Testing your Forms and Salesforce Connectors

Introduction

One of the most important steps before sending out a form to respondents, is testing. You will want to make sure your form and connectors work exactly how you expect them to, regardless of a respondent's use case. The best way to ensure that everything is working properly is through testing, and lots of it. Below, we have listed a number of resources and tips you can use when testing your forms and connectors.

Steps for Testing

Before sending out a form to your respondents its important to test it first. If respondents receive errors or are unable to submit a form, that could mean missing leads, incomplete information, or lost business. Therefore, we always recommend that our users spend significant time testing their forms before sending them out.

Regardless of your organization, the main goal with testing a form is to try and break it. You'll want to create test submissions for every type of use case, including ones where respondents might enter incorrect information, and then see if anything goes wrong. By testing for all these different possibilities, you can better ensure that your form is ready to be rolled out!

1. Test your Form First

Before you setup your connector, make sure you have finished building your form, that all your field validations are in place, and that the form by itself is submitting as expected.

This is the perfect time to consider different respondent use cases as well. Think about the different ways someone might approach your form, and all the possible ways they could proceed through it. You can also check out our page on Best Practices for User Friendly Forms to get some additional ideas for structuring your forms in friendly ways.

2. Connect to your Salesforce Sandbox

Once you have your form built, you're ready to add in your Salesforce Connector(s). When working with Salesforce, you may want to start the testing process by connecting to your Salesforce Sandbox account. This way, you won't be sending over test data to your production instance, which you might later have to worry about deleting. While this isn't required, many of the organizations we work with find this step to be helpful.

3. Double Check Field Mappings

In your Salesforce Connector, you'll want to check and confirm your field mappings. First, make sure there are no blank field mappings, and check your send-as values as well.

You'll also want to make sure that you're sending over values for everything that is required on the Salesforce side. Sometimes, there are fields to consider that may not be visible on your form (e.g. Record Type ID, Status, Submitted Date, etc) and you'll want to make sure that these have been mapped as well.

4. Test Submissions

At this point, it might be helpful to make a list of all possible respondent use cases. This way, you can conduct test submissions for the variety of scenarios your form might encounter. We recommend submitting test submissions for all of these possible use cases, as well as for cases that may involve a respondent submitting the form with a mistake or a missing field.

5. Check your Connector Logs

Once you've completed a test submission, check your connector logs to see how the response was processed. The connector log can tell you if records were prefilled, created, updated, or looked up as expected.

You can also use the log to tell you if anything went wrong, and see which connector step had an error. Make sure to check the log after each submission. If you're using the Prefill Connector, check those logs as well.

6. Test Embedding and Publishing

Once your form and the connectors are working as expected, you'll want to embed or publish your form in the same manner you plan on using for your finalized form. Once you've done this, complete additional test submissions in order to ensure that responses are still being processed as expected.

7. Get Feedback from Others

We also recommend sharing your published form with others in your organization in order to get additional test submissions and feedback. This can be a helpful step to make sure that everything is working as expected before you roll out your final form to your respondents.

8. Test in Production Mode

Finally, you'll want to switch your Salesforce Connector back to production mode and complete multiple test responses here as well. This step can help make sure that responses are still being processed as expected, and that the data is making its way to the correct objects in your production instance. You may also want to flag these test submissions for deletion, since they will be going to your production instance.

Rolling Out your Form

Even with all these steps completed, there might be surprises that arise after you send out your form. We recommend starting small whenever possible, so that you can have a limited number of respondents complete your form to make sure that everything is running as expected.

And if you do run into issues, our support team is here to help! Send us a message at help@formassembly.com at any point during this process and we'll make sure that you can get your forms up and running as quickly as possible!