

Best Practices and Considerations for Dynamic Forms and Dynamic Actions

1. Use tabs and accordions to organize field sections with Dynamic Forms.
2. Use visibility filters for relevant information. Especially exciting are the additions of field visibility, component visibility on field sections, and action filtering. Rethink your design to be “just in time”, meaning the information shows up when the user needs it.
3. By using visibility filtering by profile and/or record type, you can keep everything on one page as opposed to needing multiple page layouts or Lightning Pages.
4. There are special considerations when using both Dynamic Forms and the standard record detail component. You have to keep both updated, so when you start using Dynamic Forms for an object, I recommend switching over completely.
5. Related Lists must still be controlled on page layouts as of Summer ‘20.

Conclusion

- Lightning App Builder is a powerful tool for Admins by allowing you to declaratively customize the UI.
- The Lightning Experience is designed differently than Classic. Redesign your business processes when using Lightning to take advantage of the new features.
- Design Lightning Pages to fit your business use cases instead of using default Lightning Pages. While you can get by using default pages, you can get much more return on your investment in Salesforce by customizing the UI to fit your needs.
- Familiarize yourself with Dynamic Forms & Actions because it’s the future. There is an exciting roadmap ahead for these features.