

Setting Up Legacy Workflows

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Note: Legacy Workflow is only available to Professional, Premier, and Basic plans.

Please use the following link for FormAssembly Workflow information on Teams plans and above: [Workflow Setup](#)

Overview

Forms can be combined together to define a **workflow**.


The workflow determines the order each form must be filled out and allows data to be passed between forms. While data can be passed between forms, it is important to note that **files and attachments cannot be passed**.

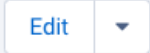
Forms are processed separately, and the processing options defined for each form are applied (e.g., preview, email notifications, connectors), with the exception of the Acknowledgment options (i.e., Thank You message and redirection), which are overwritten by the workflow engine.


One of the benefits of using a workflow is that all information is submitted and run through your respective connectors after each individual form. This way, if a user fails to complete the entire workflow, some of their information is still submitted. On the other hand, if you're working within a single form that is broken into multiple pages, information is not submitted until the completion of the last page.

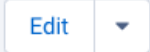
Note: Workflows cannot be shared between accounts.

Workflows

 WORKFLOW ID 4
Registration
Last modified 11/07/2018



 WORKFLOW ID 13
Test
Last modified 02/27/2019



Note:

- Workflow logic is not yet available. You can only define a predefined, sequential list of forms.
- Passing data between forms is limited by the maximum size allowed for URLs and shouldn't be used for large text fields (over 2000 characters, all fields combined).
- You are **not** currently able to use a [redirect link](#) at the end of a workflow.

You can create a **dynamic workflow** by using the redirect link in the Notifications tab for each form individually, instead of using a Workflow.

Configuration

To create a new workflow, on your **Forms** page, select **New Workflow** on the left sidebar.

The workflow configuration screen contains the following settings:

Name	The name of the workflow (not displayed to the respondents)
Thank You Page	The address of a page where you want the respondent to be redirected once the last form of the workflow has been completed. If this option is not set, the Thank You message in the Notification settings of the last form of the workflow will be used instead.
Steps	A Workflow Component, or step, is a single form with its optional parameters.
Parameters	(Optional) This setting is automatically appended to a form's query string and must be formatted accordingly. You may use it to pass data between forms (see below).

Pass Data Between Forms

In the workflow configuration screen, the **parameters** option can be used to pass data between forms. A parameter is a field name/value pair, with the following format:

```
FIELD_NAME=FIELD_VALUE
```

You can find your field names on the form's [alias](#) page.

For example, if you had a field called "price" with an alias of tfa_1 and you wanted to automatically fill it with a value of "\$10.00," your parameter would look like this:

Steps:	
1. Form:	<input type="text" value="Work Flow Page 1"/>
Parameters:	<input type="text" value="tfa_1=\$10.00"/>

You can also reference data submitted in the previous form by replacing `FIELD_VALUE` with the corresponding field name, surrounded by a double percent sign (%%).

```
FIELD_NAME=%%FIELD_NAME_PREVIOUS_FORM%%
```

For example, if you had a field on your second form with an alias of tfa_1 that you wanted to fill with a value from a field on your first form that had an alias of tfa_7, your parameter would look like this:

2. Form:	<input type="text" value="Work Flow Page 2"/>
Parameters:	<input type="text" value="tfa_1=%%tfa_7%%"/> Remove

To separate different field name/value pairs, use the ampersand (&) character.

```
FIELD_NAME=FIELD_VALUE&OTHER_FIELD_NAME=%%OTHER_FIELD_NAME_PREVIOUS_FORM%%
```

For example, if you wanted to define a field value and prefill a field with a previous field's value, your parameter would look like this:


2. Form:	<input type="text" value="Work Flow Page 2"/>
Parameters:	<input type="text" value="tfa_1=\$10.00&tfa_2=%%tfa_7%%"/> Remove

Again, you can refer to the form's [aliases](#) page to identify field names.

Note: The **parameters** option is automatically appended to the form URL, so you should only specify field name/value pairs (i.e., omit the URL part).

Public Workflow Link

Click Edit on the workflow for the FormAssembly hosted workflow link to send to prospective respondents. You can also publish your workflow, see below for more.



WORKFLOW ID 4
Registration
Last modified 11/07/2018

[Edit](#)

Embedding a Workflow

Using an iFrame

To publish your workflow within an iFrame, use the standard FormAssembly iFrame code and replace the URL in the iframe src="" below with your Workflow Start URL:

```
<iframe src="http://tfaforms.com/YOUR_FORM_ID" height="800" width="600"
frameborder="0" ></iframe>
<script src="https://tfaforms.com/js/iframe_resize_helper.js"></script>
```

Your Workflow Start URL can be found on the Workflow tab:

Public Address

Your workflow is publicly available at this address:

<http://www.tfaforms.com/workflows/start/1515>

Using WordPress

To embed a workflow within WordPress, begin by making sure that you have installed the most recent version of our [WordPress plugin](#).

Next, use the following shortcode to publish your workflow:

```
[formassembly workflowid=1234]
```

Note: Your **workflow ID** is the number after the `tfaforms.com/workflows/start/` in your workflow URL:

<http://www.tfaforms.com/workflows/start/1515>

Using a Server-Side Method

To use a server-side script to publish your workflow you should begin by placing [the code](#) that you are using for your server-side script into the page you're making.

Next, you'll want to replace the reset link that is referencing your form.

Replace: `https://app.formassembly.com/rest/forms/view/123456`

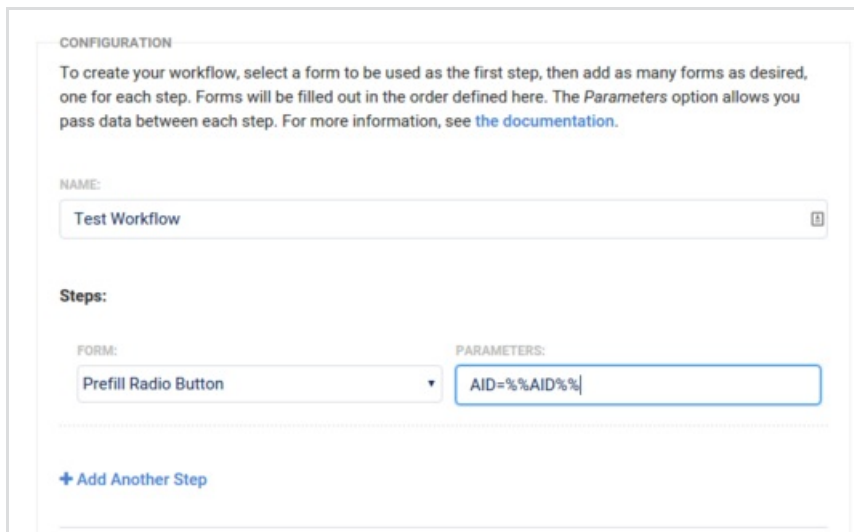
With workflow details: `https://app.formassembly.com/rest/workflows/start/98765`

Then you should be ready to test! Just make sure that your workflow ID and URL are correct as outlined above.

Passing Prefill Parameters to a Workflow

If you would like to pass an unsecure query parameter to the first form in a workflow, then there is one step you'll need to complete in addition to building your [prefilling link](#).

For this example, let's say you're using the parameter "AID" for an account ID. On the configuration page of the first form in your workflow, you'll need to add AID=%%AID%% for the first step. For example:



The image shows a configuration window titled "CONFIGURATION". Inside, there is a text block explaining workflow creation: "To create your workflow, select a form to be used as the first step, then add as many forms as desired, one for each step. Forms will be filled out in the order defined here. The *Parameters* option allows you pass data between each step. For more information, see [the documentation](#)." Below this, there is a "NAME:" label followed by a text input field containing "Test Workflow". Underneath, a "Steps:" label is followed by two columns: "FORM:" and "PARAMETERS:". The "FORM:" column has a dropdown menu with "Prefill Radio Button" selected. The "PARAMETERS:" column has a text input field containing "AID=%%AID%%". At the bottom left of the configuration area, there is a blue link that says "+ Add Another Step".

Once you've added that into the configuration and applied the changes, you'll be good to start testing your prefilling link!
