange package (v2.6 or above). Then use the following information when adding the **FormAssembly Lightning Component** to a Community page.

FORM ID:

4642405

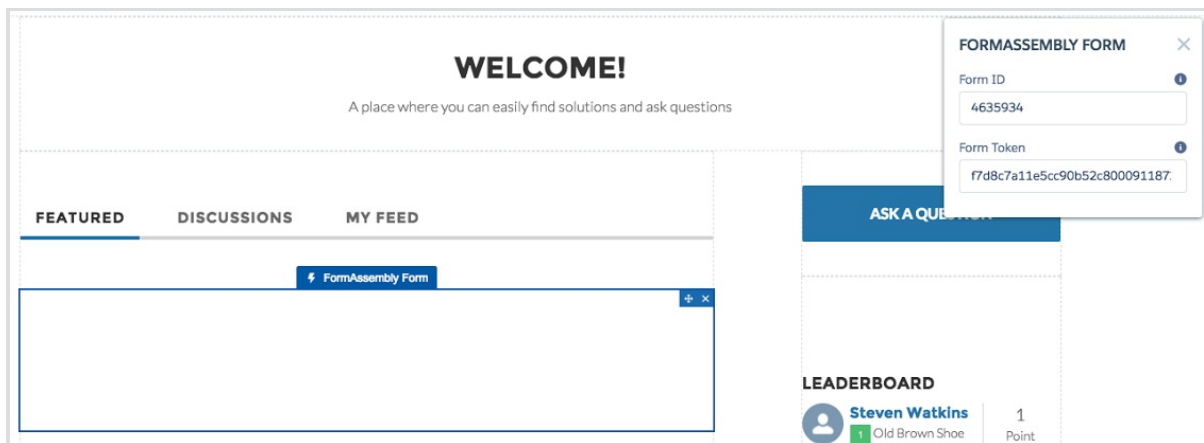
SECRET TOKEN

eafccabcd288c65e64e763fbcf16c660f30ee432

(Reset Token)

11. Return to your Experience Cloud Builder page and paste the token value into the Lightning Component dialog box. Additionally, you will need to **paste in the Form ID**, which can be found at the top of the **configuration page**.

Note: If you are **not** using the [Salesforce Communities Authentication](#), you will not need to paste in the form token; that can be left blank.



12. Press **enter** on your keyboard to save that information. Finally, **publish** the changes to your Experience Cloud Site. You should now be able to see the form when logged in to your Experience Cloud Site.

Add FormAssembly Apex Class Permissions for Experience Cloud Users

To ensure the function of forms embedded using the FormAssembly Lightning Component for Salesforce Experience Cloud Sites, you will need to assign specific Apex Classes to Guest and Experience Cloud Users.

You may follow the steps in either of the two options:

Option 1: Using Enhanced Profile Views to Modify User Profiles

Note: You will need to enable the Enhanced Profile User Interface and the Enhanced Profile List Views permissions under **Setup → Users → User Management Settings** to use this method.

1. Navigate to **Setup → Users → Profiles**
2. Select your Experience Cloud User Profile
3. At the top of the profile select the **Enabled Apex Class Access** option, this will redirect you to the **Enabled Apex Class Access** section where you can see the Apex Classes this profile has access to.
4. Select **Edit**
5. Select all Available Apex Classes containing the "tfa." prefix namespace and add them to the Enabled Apex Classes
 - **Note:** Apex Classes are case-sensitive and the lowercase "tfa." classes may appear towards the bottom of the list.
6. Click **Save**

Option 2: Adding User Permission Set

1. Navigate to **Setup → Users → Permission Sets**
2. Create a new permission set to apply to users who need access to FormAssembly forms embedded in Salesforce Experience Cloud Sites.
3. Select the newly created permission set.
4. Under the **Apps** section, select **Apex Class Access**
5. Click **Edit**
6. Select all Available Apex Classes containing the "tfa." prefix namespace and add them to the Enabled Apex Classes
 - **Note:** Apex Classes are case-sensitive and the lowercase "tfa." classes may appear towards the bottom of the list.
7. Click **Save**
8. Click on **Manage Assignments** to apply the permission set to any users that need access.

Troubleshooting

After you publish your form, if you see "Please wait" or "Form will be displayed here" on your live Experience Cloud Page where the form should be, there are a few settings you will need to check to attempt to resolve this error.

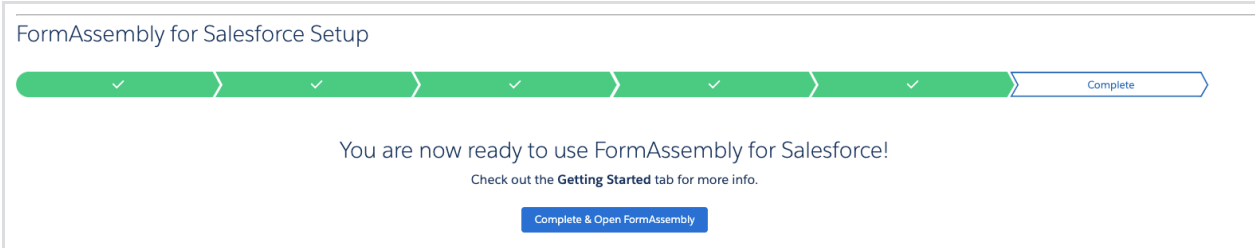
Method 1

For FormAssembly App version 2.4 or Lower:

You will need to complete the new package setup process introduced in version 2.15 up to the current version. You can access the documentation on [how to install FormAssembly for AppExchange here](#).

For FormAssembly App version 2.34 (current version):

1. Go to **Salesforce > Setup > Installed Packages > Configure** (for FormAssembly) under FormAssembly Setup Information. This will take you to the following screen:



FormAssembly for Salesforce Setup

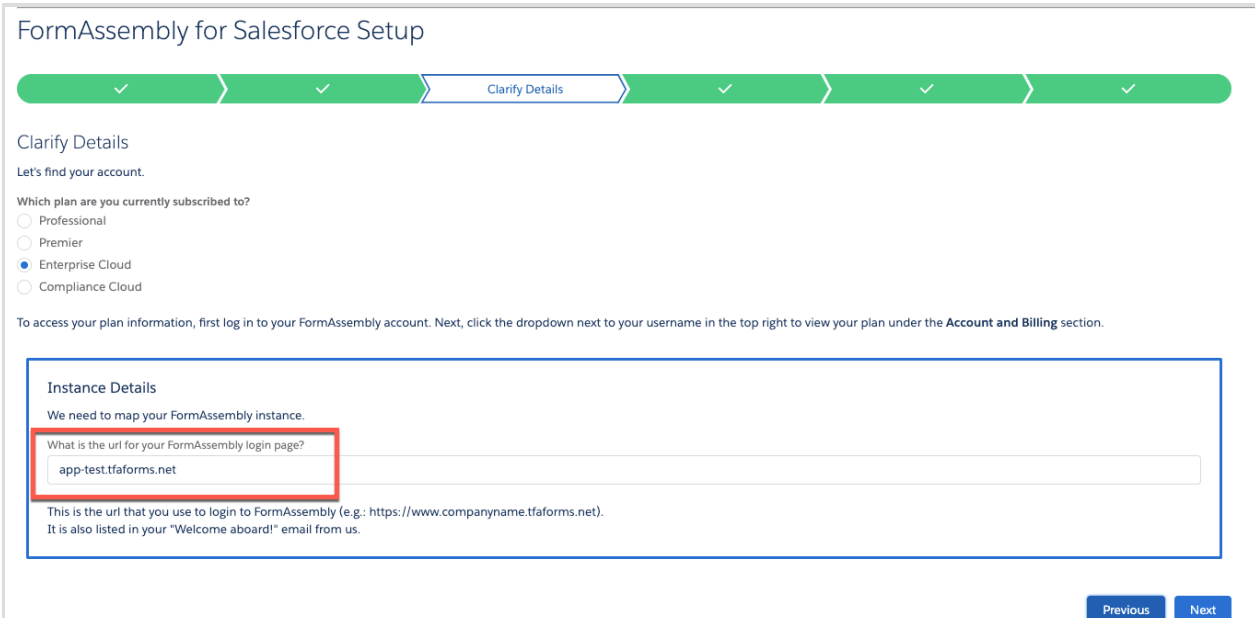
Progress bar: 6 steps, last step is 'Complete'.

You are now ready to use FormAssembly for Salesforce!

Check out the **Getting Started** tab for more info.

[Complete & Open FormAssembly](#)

2. To confirm what the instance URL is, scroll down and go to **"previous"**, **"edit details"**, and **"previous"** to reach the page below:



FormAssembly for Salesforce Setup

Progress bar: 6 steps, 3rd step is 'Clarify Details'.

Clarify Details

Let's find your account.

Which plan are you currently subscribed to?

- ☐ Professional
- ☐ Premier
- ☒ Enterprise Cloud
- ☐ Compliance Cloud

To access your plan information, first log in to your FormAssembly account. Next, click the dropdown next to your username in the top right to view your plan under the **Account and Billing** section.

Instance Details

We need to map your FormAssembly instance.

What is the url for your FormAssembly login page?

This is the url that you use to login to FormAssembly (e.g.: <https://www.companyname.tfaforms.net>). It is also listed in your "Welcome aboard!" email from us.

[Previous](#) [Next](#)

3. Make sure the instance URL does **not** include "https://" here.

4. Once you've confirmed the installed package URL is correct, navigate to **Setup > Custom Settings > Manage > Edit**, and ensure the **instance URL matches** the **installed package URL** (and does not include "https://"):

FormAssembly Configuration Edit

Provide values for the fields you created. This data is cached with the application.

Edit FormAssembly Configuration

Save

Cancel

FormAssembly Configuration Information

Location	FormAssembly
Account Info Confirmed	<input type="checkbox"/>
FormAssembly Instance	app-test.tfaforms.net
FormAssembly Plan	enterprise
Has Account	yes
Test Successful	yes
Username Field	
Username Matches FormAssembly	yes
Wizard Position	5

5. Refresh your Experience Cloud Page and your form should now show.

Method 2

If the Custom Setting does not resolve the error, go to **Salesforce > Setup > TRUSTED URLS**. If your FormAssembly instance URL is not configured as a trusted site, add it here.

In addition to your FormAssembly instance URL (Enterprise and Compliance Cloud users), we recommend adding the following sites to your list of TRUSTED URLS:

- <http://www.tfaforms.com/>
- <https://www.tfaforms.com/>

SETUP

Trusted URLs

Trusted URLs

Specify the URLs that you trust to interact with your users and network. You can use Content Security Policy (CSP) directives to control the types of resources that Lightning components, third-party APIs, and WebSocket connections can load from each trusted URL. If you enabled the Permissions-Policy HTTP header in Session Settings, you can control which URLs can access browser features from Salesforce.

Related Policies

Content Security Policy (CSP). Use CSP directives to specify whether Lightning components, your CSP-secured [Aura or LWR sites](#), third-party APIs, and WebSockets connections can load scripts, fonts, images, media, or stylesheets from each trusted URL. The main objective of CSP is to help prevent cross-site scripting (XSS) and other code injection attacks.

Permissions Policy. Control access to browser features such as cameras and microphones. To use this policy, enable the Permissions-Policy HTTP header under Browser Feature Permissions in [Session Settings](#).

Trusted URLs

View: All Create New View

Action	API Name	URL	Active	CSP Context	Created By	Created Date	Last Modified By	Last Modified Date
Edit Del	App	app.formassembly.com	✓	All	JSwan	6/12/2023, 2:30 PM	JSwan	6/12/2023, 2:30 PM
Edit Del	AppTest	app-test.tfaforms.net	✓	All	JSwan	9/27/2023, 7:41 AM	JSwan	9/27/2023, 7:41 AM
Edit Del	enterprise_demo	enterprise-demo.formassembly.com	✓	All	JSwan	6/12/2023, 12:36 PM	JSwan	6/12/2023, 2:31 PM
Edit Del	Tfaforms	www.tfaforms.com	✓	All	JSwan	6/12/2023, 2:30 PM	JSwan	6/12/2023, 2:30 PM

Method 3

If the form is still not displaying, go to **Salesforce > Setup > Manage Users > Profiles**. Find the user profile you are using for your Experience Cloud User and click **Edit**. Using CTRL-F (or

Command-F for MacOS), search for "API" and confirm that the **API Enabled** setting is checked:

Administrative Permissions	
Access Community Management	<input type="checkbox"/>
Access Libraries	<input checked="" type="checkbox"/>
Add People to Direct Messages	<input checked="" type="checkbox"/>
Allow Inclusion of Code Snippets from UI	<input type="checkbox"/>
Apex REST Services	<input checked="" type="checkbox"/>
API Enabled	<input checked="" type="checkbox"/>
Can Approve Feed Post and Comment	<input type="checkbox"/>
Close Conversation Threads	<input type="checkbox"/>
Create and Customize List Views	<input type="checkbox"/>
Create and Customize Reports	<input type="checkbox"/>
Create and Own New Chatter Groups	<input checked="" type="checkbox"/>
Create Content Deliveries	<input type="checkbox"/>
Create Public Links	<input type="checkbox"/>
Delegated External User Administrator	<input type="checkbox"/>
Edit My Own Posts	<input type="checkbox"/>
Manage Unlisted Groups	<input type="checkbox"/>
Moderate Communities Feeds	<input type="checkbox"/>
Moderate Communities Files	<input type="checkbox"/>
Moderate Community Users	<input type="checkbox"/>
New Salesforce Mobile App	<input type="checkbox"/>
New Salesforce Mobile App - Customizable Navigation (Pilot)	<input type="checkbox"/>
Password Never Expires	<input type="checkbox"/>
Pin Posts in Feeds	<input type="checkbox"/>
Portal Super User	<input type="checkbox"/>
Remove People from Direct Messages	<input checked="" type="checkbox"/>
Report Builder (Lightning Experience)	<input type="checkbox"/>
Select Files from Salesforce	<input checked="" type="checkbox"/>
Send announcement emails	<input type="checkbox"/>
Send Outbound Messages	<input checked="" type="checkbox"/>
Share internal Knowledge articles externally	<input type="checkbox"/>

Note: The standard Experience Cloud User Profile provided by Salesforce does not have the API Enabled setting checked, so you will need to make a clone of that profile and check the setting for users to access forms within the Experience Cloud Page.

Method 4

If you are still unable to see your form on the Experience Cloud Page, please [contact our support team](#).

Prefilling with the Lightning Component

When a form is embedded in an Experience Cloud Page with the FormAssembly Lightning Component, it is possible to use standard prefilling methods to prefill Salesforce data into your form.

1. You can prefill through [the Experience Cloud Page URL](#).
2. You can prefill your form using the [Salesforce Prefill Connector](#).
3. If you have enabled [Salesforce Communities Authentication](#), then you can prefill using session parameters.

Note: We always recommend only embedding one form onto a single Experience Cloud Page, particularly when prefilling.

When prefilling using methods 1 and 2, you'll need to add the prefill values to the URL of the Experience Cloud Page.

- For the following URL: <https://FAdemo.na50.force.com/prefillingtest/s/>
 - **Method 1:** If your form was embedded on your Experience Cloud Page at the URL above and you are prefilling through the URL, you would need to append "**?field_alias=XXXXXX**" to the end of the URL.
 - https://FAdemo.na50.force.com/prefillingtest/s/?field_alias=XXXXXX
 - **Method 2:** If your form was embedded on your Experience Cloud Page at the URL above and you are using the Salesforce Prefill Connector, you would need to append "**?queryparameter=XXXXXX**" to the end of that URL.
 - <https://FAdemo.na50.force.com/prefillingtest/s/?queryparameter=XXXXXX>

Please refer to the help documentation for your chosen prefilling method before building your link.

Note: The page your form is embedded on within your Experience Cloud Page is not the same as your Portal Login URL. After logging into your Experience Cloud Page, you can access the page URL where your form is embedded.