

FormAssembly Quick Start Guide

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In this Article

- [Introduction](#)
- [Defining Your Purpose](#)
- [Building Your Form](#)
- [Form Processing](#)
- [Form Branding Options](#)
- [Configure your Connectors and Integrations](#)
- [Link and Share your Forms](#)
- [Test Your Forms](#)
- [Send Notifications](#)
- [Choose a Publishing Method](#)
- [Congratulations!](#)

Related Articles

Introduction

Every day, FormAssembly is helping customers change, streamline, and improve their data collection processes across a variety of departments and organizations. With a data collection tool this powerful and flexible, you may be wondering just where to begin on your form building journey. This guide is the perfect place to start! Each section will cover one aspect of the form creation process and introduce you to various options, features, and links to additional documentation to help you proceed.

Once you have read through this guide, we also recommend checking out our [Best Practices when Building Forms](#) document to make sure your data collection process runs smoothly.

Defining Your Purpose

The FormAssembly Form Builder has a number of fields, so deciding which data you want to collect and where you want to send it comes first. Ask yourself what you want this form to accomplish. Who is filling out the form? What information about them do you want to collect? What will you be doing with this data? Does it need to be sent to Salesforce or to another location? Will they be filling out this form on a mobile device? How long do you want this form to collect data for?

These are only a couple of examples of the questions you should be asking yourself before you build your form. Once you have a clear picture of how you want your form to work, then you can begin building!

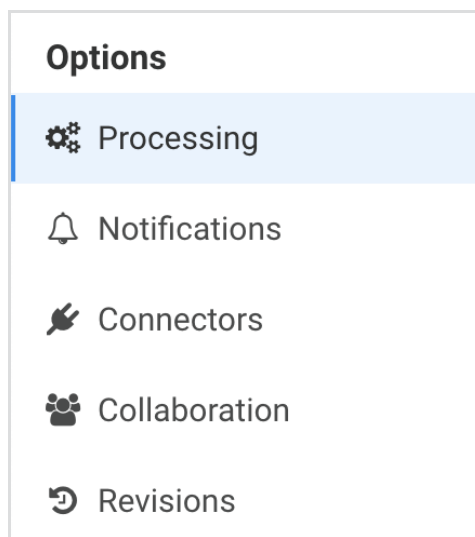
Building Your Form

Once you have decided the purpose of your form, you'll need to start adding the necessary data collection fields in the Form Builder. If you'd like to quickly build a form then you can use the [Salesforce Form Import Tool](#), our [Template Library](#), or our [Convert PDF feature](#).

The Salesforce Form Import Tool will allow you to quickly create a new form using your Salesforce objects and fields as a template. This tool both creates the web form and automatically configures the Salesforce Connector. Meanwhile, our Template Library is a valuable resource that showcases example forms from our team. These example forms can be used as-is or customized as needed. Lastly, if you have a PDF of a form you've used or designed elsewhere, let our Convert PDF AI agent create a FormAssembly form from your file for you.

Form Processing

Once your form has been built, you can use the available Form Processing options to add even more functionality to your forms! You can access the Processing options for your form by clicking on "Processing" under the "Options" menu on the left side of the Form Builder:



Here are some examples of what you can accomplish with the Processing options:

- Allow your respondents to [save a form and resume it later](#).
 - [Set your form to become unavailable](#) after a certain period of time or a number of responses.
 - Allow respondents to [review their responses before submitting](#).
 - [Add E-Signatures to your form](#) if you're on a Premier plan or above.
 - [Prevent spam with Google reCAPTCHA](#).
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Form Branding Options

We love simple, elegant forms. But there's nothing like adding your own unique branding to set your form apart! We have a variety of pre-made themes which you can use to quickly style your forms. If these aren't your style, [use the provided customization controls to make the theme your own](#).

If you'd like, [you can add even more customization to your forms by using custom code](#). We do not support writing or editing custom code, but if you're comfortable with HTML, CSS, and JavaScript then you can add custom code [directly to your individual forms](#) or [to the header and footer of all the forms in your account](#).

Configure your Connectors and Integrations

Where do you want to collect your data? [You can always export your data directly from FormAssembly](#), but we also have a number of connectors and integrations available to you. For example, you can [send your data to Salesforce](#) or [to Google Spreadsheets](#) with ease. Or you can [use our HTTPS connector](#) to automatically forward your collected data to a remote script. One fantastic example of a remote script integration can be seen here [in our MailChimp documentation](#).

You can also [prefill data into your form from Salesforce](#) or Salesforce Marketing Cloud if you'd like to make filling out the form even easier on your respondents. We have many customers who use the Salesforce Prefill connector to prefill a record into the form which their respondent can then update. However, prefilling data through a connector does require a Premier plan or above. If you're on a Professional plan then you can still [prefill you form through the URL](#)!

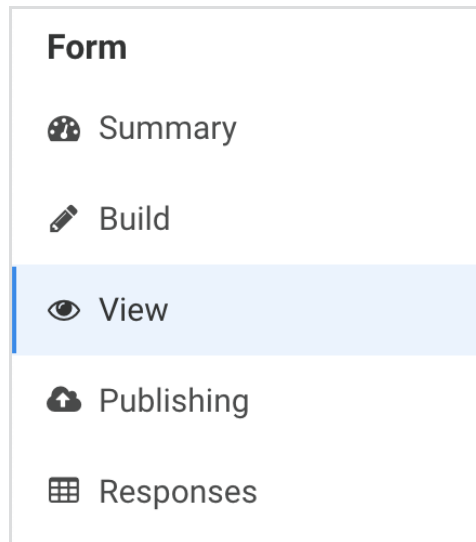
Link and Share your Forms

[Redirect URLs](#) can send your customers to a web page once they have finished filling out the form. If you want to add extra functionality and logic, [they can also use formulas](#) to conditionally send your respondent to different sites or forms based on the responses to specified fields. You can even collect information in one form, and then send it to the Salesforce Prefill connector in a second form if you'd like your respondent to be able to search for their records and update them.

With all of these form options available, you may want some help when building your form! If you have two FormAssembly accounts then you can [share your forms and responses between them with Collaboration settings](#). If you would instead like the assistance of one of our experts, [then you can reach out to our Implementation Services team for a quote](#). Our experts can provide training, help you build your forms, and assist with high-volume launches.

Test Your Forms

Make sure to test your forms before sending them out! Submit a test response and then [view the Responses page](#) to make sure everything is appearing correctly. To view your live form you can click the View button on the left when inside the Form Builder:



Send Notifications

If you'd like to be notified when your form is filled out, [you can use our Notifications page](#) to set up an email template that will send every time the form is submitted. These emails can contain whatever text and form fields you choose.

The Autoresponder can be configured if you would like to [send an automated response to your respondents when they fill out your form](#). To add even more customization to your emails, you can [use our post-processing formulas](#) to change the information in the email templates based on selections in the form.

Choose a Publishing Method

We do host your forms for free, but if you'd like your form to appear on your website then we have a few additional options for you. Each publishing option has pros and cons, [so we've created a chart that you can use to compare them](#).

Congratulations!

You're now ready to start building your forms. This was just a brief overview of what can be possible within FormAssembly. We still have dozens of features, plenty of options, and a Knowledge Base packed full of documentation that can guide you on your journey. As you navigate through the form builder and begin collecting data, you can always [reach out to our team anytime for assistance](#). Happy form building!
