

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

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Overview

Once you've upgraded to one of FormAssembly's Essentials, Team, Enterprise, or Government plans, you'll want to ensure only your new instance's forms can be submitted. Below are important tasks to ensure a smooth transition.

As you transition into your new instance, we can move your previous Basic account to one that does not require payment.

Requirements

Essentials

Team

Enterprise

Government

For information on upgrading, please contact our [Sales Team](#).

Upgrading from a Basic Plan

If you have an existing Basic plan account that you intend to replace with your new Essentials, Team, Enterprise, or Government plan, we recommend you take the following steps:

- 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.
- Once you have finished migrating your forms to your new Essentials, Team, Enterprise, or Government plan, it is recommended that you cancel or suspend your old Basic account:

- If you no longer wish to retain your old forms and data, you may **cancel** your account by logging in to your Basic 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 can only review old forms and view responses.

Transfer your forms to an Essentials, Team, Enterprise, or Government Plan

- To **replicate existing forms** in your Basic account over to your new Essentials, Team, Enterprise, or Government plan instance, use the [Form Transfer Tool](#).
- Any new forms (i.e., which do not exist in your Basic account) must be created with the new Essentials, Team, Enterprise, or Government account.
- If your forms are embedded on an external site, you must **republish** the new Essentials, Team, Enterprise, or Government plan version of your forms.
- You will also need to update any links to your forms to point to the new Essentials, Team, Enterprise, or Government plan version of your forms.
- **Once forms are transferred**, archive your forms in the old Basic account or ask us to cancel the account.

Single Sign-On

If you are on a Team, Enterprise, or Government plan, you now have the option to [set up Single Sign-On Authentication for your instance](#) and have your users log into their accounts through your Single Sign-On software.

If you are using Single Sign-On through Salesforce, you must replace your current Basic account information with your new Essentials, Team, Enterprise, or Government account information. You can [follow the steps in this documentation to replace your account information](#).

Cancelling Essentials, Team, Enterprise or Government

It is possible to downgrade from your Essentials, Team, Enterprise, or Government plan at any time, however, there are several important points to keep in mind:

- Any existing response data that you have not exported, that is stored within your Essentials, Team, Enterprise, or Government instance, will be lost.
 - If downgrading to an Essentials, Team, or Enterprise plan:
 - You may use the [Form Transfer Tool](#) to transfer your forms from your current account to your new downgraded account.
 - Any connectors configured on your forms will need to be reauthorized within your new account.
 - All forms published under your previous Essentials, Team, Enterprise, or Government instance will need to be republished.
 - If downgrading to a Basic plan:
 - You cannot transfer forms from an Essentials, Team, Enterprise, or Government instance to a Basic account. Instead, you will need to create new forms.
 - Before beginning the process of downgrading, we recommend contacting our [Sales Team](#).
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