

FormAssembly and Salesforce

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Introduction

FormAssembly and Salesforce are a match made in heaven. With FormAssembly's simple, yet powerful data collection and Salesforce's robust CRM, your data is in good hands! Your FormAssembly forms can work with Salesforce in a number of ways. We'll cover each of them below.

Import a Form From Salesforce

You can quickly create a form that contains fields and mappings for all your standard and custom objects and fields in Salesforce by [using the Salesforce Import Tool](#).

Sending Data to Salesforce

Our Salesforce connector can send data to any Salesforce object or field, standard or custom, which are accessible through the Salesforce API. You can send the data on submission of the form, or immediately after. [Check out this help document](#) to learn how to set up the Salesforce connector.

In your Salesforce connector, you can:

- [Create new Salesforce records.](#)
- [Update existing Salesforce records.](#)
- [Look up existing Salesforce records.](#)

In addition, you can send information from other connectors and features to Salesforce too! Some examples of this include [Stripe IDs](#), [E-Signature reports](#), [PDFs of the response](#), and [files uploaded to your form](#).

Prefill Forms with Salesforce Data

You can make filling out forms even easier by [prefilling data from your Salesforce records](#) directly into your form fields!

Open FormAssembly in Salesforce

The FormAssembly AppExchange App [lets you open FormAssembly inside of Salesforce](#). Using SSO, you'll be able to do all your data collection and Form Building work in one browser tab.

Embed your form in a Salesforce Experience Cloud Site

Collect data from your Salesforce Experience Cloud Site members by [embedding your form in a Salesforce Experience Cloud Site](#) (formerly Communities).

Salesforce Experience Cloud Authentication

If you have a Team, Enterprise, or Government plan, you can [require that your form respondents log into your Salesforce Experience Cloud Site to access the form](#). Plus, this allows you to prefill data from their user records!
