Connector Options & Triggers

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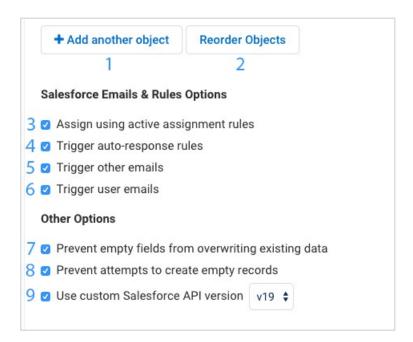
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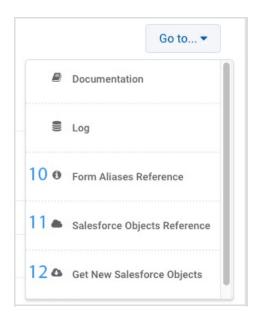**Related Articles**

Introduction

You can choose to have certain Salesforce actions occur when FormAssembly creates or updates records, or to have FormAssembly perform some optional actions before sending data to Salesforce.

To locate the Connector Options in the Salesforce Prefill Connector, click to Configure your connector and scroll to the bottom of *STEP 2 OF 2 - CONNECTOR INSTRUCTIONS*.

To locate the Connector Options in the Salesforce Submitted, After Form Submitted, and Save Connectors, click to Configure your connector and scroll to the bottom of Connector Instructions. Open the 'Edit Connector Options (Triggers, Rules, Data Retentions, API Version) menu to continue.

Options

Select an option:

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1. Add Another Object

You can add additional steps to create or update multiple records with one connector.

2. Reorder Objects

Reorder the steps of the connector. This is helpful to ensure steps that need referenced later are above steps which need to reference it.

3. Assign using active assignment rules

Uses the default (active) assignment rule for a Case or Lead. If set for an Account, all territory assignment rules are applied, otherwise, no territory assignment rules are applied.

4. Trigger auto-response rules

Indicates whether to trigger auto-response rules (checked) or not (not checked), for leads and cases. In the Salesforce user interface, this email can be automatically triggered by a number of events, for example resetting a user password.

5. Trigger other emails

Indicates whether to trigger email outside the organization. In the Salesforce user interface, this email can be automatically triggered by creating, editing, or deleting a contact for a case.

6. Trigger user emails

Indicates whether to trigger email that is sent to users in the organization. In the Salesforce user interface, this email can be automatically triggered by a number of events; resetting a password, creating a new user, adding comments to a case, or creating or modifying a task.

7. Prevent empty fields from overwriting existing data

Keeps FormAssembly from sending empty fields to Salesforce when doing an upsert/update on an existing record which would normally overwrite completed fields.

8. Prevent attempts to create empty records

Keeps FormAssembly from sending records to Salesforce if none of the record's fields are completed. This allows objects like File Attachment records to only be sent if the respondent has attached a file to the file upload field.

9. Use Custom Salesforce API Version

When we update the version of the Salesforce API used by FormAssembly, it is automatically applied to all new connectors.

On existing connectors, you may choose to upgrade to the newest API version.

Doing so is useful if you want to make additional changes to your connector and use one of the new Salesforce objects.

This can impact object and field names on existing connector configurations and the fields will need to be remapped. This will also give you access to any new objects or fields Salesforce creates. An example of a change is the object named **FeedPost** was changed to **FeedItem** in version 21 of the Salesforce API.

To upgrade an existing form to the newest API, you can either:

1. Uncheck the **Use custom Salesforce API version** check box and save your connector.
2. Select the latest compatible version from the dropdown and save your connector.

10. Show list of available aliases for this form.

Field aliases are helpful when building dynamic formulas.

11. See all Salesforce Objects

This is a view of how FormAssembly sees your Salesforce objects and fields.

This is helpful when needing to know what type of data a field will accept.

12. Get New Salesforce Objects

This will refresh the list of objects and fields that FormAssembly has for your profile.

This link only relates to the form you are working on.

If you are not able to find your newest custom Salesforce fields, this link will help. More on this.