

Introducing the Forms Page and Forms List

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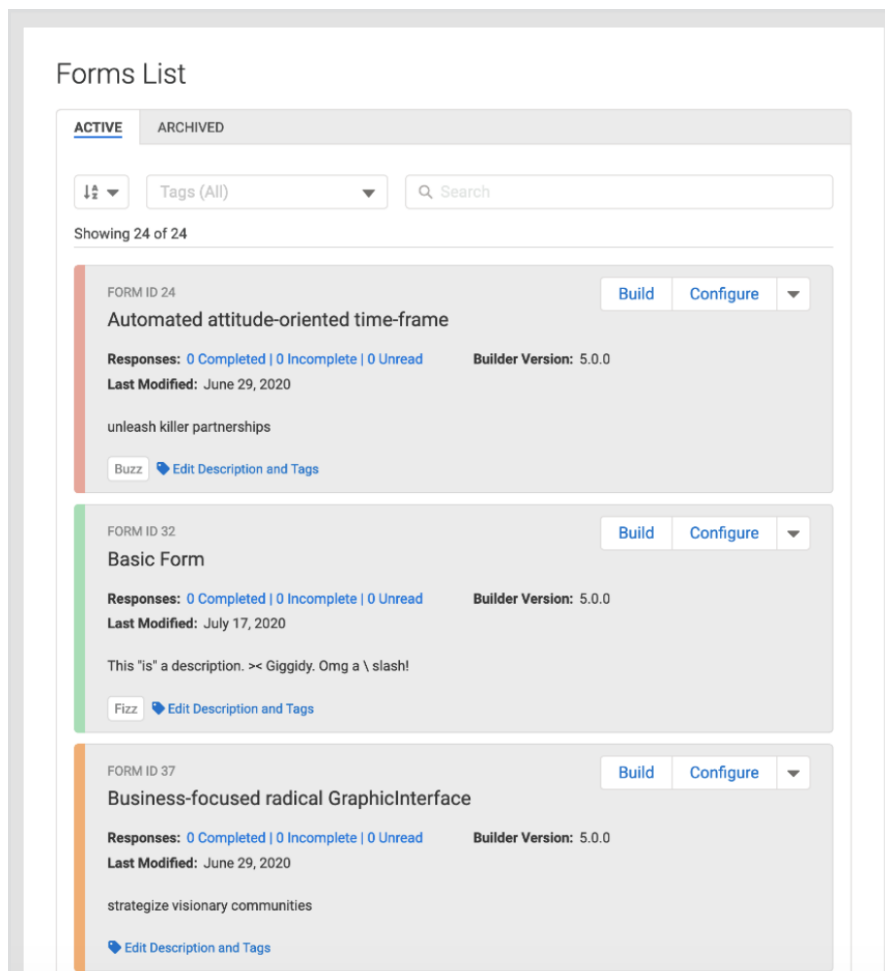
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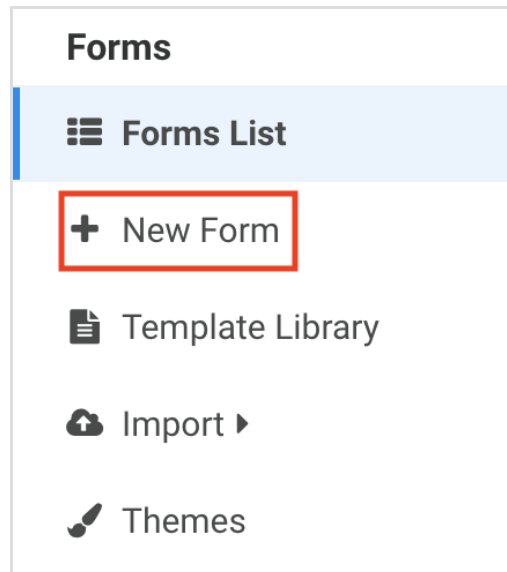
What is the Forms List?

The **Forms Page** is the screen you see directly after logging into FormAssembly. From this page, you can create, clone or edit forms, view responses, build workflows, and more.

This page also contains the **Forms List**. This is a list of all of the forms in your account:

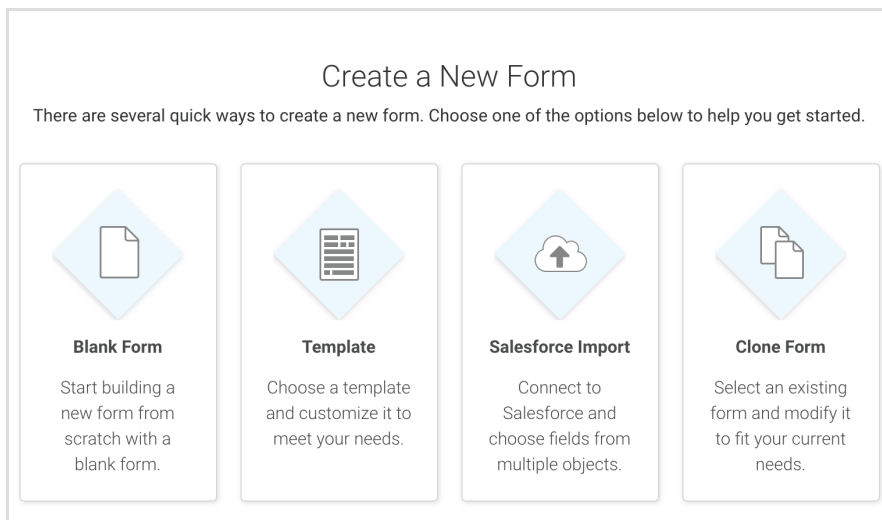


Creating New Forms



When you click "New Form", you will have several options to choose from. For your first form, you can [dive into one of our templates](#) or [use our Salesforce Import tool](#)** to quickly build a form with objects and fields from Salesforce. Click Blank Form to create a form from scratch or even clone a previously created form.

** *Depending on Salesforce plan or permissions.*



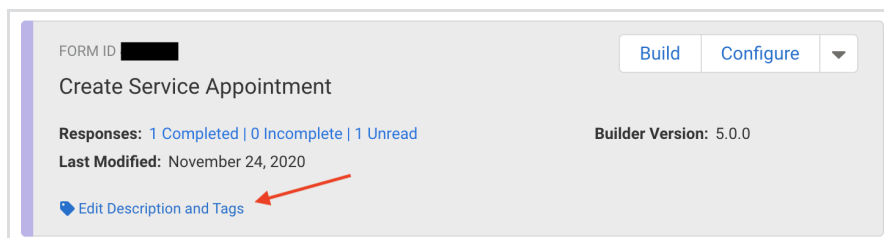
Organize Your Forms

The easiest way to keep your forms organized is to use Tags and Descriptions with your forms.

You can add tags to each of your forms in order to make it easier to find the form you're looking for by using the filtering options at the top of your Form List. You can also add a short description to each form.

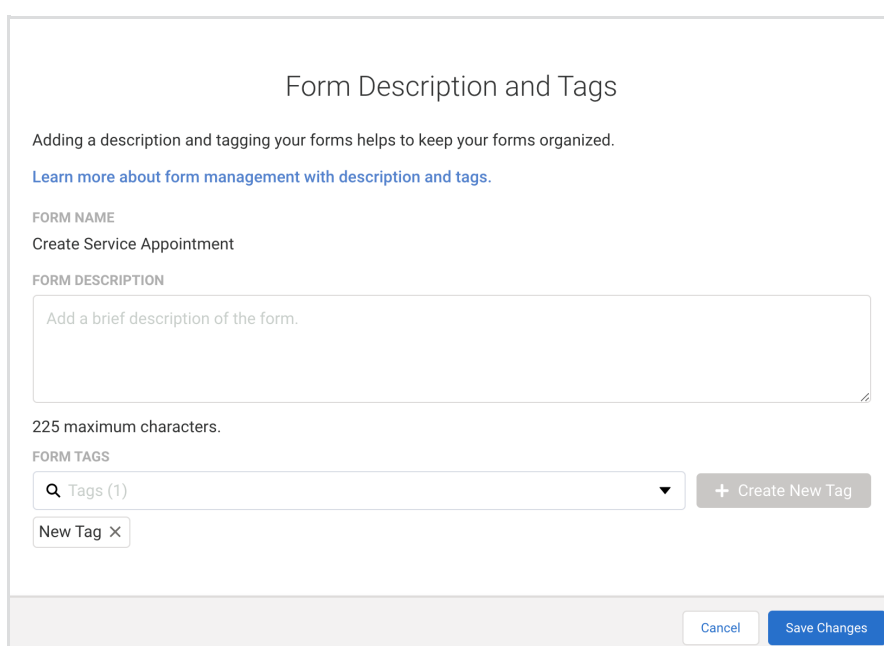
Adding Tags & Descriptions

To add a tag to your form, click the **Edit Descriptions and Tags** link.



The screenshot shows a form configuration panel for 'Create Service Appointment'. At the top left, it displays 'FORM ID' followed by a redacted ID. To the right are 'Build' and 'Configure' buttons. Below the form name, it shows 'Responses: 1 Completed | 0 Incomplete | 1 Unread' and 'Last Modified: November 24, 2020'. On the right side, it indicates 'Builder Version: 5.0.0'. At the bottom left, there is a link 'Edit Description and Tags' with a red arrow pointing to it.

After clicking the link, you'll be able to add in single or multiple tags as well as a description for your form.

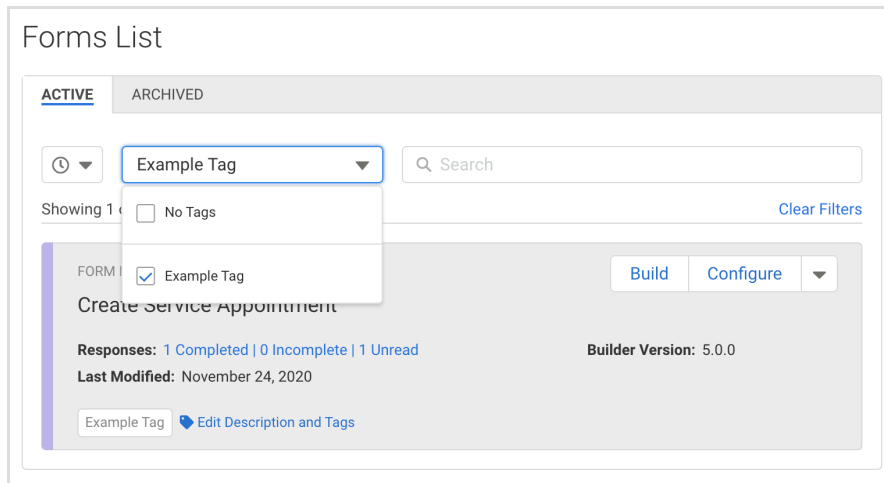


The screenshot shows the 'Form Description and Tags' configuration page. The title is 'Form Description and Tags'. Below the title, it says 'Adding a description and tagging your forms helps to keep your forms organized.' and provides a link 'Learn more about form management with description and tags.'. The 'FORM NAME' is 'Create Service Appointment'. The 'FORM DESCRIPTION' section has a text area with the placeholder 'Add a brief description of the form.' and a note '225 maximum characters.'. The 'FORM TAGS' section includes a search box with 'Tags (1)', a '+ Create New Tag' button, and a 'New Tag X' button. At the bottom right, there are 'Cancel' and 'Save Changes' buttons.

Please Note: You will only be able to add tags to a form that you own. If a form has been shared with you, you will be unable to edit or add tags to the form.

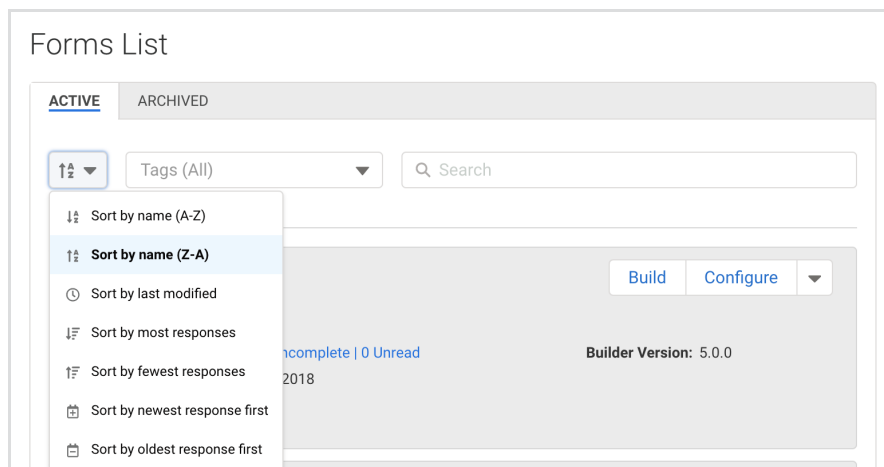
Searching Tags

After you've added tags to your form, you can search for your tags using the Tags search box at the top of the Form List page. Additionally, you can use the search bar at the top right to find specific tags as well.



Sort & Filter

You can sort forms alphabetically, by last modified, by most recent responses, by the number of responses, and by tag. You can also use the search bar to find forms based on their Title or Form ID.



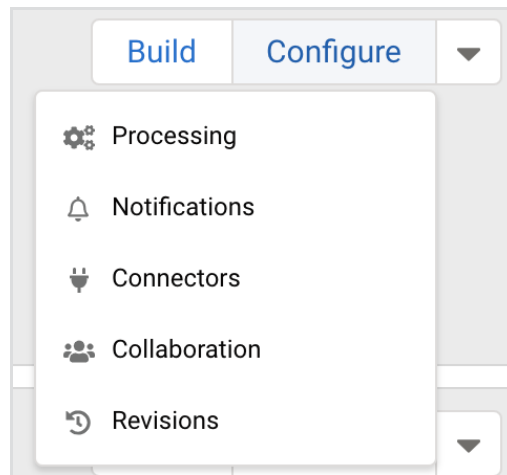
Managing Forms

Build

On the images above, you can see that each form has its own "Build" button. A quick click takes you straight to the Form Builder for the specified form.

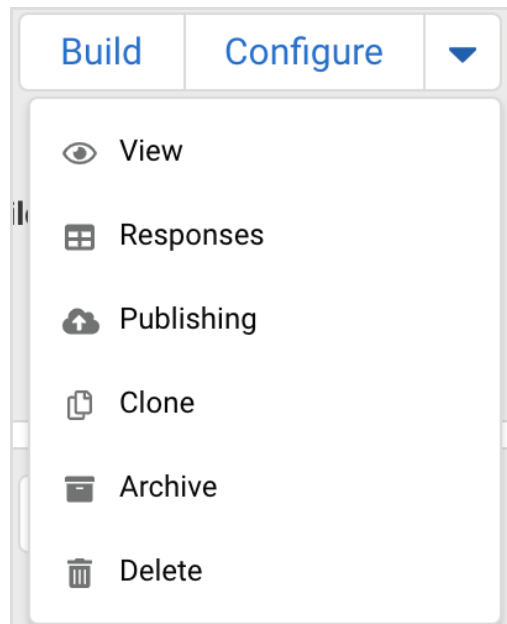
Configure

Set which dates your forms are active, who gets email notifications, configure connectors, and more from the Configure button. [Here's more on configuring your forms.](#)



More

To see more, you can expand the additional options menu to the right of the "Configure" button. This menu contains the following options.



- Click **View** to see the live version of your form.
- **Responses** will take you to the My Responses page for the form.
- The **Publishing** page covers which publishing options are available for the form.
- Click **Clone** to create an exact copy of a form (including connectors). You can read more about cloning your forms below.
- **Archiving** a form will make it no longer public, but you can still access it.
- **Deleting** the form will erase it completely.

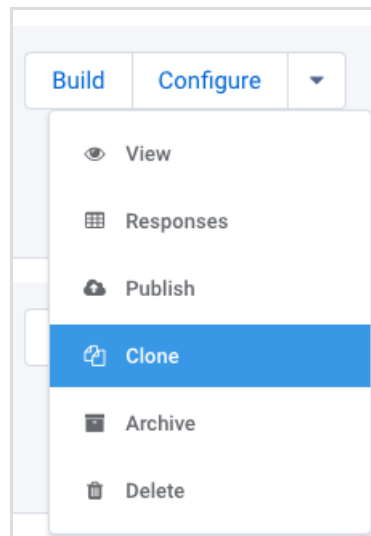
Cloning Forms

As we mentioned above, cloning a form creates an exact copy of the form, including any

connectors. This can be helpful for troubleshooting or for starting your building process by using an already existing form as a template. It is important to note that no responses will be copied over to the cloned form. Additionally, notification and processing settings will also not be copied over and you will need to reauthenticate your connectors in the clone.

To clone your forms:

1. Hover your mouse over the down arrow next to configure beside the form you want to clone, and click "Clone".



2. The Form Builder will automatically open with the clone inside the canvas. However, this is only a preview. In order to fully create the clone you will need to click the "Save" button before you go any further.
3. The clone will automatically be renamed to "[title of original form] + (copy)". You can leave the name as-is, or you can change the name to differentiate it from the original form.
4. After you have clicked Save, you'll now have a clone!

Please note: If your form has not yet been upgraded to version 5.0, do not upgrade the cloned form until AFTER you have saved it or it will not clone.

Form Name Notes

Form Names have a maximum character length of 255 characters for alpha/numeric characters. However, when you add special characters the Form Name deviates from the maximum length of 255 due to width considerations in order to display the whole value fully on the Forms List page. Because of this, when using special characters there may be less than 255 characters appearing in the Forms List.
