Get Started with Salesforce

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Salesforce + FormAssembly

Integrating with Salesforce is easy with FormAssembly! We've listed the best place to start for each of our Salesforce options.

You must have a FormAssembly Premier Plan or Salesforce Connector Add-on, depending on the integration. If you do not have an account, sign up for a trial here.

Salesforce Update Connector

Create and update records in Salesforce when a form is submitted or saved by the respondent.

Available on Premier Plan or Salesforce Connector Add-on.

Start here!

Access FormAssembly through Salesforce

Sign into FormAssembly and work on your forms directly within Salesforce.

Available on Premier Plan and above

Your FormAssembly username must match your Salesforce username.

Do it now!

Import a Form from Salesforce

Learn how to quickly import a form from Salesforce.

Our import tool will even help configure your connector!

Learn How!

Salesforce Prefill Connector

Prefill a form with existing data in Salesforce.

Available on Premier Plans or Salesforce Connector Add-on.

Check it out!

Authenticate with Salesforce Experiences

(formerly: Communities)

Salesforce Portal Authentication requires a login to access the form.

Available on our Team Plan and above with the Salesforce Connector Add-on only.

Find out how!

Salesforce Marketing Cloud Connector

(formerly: ExactTarget)

Create and update Salesforce Marketing Cloud records.
Available on Premier Plan or with the Salesforce Connector Add-on.

Learn More!

SFMC: Prefill Connector

(formerly: ExactTarget)

Prefill a form with existing data from Salesforce Marketing Cloud.

Available on Premier Plan or with the Salesforce Connector Add-on.

Learn More