New Custom Salesforce Fields and Objects (Refresh Schema)

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The Salesforce schema is the list of objects and fields that you have available for use in your FormAssembly Salesforce connector.

After you've made changes or created new objects or fields in Salesforce, you must update your Salesforce schema in your connector to use a refreshed list of objects and fields, so your changes in Salesforce are available to your connector.

Refresh Schema

To update your schema, follow these steps:

- 1. Open your Salesforce connector.
- 2. Save the connector, if needed.
- 3. Click the Go To menu, in the upper right-hand corner.
- 4. Click the option "Get New Salesforce Objects."
- 5. Click **OK** to refresh the page.

Note: The following Salesforce fields are unavailable to the schema:

- Auto-numbering fields
- Formula fields
- Lookup fields

Troubleshooting

I've followed the steps above and I keep getting an error.

Update your Salesforce credentials within the connector, and retry the refresh steps above.

I still don't see the field I need.

Update your Salesforce credentials within the connector, and retry the refresh steps above.

If this still does not allow you to see the field you need, please contact our Support Team for further assistance.

Please send the following information:

- 1. The Salesforce Object the field is in.
- 2. The Field Name
- 3. The Field Type.
- 4. A link to the form or connector