Form Transfer Tool

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In this Article

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Overview

The FormAssembly Form Transfer tool makes it easy for you to move your forms and connectors **from FormAssembly Instance to Instance.**

You can move your forms and connectors on your own without needing to start a support ticket, of course, we're here and ready to help if you run into difficulties!

Please note that forms cannot be downgraded from Team plan and higher accounts to Basic and Essentials plan accounts. They can only be transferred from Basic and Essentials plan accounts to higher plan accounts, or between Team plan and higher plan accounts.

Setup

Enable your Server: First, access the **Admin Dashboard.** You will need to add any servers that you want to transfer forms to or from. You can add them by going to **Admin → Settings → Miscellaneous → Form Transfer Settings**. The main FormAssembly server (Basic plan) is enabled by default:
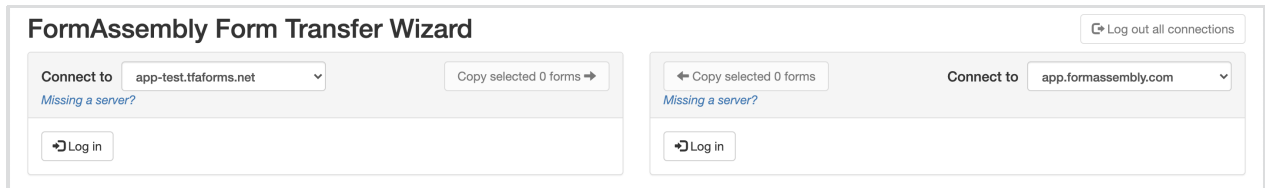
Transferring Forms

Before beginning your Form Transfer, please make sure to read the Important Notes about Form IDs below.

> **Note:** Archived forms cannot be transferred. They must be active for the Form Transfer tool to see them.

To start your Form Transfer, make sure that you are logged in as the desired user (as defined above) on your **transfer destination Instance**. This may require you to do an admin override as the user you want to transfer forms to.

Next, go to the Form Transfer tool. It can be found here: `https://[server sub-domain].tfaforms.net/form_transfer/`

From here you will need to select the server to log into. You will need to select both the server you will be copying forms from and the server you will be copying forms to. Select one on the right and one on the left; it does not matter which server is on which side.

Select the one that you want to connect to and choose to log in.

> **Note**: The account used to authorize the Form Transfer tool must have user account permissions granted for "Access shared forms". This is in the Basic Permissions set under General Permissions.

Once there you will need to authorize the external access:

After logging in you will need to select the forms you want to move over and choose "Copy Selected # Forms".

If you do not see any forms after authenticating, try refreshing the webpage **without** selecting "Log out all connections."

FormAssembly Form Transfer Wizard   ⏻ Log out all connections

| Connected to | app-test.tfaforms.net ▾ | Copy selected 0 forms ➡ | | ⬅ Copy selected 0 forms | Connected to | app.formassembly.com ▾ |

Missing a server?   *Missing a server?*

User: ▬▬▬▬▬▬▬▬   User: ▬▬▬▬

Overwrite: Overwrite:

☐ Keep current form IDs when transferring.   ☐ Keep current form IDs when transferring.

Predefined Content: Predefined Content:

☐ Copy over predefined content.   ☐ Copy over predefined content.

Forms: Forms:

After that, you're ready to go! Your new forms will have been transferred over to the server you selected.

If you get any red exclamation points (!) when copying your forms, try selecting fewer forms and copying them in batches.

> **Note:** Connectors on the transferred form will need to be re-authenticated to your Salesforce account after transferring.

What Gets Copied

When you use the Form Transfer tool, you are essentially copying the form to a new location, so the form will still be available in its original location as well, once the transfer is complete.

Additionally, when you transfer a form, the **connectors** and **theme** will be transferred along with the form.

The only things that **are not transferred** are Form Settings you have on the display, configuration, and/or notification tabs, any associated images that were uploaded into a form, and response data (including form attachments).

You may reconfigure your notification and display/processing options on your new form once it has been transferred. Currently, we have no way of transferring response data or form images.

Predefined Content

If your Basic or Essentials plan account has Predefined Content saved which you would like to transfer as well, then you can check the "Copy over predefined content" checkbox.

> **Note:** Checking the "Copy over predefined content" checkbox will transfer over Predefined Content from ALL of the forms, which can create duplicates. We recommend only checking this checkbox for **one** Form Transfer before continuing with the rest of the forms.
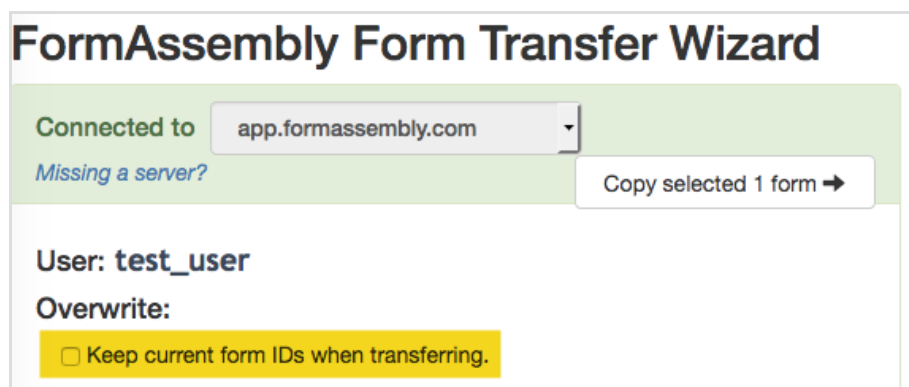
If you do not have a Basic or Essentials plan account and would like to transfer Predefined Content to your Team plan or above account you can reach out to our Support team for assistance.

Important Notes

If you are transferring your forms to a Team plan or higher Instance, you will need to update any links pointing to the form. The links should reflect the URL of your newly transferred forms. The correct URL may be located on the Publish page of your form.

> **Note:** If the form you are transferring has the same ID as a form that already exists in the destination location, **the form in the destination location will NOT be overwritten**. Instead, a new ID will be assigned to the transferred form.

To overwrite an existing form in the destination location, be sure to check the box labeled "Keep current form IDs when transferring."

Transferring Form Ownership within the Same Instance

To transfer ownership of a form to another account within the same FormAssembly Instance, please refer to these documents on Form Collaboration and Form Administration.