Upgrading Your FormAssembly Plan

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Overview

With FormAssembly's Essentials, Team, Enterprise, and Government plans, you can manage your organization's users and forms, along with each user's preferences and permissions. This is handy when you have an army of users that need specific access roles and preferences.

How do I upgrade?

Upgrading your plan is a smooth process. We have a few steps to take to provide you with the setup and customization you need.

Contact Us

The first step for upgrading is to contact us. This will help us understand your specific needs when setting up your upgraded instance of FormAssembly, as well as what you may have questions about.

You can also compare features to learn more.

Expect our follow-up email as soon as we set up your order. You will receive an email containing the URL and credentials to log into your FormAssembly instance.

Helpful Links

Customize Your URL

We're happy to host your company's new instance of FormAssembly. Team plans and higher allow you to specify the custom URL for your forms to match your company's branding. For example `mycompany.tfaforms.net` .

You're also able to request a discount if your organization is a nonprofit.

During your upgrade, we recommend reviewing any externally published forms you may have to ensure your publishing methods are updated with your form's new URL.

Add More Users to Your Instance

Essentials plans and higher are built for instances with multiple users. If you would like to add additional users, please contact your Customer Success Manager.

Payment Method & Billing Schedule

A monthly subscription requires a credit card. On an annual subscription, we can invoice you.

Choose an annual billing schedule for a 10% discount.

Contact Information

We want to make sure that we communicate with you properly moving forward. For example, you may be the administrator for your system but have another colleague who should be set up as the primary contact or billing contact. You can note this on the order form.

Nonprofit Discount

On all FormAssembly plans, you can request a 20% nonprofit discount.

Content Migration

If you would like to have your existing forms copied from your current account, you can use our Form Transfer Tool.

For future access to your original forms, ask to suspend your account. You will still be able to access all the forms and responses, but new form submissions will not be processed or submitted through connectors.

During your upgrade and migration process, we recommend reviewing your externally published forms, if you have any, to ensure your publishing methods are updated with any changes to your forms' URLs.