

[Internal Only / Obsolete] Your Welcome Call

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Welcome to FormAssembly!

We are excited to have you and your team as part of our community! We look forward to building a successful relationship together, which includes working with you to get the maximum value from your FormAssembly account.

The first step to fully utilizing your FormAssembly account is to set up a Welcome Call.

What is a Welcome Call?

The Welcome Call is a one time 45 minute conference call between your team (up to 3 people) and a Customer Success Specialist.

This call is available within your first 90 days.

During this meeting we will welcome you to our community, review the basics of your account and talk through fundamental form questions. *If you would like the call to be recorded, please let us know beforehand and we will record the Welcome Call for you and your team.

Call Structure

1. Introductions
2. Company, Account and Support Review
3. Questions

Example of topics and questions typically covered

Existing Forms

How do I change the colors on my form?

What makes forms easier to fill out?

How do we transfer forms?

Feature Inquiries

Is it possible to purge data?

Can FormAssembly _____?

How do I _____?

Integrations/Connectors

How does the Salesforce Prefill Connector work?

How do I take check and/or card payments?

Publishing Options

Is it possible to publish on our web site?

Are there restrictions to publishing forms?

Use Cases

I would like to limit duplicates created in Salesforce.

I would like to make a workflow.

How do I schedule a Welcome Call?

Before the call

Take time to log into FormAssembly and build a form or two so we can focus on processes you want to improve by using FormAssembly.

Schedule Your Welcome Call

Once you schedule your call, you'll receive an email confirming the time and the details you need to join the call.

After the Call

Our team will follow up by email with additional docs/videos, a recording of the call if requested, as well as the answers to any questions you might need to check in with the team about.

You can continue to [ask our team questions anytime](#), before and after your Welcome Call, with our email and chat support.

We look forward to working with you!
