

JUST LIKE MAGIC:

A Beginner's Guide to FormAssembly

Do you believe in magic? Master these FormAssembly tricks and become a data collection magician.





Contents

Welcome to FormAssembly

Trick #1:

How to Build Your First Form—No Code Required

Trick #2:

How to Send Data to Salesforce & Update Records Automagically

Method 1: Setting up a Salesforce Connector After Building a Form

Method 2: Using the Salesforce Import Tool to Create a Salesforce-Integrated Form

Trick #3:

How to Pull Endless Use Cases out of a Hat

Unlimited Use Cases

All the Features You Need

Welcome to FormAssembly

Welcome to the FormAssembly family! We're thrilled to have you on board. As you probably know by now, 5,000+ leading companies use FormAssembly to streamline data collection processes, and we're so excited for you to experience the magic of FormAssembly too.

We know that getting started with a brand new platform can be daunting—but this eBook includes everything you need to know to harness the power of FormAssembly.

Read on to unveil the essential “tricks” you’ll need to master, use case ideas, and additional resources that will help you become a data collection magician in no time. To follow along with this guide, you’ll need to [start a FormAssembly trial](#) if you haven’t already—it only takes a minute.



Trick #1:



How to Build Your First Form—No Code Required

Prepare to be amazed! Building your first form with FormAssembly is simple, and you don't need any coding knowledge to build a sophisticated form.

Once you've established your form objective, whether it's a contact form, registration form, or something else, [jump into FormAssembly](#) and follow the steps below to make your first form appear out of thin air.



Expert trick:

"Make a plan! Know what data you need to collect and how you'd like it to be used before you start building your form."



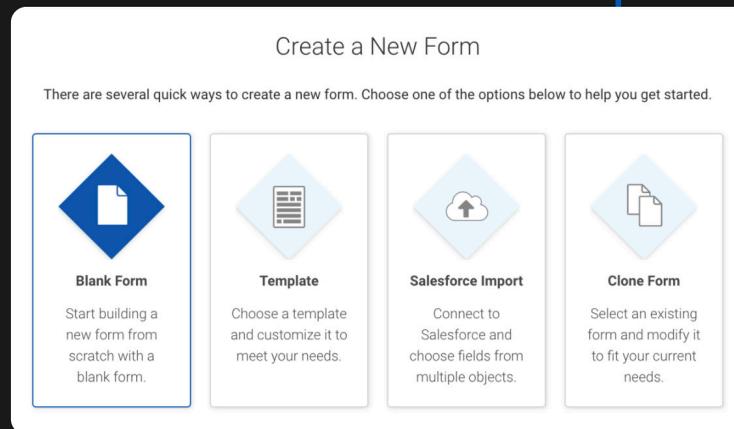
—Kayla Condello,
Knowledge Coordinator

1. [Log in to FormAssembly](#) and access the Forms page. This is the first page you'll see after logging in.



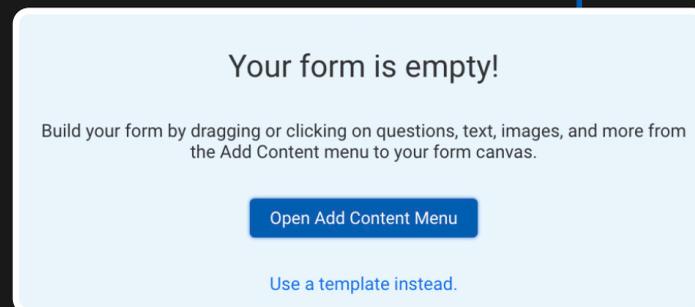
2. Click "+ New Form" in the side navigation menu.

3. When the "Create a New Form" modal appears, you'll be presented with multiple options so you can choose how you'd like to proceed.



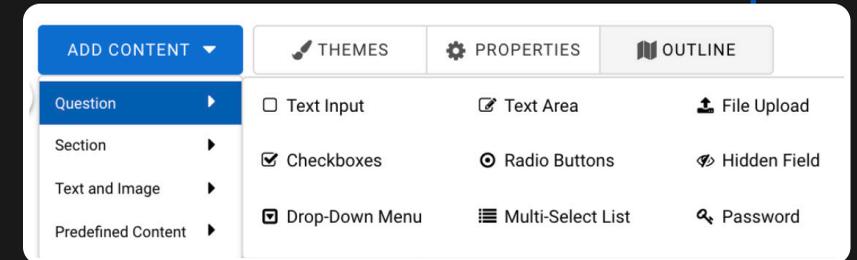
For this trick, please choose the "Blank Form" option to learn how to build a form from scratch.

4. When you see the message shown on the right, click the "Open Add Content Menu" button.

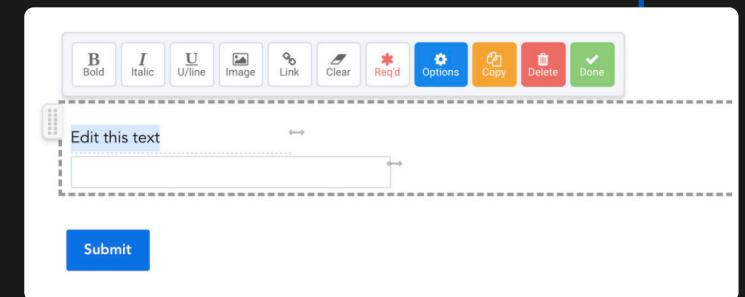


5. The content menu will appear with a variety of content categories, including questions, sections, text and images, and predefined content.

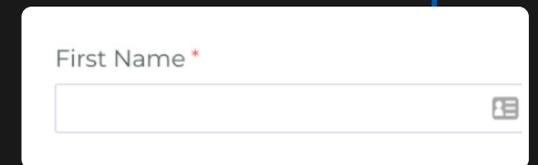
Hover over each category to see the options within each category.



6. As you know, many forms begin by asking the respondent for their name, so we'll start this form with a simple Text Input field. Click "Text Input" in the content menu, and your field will appear in your blank form.

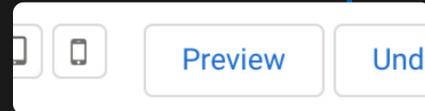


7. Edit the text above the field, called the field label, to specify which piece of information you want your respondents to enter in this field. For this example, we'll go with "First Name."

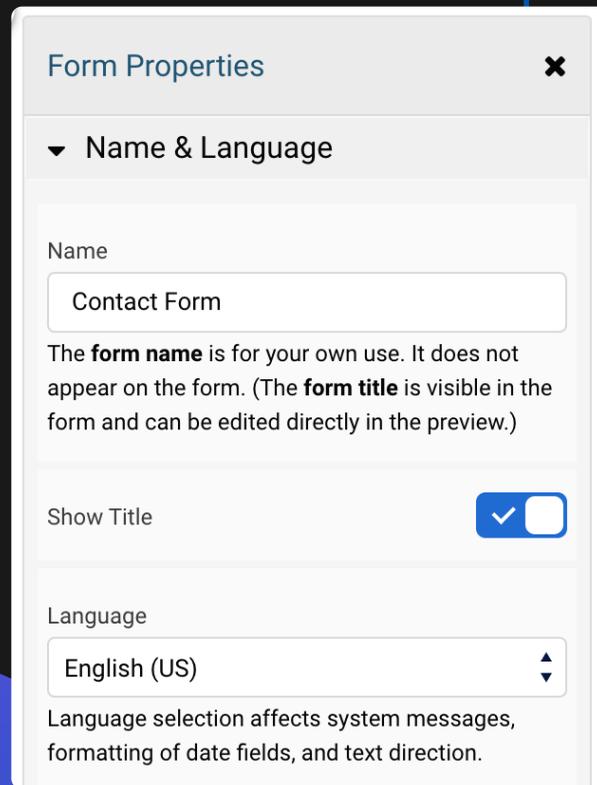


8. Add additional text input fields to prompt the respondent to provide additional information, such as their email address. Click "Req'd" to mark any required fields.

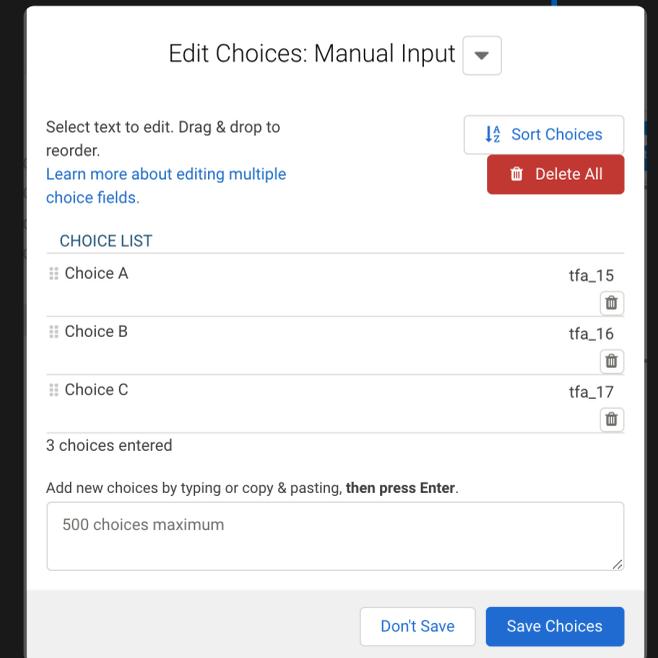
9. Click the "Preview" button located at the top right-hand side of the form builder to preview the form.



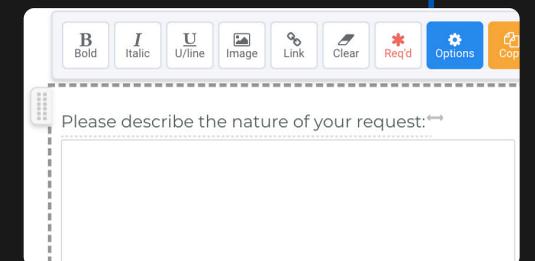
Change the form title to be descriptive yet succinct under the "Properties" option, and add context with a text field below it if necessary.



10. Select additional fields based on questions you need to ask. For example, add a dropdown to allow the respondent to select one option from a longer list of options, add radio buttons to allow the respondent to select one option from a shorter list of options, add checkboxes to allow the respondent to choose multiple options from a list of options, or add a text area for questions that require longer answers.



Voila! You've now built your very first form without writing a single line of code. This tutorial is the foundation of everything else you'll need to know about FormAssembly.



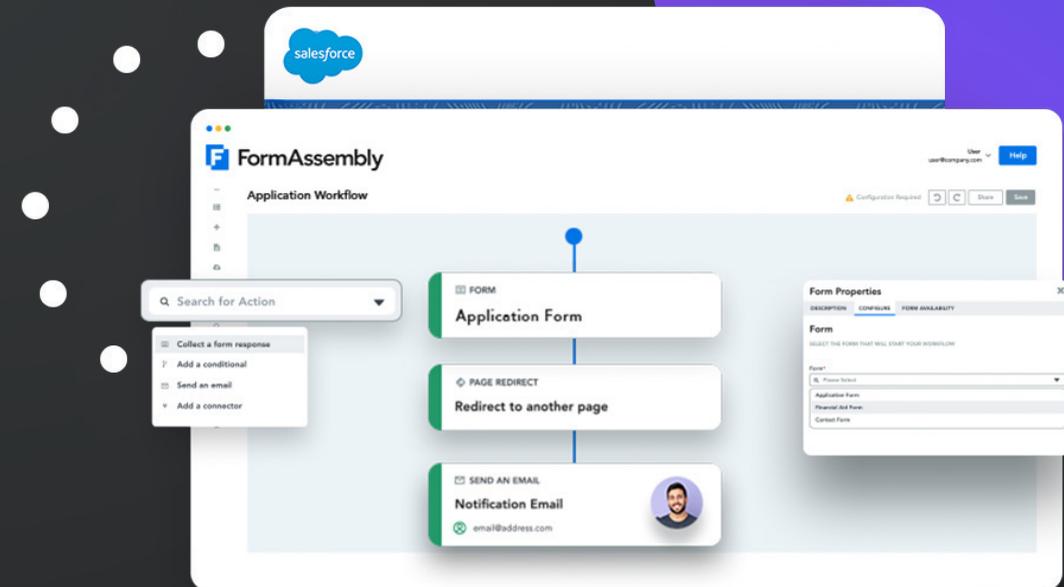
Trick #2:

How to Send Data to Salesforce and Update Records Automagically

For our next trick, we'll show you how to take advantage of FormAssembly's robust Salesforce integration. Hop into the form builder, connect your forms to Salesforce, and poof! You'll be able to make manual data entry disappear—no illusions necessary.

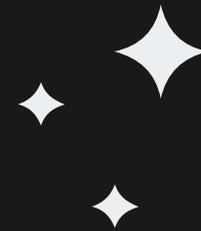
Not only will you be able to create new records in Salesforce, but you'll also be able to modify existing ones, prefill your forms with data from Salesforce, and so much more. It's almost too good to be true.

You can create Salesforce-integrated web forms in one of two ways. The first method is to build your form using the instructions we shared above and then configure the Salesforce Connector. The second way is to use the Salesforce Import Tool to import your form from Salesforce, building a form and connector all at once. We will cover both methods in this tutorial.



Method 1:

Setting up a Salesforce Connector After Building a Form



After Form Submission vs. On Form Submission

Add connector for form submission:

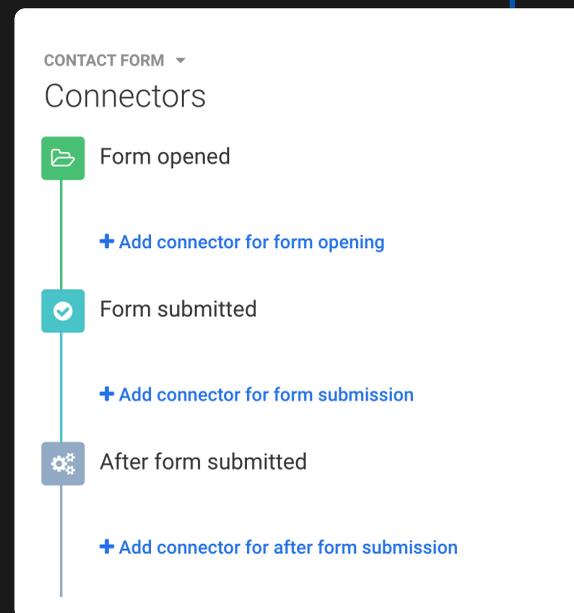
Connectors set up here will activate at the same time as a form submits. Any connector errors will display to the user and will prevent the form submission from successfully going through.

Add connector for after form submission:

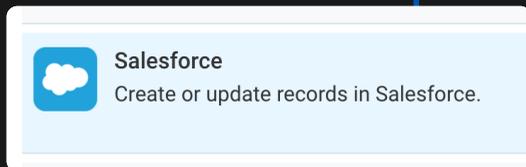
Connectors set up here will activate after the submission goes through, meaning respondents won't see any potential errors.

Initial Salesforce Setup

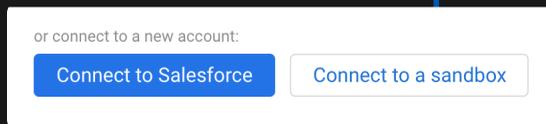
1. After creating a form that you want to use to send data to Salesforce, navigate to the Connectors option (located on the left hand side menu) for that form.
2. Select "Add connector for form submission" or "Add connector for after form submission."



3. Select the Salesforce Connector from the list of options and hit "Configure" on the element that appears.



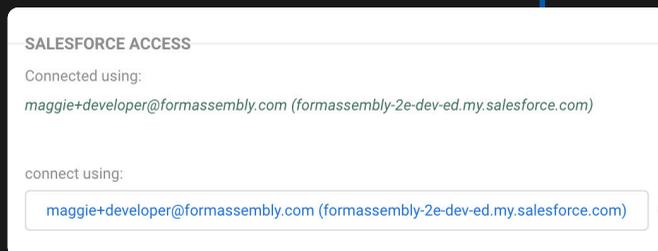
4. On the Salesforce Connector configuration page, select **Connect to Salesforce** unless the other options **Connect using a sandbox** or **Connect to a custom domain** apply to you.



5. After filling in your Salesforce username and password, accept the prompt on the popup to allow access.



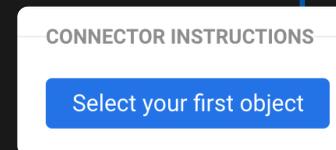
6. After authenticating a form, you can set up integrations on other forms by using the existing authenticated user.



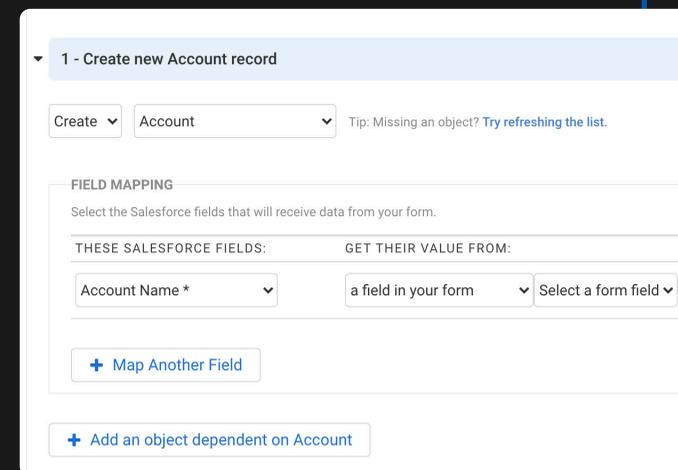
Creating a Record in Salesforce

After the initial setup is complete, it's time to configure your form to send data directly to Salesforce. There's an astounding range of ways you can connect FormAssembly with Salesforce, but we'll start with a simple, useful trick: How to set up a form to create a new record in Salesforce.

1. Choose the type of object and specify that you would like to create it.



2. After adding the object type, you can use the Field Mapping section that appears to map the fields from your form to corresponding Salesforce fields. Any required fields for the object you specify will automatically appear, but you may add others as well.



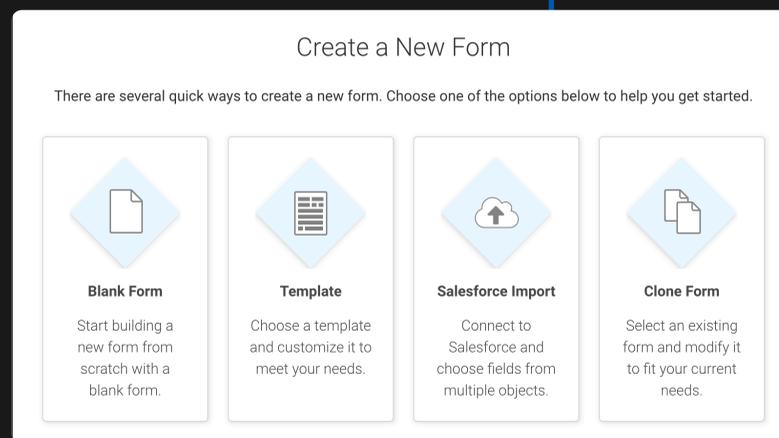
Next, simply save and test your form!

Method 2:

Using the Salesforce Import Tool to Create a Salesforce-Integrated Form

Want to learn an even faster, more efficient way to create Salesforce-connected forms? Meet the star of our next trick: the Salesforce Import Tool. This feature allows you to build new web forms using Salesforce objects and fields as a template. In just minutes, you can build a form to create new records in Salesforce. Magical, isn't it?

1. From the Forms page, select "New Form," then choose "Salesforce Import" from the available options.
2. If you haven't already, connect your Salesforce account.



Expert tricks:

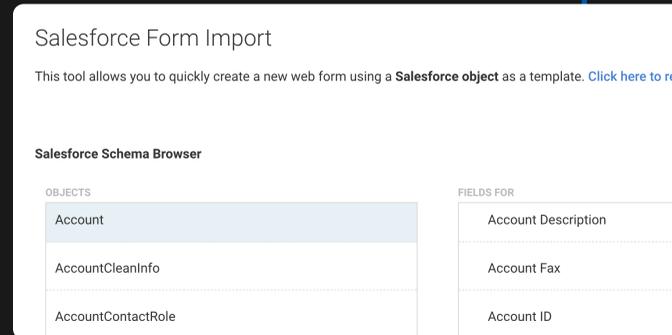


Level up your Salesforce Submit Connector usage with these five notable features:

- **Collapsing Connector Steps** — Minimize connector steps that you're not working on to eliminate visual clutter on your screen.
- **Add Comments** — Give your connectors context with the ability to add reminders, descriptions, and other notes on steps within your connector.
- **Copy Existing Objects** — Save time by copying objects you've already created and using existing mappings as a starting point.
- **Remove Objects** — Easily remove objects by selecting "Remove Object" from the dropdown menu next to the "Edit" button.
- **Access Connector Logs** — Troubleshoot errors and get back end information on your forms by reviewing the [Connector Log](#) for your form.

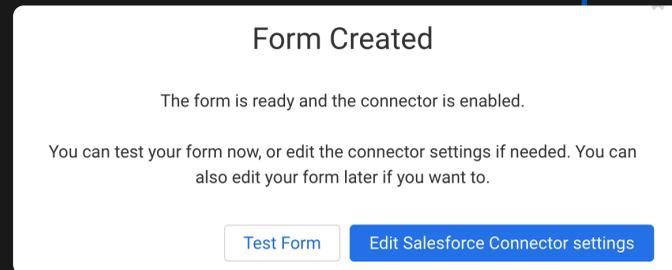
Pick your object. If you want to build a Web-to-Lead form, for example, you should select the Lead object.

Next, choose the fields you want to include in your form, both the required fields for the object you picked and any additional fields.



3. After that, simply hit "Save." You can move on to testing your form or view and revise the Salesforce configuration as needed.

You can also rearrange the fields in your form or adjust the styling if you like.



There you have it! These two examples are just a taste of all the magic our Salesforce integration has to offer.

Trick #3:

How to Pull Endless Use Cases out of a Hat

But wait—there's more. It may sound cheesy, but FormAssembly's magical qualities don't just extend to the form builder and Salesforce Connectors. With FormAssembly, organizations can transform old, outdated processes of all kinds with streamlined, user-friendly web forms.

Unlimited Use Cases

With FormAssembly, you'll amaze your coworkers as you constantly pull new cases out of your form-building hat! FormAssembly can be used in all industries for nearly any purpose. Here are just a few of the use cases our clients bring to life on a regular basis:



Healthcare

- Patient intake
- Pre/post-visit surveys
- Health research forms
- Vaccination forms

Financial Services

- Bank account RFI forms
- Loan applications
- Customer/client onboarding
- Paycheck Protection Program forms

Government

- State and federal capital improvement projects
- Community outreach
- Civic services (water testing requests, appointment scheduling, etc.)

Nonprofit

- Program application forms
- Evaluation forms (participant, organizational, mentor, etc.)
- Donation forms (for recurring and one-time donations)
- Volunteer management forms

Higher Education

- Scholarship and grant applications
- Event registration and event maintenance (RSVPs, etc.)
- Internal administration (Registrar, Admissions, Services, etc.)
- Outreach and recruitment (RFIs, lead generation, etc.)



All the Features You Need

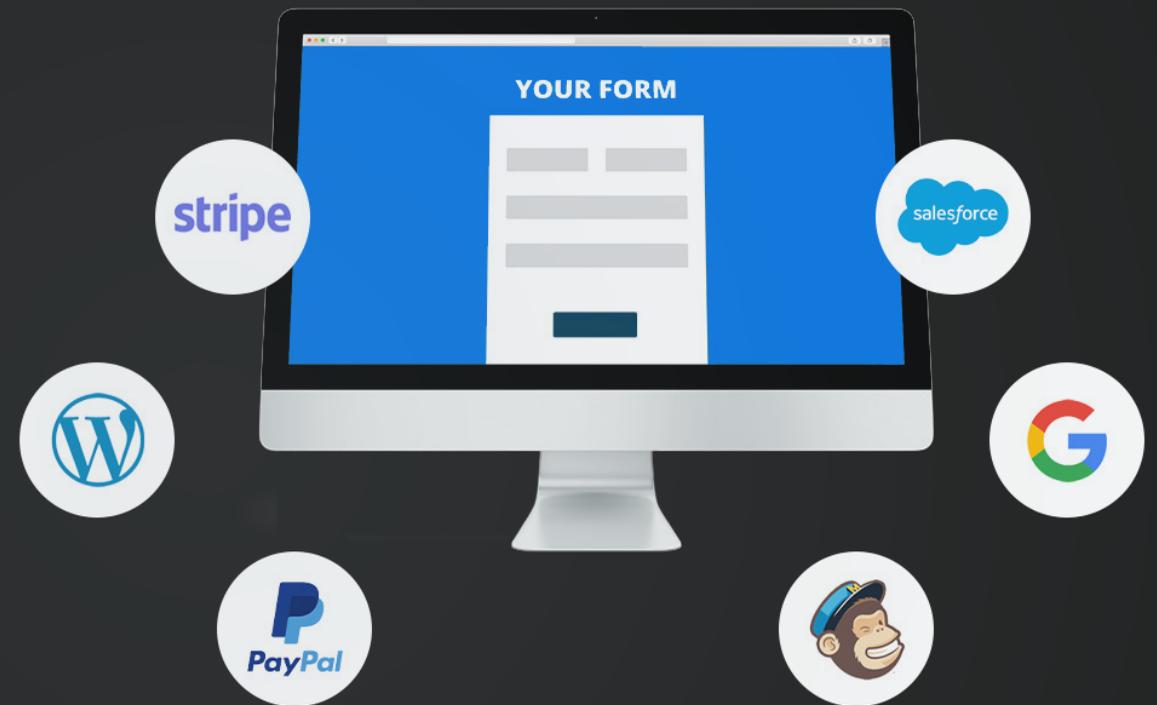
If you haven't realized this by now, basically every little thing FormAssembly does is magic. Not only can you build and customize modern, user-friendly forms, you can also customize them to meet your needs, connect data in all sorts of ways, and maintain security and compliance all at the same time.

Collect Payments and More

Want to collect payments? You can do that with FormAssembly. Want to register people for your GotoWebinar sessions? Send data to Pardot, AWeber, Mailchimp, Google Sheets, and more? You can do that too. FormAssembly integrates with systems you may already use to help you get more from your forms.

Stay Secure and Compliant

FormAssembly is PCI DSS Level 1 Certified and is compliant with GDPR and FERPA on all plans. All plans also include encryption in transit and at rest. Our higher plans are compliant with regulations vital to specific industries, such as HIPAA and GLBA compliance on our Compliance Cloud plan and FedRAMP Ready status on our Government Cloud plan.



Do More With One Platform

You might even feel like the FormAssembly team can read your mind with the useful and prolific features available across our platform.

E-Signatures

Add legally binding e-signatures to your FormAssembly forms for contracts, waivers, and more.

Salesforce Dynamic Picklists

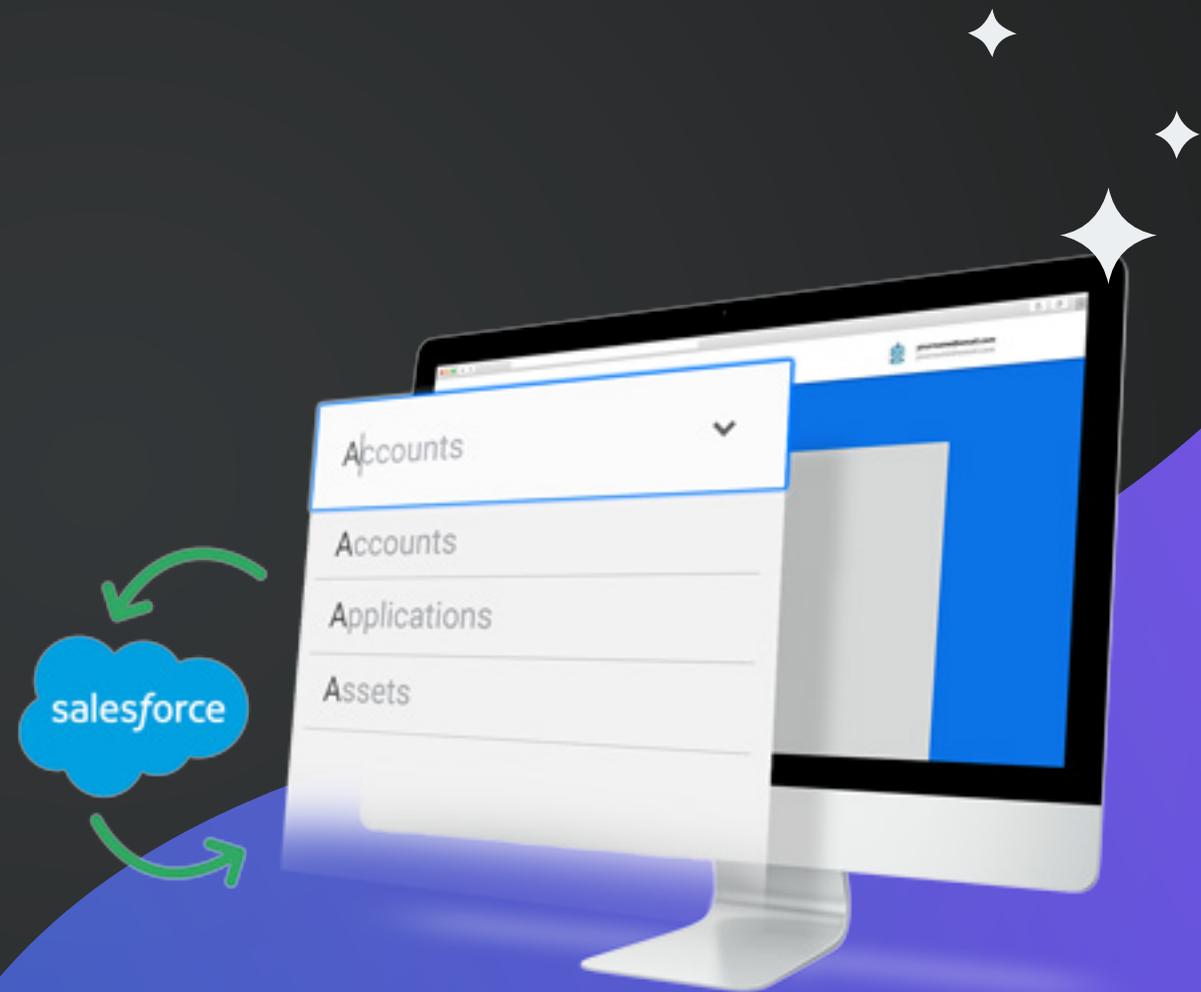
Pull options for multiple-choice questions directly from Salesforce picklists so that your forms magically reflect the most up-to-date information in Salesforce.

Theme Editor

You don't have to be a tech wizard to design attractive forms with FormAssembly! With the Theme Editor, it's easy to style your forms to match your preferences or company branding.

Ready to see these features and more in action?

[Sign in and start building.](#)





Your magic moment with FormAssembly awaits.

If you need any extra guidance throughout your form building journey, don't hesitate to reach out to our friendly [support team](#)! Log in to your account and start creating extraordinary web forms today.

[Log In Now](#)