

# Mega Forms Demo Script – AEM Forms

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## Introduction

The demo will arm you with a hands-on AEM Forms demo that illustrates the AEM Forms user experience.

This demo showcases the AEM Forms User experience, and highlights the following AEM Forms features:

- User Prefill
- Conditional Display Logic
- Form field validation and conditional validation
- Document of Record
- Repeatable Rows and Calculations
- Client Libraries and Advanced Calculations

It includes:

- AEM Forms Loan Application Click thru Demo
- Narrated instruction video

## Setup and prerequisites

### Requirements

Required list of software to be configured to work for this demo:

- Adobe XD

### Key resources

- XD File
- This demo script
- Video walkthrough Loan Application instruction video

### Other tools and resources

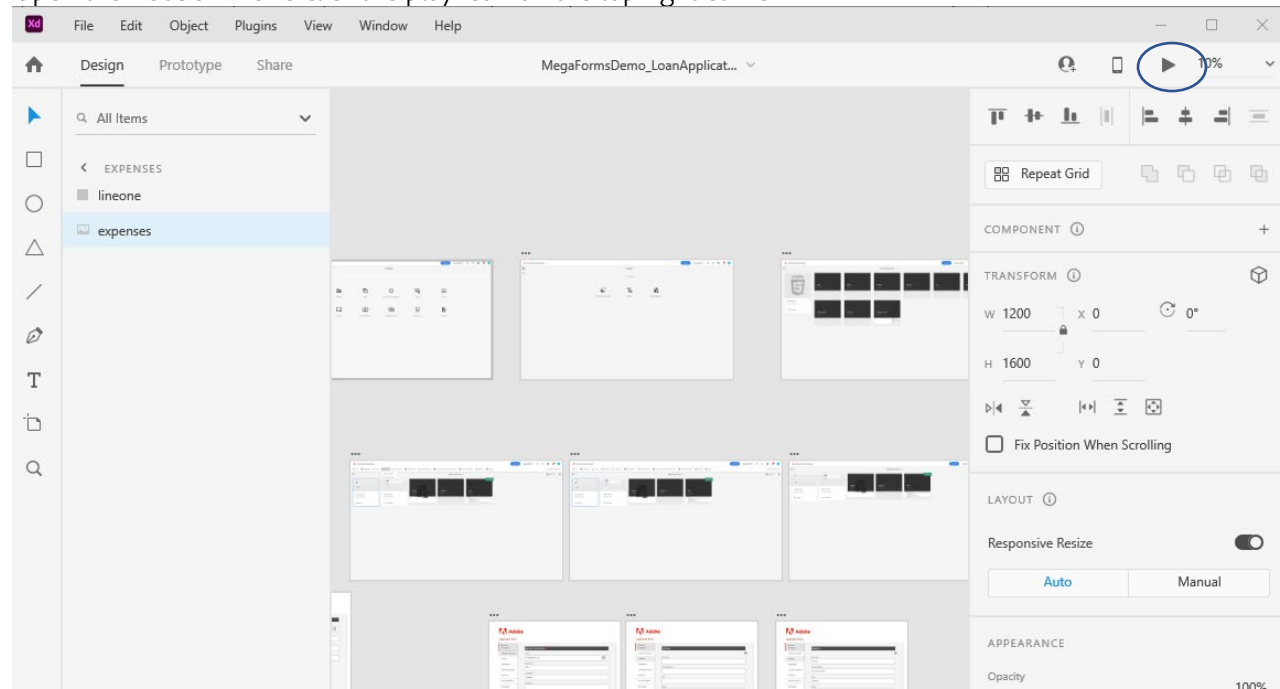
- AEM Forms [Documentation](#)
- AEM Forms [Tutorial](#)

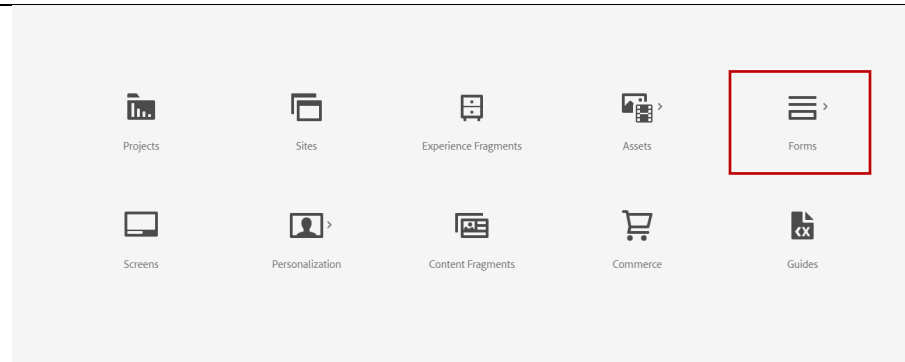
### Demo Tips

- Dual monitors: dedicate a monitor for demo and a monitor for demo script
- Demo environment and demo script test run day before demo

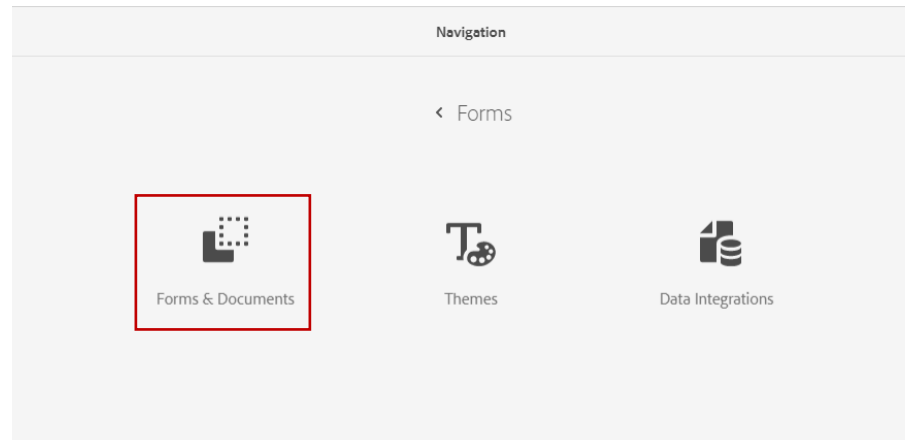
## Loan Application Adaptive Form

Step	Demo Steps
Preview as HTML	<ol style="list-style-type: none"><li data-bbox="573 305 1927 341">1. Open the Adobe XD and click the play icon on the top right corner</li><li data-bbox="573 341 1927 376">2. This will open a new prototype window.</li><li data-bbox="573 376 1927 412">3. Click The Forms Icon</li></ol>

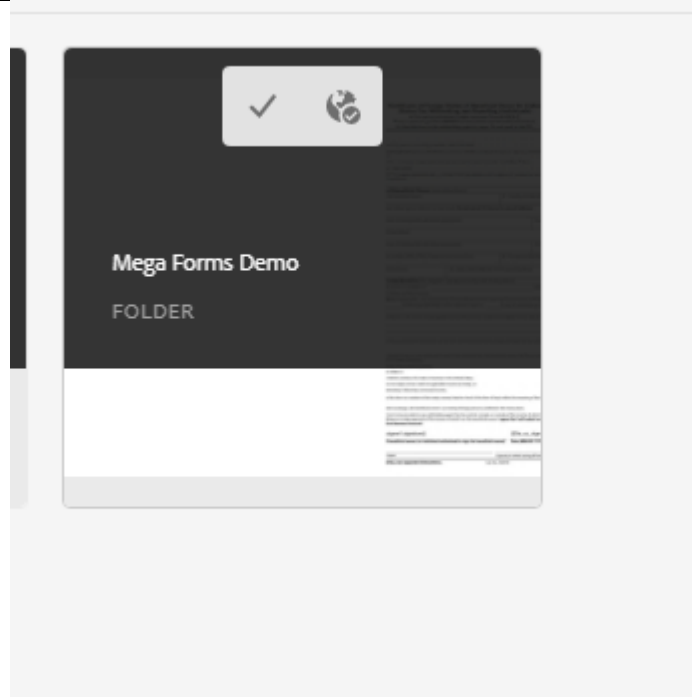




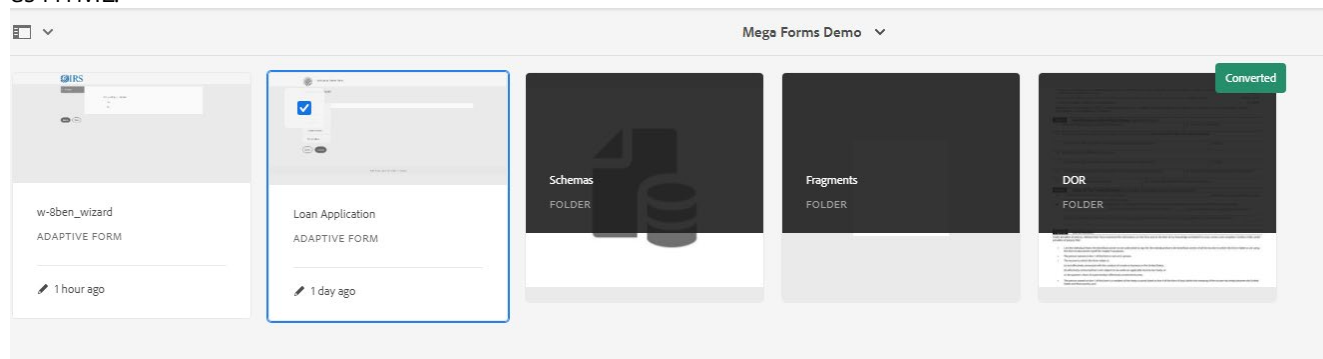
4. Click Forms and Documents



5. Select the Mega Forms Demo Folder



6. Select the Loan Application Form and in the in the navigation menu above, select the preview icon and preview as HTML.



7. This will open the form in preview mode. You can see that my e-mail address and name are populated. This uses the out-of-the-box user prefill service.



### Application Form

**Member Information ?**

Email  
formuser@adobe.com

First Name  
Form

Last Name  
User

Date of Birth  
MONTH DAY YEAR  
MM DD YYYY

Marital Status

Applicant Last Name

8. Select "Yes" for "Is there a secondary applicant" radio button field

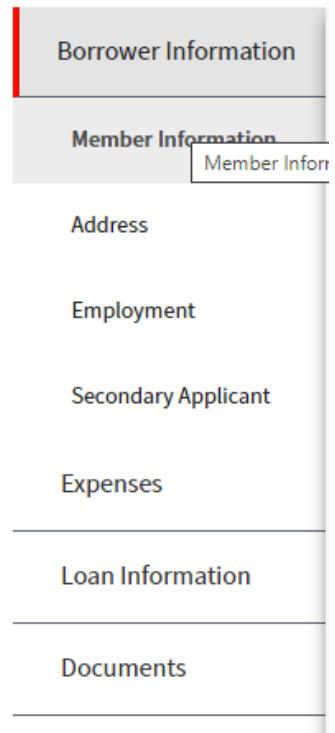
**Number of Children**

- 1 +

**Is there a secondary applicant**

Yes No

9. A "Secondary Applicant" link will appear in the left menu bar



10. Select the Address tab in the menu bar top open the Address section of the form. Select the geo-location icon in

**Adobe**

**Application Form**

Borrower Information

Member Information

**Address**

Employment

Secondary Applicant

Expenses

Loan Information

Documents

**Address**

Zip Code

Street Address

City

State

Country

Is the above your permanent address?

Yes No

Reset Submit

the top right corner of the form. This is mimicking the Loan Applications geo location function, that populates



the user's address, that integrates with the Google Maps API.



### Application Form

Borrower Information

Member Information

Address

Employment

Secondary Applicant

Expenses

Loan Information

Documents

Address

Zip Code

30315

Street Address

123 Main Street

City

Atlanta

State

Georgia

Country

United States of America

Is the above your permanent address?

Yes

No

Reset

Submit

11. Alternatively, entering in a postal code, will populate the associated City, Zip, State and Country. This functionality demonstrates how Third-Party API's can be used to populate data in AEM Adaptive Forms.
12. Select "No" for "Is the above your permanent address" and a permanent address section will appear. Before entering in more data, click the "Submit" button to submit the form. You will see a validation message stating that the permanent street address is required. This demonstrates conditional form validation. Select "Yes" to return the previous state. The Street Address field is no longer required.

The screenshot shows a form section titled "Is the above your permanent address?". Below this title are two buttons: "Yes" (dark grey) and "No" (blue). The "No" button is selected. Below the buttons is a section titled "Permanent Address" in red. Under this section, there are five input fields: "Street Address", "City", "State", "Country", and "Zip". The "Street Address" field is highlighted with a red border and has a red validation message below it that says "This field is mandatory." The other fields have green borders. The "State" and "Country" fields are dropdown menus with a downward arrow icon.

13. In the Expenses section of the form, there is a dynamic table with calculations. You can add additional rows, change the amounts, and delete rows. This is all out of the box functionality and does not require any additional

scripts or coding.

#### Application Form

The screenshot displays an Adobe Experience Manager (AEM) application form. On the left is a sidebar with four tabs: 'Borrower Information', 'Expenses' (which is selected and highlighted with a red border), 'Loan Information', and 'Documents'. The main content area shows a modal titled 'Monthly Expenses'. Inside this modal, there is a section labeled 'Details' containing a table. The table has two columns: 'Category' and 'Amount'. It lists three expense items: 'Housing' with an amount of '\$2,000.00', 'Food' with '\$300.00', and 'Clothing' with '\$100.00'. To the right of each row in the table are two icons: a plus sign (+) for adding more items and a trash can icon for deleting the item. Below the table, there is a label 'Total Monthly Expenses' followed by a text input field that displays the value '\$2,400.00'.

14. To start the expenses animation. Click into the column under the category header. This will populate the first row.
  - a. To add a second row, select the plus icon in the first row
  - b. To add a third row, select the plus icon in the second row
  - c. Then select the trash can icon on the second row to remove it.
  - d. The Total Monthly Expenses will field will change the total accordingly
15. Select the Loan Information tab in the left navigation menu
16. In the Loan Information section, there is a loan payment calculator. It uses a AEM Client Library, that is configured in the Adaptive Form. Enter in the loan amount, select loan years, and credit score range. This will auto populate the Payment Estimate amount. This is an example of using advanced scripts and leveraging third-party JavaScript API's.



## Application Form

Borrower  
Information

Expenses

Loan Information

Documents

### Loan Calculator

Loan Amount

*This field is mandatory.*

Loan Months

-	24	+
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Interest Rate

Reset

Submit

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17. To start the calculator, click into the “Enter requested loan amount” field.

18. This will populate a loan amount and display a loan summary on the right.

19. Select the plus icon for the Loan Months field, this will increase the loan months to 30 and the loan summary



### Application Form

Borrower  
Information

Expenses

Loan Information

Documents

#### Loan Calculator

Loan Amount

\$15,000.00

Loan Months

-

30

+

Interest Rate

5.25

#### Loan Summary Estimate

Loan Amount: \$15,000.00

Monthly Payment: \$534.62

Sum of all Payments: \$16,038.67

Total Interest: \$1,038.67

Number of Payments: 30

Date of First Payment: June 1st, 2023

Last Payment Date: November 1st, 2025

#### Amortization Schedule

Show Amortization Table

☐ NO

Reset

Submit

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will update accordingly.

	20. Next select the Show Amortization Table toggle. This is set the toggle to "Yes" and display an amortization table below the loan summary.
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#### Application Form

Borrower  
Information

Expenses

Loan Information

Documents

#### Loan Calculator

Loan Amount

\$15,000.0

Loan Months

- 30 +

Interest Rate

5.25

#### Loan Summary Estimate

Loan Amount: \$15,000.00

Monthly Payment: \$534.62

Sum of all Payments: \$16,038.67

Total Interest: \$1,038.67

Number of Payments: 30

Date of First Payment: June 1st, 2023

Last Payment Date: November 1st, 2025

#### Amortization Schedule

Show Amortization Table

YES

Payment #	Payment Amt	Principal	Interest	Remaining Balance	
1	\$534.62	\$468.99	\$65.63	\$14,531.01	+
2	\$534.62	\$471.05	\$63.57	\$14,059.96	+
3	\$534.62	\$473.11	\$61.51	\$13,586.85	+
4	\$534.62	\$475.18	\$59.44	\$13,111.67	+
5	\$534.62	\$477.26	\$57.36	\$12,634.41	+
6	\$534.62	\$479.34	\$55.28	\$12,155.07	+

	<p>21. This leverages OTB dynamic functionality and custom JavaScript client libraries. Leveraging OTB features and client libraries can be a powerful way to add functionality to an Adaptive Form.</p> <p>22. Now Select the <b>Documents</b> tab in the navigation menu</p> <p>23. This displays the document panel.</p> <p>24. Select the Attach button, and this will populate an image document.</p> <p>25. In the Documents Attached field, select the <b>Date of Birth</b> option</p> <p>26. Select the Submit button to Submit the form</p> <p>27. A Thank You screen will display</p> <p>28. Now, is a good time to discuss the AEM Forms Submit Action.  <a href="https://experienceleague.adobe.com/docs/experience-manager-cloud-service/content/forms/adaptive-forms-authoring/authoring-adaptive-forms-foundation-components/configure-submit-actions-and-metadata-submission/configuring-submit-actions.html?lang=en">https://experienceleague.adobe.com/docs/experience-manager-cloud-service/content/forms/adaptive-forms-authoring/authoring-adaptive-forms-foundation-components/configure-submit-actions-and-metadata-submission/configuring-submit-actions.html?lang=en</a></p> <p>29. Click anywhere on the Thank You screen and it will navigate to the power automate video.</p>
	<p>30. Click on the to play a video of the submission to Microsoft Power Automate.</p>

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