

I've upgraded to Enterprise. What's next?

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Overview

Once you've upgraded to FormAssembly's Enterprise or Compliance Cloud Plan, you'll want to make sure only your Enterprise/Compliance Cloud forms can be submitted. Below are important tasks to ensure a smooth transition.

We can also move your Professional or Premier account to one that does not require payment as you transition through your migration.

Note: All Enterprise Cloud instances come with 10GB of space for storage. If you have a need to upgrade that amount, please contact FormAssembly support.

Requirements

Enterprise

Compliance Cloud

For information on upgrading, please contact our Sales Department at sales@formassembly.com.

Upgrading from a Professional or Premier

Plan

If you have an existing Professional or Premier Plan account that you intend to replace with your new Enterprise/Compliance Cloud Plan we recommend you take the following steps:

1. Migrate any forms and settings using the [Form Transfer Tool](#) within 30 days to avoid additional charges. If you require special accommodations for migrating your forms and data, please let your Account Executive or our Support team know beforehand.
2. Once you have finished migrating your forms to your new Enterprise/Compliance Cloud Plan, it is recommended that you cancel or suspend your old Professional or Premier Plan account:
 - If you no longer wish to retain your old forms and data, you may **cancel** your account by logging in to your Professional or Premier Plan account and clicking the My Account tab ► Plan.
 - If you need to retain access to your old response data, please contact our support team to have your account **suspended**.
Note: A suspended account will only have access to review old forms and view responses.

Transfer your forms to Enterprise or Compliance Cloud

- To replicate existing forms in your Professional or Premier Plan account over to your new Enterprise/Compliance Cloud instance, use the [Form Transfer Tool](#).
- Any new forms (i.e., which do not exist in your Professional or Premier account) must be created with the Enterprise/Compliance Cloud account.

- If your forms are embedded on an external site, you will need to [republish](#) the new Enterprise/Compliance Cloud version of your forms.
 - You will also need to update any links to your forms to point to the new Enterprise/Compliance Cloud version of your forms.
 - **Once forms are transferred**, archive your forms in the old premier or professional account or ask us to cancel the account.
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Single Sign-On in Salesforce

To replace your Single Sign-On (SSO), so you can log into the Enterprise/Compliance Cloud account through Salesforce, [follow the steps in the documentation](#).

- You must install the new version of the AppExchange app found in the doc link above.
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Cancelling Enterprise or Compliance Cloud

If you would like to downgrade from your Enterprise/Compliance Cloud plan at any time, this is possible; however there are several important points to keep in mind:

- Any existing response data that you have not exported, and that is stored within your Enterprise/Compliance Cloud instance, will be lost.
- All forms that are published under your Enterprise/Compliance Cloud instance will need to be republished in your new downgraded account.
- Any connectors that you have setup will need to be reauthorized in your new downgraded account.
- Prior to beginning the process of downgrading, we recommend that you

contact our [sales team](#).
