Grant Access Feature for the Admin Dashboard

Download the PDF of this article.

In this Article

Introduction Getting Started Granting Administrator Access Granting FormAssembly Access Reviewing Access Grants

Related Articles

The Grant Access Feature in FormAssembly can be used to accomplish two functions. First, if your organization is in need of support from the FormAssembly team, you can grant access to your forms so that we can better troubleshoot any issues you might be facing.

Second, if your Administrator has enabled the Grant Access feature, then they will need to request access to your account before being able to log in through your username.

Getting Started

To begin, hover over the blue Help menu at the top right of FormAssembly and select Grant Access.



You will be taken to the Grant Access page, where you will see two options: Administrator Support and

FormAssembly Support.

If you need to grant your Administrator access, select **Go to Administrator Support**.

If you need to grant access to FormAssembly to help troubleshoot an issue, you should select **Go to FormAssembly Support**

Grant access to my account FormAssembly offers two ways for you to allow others to access your account for support.
Administrator Support You may grant administrators access to your account. The administrators will be able to access your account and act "as you" for a limited time. Go to Administrator Support
FormAssembly Support You may grant FormAssembly Support access to your account. We will be able to securely log in to your account and act "as you" for a limited time. Go to FormAssembly Support

If your Administrator has selected that permission is not required to log in as users, then you will not see the Administrator Support option:

ار م	
AQ	ministrator Support
You	I may grant administrators access to your account. The administrators will be able to access your account
and	act "as you" for a limited time.
As	of right now, the administrators do not need permission to log into your account. Contact them if you need
heli	p.

Granting Administrator Access

Once you click **"Go to Administrator Support,"** you will be taken to the Administrator Support screen, where you can select the number of days account access will be granted (3, 5, 15, or 30 days). Once the selection is made, you will need to confirm your password and then click the **Grant Access** button.

You can After tha revoke it	grant administrators ac it period has expired, ac manually.	ccess to your account for a set period of time ccess is automatically revoked. Or, you can
GRANT AG	CESS TO YOUR ACCOUNT FO	DR:
✓ 3 Day	s .	
5 Day	s	
15 Da	ys	
30 Da	ys	

A modal will appear prompting you to confirm your consent to allow access. Select **Grant Access** again to confirm.

Grant acc	ess
This will grant access to your account. This me able to log in to your account and provide you in your account is logged at all times.	eans that administrators will be with assistance. Anything they do
Do you confirm your consent to allow access?	Cancel Grant access

The Administrator Support screen will display the date that administrator access will be provided until. You can choose to revoke this access at any time by clicking the **Revoke Access** button.



Granting FormAssembly Access

If the need arises for you to grant the FormAssembly support team access to your account, you can do so by clicking the **Go to FormAssembly Support** button.

On the FormAssembly Support Access screen, select the Grant Access Type you want to use.

- Selecting Forms and Responses will grant access to your forms, connectors, and form responses.
- Selecting Full Access will grant access to forms and responses, as well as your notifications and processing options.

Additionally, you will need to select the number of days (3, 5, 15, or 30) for which access will be granted.

period has time.	help, you can grant the FormAssembly support team access to your account. After the expired, access is automatically revoked. You can also revoke access manually at any
In compliar possible. Pl	ce with our Information Security policy and best practices, we request the least acces ease contact Support with any questions.
GRANT ACCE	SS TYPE: 0
Forms a access	nd responses access 🛛 🔾 Full
GRANT ACCES	SS TO YOUR ACCOUNT FOR:
✓ 3 Days	
5 Days	
15 Days	

Once selections are made, enter your FormAssembly password and click the **Grant Access** button to give access to the FormAssembly support team.

Note: If you are a Single Sign-On (SSO) user through Salesforce, you will not be required to enter your password during this step.

A modal will appear prompting you to confirm your consent to allow access. Select **Grant Access** again to confirm.



Once access has been granted to FormAssembly, you will be able to see your current access grants at the bottom of the page. If needed, you may revoke access here by selecting **Revoke Access**.

Grant ad	ccess to F	FormAssembly	Support	
lf you need he period has ex time.	elp, you can gran pired, access is	nt the FormAssembly sup automatically revoked. Ye	port team access to you ou can also revoke acce	ır account. After that ss manually at any
In compliance possible. Plea	e with our Inform ase contact Supp	nation Security policy and port with any questions.	l best practices, we requ	est the least access
You have grar GRANTED	nted FormAssem	nbly Support access to yo	our account. ACCESS LEVEL	ACTIONS
You have grar GRANTED 07/10/2025	expires	nbly Support access to yo	ACCESS LEVEL	ACTIONS

Reviewing Access Grants

Should you need to review your Access Grants at any point in time, they are available on the Grant Access pages for both Administrator Support and FormAssembly Support.

Administrator Support

If Administrator Support access is currently active, the option to **Revoke Access** is available. If no access grant is active, you will see the option to create an access grant.

At the bottom of the page, a log of Recent Previous Access Grants is available for review, displaying the date the access was granted, the duration of the access grant, the expiration date, and the current status.

You can grant admin expired, access is au	istrators access tomatically revo	to your account for a soked. Or, you can revoke	set period of time. After that period has e it manually.
You have granted ad	ministrators acc	ess to your account un	ntil: 07/13/2025 13:55
YOU MAY REVOKE ACCES	S TO YOUR ACCOU	INT	
Revoke access			
Recent Previous A	Access Grant	S	
Recent Previous A	Access Grant	S EXPIRES	STATUS

FormAssembly Support

Your current access grants are displayed at the bottom of the page with the date the access was granted, the date the access expires, the access code to provide to the FormAssembly Support team, and the access level selected for the access grant.

If needed, you may revoke access with the **Revoke Access** button.

Grant ad	ccess to F	ormAssembly	Support	
lf you need he period has ex time.	elp, you can gran pired, access is	nt the FormAssembly sup automatically revoked. Ye	port team access to you ou can also revoke acce	r account. After that ss manually at any
In compliance possible. Plea	e with our Inform ase contact Supp	nation Security policy and port with any questions.	l best practices, we requ	est the least access
You have grar	nted FormAssen	nbly Support access to yo	our account.	ACTIONS
You have grar GRANTED 07/10/2025	expires	nbly Support access to yo	ACCESS LEVEL	ACTIONS