

# Use Case: Create a Survey Form and Send Responses to Salesforce

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### Overview

Organizations often need to collect survey responses and store the results in Salesforce for reporting, follow-up, or other Salesforce processes.

By creating a survey in FormAssembly and configuring the Salesforce Connector, survey responses can be sent directly to Salesforce when the form is submitted.

This approach can be used to collect information such as customer feedback, satisfaction ratings, event feedback, or other survey responses.

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## Create the Survey

There are two ways to create a survey in FormAssembly:

- **Use Fai:** Describe what the survey is for and the information you want to collect. Fai can help create the survey based on your description.
- **Create the survey manually:** Add the fields and response options needed for your survey using the Form Builder.

## Use Fai to Create the Survey

Fai can help create a survey based on a description of your use case.

When describing your survey, include information such as:

- The purpose of the survey
- Who will complete the survey
- The information you need to collect
- Any specific questions you want to ask
- The types of responses you want to collect

For example, you could ask Fai to create a customer satisfaction survey that collects the customer's name, satisfaction rating, products used, whether they would recommend the company, and any additional comments.

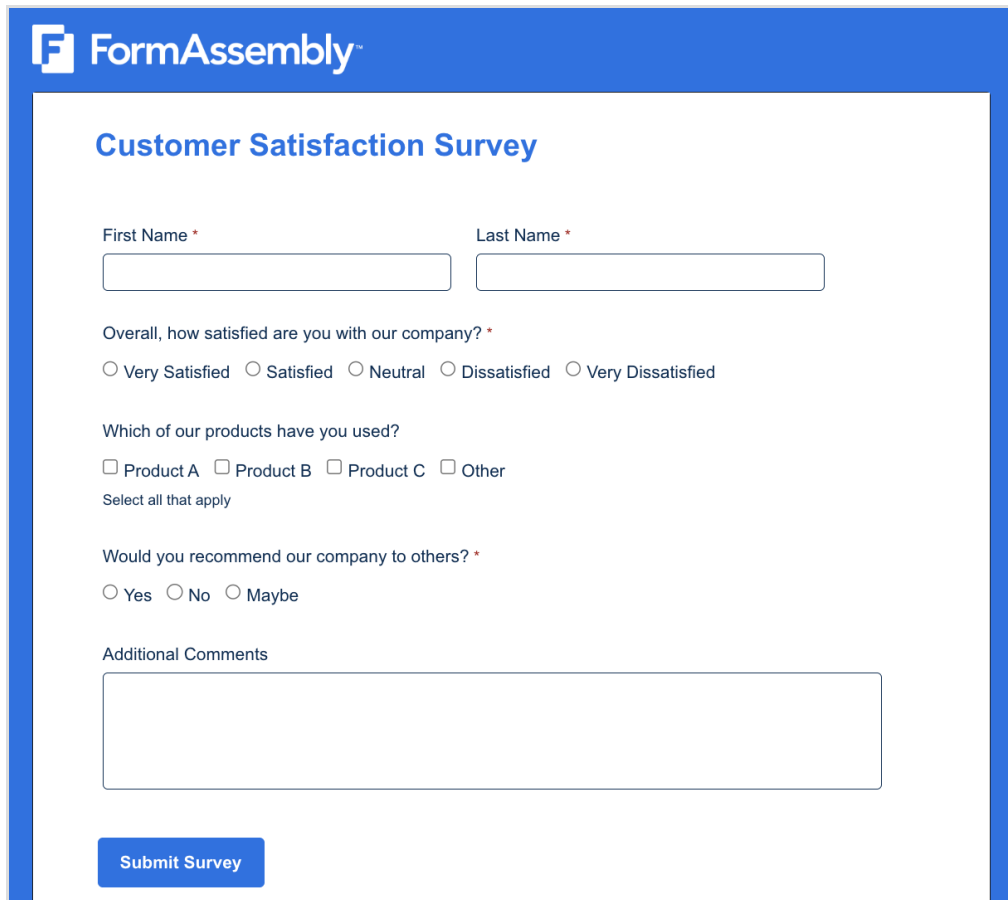
Review the survey created by Fai and make any changes needed before connecting it to Salesforce.

For more information about Fai, see [Fai, The FormAssembly AI Assistant](#) document.

## Create the Survey Manually

You can also create the survey directly in the Form Builder.

Add the fields needed to collect your survey responses and configure the available response options.

The image shows a screenshot of a FormAssembly survey titled "Customer Satisfaction Survey". The form is set against a blue header with the FormAssembly logo. It contains several fields: "First Name \*" and "Last Name \*" are text input fields. Below them is a question "Overall, how satisfied are you with our company? \*" with five radio button options: "Very Satisfied", "Satisfied", "Neutral", "Dissatisfied", and "Very Dissatisfied". The next question is "Which of our products have you used?" with four checkbox options: "Product A", "Product B", "Product C", and "Other". A note "Select all that apply" is below the checkboxes. The following question is "Would you recommend our company to others? \*" with three radio button options: "Yes", "No", and "Maybe". At the bottom is a large text area for "Additional Comments". A blue "Submit Survey" button is located at the bottom left of the form.

For questions with a defined set of responses, use a field such as a Radio Button, Dropdown, or Checkbox. The response options should correspond to the values you want to store in Salesforce.

For questions that require a written response, use a Text Field or Text Area.

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## Configure the Salesforce Connector

After creating the survey, configure the Salesforce Connector to send the responses to Salesforce.

Select the Salesforce object where you want to store the survey data, such as the Contact, Case, or another custom Salesforce object.

Configure the connector to create a new record or update an existing record, depending on your use case.

For more information about configuring the Salesforce Connector, see either the [Form-native Salesforce Connector documentation](#) or the [Salesforce Workflow Connector documentation](#).

## Map Survey Fields to Salesforce Fields

After selecting the Salesforce object, map the FormAssembly survey fields to their corresponding Salesforce fields.

FIELD MAPPING
Select the Salesforce fields that will receive data from your form.

| THESE SALESFORCE FIELDS: | GET THEIR VALUE FROM:                        |
|--------------------------|----------------------------------------------|
| First Name               | First Name                                   |
| Last Name                | Last Name                                    |
| Email                    | Email                                        |
| Satisfaction Level       | a field in your form Overall, how satisfi... |

This is a multiple choice question. You may provide alternative labels to send to Salesforce.

| THESE CHOICES:    | WILL BE SENT AS:  |
|-------------------|-------------------|
| Very Satisfied    | Very Satisfied    |
| Satisfied         | Satisfied         |
| Neutral           | Neutral           |
| Dissatisfied      | Dissatisfied      |
| Very Dissatisfied | Very Dissatisfied |

+ Map Another Field

Make sure that the value being sent from the form is compatible with the Salesforce field receiving it.

For example, if a Salesforce field is a restricted picklist, the survey response should match one of the available Salesforce picklist values.

## Test the Survey

After configuring the Salesforce Connector and field mappings, submit a test response.

Verify that the Salesforce Connector processes the submission successfully and that the responses are saved to the expected Salesforce fields.

Check the following:

- The survey can be submitted successfully.
- The Salesforce record is created or updated as expected.
- Each survey response is mapped to the correct Salesforce field.
- Picklist and checkbox values are stored correctly.
- Required Salesforce fields have the values needed to create or update the record.

If the connector returns an error, check the Salesforce Connector log to identify the field or value causing the issue.

## Result

The survey is now configured to collect responses in FormAssembly and send the submitted data to Salesforce.

Each time a respondent submits the survey, the Salesforce Connector sends the mapped responses to the configured Salesforce record. The data can then be used for reporting, follow-up, automation, or other Salesforce processes.