Quick Start Guide

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Form Building Process

Building a form can be a long and very involved process, but we're here to help!

Below is an outline to help you through the form building process, including configuring connectors, testing, and publishing. Our team is happy to answer your questions along the way! With so many options, it's important to find what works best for you. You can also view our Best Practices in Form Building document to learn more about our recommended practices when building your forms.

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1. Define the Purpose

List what information you want to collect on your form and why.

People don't usually enjoy filling out forms, so it's important to make good use of the time they are giving you.

Check out Best Practices for User Friendly Forms for some great tips!

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2. Form Fields

Decide which fields should be visible to all respondents and which fields will show to specific groups.

For more on this, see our article Create a Form for Multiple Audiences.

This is also a good place to think about what validations the individual fields will need, or if you need a calculation in your form.

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3. Build your form.

We have multiple methods to create a form, like using a template or importing from Salesforce to save some time.

Find out more here.

1. Create all the fields on your form.
2. Add your conditional logic and calculations.
3. Customize the look & feel of your form by adding a theme.

> **Tip:** Sometimes it's best to save making your fields required until you do some testing. This way you don't need to fill everything in to test something specific.

4. Test your form.

Fill it out and take a look at the response in FormAssembly.

Within each response is a log of activity. Here's more on viewing your responses in FormAssembly.

5. Configure your connectors and integrations.

FormAssembly offers many options to integrate with other services. Learn more.

> **Tips:** Focus on setting up one at a time and test each connector separately, before testing it all together.
> Once you're happy with how the connectors work, add your required field validations.

6. Choose a publishing method.

Find out which publishing option will suit your needs best.

Some methods auto-update with any changes made in the form and some are unfriendly to the prefill connectors. This page goes over the pros & cons of each.