

Use FormAssembly in Salesforce

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Introduction

FormAssembly for AppExchange is an app that allows you to access your FormAssembly account from within Salesforce, without requiring a separate login (this is also called **Single Sign-On** or SSO). Additionally, the **FormAssembly Lightning Component** will be added to the Experience Builder, allowing you to easily embed FormAssembly forms into your Salesforce Experience pages.

Getting Started

Note: Using FormAssembly for AppExchange will only change your user experience. All functionality is the same whether accessing FormAssembly through AppExchange or through app.formassembly.com (or your equivalent Essentials and above URL).

Confirm that your FormAssembly username matches your Salesforce username.

To set up SSO, your usernames in both accounts must match. This is a requirement on both the FormAssembly and Salesforce sides of the setup. If your usernames do not match, you will need to change your FormAssembly username.

For Professional, Premier, and Basic users:

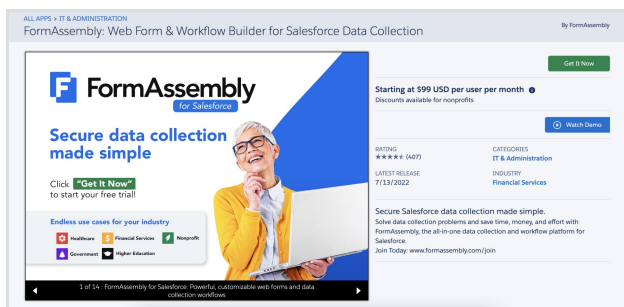
Please [contact our support team](#) and request that your username be changed to match.

For Essentials, Team, Enterprise, and Government users:

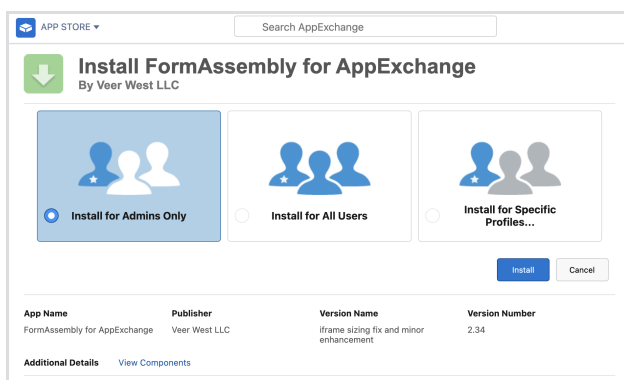
Please reach out to your account administrator and request that your username be changed to match.

Install the FormAssembly app for AppExchange.

Install the most recent version of our AppExchange app here.

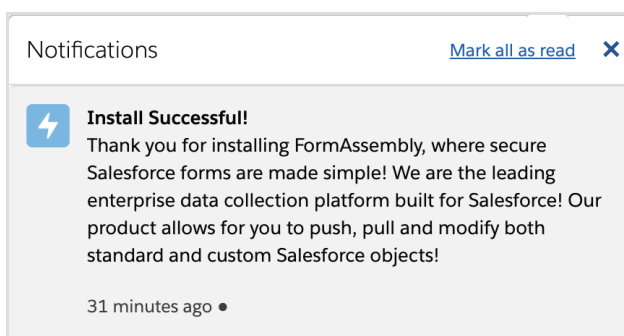


You will then select whether to install the app for admins, all users, or specific profiles.



Continue the installation.

Once the installation completes, you will see a notification appear in Salesforce. If you do not see this notification, make sure that you are the system admin for your Salesforce account. **Click on this notification to continue with the setup process.**



Now click Let's Get Started to begin the setup wizard. You will be taken through the following steps:

1. Confirm Account - Confirm that you have an active FormAssembly account that can be connected to Salesforce.

FormAssembly for Salesforce Setup

Confirm Account

In order to use this package, you must have a FormAssembly Account.

Do you have a FormAssembly Account?

Yes, I have an active account.

No, I do not have an account.

Previous Next

2. Clarify Details - Select your current FormAssembly plan from the list. This will be setting your instance for the app, so be sure to choose the correct plan. **Note: This section displays our legacy plans. Basic users can select Professional, while Essentials and Team plans can select Enterprise.** If you select Enterprise or Compliance Cloud, make sure your FormAssembly instance URL is entered exactly as shown in your browser's address bar.

FormAssembly for Salesforce Setup

Clarify Details

Let's find your account.

Which plan are you currently subscribed to?

Professional

Premier

Enterprise Cloud

Compliance Cloud

To access your plan information, first log in to your FormAssembly account. Next, click the dropdown next to your username in the top right to view your plan under the **Account and Billing** section.

Instance Details

We need to map your FormAssembly instance.

What is the url for your FormAssembly login page?

This is the url that you use to login to FormAssembly (e.g.: https://companyname.tfaforms.net). It is also listed in your "Welcome aboard!" email from us.

3. Confirm Username - Confirm your usernames match just as you did previously in this document.

FormAssembly for Salesforce Setup

Confirm Username

Let's make sure your FormAssembly and Salesforce accounts have matching usernames.

Can you confirm that your FormAssembly and Salesforce usernames are identical?

Yes, they are identical.

No, they are different.

4. Test Connection - This will open a new tab where you can log into FormAssembly. This is being done to check your connection and settings. If you're unable to login, check again to make sure that your selected plan is correct and that your usernames match.

Confirm and Test Account Details

Check that the data entered is correct.

Account Type: Enterprise Cloud
Account Location: https://app-test.tfaforms.net

Test Connection
 Let's test that the information provided can connect you to the system.

[Connect to FormAssembly](#)

Note: This will open a new tab.

5. Finish Setup - Your setup is now complete! You should now be able to access your FormAssembly account inside Salesforce.

Test Connection
 Let's test that the information provided can connect you to the system.

Are you able to connect to FormAssembly?
 Yes, I am able to log into the application.
 No, I could not connect.

✓ Congratulations! Connection is successful! You are all set to start using FormAssembly with Salesforce.

[Edit Details](#) [Finish Setup](#)

Do you need to set up additional Salesforce users or profiles that will be using the FormAssembly App?

You may add in additional profiles and roles by going to your **custom settings** and clicking on **Manage** next to the FormAssembly package.

If you are an Essentials and above user, these new profiles/users must all have their instance URL set to xxxxx.tfaforms.net with "xxxxx" being replaced by your instance URL. Once this step is done, [complete the email verification process](#) and you're all finished. You can now launch the FormAssembly app from the app launcher!

Manage		Public	Hierarchy	tfa	FormAssembly for Salesforce Custom Settings	355 1	355
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Using Single Sign-On Between Production and Sandbox

As noted above, SSO can only be used between a single Salesforce account and a single FormAssembly account, because the usernames must match.

Therefore, if you are planning on using SSO for **both** a sandbox instance of Salesforce and a

production instance of Salesforce, you will need to request that your username be changed when switching between the two, in order for your FormAssembly and Salesforce username to match. Please note, that if you are an Essentials and above user, you have the capability to change your username from the admin dashboard.

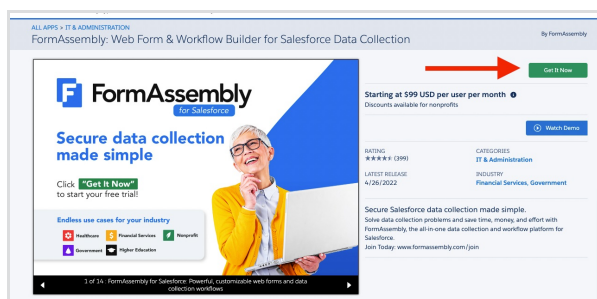
Alternatively, you can log in to FormAssembly at app.formassembly.com or through your Essentials (and above) URL to avoid changing your username. You will have access to identical functionality by logging into the FormAssembly through the web compared to logging in through SSO in Salesforce.

Single Sign-On and SAML

SAML 2.0 is supported for Single Sign-On. You can follow the steps [in this documentation](#) when setting up SAML with Salesforce as the identity provider.

Updating the AppExchange App

1. Access the [FormAssembly for AppExchange package](#).
2. Click on the **Get it Now** button.



3. Choose whether to install the package in Production or in Sandbox.

Where do you want to install this package?

Install in a Production Environment

Install this package in the org where you or your users work, including Developer Edition orgs.

* Connected Salesforce Accounts ⓘ

angeliquetest@formassembly.com

All done! We finished gathering your accounts.

Don't see your account? [More Info](#)

[Install in Production](#)

Install in a Sandbox

Test this package in a copy of a production org.

[Install in Sandbox](#)

[Cancel](#)

4. Login to your Salesforce account.

5. Check the terms and conditions checkbox and click **Confirm and Install**.

Confirm Installation Details

Review the [customization guide](#) for installation and configuration steps.

Package	Version
FormAssembly for AppExchange (Form Assembly Form / 2.27.0)	Form Assembly Form / 2.27.0
Subscription	Organization
Free	Veer West LLC
Duration	Number of Subscribers
Does Not Expire	Site-wide
Username angeliquetest@formassembly.com	

Here are the details we'll share from your profile [Edit Profile](#)

* First Name	Angelique	* Company	FormAssembly
* Last Name	Pascual	* Country	Philippines
Job Title		State/Province	
* Email	angelique@formassembly.com		
Phone			

I have read and agree to the terms and conditions.

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. [Learn More about the AppExchange Security Review.](#)

Allow the provider to contact me by email, phone, or SMS about other products or services I might like

[Cancel](#) [Confirm and Install](#)

6. Select the profile you would like to install the package for and click **Upgrade**.

Upgrade FormAssembly for AppExchange
By Veer West LLC

ⓘ An earlier version is installed. It can be upgraded while preserving the existing data.
Installed: Summer 22 (2.26) New Version: Form Assembly Form (2.27)

Install for Admins Only

Install for All Users

Install for Specific Profiles...

[Upgrade](#) [Cancel](#)

App Name	Publisher	Version Name	Version Number
FormAssembly for AppExchange	Veer West LLC	Form Assembly Form	2.27

[Additional Details](#) [View Components](#)

7. Wait for the upgrade to complete. You will receive a confirmation once done.



Upgrade FormAssembly for AppExchange

By Veer West LLC



Upgrade Complete!

Done

App Name	Publisher	Version Name	Version Number
FormAssembly for AppExchange	Veer West LLC	Form Assembly Form	2.27