

Cello How-To Guide

Dynamic Forms Builder

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1 Introduction to Dynamic Forms

Dynamic Form Builder helps each individual Tenant (Customers) to create Custom forms and Grids by themselves. The Dynamic Forms feature is easy to use, dynamic in nature and you can see your form taking shape as you add the elements and its attributes.

Dynamic Form Builder is a useful tool especially for clients where:

- Form needs to be built more frequently.
- Form elements keep changing.
- Many forms must be built and clients do not want to engage a developer to build forms on frequent basis.

CelloSaaS Dynamic Form Builder offers a solution to all of the requirements above. The Form Builder has the following features:

- Web based Form/Grid Builder. Access and build forms on the fly.
- Tenant Specific
- Create form by choosing the options and element fields and seeing them in action immediately.
- Create the following fields in the form
 - Single line text field with different data types such as Varchar, Date, Integer, Float, Boolean.
 - Dropdown box with option to have pre-defined values or use custom
 - Entity (Pre-Configured)

All the fields further have design and validation options:

- You can define order of the field
- You can define Read-only/Editable Field
- You can define Visible/Invisible Field
- Max characters allowed
- Required or Not Required field
- Set Validation via Regular Expression

This Document helps you to understand the Dynamic Forms capability in detail

2 Dynamic Forms

Follow the below step by step procedure to create Dynamic Forms

Step 1:

Navigate to Configuration Management >> Manage Entities

admin@company.com | Change Tenant

Entity Management Tenant: Company Add

Entity Name	Manage Extn Fields	View Base Fields	Validation Rule	Pre-Processor Rule	Delete Virtual Entity
Address					-
ContactDetails					-
EmployeeEntity			
Tenant					-
User					-

Step 2:

Click on Add button to add a virtual Entity.

Step 3:

Fill the below form

1. Virtual Entity Name
2. Choose the Feature it belongs to (A entity can only belong to only one feature at a time)

admin@company.com | Change Tenant

Add Virtual Entity

Entity Name*

Feature*

Cancel Save

Step 4:

Once the Virtual Entity is created it will start appearing the Entity List (Refer below screen).

CelloSaaS admin@company.com | Change Tenant

Entity Management Tenant: Company Add

Entity Name	Manage Extn Fields	View Base Fields	Validation Rule	Pre-Processor Rule	Delete Virtual Entity
Address					-
ContactDetails					-
EmployeeEntity			---	---	
Tenant					-
User					-

Step 5:

Click on **Manage Extn Fields** to add Attributes to the Entity.

CelloSaaS admin@company.com | Change Tenant

User Entity Field Management Back Add

No Extended Fields Available!

Click here to add a Custom Field

Step 6:

Fill the details requested in the Field Details Form.

1. Name of the Field
2. Data Type
3. Pickup list (If Pick up list chosen in the Data Type Field)
4. Entity Field
5. Length
6. Validation regular expression
7. IsUnique

How-To – Dynamic Form Builder

Field Details

Name:

Data type:

PickUpField:

EntityField:

Length:

Validation regular expression:

Is Unique:

Back Add

Note: If you want utilize an existing custom field available in another Virtual Entity, select the data type as entity and select the appropriate entity name from the Entity Field dropdown.

Field Details

Name:

Data type: *Select the Datatype as Entity*

PickUpField:

EntityField: *Select the Entity from the dropdown*

Length:

Validation regular expression:

Is Unique:

Back Add

Step 7:

You can add any number of fields in a given entity with different data types

EmployeeEntity Entity Field Management

Display Column Name: Save

Search GO

Field Name	Length	Is Unique	Field Type	Edit Field	Delete Field
Age	0	False	int		
Employee Name	0	False	Text		

Step 8:

Now that the Virtual Entity is added, the next step to create a Dataview to hold this entity. The user needs to create a dataview to display Form and another dataview to display DataGrid.

To create a dataview

Navigate to Configuration Management >> Manage Dataview

The screenshot shows the 'Data View Management' page in the CelloSaaS application. The top navigation bar includes icons for My Account, Subscription, Tenant, Access Control, Configuration, Business Events, Notifications, Workflow, Reporting, AddOn, and Monitor. The 'Add' button is highlighted with a red box. Below the navigation bar, there is a search bar and a table of dataviews.

Name	Description	Main Entity	Manage Field	Edit	Delete
Contact Details	Contact Details	ContactDetails		-	-
Employee Form	Employee Form	EmployeeEntity			
Employee Grid	EmployeeGrid	EmployeeEntity			
Tenant Address Details	Tenant Address Details	Address		-	-
Tenant Details	Tenant Details	Tenant		-	-
Tenant Details Grid	Tenant Details Grid	Tenant		-	-
Tenant Relations Grid	Tenant Relations Grid	TenantRelations		-	-
Tenant User Details	Tenant User Details	User		-	-
User Address Details	User Address Details	Address		-	-
User Details	User Details	User		-	-

At the bottom of the table, there is a pagination control showing 'Show 10 entries' and 'Showing 1 to 10 of 11 entries'.

Step 9: Create a Form Dataview

Click on Add button in the Dataview List page to bring add Dataview Form

Fill in the below details, they are

1. Select the Main Entity
2. DataviewID (Unique ID)
Note: DataviewID name must not contain any space or special Characters and must end with a Term “Form” in case of Form and “Grid” in case of Grid.
3. Dataview Name (Unique Name)
4. Friendly Description for the Dataview

My Account Subscription Tenant Access Control Configuration Business Events Notifications Workflow Reporting AddOn Monitor

Add VirtualEntity DataView

Main Entity*

Data View Name*

Data View Id*

Description*

Cancel Save

My Account Subscription Tenant Access Control Configuration Business Events Notifications Workflow Reporting AddOn Monitor

Data View Management Tenant: Company Add

Search GO

Name	Description	Main Entity	Manage Field	Edit	Delete
Contact Details	Contact Details	ContactDetails		-	-
Employee Form	Employee Form	EmployeeEntity			
Employee Grid	EmployeeGrid	EmployeeEntity			
Tenant Address Details	Tenant Address Details	Address		-	-
Tenant Details	Tenant Details	Tenant		-	-
Tenant Details Grid	Tenant Details Grid	Tenant		-	-
Tenant Relations Grid	Tenant Relations Grid	TenantRelations		-	-
Tenant User Details	Tenant User Details	User		-	-
User Address Details	User Address Details	Address		-	-
User Details	User Details	User		-	-

Show 10 entries Showing 1 to 10 of 11 entries

Step 10:

Follow the Step 9 and create a Grid Dataview.

Step 11:

After successfully creating Virtual Entity, Dataview and DataGrid, You can see a new menu appearing in the Horizontal menu at the top (Refer below Screenshot)

My Account Subscription Tenant Access Control Configuration Business Events Notifications Workflow Reporting AddOn Monitor

Product Dashboard Manage EmployeeEntity

Step 12:

Navigate to AddOn >> Virtual Entity Name (Refer the below Screen)

CelloSaaS admin@company.com | Change Tenant

- My Account
- Subscription
- Tenant
- Access Control
- Configuration
- Business Events
- Notifications
- Workflow
- Reporting
- AddOn
- Monitor

Employee Form

Employee Name

[Cancel](#) [Save](#)

Employee Grid

Search [GO](#)

Age	Employee Name	Edit	Delete
30	Frederick	Edit	Delete

3 Contact Information

Any problem using this guide (or) using Cello Framework. Please feel free to contact us, we will be happy to assist you in getting started with Cello.

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