

Configure Your Forms

Download the PDF of this article.

In this Article

[Configuring Your Forms](#)
[Summary](#)
[Publish](#)
[Processing](#)
[Notifications](#)
[Connectors](#)
[Collaboration](#)
[Revisions](#)

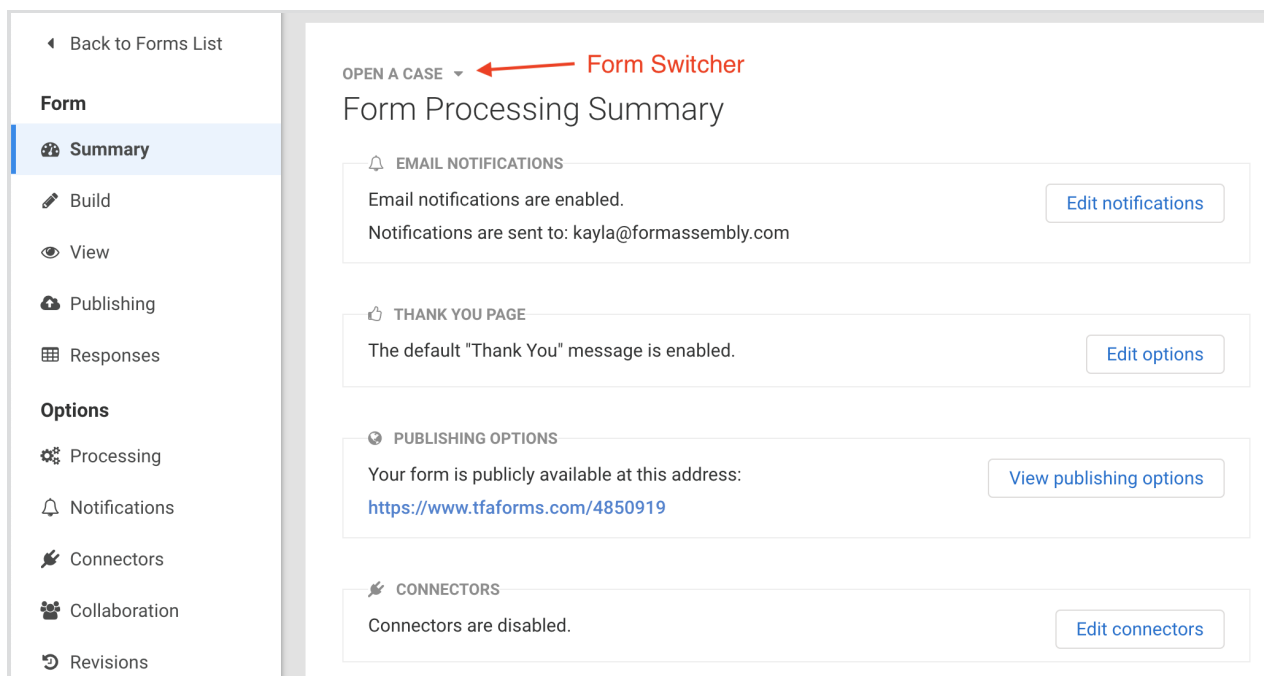
Related Articles

Configuring Your Forms

When you click the Configure button, you will start off at the Summary page for your form.

On the left side bar, there are links to helpful places, like the form's publishing information or the View button, which opens in another tab for testing.

The lower set of options will help you configure your form. From here, you can set up email notifications, configure connectors, and allow others to work on your form.



◀ Back to Forms List

Form

- Summary**
- Build
- View
- Publishing
- Responses

Options

- Processing
- Notifications
- Connectors
- Collaboration
- Revisions

OPEN A CASE ▼ **Form Switcher**

Form Processing Summary

EMAIL NOTIFICATIONS

Email notifications are enabled.
Notifications are sent to: kayla@formassembly.com [Edit notifications](#)

THANK YOU PAGE

The default "Thank You" message is enabled. [Edit options](#)

PUBLISHING OPTIONS

Your form is publicly available at this address:
<https://www.tfaforms.com/4850919> [View publishing options](#)

CONNECTORS

Connectors are disabled. [Edit connectors](#)

Summary

It's a quick peek at the selected form. See the image just above.

Publish

The **Publish** page displays the form details of the multiple publishing options. Here's a comparison of the [publishing options we offer](#) and a link to assist you in [prefilling](#) the selected form.

Processing

Many options are on this page to define how your form processes and looks.

- Set the [language of the form](#).
 - Edit the [form availability](#) dates.
 - Allow respondents to [save their progress and resume later](#).
 - Create an unavailable message.
 - Enable [CAPTCHA](#) to prevent spam
 - Enable the [review page](#).
-

Notifications

Receive and send email notifications when someone submits a response to your forms. This is also where you will decide what is seen after the form is submitted.

- Customize the [Thank You Page or redirect to a URL](#).
 - Enable [email collection](#) for a reply-to address.
 - Manage your [notifications](#).
 - Manage the [auto-responder](#).
-

Connectors

The connectors available to you depend on your plan or permissions.

We have several phases of form processing where connectors can be used. [Learn more here](#).

Connectors



Form opened

[+ Add connector for form opening](#)



Form progress saved

[+ Add connector for form progress saving](#)



Form submitted



Salesforce
● ENABLED

[Configure](#)

[Logs](#)



[+ Add connector for form submission](#)



After form submitted

[+ Add connector for after form submission](#)

Collaboration

Share the form with other users and manage their permissions to view responses and/or edit the form.

You can share to an individual user or share to our [Templates Library](#).

When you share to our Template Library, you'll be able to share the connector settings too. This will not share your actual form, only a version that others can copy from.

You can also:

- Provide a description of the form.
- Select a category and/or subcategory for the form, for sorting in the Forms List.
- Import form sharing from another form.

Revisions

Leave notes about the version of your form and view the revision history of the form and roll back to any previous revision.

This can be incredibly helpful if one of your forms stops working after a recent update or change, or if you need to access information that is only available in a previous version of your form.

If you decide to revert to an older form, it is a good idea to take detailed notes in the comment section in order to accurately track the changes you have made. Please see below for additional steps on recovering forms and accessing information from previous revisions.

How to Undo a Save that Broke a Form

If your form is not loading and you are stuck with a blank or white screen, or if your form is taking a very long time to load, it is most likely that some feature of the form is broken and causing this to occur. To fix this issue, you can follow these steps:

1. Write a note about the problem with the current revision in the comments section of the revisions tab.
2. Revert the form to an older version that was working correctly.
3. Write a note about the revision you have reverted to in the comments section (example: Restored to version 10)
4. Test the live form to see if it is working again
5. Make SMALL changes to get the form back to the latest version.
6. Save often!
7. Test on the live form again.
8. Repeat steps 4-7 until the form has all of its changes back in, or until you isolate the error that is causing the form to break.

How to Get Information from an Older Revision

If you are performing a CVS export and there is missing data or information that was available in a previous revision, you can use the following steps to access that information:

1. Export the data that is for the most recent revision.
 2. Find the specific question that is missing data.
 3. Go to the revisions tab and make a note about the latest revision (example: This is the latest save before reverting to search for older field response data).
 4. Begin looking at the previews to see when the field in question was changed or deleted.
 5. Make a note in the comments section saying that you reverted the form to load old field data.
 6. Run the CVS export again to get the older field data.
 7. Repeat steps 1-7 as necessary to find all of the old field data.
 8. Revert the form back to the latest version so that users see the most recent version of the form.
-