

Release 5.173

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Related Articles

New Features & Enhancements

Workflow Collaboration Enhancements

Access Level Controls

- Shared workflows now appear in the workflow list for all collaboration roles (Manager, Editor, and Auditor)
- Workflow builder access is now enforced based on collaboration role—Editors, Managers, and Owners can edit workflows, while Auditors are blocked from the builder
- Approval step actions on the responses page now respect collaboration access levels
- Form assignment step actions (Send Reminder, Reassign Step) are now restricted based on collaboration access level

FormAssembly Atlas Explorer Subscription Management & Workflow Usage Tracking

Atlas Explorer Subscription Management

- FormAssembly Atlas Explorer Plan Administrators and users with “Authorized to Purchase” permission can now access a dedicated Subscription tab in the Admin Dashboard to manage billing and plan details
- View comprehensive plan information including purchased items and billing details (recurring charges, billing dates, total due)
- **Self-service capabilities:**
 - Purchase single-item add-ons for Integrations and features directly through the dashboard
 - Update payment methods securely via Stripe integration
 - Cancel and restore subscriptions

FormAssembly Atlas Explorer Plan Overage Management

- FormAssembly Atlas Explorer plan users now receive email and in-app banner notifications when their account exceeds the 3 active workflow limit
- Real-time overage calculation triggers on workflow status changes, creation, updates, and deletion

- New workflow consumption data display on the Licensing page shows active workflow count, limit, and available capacity

SAML Config UI: Classic customers will see updated UI in the forms list and the SAML setup page to indicate if SAML configuration steps are needed

Bug Fixes

- **Collaboration Access:** Resolved an issue where users with manager access in the new form collaboration component weren't receiving the same connector access level as they previously were
 - **Menu Dependencies:** Fixed a bug where orphaned parent's category remained stuck in child's menu after decoupling menu-dependent fields
 - **Dynamic Picklists:** Updated currency code/name matching logic for Dynamic Picklist v2
 - **Color Picker:** Fixed FormAssembly Atlas form builder color picker to allow dragging, clicking, and manual hex/RGB code entry
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Important Notes

- All changes in this release are **backward compatible** between FormAssembly Atlas and FormAssembly Classic unless otherwise noted
 - No action is required from customers to benefit from these improvements unless otherwise noted
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