

Workflow Assignments

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Introduction

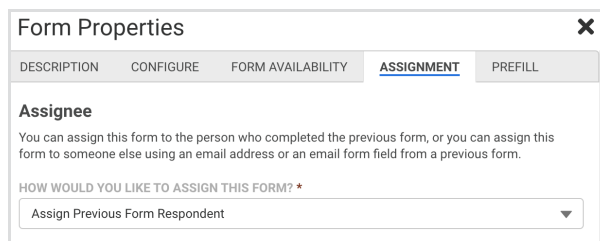
When using FormAssembly Workflow to create a customer journey, you may require data from multiple form respondents. Our Workflow Assignments feature adds the ability to easily assign someone to a Form Step in your Workflow Builder. This way you can collect data from a number of respondents, all within one Workflow Response.

Note: FormAssembly Workflow is only available on Team plans and above.

Assigning a Step

Before we begin, please note that Workflow Assignments can only be made on Form Steps. You cannot assign any other step types to multiple respondents.

1. Click on any Form Step in your Workflow Builder to open the Form Properties.
2. In Form Properties, select the **Assignment** tab.




The screenshot shows a 'Form Properties' dialog box with a close button (X) in the top right corner. It has five tabs: 'DESCRIPTION', 'CONFIGURE', 'FORM AVAILABILITY', 'ASSIGNMENT', and 'PREFILL'. The 'ASSIGNMENT' tab is selected and highlighted. Under the 'Assignee' section, there is a text box explaining: 'You can assign this form to the person who completed the previous form, or you can assign this form to someone else using an email address or an email form field from a previous form.' Below this is a dropdown menu labeled 'HOW WOULD YOU LIKE TO ASSIGN THIS FORM? *' with the option 'Assign Previous Form Respondent' selected.

3. You can now select how to assign the form: [Assign Previous Form Respondent](#), [Assign with an Email Address](#), or [Assign Dynamically with a Form Field](#). Please refer to the sections below to learn about each assignment option.
4. Click **Save** to apply your changes.

Assign Previous Form Respondent

The default assignment option is to assign a previous form respondent. This option will continue with the same form respondent who filled out the previous Form Step. This assignment option requires that you do not have any Page Redirect Steps between this step and the previous form action. If you do have a Page Redirect Step, a warning will appear under the dropdown menu.

 When assigning the previous respondent be sure to remove any Page Redirect steps between this step and the previous form action.

Assign with an Email Address

This assignment option allows you to assign the step to a **set email address**. This option can be used when you have a specific person or email which should be assigned the Form Step, such as an internal approval of the data.

When this option is selected, a new Notification Settings section will appear below the dropdown menu.

Notification Settings

You can change the requester name and email address and add a reason for the form assignment. Requester details and reason will be included in the assignment email.

REQUESTER NAME *

REQUESTER EMAIL ADDRESS *

REASON FOR REQUEST

In this section, you'll need to fill in the following information:

- **Requester Name:** The name of the person who is requesting that this form be filled out by the new respondent.
- **Requester Email Address:** The email address of the person requesting that this form be filled out by the new respondent.
- **Reason For Request:** The reason why this form is being filled out by the new respondent.

These fields will be used to generate an email request which will be sent to the set email address. The email recipient will be able to use the link in the email to continue as the new workflow respondent.

Assign Dynamically with a Form Field

This assignment option allows you to dynamically assign the Form Step based on a previous form

field. In order to use this option, the following conditions must be met:

1. There must be a form field with email validation in a previous Form Step.
2. The email collection field must be on a form on the same path as the form being assigned.

When this option is selected, an Email Field will appear below the dropdown menu.

Assignee

You can assign this form to the person who completed the previous form, or you can assign this form to someone else using an email address or an email form field from a previous form.

HOW WOULD YOU LIKE TO ASSIGN THIS FORM? *

Assign Dynamically with a Form Field ▼

EMAIL FIELD *

Select an Option ▼

Use the Email Field to select the email collection field from a previous Form Step. This email collection field should be a text input field with email validation and must be in a Form Step on the same path as the one being assigned.

A new Notification Settings section will also appear.

Notification Settings

You can change the requester name and email address and add a reason for the form assignment. Requester details and reason will be included in the assignment email.

REQUESTER NAME *

REQUESTER EMAIL ADDRESS *

REASON FOR REQUEST

In the Notification Settings section, you'll need to fill in the following information:

- **Requester Name:** The name of the person who is requesting that this form be filled out by the new respondent.
- **Requester Email Address:** The email address of the person requesting that this form be filled out by the new respondent.
- **Reason For Request:** The reason why this form is being filled out by the new respondent.

These fields will be used to generate an email request which will be sent to the email address collected by the Email Field.
