# Form Optimization Guide for FormAssembly

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# Welcome to your guide to form optimization with FormAssembly!

Whether you're just starting out or looking to refine your skills, we're here to help you build efficient and user-friendly forms that perform beautifully, no matter the scenario. Through this article, you'll learn how to configure your forms for optimal performance, understand the impact of different form features on the respondent experience, and discover how to make your forms work best for your needs.

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# What is Optimization?

In FormAssembly, optimization means setting up your forms to load fast, run smoothly, and offer a seamless experience for everyone who uses them. It's all about knowing which features pack a big punch—these "power features" can supercharge your form but might slow things down if not used wisely. Think of it as finding the perfect balance to get the most out of these powerful tools without weighing down your form's performance.

## What Makes Something Optimized?

An optimized form in FormAssembly should:

- Load quickly for all users regardless of their internet speed.
- Have minimal bounce rates and drop-offs due to performance issues.
- Submit data efficiently without errors or long waiting times.

## What is Not Optimized?

A form that isn't optimized might:

- Load slowly, causing user frustration and high abandonment rates.
- Contain complex features and formats that confuse the respondent and make filling out the form more difficult.
- Experience errors during submission due to timing out.

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# Creating an Optimized Form with Power Features

When building forms in FormAssembly, you have a toolkit of advanced features at your disposal. These power features can significantly enhance the functionality of your forms but need to be used thoughtfully to avoid performance pitfalls. Here's how these powerful elements can impact your form's loading time and overall efficiency:

- **Conditional Logic**
  - This feature helps create dynamic forms that adapt based on user input. However, excessive use can increase form complexity and slow down response times as the system continually recalculates what to display next.
  - **Tip:** If you have multiple conditional fields, consider grouping them into sections and adding the conditional logic at the section level instead of on individual fields. This can simplify form logic and improve performance.

- **Dynamic Picklists**
  - These are great for ensuring form accuracy and relevance by populating picklists based on previous answers. Yet, they require additional queries and data fetching, which can delay form loading, especially if the data source is large.
  - **Tip:** We also advise against copying Dynamic Picklists or their mapped fields as this can cause unpredictable behavior and potentially degrade performance.

- **Calculated Fields**
  - While they automate calculations and improve user experience, calculated fields can be resource-intensive, especially when they depend on multiple inputs or complex formulas.

- **Autosuggest Menus**
  - These menus enhance the user experience by predicting text inputs. However, they can slow down your form if they're fetching a lot of data or if the autocomplete suggestions are not well-optimized.

- **Repeatable Sections**
  - This feature allows users to duplicate certain parts of the form as needed. It's incredibly useful but can lead to performance issues if users add many sections, as each one can multiply the data processed.

- **Custom Code**
  - Tailoring your form with custom JavaScript or CSS is powerful, but excessive code can lead to slower load times and potential bugs if not implemented correctly.

- **Prefilling**

- Filling fields automatically with known data saves time but can slow down the form loading if it involves pulling large amounts of data from external sources.

- **Salesforce Submit Connector Size**
  - Integrating large amounts of data with Salesforce through your form can impact performance, particularly if the data transactions are complex or the volume is high.
  - **Tip:** Large connectors such as these are better handled during the "After Form Submit" portion of the timeline to ensure smoother operation.

- **Menu Dependencies**
  - Dependencies between different menu fields can create a seamless experience but might also introduce delays as the system needs to check and recheck conditions based on user selections.

Using these power features effectively can turn a standard form into a smart, responsive tool that enhances user engagement. However, it's crucial to balance their benefits with the potential impact on form speed and simplicity to maintain optimal performance.

# Ways to Further Optimize Existing Forms

Improving your forms over time is just as important as building them right the first time. This ongoing process helps ensure your forms continue to meet the needs of your users while maintaining high performance. Here's a simple breakdown of how you can keep your forms in top shape:

## Regularly Check Form Performance

It's like giving your car a regular tune-up. Just as you wouldn't want your car breaking down on the highway, you wouldn't want your form to slow down or stop working for your users. Keep an eye on key indicators such as:

- **Drop rates**
  - How often are people leaving your form before finishing it? A high drop rate might indicate that part of your form is confusing or too long.

- **Bounce rates**
  - Are users leaving quickly after they start filling out the form? This could suggest that the form is not what they expected or that it loads too slowly.

- **Submission errors**
  - If people frequently encounter errors when submitting the form, there might be issues with how the form fields are set up or validated.

## Update Based on What You Learn

Once you know where the problems lie, you can start making specific changes. For example:

- If the drop rate is high on a specific page, maybe that page is too complex or asks for sensitive information too early.
- If users are bouncing off quickly, check if the form's initial loading time is too long or if the first questions are off-putting.
- If there are submission errors, ensure that your field validations are clear and that you aren't asking for data in a format that users might not understand.

By routinely analyzing these metrics and tweaking your forms accordingly, you can greatly enhance how they perform and how satisfying they are for users to complete. This isn't just a one-time fix but a continuous effort to align your forms more closely with user expectations and technical best practices.

# Final Notes

Optimizing forms is a continuous process that involves balancing functionality with performance. By following these guidelines, you can ensure that your forms not only meet the needs of your users but also perform efficiently under various conditions.