

Box Connector

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Overview

Send uploaded files from workflow responses directly to a destination Box folder with the Box Connector.

This connector is available as an Add-on for Team plans and higher when using FormAssembly Workflow. For those interested in purchasing this Add-on, please contact your Account Manager. If you do not have an Account Manager, [please contact our Sales Team](#).

Requirements

To use the Box Connector, a FormAssembly user must

- be part of a Team plan or higher
- purchase the Box Connector Add-on for their instance
- have Content Management user permissions enabled for their login
 - specifically, the Box Add-on must be enabled for the user account
- have a Box account
- use the connector on a FormAssembly Workflow

Note: If the user lacks the FormAssembly user permission to Box but the Box connector step is configured in the workflow, the connector will be skipped.

Add the Box Connector to your Workflow

Note: The Box Connector is in Beta.

- Select **Add Step** and choose **Connector**
 - Select **Box**
-

Set up the Connector Properties

Description Tab

Use the Description tab to add a Step Name and Step Description.

Authorization Tab

The Authorization dropdown lists all saved authorizations from all workflows owned by your user account. Select an existing authorization from the list or scroll to the bottom to create a **New Authorization**.

Create a New Authorization

- Select **New Authorization** from the Authorization dropdown list
- Enter a **Name** for the authorization
- Click **Authorize**

Grant access to Box

- Sign in with your Box account credentials
- Complete any additional authentication steps configured for your Box account
- Accept the permissions requested by the FormAssembly Box Connector for your Box account
 - If you do not accept the permissions, you will be unable to use the connector
- Click **Save** to store and apply this authorization to the connector

Edit an Existing Authorization

- Select a saved authorization from the Authorization dropdown list
- Click **Edit** to modify authorization settings
- When complete, click **Save** to apply the changes to the saved authorization, or click **Save as New** to save the modified authorization as a new entry in the Authorization dropdown list.

Manage or Delete Authorizations

- Click **Manage** to view the Authorizations page

From the Authorizations page, an authorization can be revoked. When revoked, the authorization is deleted from all connectors. Ensure an authorization is not used in a live workflow before it is revoked, to prevent connector errors.

Note: Only the original creator of the authorization can manage it, ensuring security and control over sensitive configurations.

Configuration Tab

Box Connector Properties
✕

DESCRIPTION
AUTHORIZATION
CONFIGURATION
ERROR HANDLING

Sending Files to Box

✓ Action 1
Close

Send file:

File upload
✕

File Upload in Every field type

Destination:

/FormAssembly
✕

Subfolder: ⓘ

f

Return
Select any variables you wish to return for use later in the workflow.

+ Add Variable

🗑 Delete Action

↻ Add Action

↻ Refresh Lists

Send File

Select a file upload field from the dropdown

- The Send File dropdown displays a list of all file upload fields available in the workflow. Please note that the displayed list is limited to 15 lines. If the desired field is not shown in the list, type the field's name to search further.

Note: For more information on file upload fields and upload size restrictions, please see [this article](#).

Destination

Select a destination folder from the dropdown

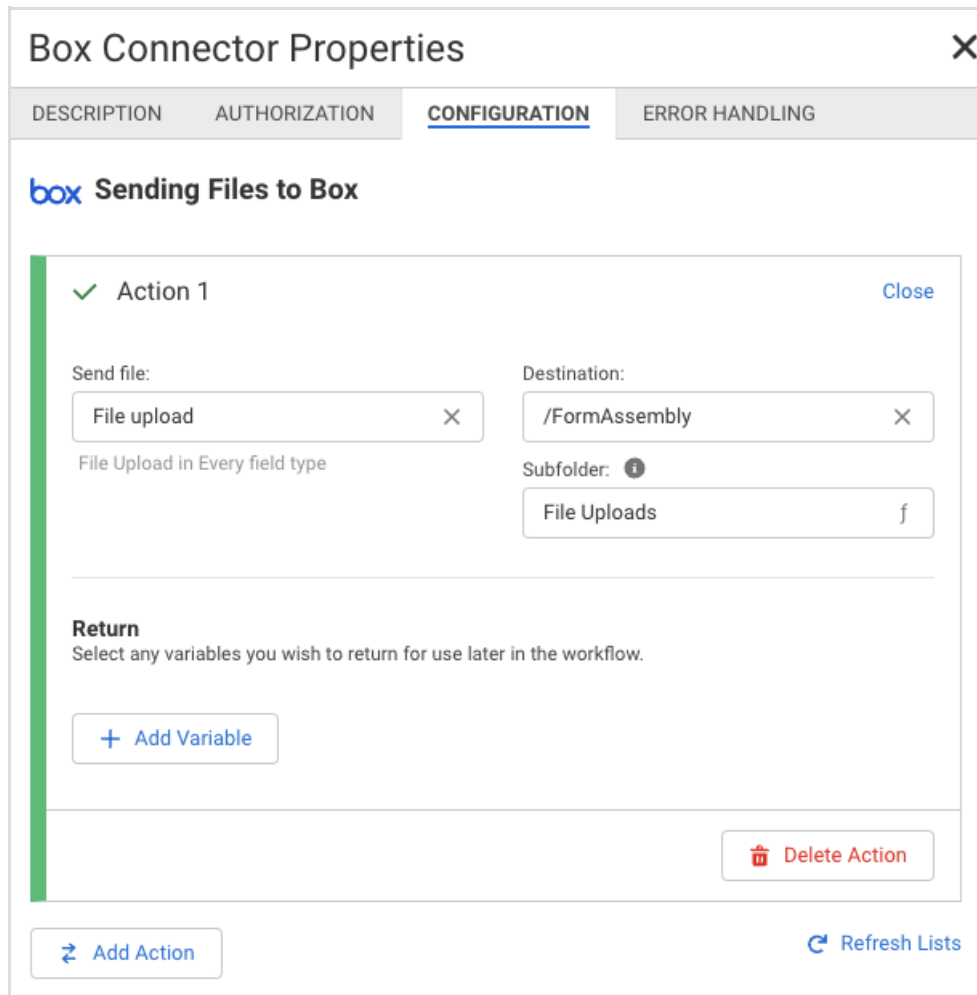
- The Destination dropdown displays a list of all Box folders the authorized Box user account can access. Please note that the displayed list is limited to 15 lines. If the desired destination is not shown in the list, type the folder's name or path to search further.

Note: If expected folders do not appear after searching, check with your Box administrator that the authorized account has appropriate permissions for the intended destination folder.

Destination Subfolder (optional)

There are two different ways to utilize the Destination Subfolder configuration option. The first is to name a destination subfolder the Send File will be sent to **statically** for every workflow response.

To do this, type in the name of a Destination Subfolder. If the named folder does not yet exist, the connector will create the folder the first time a response a workflow response is received.



The screenshot shows the 'Box Connector Properties' dialog box with the 'CONFIGURATION' tab selected. The title bar includes a close button (X). The dialog has four tabs: DESCRIPTION, AUTHORIZATION, CONFIGURATION (active), and ERROR HANDLING. The main content area is titled 'box Sending Files to Box'. It features a green vertical bar on the left and a 'Close' button on the right. The configuration is for 'Action 1'. Under 'Send file:', there is a text input field containing 'File upload' and a close button (X). Below it, the text 'File Upload in Every field type' is displayed. Under 'Destination:', there is a text input field containing '/FormAssembly' and a close button (X). Under 'Subfolder:', there is an information icon (i), a text input field containing 'File Uploads', and a function icon (f). Below the configuration fields, there is a 'Return' section with the text 'Select any variables you wish to return for use later in the workflow.' and a '+ Add Variable' button. At the bottom right, there is a 'Delete Action' button with a trash icon. At the bottom left, there is an '+ Add Action' button with a plus icon. At the bottom right, there is a 'Refresh Lists' button with a refresh icon.

The other method is to configure a **dynamic** Destination Subfolder by creating a subfolder naming convention. Using this alternative method, Send Files for each workflow response can be organized within their own folder separate from other workflow responses. This may be desirable in cases where you expect to receive workflow responses where file names are the same or are difficult to differentiate (if needed).

Accessing Variables to Create Dynamic Destination Subfolders

- Select the function (f) icon to open the WYSIWYG editor
- Select the alias dropdown from the toolbar to open a list of available variables
- Select an available variable from the list

For more information about variables, please see our [documentation on Form Calculations](#).

Return (optional)

Utilize this section to capture the uploaded Send File's URL or ID within the Destination to be referenced later in the workflow. Use the Add Variable button to add one or more return variables, and complete the configuration steps to set the return variable's **Operation Result** and **Return Variable Destination**.

Box Connector Properties

DESCRIPTION AUTHORIZATION **CONFIGURATION** ERROR HANDLING

box Sending Files to Box

✓ Action 1 Close

Send file: × Destination: ×

File Upload in Every field type Subfolder: ⓘ f

Return
Select any variables you wish to return for use later in the workflow.

RESULT FROM DESTINATION

<input type="text" value="URL"/> ×	→ <input type="text" value="x"/>	<input type="text" value="FileUploadURL"/> 🔍 🗑️
<input type="text" value="ID"/> ×	→ <input type="text" value="x"/>	<input type="text" value="FileUploadID"/> 🔍 🗑️

+ Add Variable 🗑️ Delete Action

➡ Add Action 🔄 Refresh Lists

Operation Result

- Choose what type of Return Variable to create by selecting an Operation Result from the dropdown
 - ID - The ID of the file uploaded by the connector
 - URL - The assigned URL of the file uploaded

Return Variable Destination

- Field - Send the Operation Result to an existing form field in the workflow
 - Use the dropdown menu to select a text field where the Operation Result will be sent. The dropdown indicates which form each field originates from.

Note:

- When returning to a form field, the form field must exist in the **same form** as the configured Send File.

- Only fields that allow text input are listed here. File upload fields, radio button fields, checkbox fields, multi-select fields, and dropdown fields are not listed.

- **Variable** - Set the Operation Result as a variable that can be referenced later in the workflow
 - Select an existing variable name from the dropdown or create a new custom variable.

Actions and the Add Action Button

The Box Connector may be configured to send data to more than one destination or subfolder by using multiple Actions. Use the **Add Action** button to create another Action for each additional destination you want to configure. Complete the configuration of the send file, destination, optional destination subfolder, and optional return section for each action.

Delete an action by pressing the **Delete Action** button at the bottom of each action configuration.

Error Handling Tab

By default, if the connector encounters an error, the workflow terminates. To override this behavior, you can configure the error to redirect the workflow to another step by selecting a step from the **Upon Connector Error...** dropdown menu.

You may create a custom error message to display to your respondent. If a custom message is not added, the default connector error displays. To include the default message with your custom message, select the checkbox.
