# Workflow-Native Connectors



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## Overview

The following information covers configuration settings shared across all Workflow-native Connectors. For configuration settings unique to the connector you are setting up, please refer to the article specific to that connector.

## List of Workflow-Native Connectors

- Google Spreadsheets Connector
- Google Drive Connector
- Microsoft SharePoint Connector
- Microsoft Excel Connector
- Box Connector
- DropBox Connector
- Webhook Connector
- Salesforce Workflow Connector

## 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 the Connector

- Sign in with account credentials for the 3rd-party application
- Complete any additional authentication steps configured for the account
- Accept the permissions requested by the FormAssembly Connector for your 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 **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.

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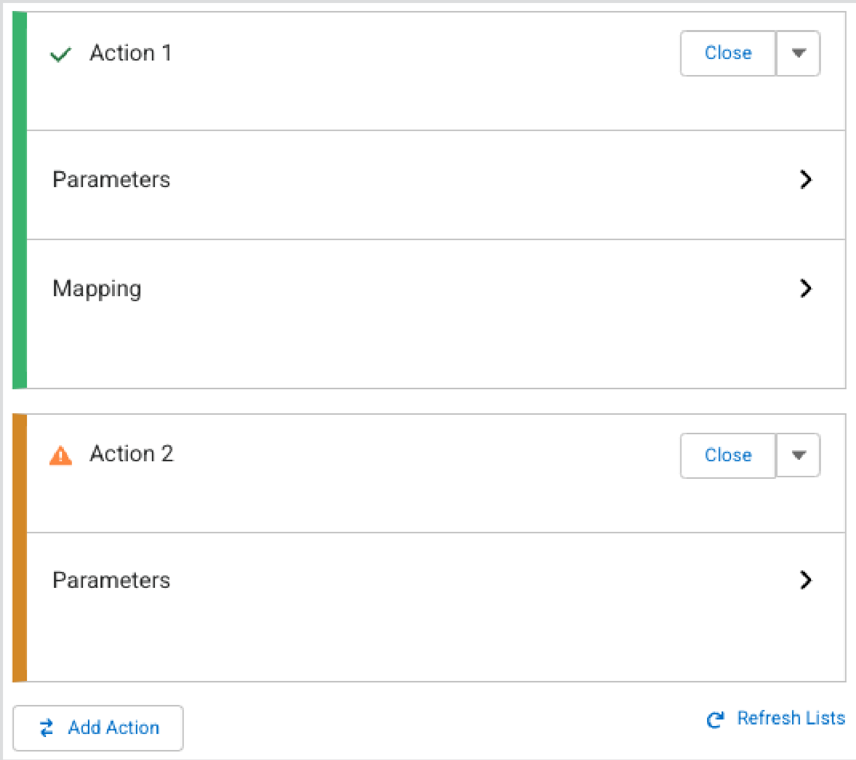
# Configuration Tab - Actions

Use the Configuration tab to create the Actions your connector will complete when it runs. The Configuration tab is only available after completing the Authorization tab.

## Add Action Button

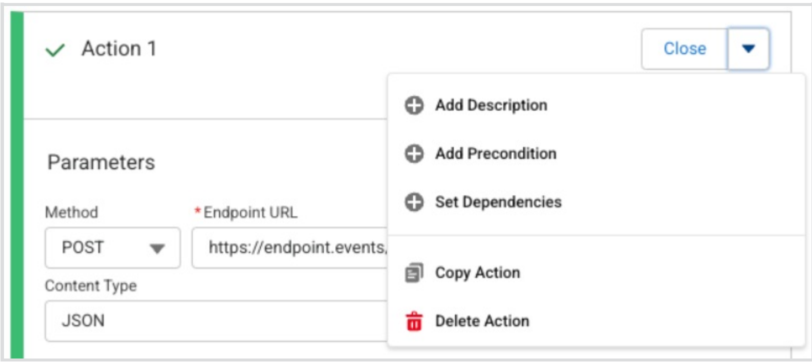
A connector may be configured to complete more than one task, such as sending a file or data to more than one destination, by using multiple Actions. Use the **Add Action** button to create an Action for each additional task you want to configure. Each Action is contained within its own Action Card.




## Action Menu

Each action has an Action Menu. You can use the Action Menu to add a description, preconditions, and dependencies, or to copy or delete an action.

Open the Action Menu by clicking the **dropdown** beside the **Close** button at the top of the action card.




### Add Action Description

To add a custom description of the action for ease of reference select **Add Description**.

### Preconditions

Preconditions determine whether a connector action runs or is skipped.

#### Add a Precondition to an Action

- Select **Add Precondition**.
- Select a **form field**, enter a **value or formula**, or select a **variable** value

- The action will only run if the selected or entered condition is True.
- If multiple conditions are added, you may specify whether you want the action to run if **all conditions** are satisfied, **any condition** is satisfied, or by using **custom** boolean logic. For more information about custom logic, refer to the Set Condition section of our Conditional Ruleset article.

### Dependencies

Actions with preconditions can be linked to dependent actions by setting action dependencies. Dependent actions run if the prerequisite action runs, and dependent actions are skipped if the prerequisite actions are skipped.

#### Add a Dependency to an Action

- Select **Set Dependencies**
  - **Note**: This option is only available if the connector contains two or more actions.
- In the **Run after** field, select the actions that are the prerequisites for this action to run.
  - **Note**: If more than one dependency is added to the **Run after** field, the action will run if any of the listed prerequisite actions are run.

### Copy Action

Actions can be quickly duplicated with the Copy Action button.

- Select **Copy Action**

All configuration details are copied into a new action within the connector's Configuration tab.

### Delete Action

Delete an action by selecting **Delete Action**.

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## 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.