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

Power Automate Submission

Adobe Sign Integration

It includes:

•Two Adaptive Forms showcasing the AEM Forms User Experience

•Narrated videos

# Setup and prerequisites

## Requirements

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

* Follow [Reference Demo Configuration Guide](https://internal.adobedemo.com/content/demo-hub/en/demos/external/aem-reference-demos.html) and ensure the following are configured
  + Reference Demo Add-On is enabled in AEM Cloud Service program
  + [AEM Forms as a Cloud Service Add On](https://experienceleague.adobe.com/docs/experience-manager-cloud-service/content/forms/setup-environment/setup-forms-cloud-service.html?lang=en)
  + [Adobe AEMXSC/minimal GitHub project](https://github.com/AdobeAEMXSC/minimal)
* Option configurations include:
  + [Power Automate Configuration](https://experienceleague.adobe.com/docs/experience-manager-learn/cloud-service/forms/forms-cs-and-power-automate/integrate-formscs-power-automate.html?lang=en)
  + [Adobe Sign Integration](https://experienceleague.adobe.com/docs/experience-manager-cloud-service/content/forms/integrate/adobe-sign-integration-adaptive-forms.html?lang=en)
  + [Google Places API Key](https://developers.google.com/maps/documentation/javascript/get-api-key)

## Key resources

* This demo script
* Video walkthrough Loan Application and W-8BEN adaptive forms
* [Adobe AEMXSC/minimal GitHub project](https://github.com/AdobeAEMXSC/minimal)

## Other tools and resources

* AEM Forms [Documentation](https://experienceleague.adobe.com/docs/experience-manager-cloud-service/content/forms/home.html?lang=en)
* AEM Forms [Tutorial](https://experienceleague.adobe.com/docs/experience-manager-learn/forms/overview.html?lang=en)

## 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

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| **Step** | **Demo Steps** |
| Preview as HTML | 1. Open web browser with URL to your AEM environment 2. Log in 3. Click Forms      1. Click Forms and Documents      1. Select the Mega Forms Demo Folder      1. Select the Loan Application Form and in the in the navigation menu above, select the preview icon and preview as HTML. 2. 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. 3. Select “Yes” for “Is there a secondary applicant” radio button fieldTable     Description automatically generated 4. A “Secondary Applicant” link will appear in the left menu bar      1. Select the Address tab in the menu bar and enter a valid zip code in the Zip Code field and tab out of the field, this will populate the city, State, and Country for that zip code. Graphical user interface, text, application, email     Description automatically generated 2. 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. 3. 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. Graphical user interface, application     Description automatically generated 4. 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. Graphical user interface, application     Description automatically generated 5. Select the Submit Button to submit the form, if power automate is configured, the form data is submitted to a power automate workflow. This is an optional configuration will be covered in a subsequent document. |

# W-8BEN Adaptive From

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| **Step** | **Demo Steps** |
| Preview as HTML | 1. Open web browser with URL to your AEM environment 2. Log in 3. Click Forms   Graphical user interface, application  Description automatically generated   1. Click Forms and Documents   A picture containing chart  Description automatically generated   1. Select the Mega Forms Demo Folder   Graphical user interface, application  Description automatically generated   1. Select the W-8BEN Wizard Form and in the in the navigation menu above, select the preview icon and preview as HTML. 2. This form demonstrates a guided user experience. The user is presented with prequalification   questions. Based on their selections they will either complete the W-8BEN or directed to use a different form.   1. Select “Yes” for “Are you filing as an individual” 2. Select “Yes” to “Are you a us citizen…”?      1. The form will prompt you to use the W-9 form instead 2. To continue, select “No” to “Are you a us citizen…”? 3. Select “No” for the remaining questions. 4. Parts I-III of the W-8BEN form will appear 5. Begin to fill out Part I of the form. Legal Name, Email Address and Beneficial Owner fields are required\* 6. Select the “Submit” Button to Submit the form. 7. If you have Adobe Sign configured, you will be directed to Adobe Sign to sign the populated Document of Record. 8. A signature and date block are placed on the form. |
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