

TITLE

Submission Form Management for a Salesforce Consulting Firm

MEET THE HERO

The Synebo's customer is a Salesforce consulting firm with a focus on process-driven, client-centric CRM solutions for nonprofits and businesses. Founded in 2002, VSC has provided over 18,000 hours of consulting and implementation services, primarily serving foundations and nonprofit organizations.

ABOUT CLIENT

Industry	2023
Founded in	<50
Employees	April 2022
Start of the project	July 2022
End of the project	

Non-profit and CRM Consulting



THE CHALLENGE

The customer needed a flexible solution to manage submission forms in Salesforce. The goal was to create customizable forms that could be easily configured and displayed, providing a convenient way for users to view and manage available forms without complexity.

Our solution

Synebo delivered a comprehensive form management package with the following key features:

1. Implemented submission forms using Angular with Apex Class, allowing forms to be opened through a Salesforce Site with a specified Form ID.
2. Utilized Visualforce Page as a container for Angular components and as a post-install instructions page.
3. Configured forms and fields using Custom Metadata Types, enabling flexibility in form customization.
4. Developed a Form Manager using LWC (Lightning Web Component) and Apex Class, providing a user-friendly interface to display available forms with direct links.

The results

The customer received a complete package with detailed installation guides and usage instructions. The package allowed them to set up submission forms with customizable fields and view the forms in a user-friendly way. This solution enhanced their ability to manage form-based interactions effectively within Salesforce.



**Custom form management
using Angular and Apex**



**Flexible form configuration
via Custom Metadata Types**



**User-friendly Form Manager
interface with LWC**