

Email Notifications and Auto-Responder

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Email Notifications and the Auto-Responder

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 user submits a form response. The default notification template includes submission date, completion time, and the full response text, but you can also customize notifications so that you receive just the information you need in the format you want.
- **The Auto-Responder** creates emails **sent to a user after they submit a form response**. In order to enable the auto-responder, you'll need to have a field in your form with email validation enabled collecting the respondent's email address. Beyond that requirement, auto-responses are flexible: you can provide a user 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 user's submissions to the form owner or manager
- Have your users receive a copy of their own form responses
- Send next steps to your users
- Send a receipt to your users
- Send a thank you to your users 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**.

Please Note: The To: field is limited to 10 email addresses, and BCC: field is limited to 15 email addresses for email notifications.

Sending an email to 10+ addresses exponentially increases the risk that that email gets marked as spam by one of the recipients. This increases the chance that FormAssembly email delivery is flagged as spam by an email provider, which means it also increases the chance that the form creator's recipients may not continue receiving FA notifications. Best practice is to create an email group for those users and use that single email address in FA settings.

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. You can enter multiple addresses by separating each address with a comma (and with **no** space). 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.

Note: In order to be able to reply to your form respondent, you will need to have the Email Collection section for your Notifications page set up by following steps 1 and 2 in the [Auto-Responder - Setup](#) section of this help document. Once this is set up, if you reply to an email notification then the reply will go to the form respondent, provided their email was collected in the form. This will override the "sender" email address and go directly to the form respondent.

If you are not receiving email notifications, please check your spam folder, and then let our support team know if you are still unable to receive them.

The Notification sender should be listed as report@formassembly.com which can also be used if whitelisting is required.


For users who are still in their trial period, you can only use your FormAssembly account email address for email notifications and auto-response emails.

Notifications - Customize

1. Set the **Email Template** option to **Customized Template**.
2. Fill out the requested information. In the **Email Subject** and **Email Content** 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. <i>You should not use this alias</i> if your form collects sensitive information that should not be sent

	over an unsecure medium such as email.
%%RESPONSE_HTML%%	An HTML formatted version of the data submitted with the form. <i>You should not use this alias</i> if your form collects sensitive information that should not be sent over an unsecure medium such as email.
%%RESPONSE_URL%%	<i>The link to see the response on FormAssembly. Login is required to access responses.</i>
%%FILE_LIST%%	The list of uploaded files (if any). Login is required to download the files. To specify a 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 (<i>not</i> the page used to <i>reach</i> the form).
%%IP_ADDRESS%%	The IP address used to submit the form.

Note: You can also use the [Formula Editor](#) to make inserting aliases easier. Use the  next to any of the customized template fields to populate your notification with aliases from your form. You can also use formulas from the Formula Editor to [add customization to your emails](#).

Notifications - Attach Response PDF

If you have a Premier plan or above, you can attach a copy of the response as a PDF to your notification emails. In order 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%%

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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 your own naming convention.

Configure the Save & Resume Notification Sender Email and Name

Once you have enabled the Save and Resume feature, you will need to configure the Sender Email and Sender Name.

When your form respondent receives email directions about how to resume their form, this information will be used.

The default values of "no-reply@formassembly.com" and "Form Notification" will automatically be shown when you are configuring these fields. However, you can customize these fields to whatever you would like, provided the email address entered is a valid format.

SAVE & RESUME:

Allow respondents to save their progress and resume the form later ?

SENDER EMAIL:

no-reply@formassembly.com

SENDER NAME:

Form Notification

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Auto-Responder - Setup

The auto-responder can be used to automatically send customizable emails to form respondents, provided they enter their email address 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:

1. In the **Email Collection** section, set the **Email question** menu to the question in your form that collects the respondent's email address.
2. If the question is not available in the menu, open the Form Builder and edit your form. Add email validation to

the question.



EMAIL COLLECTION

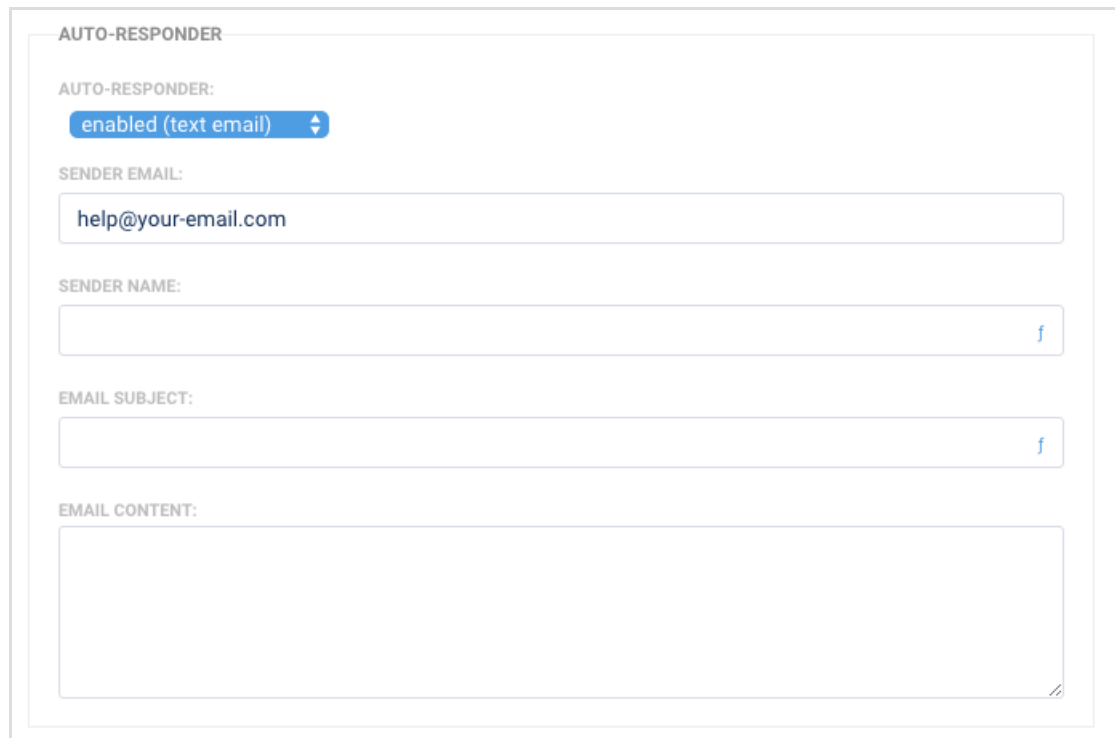
Does your form ask for the email address of the respondent? If yes, please select the corresponding question.

EMAIL QUESTION:

Email

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 email address and name that will appear as the sender of the email (e.g., your name and email).
3. Enter the email subject and message.



AUTO-RESPONDER

AUTO-RESPONDER:

enabled (text email)

SENDER EMAIL:

help@your-email.com

SENDER NAME:

NAME

EMAIL SUBJECT:

SUBJECT

EMAIL CONTENT:

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 responses@formassembly.com or a non-generic email of your own.

Auto-Responder - Customize

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. <i>You should not use this alias if your form collects sensitive information that should not be sent over an unsecure medium, such as email.</i>
%%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.