

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**
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Set up the Connector Properties

Refer to our [Workflow-native Connectors article](#) for general configuration information.

Configuration Tab

The screenshot shows the 'Box Connector Properties' dialog box with the 'CONFIGURATION' tab selected. The window title is 'Box Connector Properties' and it has a close button (X) in the top right corner. Below the title bar are four tabs: 'DESCRIPTION', 'AUTHORIZATION', 'CONFIGURATION' (which is underlined and active), and 'ERROR HANDLING'. The main content area is titled 'box Sending Files to Box'. It contains a section for 'Action 1' with a green checkmark and a 'Close' button. Below this is a 'Parameters' section with a dropdown arrow. It includes two input fields: 'Send file:' with a dropdown menu showing 'File Upload' and a close button (X), and 'Destination:' with a dropdown menu showing '/FormAssembly' and a close button (X). Below the 'Send file:' field is the text 'File Upload in Simple Form, Multiple Types'. The 'Subfolder:' field has a dropdown menu showing 'File Uploads' and a close button (f). Below the parameters is a 'Return Variables' section with a dropdown arrow and the text 'Select any variables you wish to return for use later in the workflow'. There is a '+ Add Variable' button. At the bottom left is a '+ Add Action' button, and at the bottom right is a 'Refresh Lists' button with a refresh icon.

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 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

Sending Files to Box

✓ Action 1
Close ▾

Parameters
▾

Send file:

File Upload
✕

File Upload in Simple Form, Multiple Types

Destination:

/FormAssembly
✕

Subfolder: ⓘ

File Uploads
f

Return Variables
▾

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

RESULT FROM box BOX
DESTINATION FormAssembly

URL	✕	→	X	FileUploadURL	✕	
ID	✕	→	X	FileUploadID	✕	

+ Add Variable

➤ 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.
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