

Create a New Salesforce Record

Download the PDF of this article.

In this Article

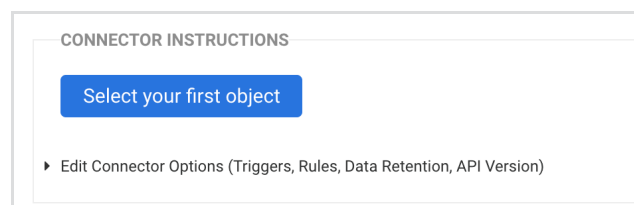
Related Articles

Introduction

With a FormAssembly web form, you can configure the Salesforce Connector to create a Salesforce record for any API-accessible object, including most standard and custom objects.

Select your First Object

The first time you enter the form's connector, you'll see a button to **select your first object**. Upon clicking the button, you'll be able to choose the kind of object you want to create, update, or lookup.



1. First, select the type of object that you would like to create.
2. After you have selected the object type, that object's required fields will be automatically added to the connector step for mapping. You can now map these, as well as any additional fields.

A screenshot of the "CONNECTOR INSTRUCTIONS" dialog box. At the top, it says "1 - Create new Account record" with a dropdown menu and an "Ok" button. Below this, there are two dropdown menus: "Create" and "Account". To the right of these is a tip: "Tip: Missing an object? Try refreshing the list." and a checkbox labeled "Skip this step if...". Below the dropdowns is a section titled "FIELD MAPPING" with the instruction "Select the Salesforce fields that will receive data from your form." There are two columns: "THESE SALESFORCE FIELDS:" and "GET THEIR VALUE FROM:". Under the first column, there is a dropdown menu with "Account Name *". Under the second column, there is a dropdown menu with "a field in your form" and another dropdown menu with "Select a form field". To the right of these dropdowns are two buttons: a trash icon and a checkmark icon. At the bottom of the dialog, there is a button labeled "+ Map Another Field".

You can [learn more about mapping fields here](#).

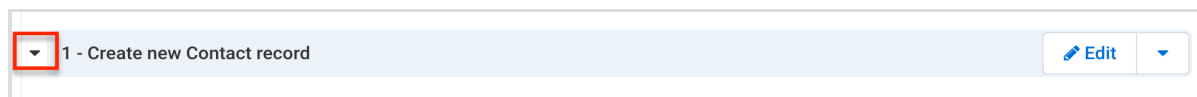
Navigating the Salesforce Submit Connector

When working with the Salesforce Submit Connector there are a few features to keep in mind that can help make your process easier.

Collapsing Connector Steps

If you find yourself working with multiple objects in your connector, it may be helpful to collapse certain steps that you are not working with currently in order to free up space on your screen.

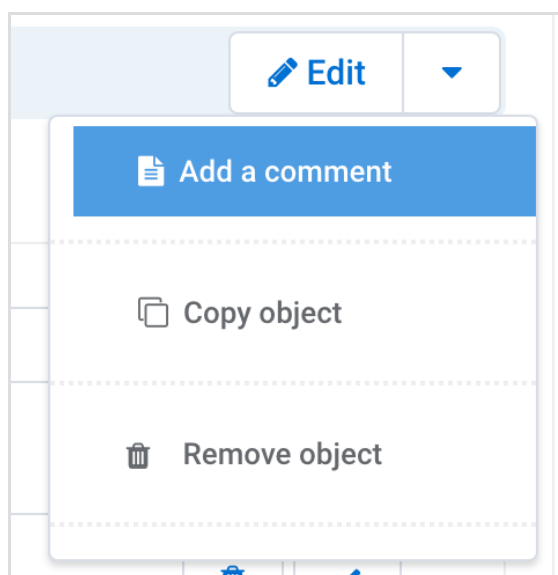
This can be done by clicking the small triangle next to each connector step. To re-expand the step, simply click the triangle again.



Adding a Comment

At times it can be helpful to add a comment to a step in a connector. This could be a short summary on the purpose of the step, a reminder note yourself about the mappings, or anything you would like to make note of.

To add a comment to a step in the connector, hover your mouse over the triangle drop down menu next to "Edit" and click **"Add a Comment."**



You'll then be able to add a comment at the top of the connector step in order to document your setup. You can also choose to delete the comment later if you'd like to by clicking the **Delete Comment** button at the top right.

Use this space to document your setup:

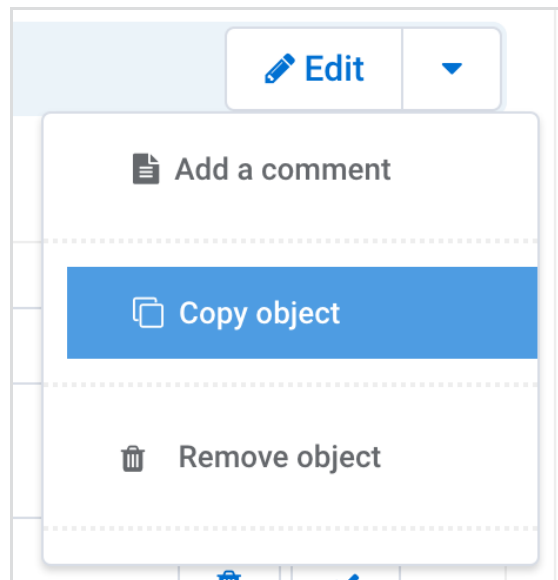
Delete comment

This is something I would like to remember...]

Copying an Object

You might also find it useful to make a copy of an object you have already created, so that you can use the mappings you have previously setup, rather than starting from scratch.

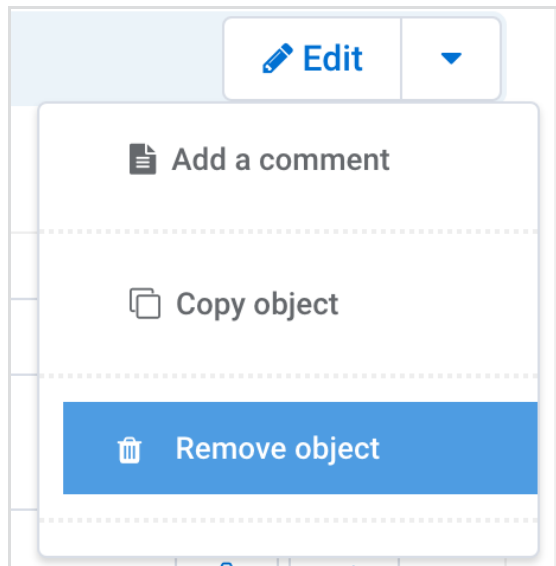
To do this, hover your mouse over the triangle dropdown menu next to "Edit" and select the **"Copy Object"** button. Once you click the button, a copy of the object will appear directly below the object you have just created. After your new object has been created, you can choose to **Reorder Objects** at the bottom of the connector if you would like to change the order of steps.



Note: You cannot use this feature to copy an object from one connector to a different connector. The only way to accomplish this is to [make a copy](#) of your form, which will copy your connector setup by default.

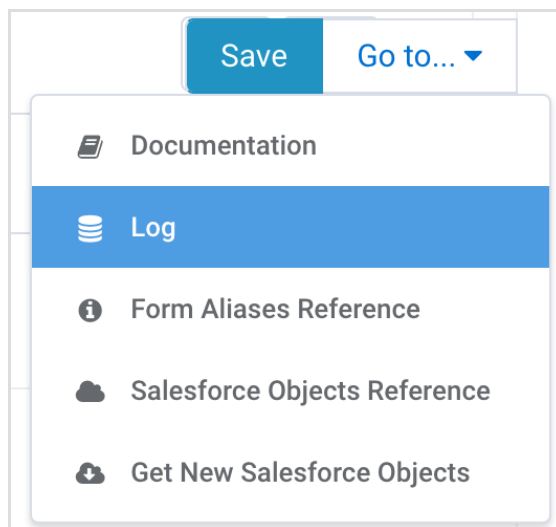
Removing an Object

If you ever need to remove an object in your connector, you can hover your mouse over the triangle dropdown menu next to the "Edit" button and select **Remove Object**.



Accessing the Connector Logs

The Connector Logs can be an incredibly helpful tool for troubleshooting errors and monitoring how your connector is functioning. These logs can be accessed from the **"Go To..."** dropdown menu at the top right of the connector. [This article](#) provides additional details on using and reading the connector log.



This link can also be used to view your Salesforce Objects, Get New Salesforce Objects (in case you've made any updates to your Salesforce records), view our documentation, and view the field aliases for the form.
