Connecting to Salesforce

In this Article

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Overview

The Salesforce Connector allows you to create or update any Salesforce object with your web forms. Here's how to connect your form to Salesforce.

Requirements

You'll need a Salesforce account and the Professional, Premier or Enterprise Plan.

Salesforce Configuration Process

There are two ways to begin your integration with FormAssembly and Salesforce.

1. Create your form then setup the connector.
2. Import your form from Salesforce and build the form and connector at the same time.

When using the import tool, you can easily go into the Form Builder, Theme Editor, or Salesforce Connector to make changes. Watch the video below for more!

Video Tutorial

Salesforce: Making a Connection is part of our Getting Started Series, focused on creating and updating records in Salesforce. We also cover attachments and
repeating fields, as well as look at the schema.

This video shows the quickest way to get started with Salesforce, using our Salesforce Form Import Tool.

This webinar is for you if:

- You're new to FormAssembly.
- You want a better understanding of FormAssembly's Salesforce Connector.

Salesforce Authentication

Begin by selecting Connect to Salesforce unless you are using a sandbox account or a custom domain, in which case you should select the appropriate option.

Once you have selected Connect to Salesforce you will be automatically redirected to the Salesforce authentication page.
After entering your Salesforce credentials, you will be asked to **Allow Access** to FormAssembly. Click on **Allow** and you will be automatically redirected back to FormAssembly.

Once you have returned to the connector setup page, you will see that your Salesforce Access has been configured to the credentials you just entered. You can change this access at any time by clicking on the **Change Access** button.

If you authenticate using a Salesforce username, password, and security token, please see [Resetting Your Security Token](#) (login required) for information on obtaining your token from Salesforce.

Once a form has been authenticated, you can authenticate a new connector on an existing or new form by selecting the current authenticated user already shown. To change a user on an authenticated connector, select change access and select the connected account.
Please Note: There can only be 5 active Salesforce OAuth tokens for a given Salesforce user/service combo. A new token is generated each time you select connect to Salesforce and login to Salesforce.

Additionally, if you need to reauthenticate your connector at any time, click here for more information.

Connecting Using a Custom Domain

If you are using a custom domain to connect to Salesforce you can select the box that says, "Connect Using a Custom Domain".

Once you have clicked that box, you'll need to enter the custom domain that you are using and click Connect.

https://yourdomain.my.salesforce.com
Salesforce API Version

When you initially create your connector and authenticate your Salesforce instance, that connector will be setup based on your current version of the Salesforce API.

The connector will not be upgraded when a new Salesforce API version is released, regardless of the checkbox status at the bottom of the connector:

- Prevent empty fields from overwriting existing data
- Prevent attempts to create empty records
- Use custom Salesforce API version

Once FormAssembly supports a new API version, the box will be automatically checked and the API setting will show the previous API version. Since API changes are not always backward compatible, this ensures that a connector will continue to work after an API update.