Use Case: Allow Respondents to Update Salesforce Records

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Introduction

There are many cases where it can be helpful to display Salesforce record information to your form respondents. In particular, you may want to allow your respondents to view and update their information which has been stored in Salesforce.

To accomplish this, you can ask your form respondents to enter a piece of information on a form, and then use that information to trigger the Salesforce Prefill Connector on a second form. The Prefill Connector can then be used to prefill and display any record information that was found. This is often referred to as a "two-form process".

Create the First Form - Collect Respondent Data

In order to prefill data from a Salesforce record, you'll first need to **locate** that record. To do this, you can collect information for the lookup from the respondent.

In this example, we'll be locating and updating a Contact record. We'll use the "Email" field to locate the Contact record in question.

Create a new form in your FormAssembly account. Then, add any lookup fields to this form! This can be an email address field, first and last name, Account ID, or any other field which the respondent can type in to locate their record. Remember to save your form before you continue!

Create the Second Form - Display and Update Respondent Data

Now create your second form. This form will display the data from your located record. Add any fields which will be needed to display the necessary information.

Save your form, and then configure your Salesforce Submit Connector so that it updates the record in question.

Prefill Your Second Form

Now that you know what information you'll be collecting and what you want to display, it's time to add the Salesforce Prefill Connector to your second form!

Follow the steps in the help document linked above to set up your Salesforce Prefill Connector. Make sure to set up the lookup as an **unsafe query parameter**.

After setting up and saving your connector, create the first part of your prefilled link by combining the link to the second form and the unsafe query parameter. The link should look something like this:

```
http://xxxxx.tfaforms.net/283230?acctnum=
```

Navigate back to your first form's Notification Page and use this link in the Redirect URL field.

Finally, use field aliases to pull information from the first form into the Redirect URL. Your final link will look something like this:

```
http://xxxxx.tfaforms.net/283230?acctnum=%%tfa_XXX%%
```

You can follow these steps if you would like to use more than one lookup value/unsafe query parameter.

If you have any questions or run into any issues, you can reach out to our Support Team for assistance!