The Salesforce Save Connector
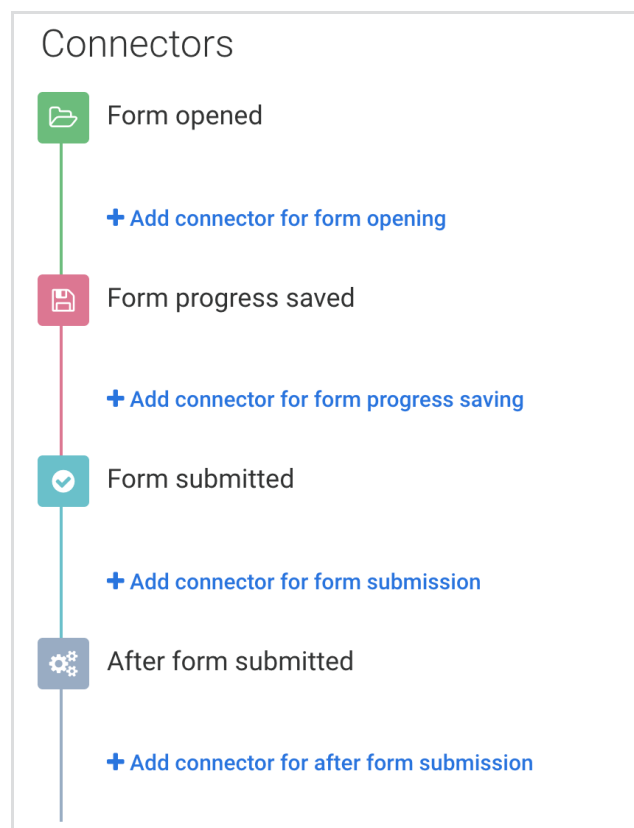
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Introduction

You can use our Salesforce connector to automatically create and update records in Salesforce when a form respondent saves their form. This can be useful with long forms, or any time you would like to send data to Salesforce when a form is saved.

In order to use the Salesforce Save connector, you must have the Save & Resume feature enabled. Then, you'll be able to add in the Salesforce connector to the Save portion of the connector timeline.

Connector Timeline

Once you have enabled Save & Resume on your form, a new position will open in your Connector Timeline with the title "Form Progress Saved".

A Salesforce Connector created in this portion of the timeline is identical to connectors in the Form Submitted and After Form Submitted stages. The only difference is when the connector runs.

Connectors in this position will run **every time the form is saved**.

We recommend using Update steps rather than Create steps where possible in the Save position in order to prevent duplicate records in Salesforce.

Once you have added a connector to this position, you can continue setting up the connector normally.