Email Notifications and Auto-Responder

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FormAssembly offers two distinct ways to send automated emails after a form response is submitted: Notifications and the Auto-Responder. The difference between these two features is their intended audience:

- **Notifications** are emails **sent to the form owner, administrator, or other individuals you designate from inside your organization**. They'll alert you every time a respondent submits a form response. The default notification template includes the submission date, completion time, and the full response text. Notifications are customizable to include just the information you need in the format you want as well.
- **The Auto-Responder** creates emails **sent to a user after they submit a form response**. To enable the auto-responder, you'll need to have a field in your form with email validation enabled to collect the respondent's email address. Beyond that requirement, auto-responses are flexible: you can provide a respondent with a copy of the data they submitted, a receipt for an order or donation, or just a message thanking them for taking the time to fill out your form.

Common use cases for notifications and the auto-responder include:

- Receive a notification about who is submitting responses to your form and send a copy of a respondent's submissions to the form owner or manager
- Have your respondents receive a copy of their form responses
- Send any next steps to your respondents
- Send a receipt to your respondents
- Send a thank you to your respondents for submitting the form

Both Notifications and the Auto-Responder are configured on the **Notifications** page. To get there:

1. From the Form List, move your mouse over the **Configure** button for the form you'd like to modify.
2. In the Configure dropdown menu that appears, click on **Notifications**.

Email Collection Setup

To be able to reply to form respondents, the Email Collection section for your Notifications page must be configured. In some Notification cases, you may not want to send a reply to a respondent and can skip the following steps. Email Collection setup is required if enabling the Auto-Responder.

1. In Notification Options, locate the Email Collection section.
2. Set the Email Question to a field in your form that collects the respondent's email address.

> **Note:** Only fields validated as an email address field will appear in the dropdown. If the field you would like to select is not appearing in the menu, ensure that the **Expected Input Format**, under **Validation Rules**, is set to "Email".

Once this is set up, if you reply to an email notification, the reply will go to the form respondent (provided their email was collected in the form).

Notifications Setup

1. Find the **Your Notifications** section.

2. Enable the notification with the **Your Email Notification** dropdown menu, choosing either text or HTML notifications.

3. Enter your email address in the **Email Responses To:** field.

   ○ Multiple addresses may be entered by separating each address with a comma (do not include spaces). Additionally, you can use a field alias if you would like the "Email Responses To:" field to be determined by a field in your form response.

4. Add any BCC addresses if applicable.

> **Note**:
> - If you are not receiving email notifications, please check your spam folder. If you are still unable to receive them, contact our support team for assistance.
> - The Notification sender should be listed as report@formassembly.com, and can be used for whitelisting if required.
> - For users who are still in their trial period, you can only use your FormAssembly account email address for email notifications.

Notifications - Customized Template Setup

1. Set the **Email Template** option to **Customized Template**.

2. Fill out the additional fields that populate - Sender Email, Sender Name, Email Subject, and Email Content.

   ○ Please note that the Sender fields do not support aliases or formulas. In the case where an alias or formula is needed, please leverage the Email Collection section and the email field collected there, or consider using a workflow.

   ○ For users who are still in their trial period, the Sender Name is locked to "FormAssembly Notification" for the duration of the free trial.

   ○ In the **EmailSubject** and **EmailContent** fields, you can use the following aliases, which will be replaced by the actual value when the email is sent:

%%FORM_NAME%%	The name of your form.
%%SUBMITTED_DATE%%	The date and time when the response was submitted.
%%COMPLETION_TIME%%	The time it took to fill out the form.
%%RESPONSE_TEXT%%	A plain text, simplified version of the data submitted with the form. *You should not use this alias* if your form collects sensitive information that should not be sent over an unsecured medium such as email.

%%RESPONSE_HTML%%	An HTML formatted version of the data submitted with the form. *You should not use this alias* if your form collects sensitive information that should not be sent over an unsecured medium such as email.
%%RESPONSE_URL%%	*The link to see the response on FormAssembly. A login is required to access responses.*
%%FILE_LIST%%	The list of uploaded files (if any). Login is required to download the files. To specify an individual upload field, use the field alias like so: %%**tfa_###_**URL%%
%%UNPROTECTED_FILE_LIST%%	Same as the previous entry, but login is not required to download the files. To specify an individual upload field, use the field alias like so: %%**tfa_###_**UNPROTECTED_URL%%
%%RESPONSE_ID%%	A unique identifier for the submitted response.
%%REFERRER%%	The address of the page hosting the form (*not* the page used to *reach* the form).
%%IP_ADDRESS%%	The IP address used to submit the form.

> **Note**: You can use the Formula Editor to make inserting aliases easier. Use the formula icon next to any of the customized template fields to populate your notification with aliases from your form. Additionally, you can use formulas from the Formula Editor to add customization to your emails.

Notifications - Attach Response PDF Setup

If you have an Essentials plan or above, you can attach a copy of the response as a PDF to your notification emails. To enable this feature, you will need to check the "Attach PDF of form response" option under "Attachments".

ATTACHMENTS:

☐ Attach PDF of form response

PDF NAMING CONVENTION:

%%FORM_NAME%% %%RESPONSE_ID%% %%SUBMITTED_DATE%%   *f*

You can also change the name of the PDF by editing the "PDF Naming Convention" field. This field uses the aliases for the form name, the response ID, and the submitted date by default. If you would like to customize this, you can use aliases or text to define another naming convention.

- Currently, it is only possible to send a PDF as a Notification, not an Auto-Response.
- Team plan users and above can send PDFs of responses through multiple emails by using FormAssembly Workflow.

Auto-Responder Setup

The auto-responder can be used to automatically send customizable emails to form respondents, provided they enter their email addresses in the form. This can be particularly beneficial any time you would like an automatic message to be sent to respondents upon submission of a form.

Before you can set up the Auto-Responder, you'll need to make sure that you're capturing the respondent's email address. See the Email Collection Setup section above.

Once the Email Collection section is configured, you can enable your Auto-Responder.

1. In the **Auto-Responder** section, set the **Auto-Responder** menu to **enabled** (choose text or HTML email).
2. Enter the **Sender Email** address and **Sender Name** (e.g., your name and email).
   - As an added security measure, when configuring a Sender Email, the email address entered requires verification before the Sender Email is updated. Emails will be sent from "no-reply@formassembly.com" until the new email address is verified.
   - If an email has not been verified:
     - a pending verification message appears under the changed field
     - the email address entered receives an email with a link to complete the verification
     - **Note**: The verification link expires after 24 hours.
   - Email addresses are verified per FormAssembly instance.
   - **Restrictions**
     - A Basic plan user, or a legacy premier or professional user, will only be able to use email addresses verified through their specific user account.
     - Sender fields are locked for Free Trial users. These users are only able to use their own account email address for Sender Email configurations.

3. Enter the **Reply-To** Email address and **Reply-To Name**. These fields support aliases and formulas. Additionally, these fields are not subject to the email verification requirements of Sender addresses.

4. Enter the **Email Subject** and a message in the **Email Content**.

> **Note**: We are not authorized to send from major email providers, such as AOL, Yahoo, or Gmail. Please set the sender email to either "no-reply@formassembly.com" or a non-generic email of your own.

Customing the Auto-Responder

In the Auto-Responder, you can use the following aliases:

%%FORM_NAME%%	The name of your form.
%%SUBMITTED_DATE%%	The date and time when the response was submitted.
%%RESPONSE%%	The data submitted with the form. *You should not use this alias* if your form collects sensitive information that should not be sent over an unsecured medium, such as email.
%%FILE_LIST%%	The list of uploaded files (if any). You will need to log into FormAssembly to see the files. If you do not want to require the viewer to log in, you can use %%UNPROTECTED_FILE_LIST%% instead.

> **Tip**: You may also build a template using any of the form's field aliases in addition to these generic response aliases. These formulas can also be used to create customized and dynamic emails.