

Salesforce Connection Best Practices

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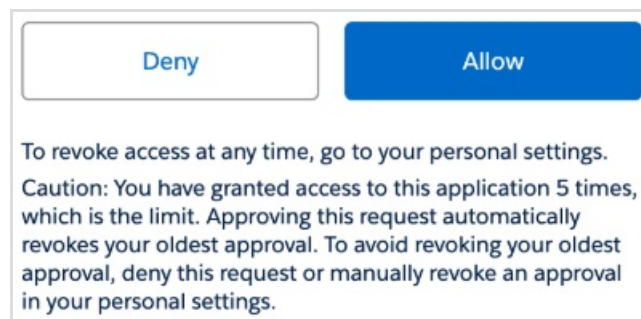
If your forms send data to Salesforce or pull data from it, your Salesforce connections keep everything running. This guide explains how those connections work, what uses them up, and how to set things up so a working form doesn't suddenly stop connecting.

How Salesforce Connections Work

Salesforce allows **five active connections (OAuth tokens) per Salesforce user for the FormAssembly Connector app**. This is a Salesforce limit, not a FormAssembly one.

When a sixth connection is created, Salesforce doesn't show an error. It quietly revokes the **oldest** connection. Any connector, workflow, or dynamic picklist still using that connection will stop working, often with no obvious warning until someone notices missing data.

Salesforce does show a warning on the "Allow Access" screen when you're close to the limit, but it's easy to miss. If you see it, stop and review your connections before you click **Allow**.



What Uses a Connection

Every time you complete the Salesforce login and approval flow from FormAssembly, you use one of your five connections. That includes:

- Clicking **Connect to Salesforce** when setting up a form-level Salesforce connector
- Clicking **Connect to Salesforce** when setting up a dynamic picklist
- Clicking **Connect to Production** when setting up a Salesforce workflow connector
- Clicking **Reauthorize** on the External Authorizations page. Reauthorizing creates a brand-new connection. It doesn't refresh the old one.

This applies even if you log in with the same Salesforce user each time. Three connectors set up with three separate "Connect to Salesforce" clicks use three connections, not one.

Best Practices

1. Reuse existing authorizations

This is the most important habit. When setting up a new connector, workflow, or dynamic picklist, select an **existing authorization** from the list instead of clicking **Connect to Salesforce** again. One authorization can power as many forms, connectors, and picklists as you need.

Only create a new connection when you truly need to connect to a different Salesforce account.

2. Use a dedicated Salesforce user, and know how many FormAssembly users can share it

We recommend connecting FormAssembly with a Salesforce user created just for FormAssembly (often called an integration user), instead of someone's personal login.

When using a dedicated Salesforce user with more than two FormAssembly users connecting to it, transfer ownership of all forms to a single FormAssembly user so that all tokens can be seen on the same External Authorizations page. Doing so makes authorization management easier.

Keep in mind that Salesforce authorizations in FormAssembly belong to the FormAssembly user who created them. Other FormAssembly users can't see or select them. That means every FormAssembly user who connects to the same Salesforce user creates their own connection, and all of those connections count toward that Salesforce user's limit of five.

If more than five FormAssembly users connect to the same Salesforce user, Salesforce will start revoking the oldest connections, and your team's forms will disconnect each other.

3. Plan who connects to each Salesforce user

- **Keep it to five or fewer.** Limit the number of FormAssembly users connecting to any one Salesforce user to five, and ideally fewer, so there's room to reauthorize without knocking someone else out.
- **One authorization per person.** Each FormAssembly user should connect once and select their existing authorization for every connector, workflow, and picklist after that.
- **Need more than five?** Create an additional dedicated Salesforce user for each group of up to five FormAssembly users, for example, one per team or department.
- **Or centralize Salesforce setup.** Have a small number of FormAssembly users own the Salesforce connector setup for your organization, rather than everyone connecting on their own.

4. Check your connections before you reauthorize

If a connection shows as invalid, check Salesforce first before you click **Reauthorize**:

1. In Salesforce, click your profile icon in the upper-right corner, then go to **Settings > Manage Connections**.
2. In the **OAuth Apps** table, count how many times **FormAssembly Connector** appears.
3. If there are already five, revoke the one with the **lowest use count** to free up a slot. Then return to FormAssembly and reauthorize.
4. If there are fewer than five, go to **External Authorizations** in FormAssembly and reauthorize the invalid connection.

Reauthorize only the connections marked invalid, and only once each. Clicking **Reauthorize** repeatedly uses a new connection every time.

5. Review your connections from time to time

A quick check of **Manage Connections** in Salesforce every few months, or whenever someone new starts building forms, can catch problems early. Revoke any connections you know are no longer in use, and try to stay below the limit rather than right at it.

6. Plan ahead before changing users

Salesforce authorizations belong to the FormAssembly user who created them. Before you deactivate a FormAssembly user or transfer their forms, check whether any connectors or dynamic picklists depend on their Salesforce authorization. You may need to reconnect those using another user's authorization or your dedicated integration user.

If You've Already Hit the Limit

If a Salesforce connector starts logging "error Connecting to Salesforce" or a dynamic picklist stops loading options, a revoked connection is a likely cause. Follow the steps in **Check your connections before you reauthorize** above to free up a slot and restore the connection.
