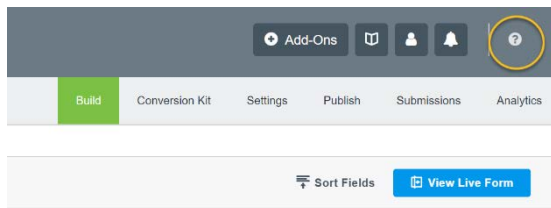


FORMSTACK ONLINE FORMS

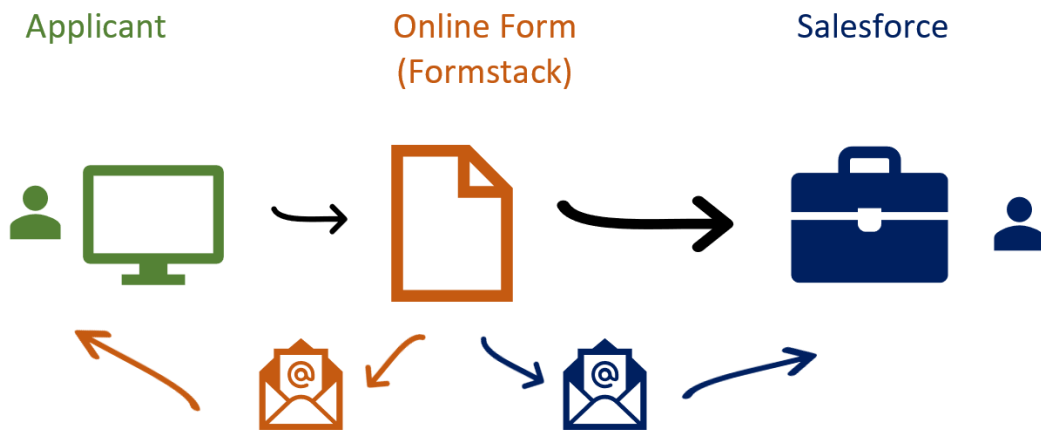
Introduction

The online application forms are built through a product called Formstack. With Formstack you can build intelligent and professional looking forms and map them into Salesforce through Formstack's Salesforce integration.

This document is intended to give an overview/guide of finding your way around Formstack and performing simple tasks. For in-depth training and help please click on the '?' in the top right.



The applicant automatically receives a custom email + copy of the completed application form. A designated person or persons within the grant-making organisation will receive an email informing them that an application has arrived.

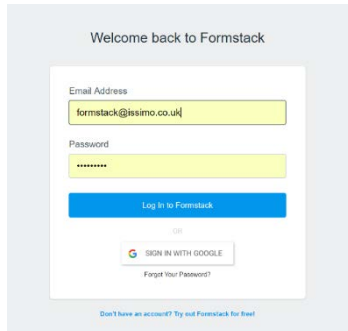


On submission applicant receives a custom email + copy of completed application form

The application arrives in Salesforce under the New Applications tab and an email is sent to a user informing them that an application has been submitted

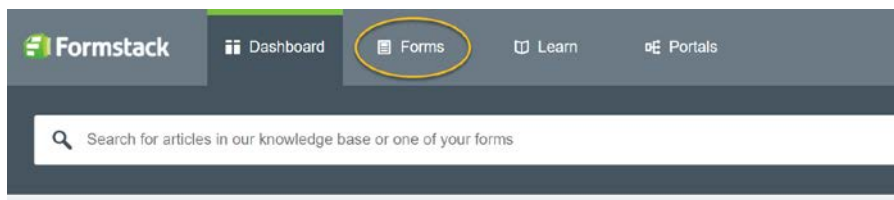
Logging into Formstack

Google Formstack and navigate to the Welcome screen and log in with your credentials:



Navigating Around Formstack

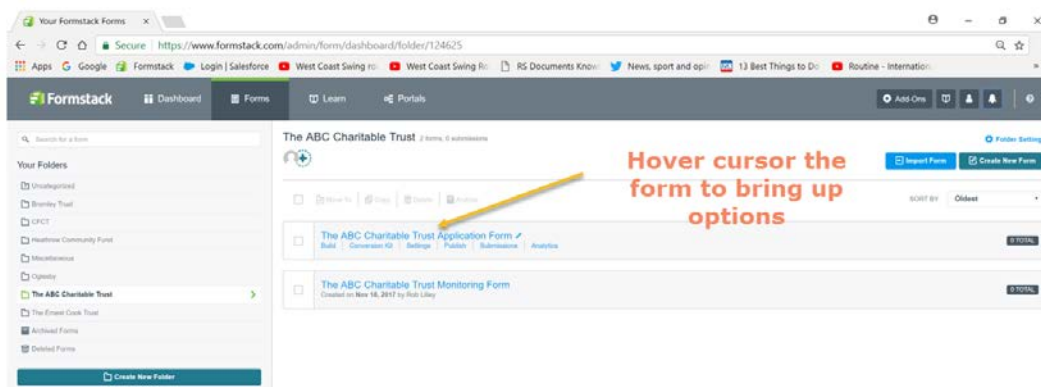
Immediately after logging in you will land on the Dashboard page.



To navigate to your forms, click on Forms tab. You may see your forms straight away or you may need to click on the folder where your forms are stored.



Position your cursor over the form to bring up the available options:



The options are:

Build: Amend the form

Conversion Kit: Ignore unless you want to upgrade Formstack

Settings: Form name, form web address, Emails & Actions

Publish: Publish (make live) any changes that you have made

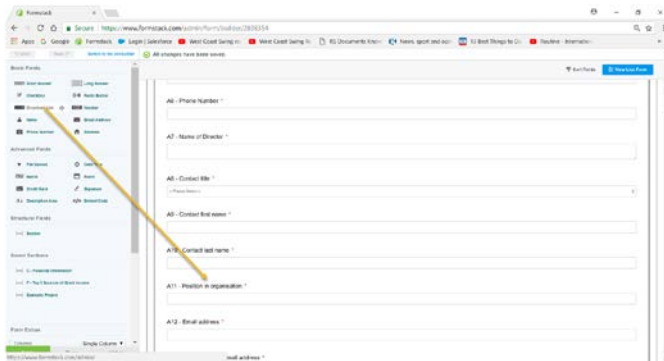
Submissions: View and export (to PDF, Excel etc) submissions

Build

From the build screen you can amend an existing form:

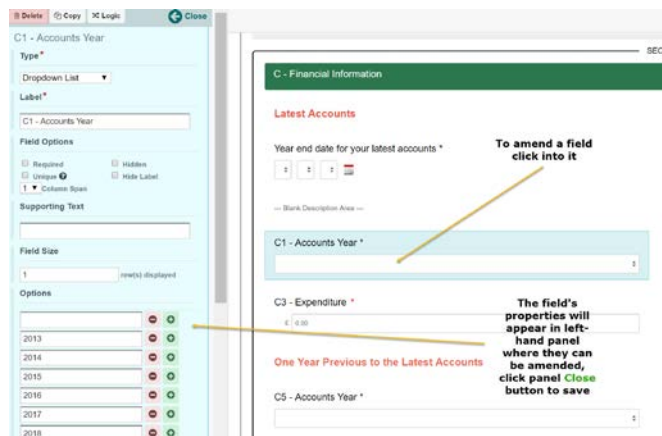
Add a Field

Drag a field onto the form from the left-hand panel



Amend a Field

Click down into the field and amend using the left-hand panel. Click Close to save.



Caution: As a field on your form is probably mapped to a field on Salesforce. You cannot change the type of field it is (e.g. from date to number) without then updating the Salesforce integration mapping in Formstack for that form (under Formstack Settings > Salesforce integration). It's fine to change the label (ie the question text) and move a field but other changes may require a corresponding change in Salesforce. Another example would be a new entry on a dropdown list. This entry would have to also exist on the corresponding dropdown in Salesforce.

Move a Field

Drag it to the required location

Add a Section

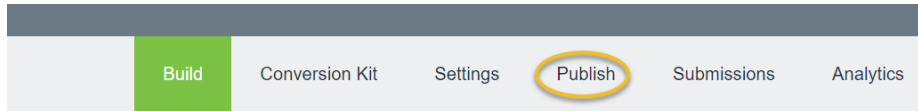
Just like adding a field but drag a section over from the left-hand panel

Move a Section

Drag the section to the required location

Publish

After you have made your changes click on the Publish button to make your changes live.



Settings

In Settings you can:

Change the name of the form and its web address

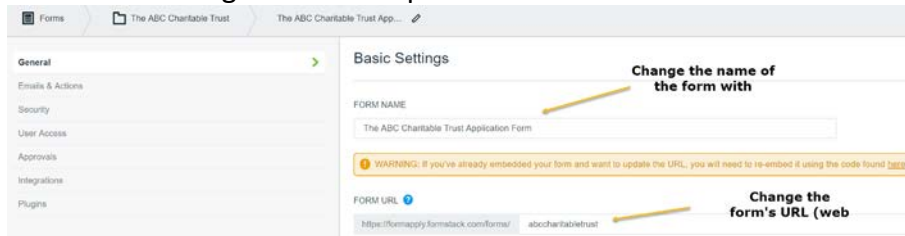
Disable the form

Set up and amend notification and confirmation emails

Change the submission message

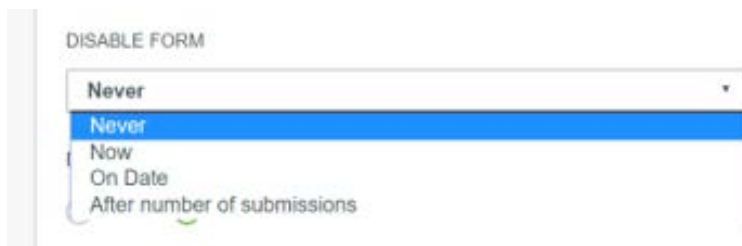
Change the Name of the Form/Web Address

Under the Settings > General options



Disable the Form

Removes the form from show online. Under the Settings > General options



You can disable the form now, on a certain date or after a certain number of submissions.

Submissions

Under the submissions tab all the submissions for a particular form are held. Along with their file attachments. Under the Submissions tab you can:

View an individual submission

Edit an individual submission

Export one or more submissions to PDF, CSV, EXCEL, RTF

Resend the submission into Salesforce

The screenshot shows the 'Submissions' tab interface. At the top, there are tabs for 'Submissions' (26 submissions), 'Partial Submissions' (3 submissions), and 'Charts'. Below the tabs, there are filters and actions: 'All Submissions', 'Create Custom View', 'Import data', and 'Sharing'. A search bar is on the right. The main content is a table with columns: 'Date Submitted', 'Which CFCT grant programme are you applying to?', 'All Your Organisation', 'Contact First Name', 'Contact Surname', and 'B14 Which category best describes your project?'. The table contains five rows of submission data.

Date Submitted	Which CFCT grant programme are you applying to?	All Your Organisation	Contact First Name	Contact Surname	B14 Which category best describes your project?
2017-11-14 11:39:05	Investing in Young People	St Giles Trust	Clare	Devies	Reducing anti-social behaviour and drug abuse
2017-11-08 17:06:44	Investing in Young People	Rochester Indoor Skate Park	Kathy	Hollies	Youth work - including sports and creative arts
2017-10-31 18:22:03	Investing in Young People	United Kingdom & Europe World Library Foundation	Caella	Sarbell	Improving parenting skills
2017-10-04 13:52:32	Investing in Young People	King's Reach	Garnet	Johnson	Reducing anti-social behaviour and drug abuse
2017-10-04 10:55:50	Apprenticeships and Vocational Learning	West County Council, 18+ Care Leavers Service	Andrea	Courlar	Educational support - improving academic attainment

View an individual submission

Simply click into the submission and view

The screenshot shows the 'Submission 1 of 26' view. At the top, there are navigation buttons: 'First', 'Previous', 'Next', and 'Last'. Below the navigation, there are action buttons: 'Edit', 'Resend Notification Email', 'Export', and 'Delete'. The main content is a form with four questions and their answers:

B9 Briefly describe the aims, objectives and activities your organisation and how it interfaces with young people with poverty of opportunity (Maximum 1,000 characters including spaces which is about 140 words)

St Giles Trust aims to break the cycle of disadvantage, crime and prison. We help people facing severe disadvantage to find jobs, homes and the right support they need to become independent, positive assets to society. We passionately believe everybody is capable of changing their lives. Our mission is to help them achieve this through peer-led services which form the backbone of our work. Every year we provide intensive support to over 6,000 vulnerable young people at risk of serious violence, enabling them to make positive life choice and breaking the cycle of exploitation and creating safer communities. In 2016/17 we delivered practical resettlement support to 4,757 young people in prison, we helped over 1,000 young NEET's realise their education, training and employment opportunities, and we provided specialist support to over 500 gang affected young people and their families.

B10 What your organisation's gross income/turnover in its last financial year?

£8532012.00

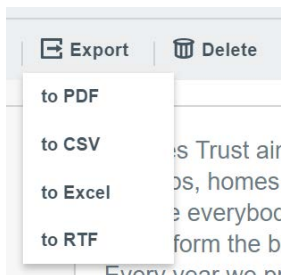
B11 Please explain how your organisation is funded and tell us about its charitable expenditure and reserves as shown in the most recent set of accounts. (Maximum 1,000 characters including spaces which is about 140 words)

We endeavor not to overly rely one main stream of funding. In our latest audited accounts 31st March 2016 we received £8,532,012. 54% statutory income from funders including the Home Office, NOMS, Community Rehabilitation Companies and local authorities e.g. Southwark and Lambeth councils). 46% charitable income from donors including Big Lottery, Comic Relief, Children in Need. Our charitable expenditure was £7,813,358. We held £2,037,439 in free reserves at the year end which equates to around 3 months running costs and is in line with the guidance issued by the Charity Commission.

B12 In broad terms which geographic area is served by your organisation?

Our main community service delivery offices are located in London, with smaller centres in Cardiff, Leeds and Ipswich.

To export to PDF, CSV, EXCEL, RTF, click on the Export button



Edit an individual submission

Within the submission, click on the Edit button. The whole submission is put in edit mode. Remember to save any changes.

Submission 1 of 26

[Edit](#) | [Resend Notification Email](#) | [Export](#) | [Delete](#)

(Numbers only please)

a) Part-Time	58
b) Full-Time	250
c) Volunteers	78

Export one or more submissions to PDF, CSV, EXCEL, RTF

If you are in an individual submission, click on the Export button. If you are viewing the list of submissions, check the submissions that you want to export and then click Export.

All Submissions | [Create Custom filter](#) | [Import data](#) | [Sharing](#)

Filtered by: All Submissions

5 of 26 Selected: [Mark As](#) | [Export](#) | [Resend to Integration](#) | [Delete](#)

<input type="checkbox"/>	Date Submitted	Which CFCT grant programme are you applying to?	A1 Your Organisation
<input checked="" type="checkbox"/>	2017-11-14 11:30:05	Investing in Young People	St Giles Trust
<input checked="" type="checkbox"/>	2017-11-08 17:06:44	Investing in Young People	Rochester Indoor Skate Park
<input checked="" type="checkbox"/>	2017-10-31 18:22:03	Investing in Young People	United Kingdom & Europe World Literacy Foundation
<input checked="" type="checkbox"/>	2017-10-04 13:52:32	Investing in Young People	King's Reach
<input checked="" type="checkbox"/>	2017-10-04 10:55:50	Apprenticeships and Vocational Learning	Kant County Council, 18+ Care Leavers Service
<input type="checkbox"/>	2017-10-03 10:46:24	Apprenticeships and Vocational Learning	Kant Refugee Action Network
<input type="checkbox"/>	2017-10-02 12:11:37	Investing in Young People	Dame Kelly Holmes Trust
<input type="checkbox"/>	2017-09-15 15:32:40	Investing in Young People	Whitstable Biennale
<input type="checkbox"/>	2017-08-29 11:42:48	Investing in Young People	Kant Horse Rescue
<input type="checkbox"/>	2017-08-23 22:47:41	Investing in Young People	Fixers (Public Service Broadcasting Trust)

Resend the submission into Salesforce

If for some reason you need to resend the submission into Salesforce, check the submission and click Resend to Integration.

Filtered by: All Submissions

1 of 26 Selected: [Mark As](#) | [Export](#) | [Resend to Integration](#) | [Delete](#)

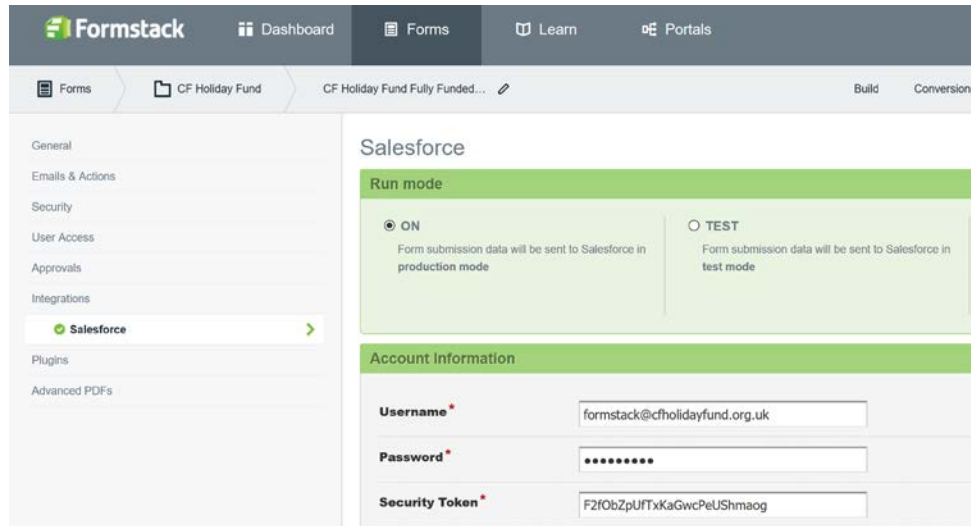
<input type="checkbox"/>	Date Submitted	Which CFCT grant programme are you applying to?
<input type="checkbox"/>	2017-11-14 11:30:05	Investing in Young People
<input checked="" type="checkbox"/>	2017-11-08 17:06:44	Investing in Young People
<input type="checkbox"/>	2017-10-31 18:22:03	Investing in Young People

Salesforce Integration

Integration with Salesforce is achieved by creating Formstack log in (user) within Salesforce. Once a Formstack log in has been created in Salesforce this log in can be used to set up the integration.

Creating the Connection: Formstack > Salesforce

In Formstack > Settings > Integrations > Salesforce



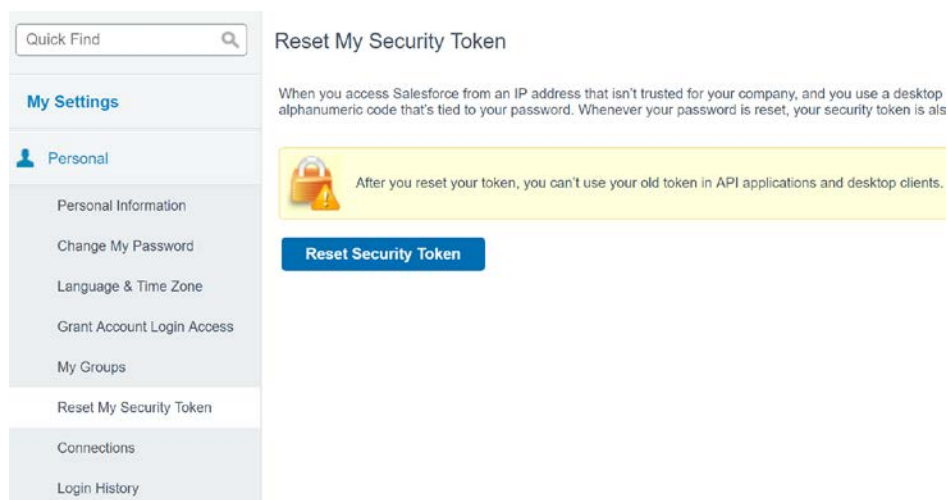
The screenshot shows the Formstack interface for configuring the Salesforce integration. The top navigation bar includes 'Formstack', 'Dashboard', 'Forms', 'Learn', and 'Portals'. The main content area is titled 'Salesforce' and is divided into two sections: 'Run mode' and 'Account Information'. In the 'Run mode' section, the 'ON' radio button is selected, indicating that form submission data will be sent to Salesforce in production mode. The 'TEST' radio button is unselected, indicating that data would be sent to Salesforce in test mode. The 'Account Information' section contains three input fields: 'Username' with the value 'formstack@cfholidayfund.org.uk', 'Password' with masked characters, and 'Security Token' with the value 'F2f0bZpUFTxKaGwcPeUShmaog'.

User id: formstack@cfholidayfund

Password: whatever password was used when setting up the user id

Security Token: a third level of security in the form of a token

The security token is obtained by logging into Salesforce, with the user id and password and then: [Click on Name > My Settings > Personal > Reset My Security Token](#)



The screenshot shows the Salesforce 'Reset My Security Token' page. The left sidebar contains a 'Quick Find' search bar and a list of settings categories: 'My Settings', 'Personal', 'Personal Information', 'Change My Password', 'Language & Time Zone', 'Grant Account Login Access', 'My Groups', 'Reset My Security Token', 'Connections', and 'Login History'. The main content area is titled 'Reset My Security Token' and includes a warning message: 'When you access Salesforce from an IP address that isn't trusted for your company, and you use a desktop alphanumeric code that's tied to your password. Whenever your password is reset, your security token is also reset.' Below the warning is a yellow box with a padlock icon and the text: 'After you reset your token, you can't use your old token in API applications and desktop clients.' A blue button labeled 'Reset Security Token' is positioned below the warning box.

The online application form is normally mapped to the Lead (New Application) object in Salesforce, however in some cases may be mapped to the Monitoring Form object for an online monitoring form or the Request in the case of, for example, a 2nd stage application.

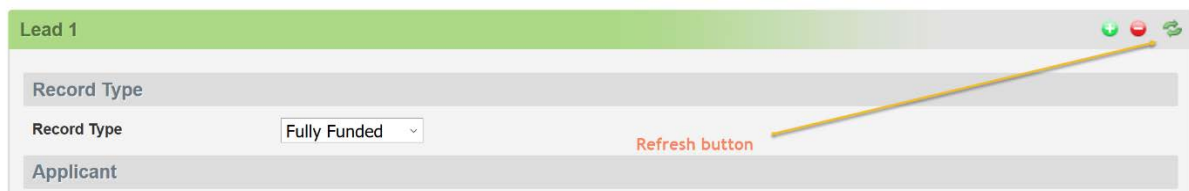
In the three cases above there are two distinct ways of working. With the application form, when submitted this *creates* a new 'new application' record in Salesforce. With the monitoring form and the 2nd stage application, an *existing* record is being *updated*.

Basic Steps for Mapping

1. Choose the object type to be mapped to
2. Within that object type, choose the record type to be mapped to

Within object types, one or more record types may exist. Different record types may be used if you have more than one programme, for example Small and Large Grant programmes. The record type is tied to the page layout. It maybe that the small and large grant programmes have very different page layouts as the large grants has many more fields and you do not want to see these fields on the small grant layout.

In the example below the form is integrated with the Lead (New Application) object in Salesforce and to the Fully Funded record type.



The refresh button is used when updating a form is you have added some extra fields on both the form and Salesforce. To see the new fields in Salesforce you must refresh the connection. The new fields that you have added in Salesforce will not be seen by Formstack until the refresh button has been pressed.

WARNING

There is a fundamental issue with Formstack in that if the object in Salesforce that you are mapping to has more than one record type, pressing the refresh button will reset the Record Type (in image above) to the default record type for the Formstack login and you may loose all the existing mapping. (If you are not mapping this form to the default record type).

More about this later...

Mapping

Salesforce Fields

Questions on Form

Project Name	Field » ▾	Project name - (max 20 words) ▾
Programme	Field » ▾	Programme Type ▾
Website	Field » ▾	Organisation website ▾
Organisation Category	Field » ▾	Organisation's category ▾
Area	Field » ▾	Area served by organisation ▾
County (Ireland) Only	Field » ▾	County (Ireland only) ▾
Type Supported by Organisation	Field » ▾	Type supported by your organisation ▾
Classification	Field » ▾	Your classification ▾

The mapping is achieved by selecting the appropriate question on the form (right-hand column) to match the Salesforce field (left-hand column)

Salesforce is Very Unforgiving...

The field type on the form must match the field type in Salesforce *exactly* or you will experience integration issues. Salesforce will reject the submission totally. What does exactly mean..?

What Does Exactly Mean...?

The field must be the same type. E.g. number field on both Formstack and Salesforce. If a number type must have the same number of decimal places.

If a text type, the number of characters allowed in Formstack must not exceed the size of the corresponding field in Salesforce.

If a picklist (dropdown), all entries must match exactly

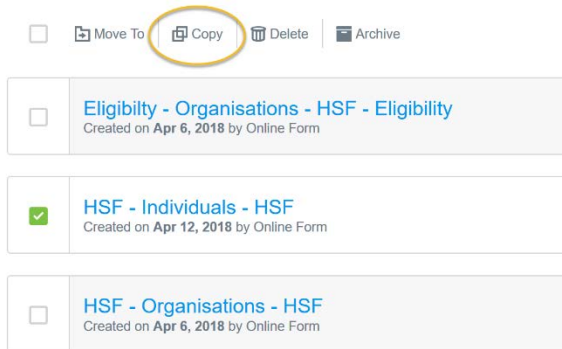
If a date field, date formats in both systems must be the same

Amending Forms

When amending forms, some amendments effect the Salesforce integration and some do not.

Copy the Form Before Amending

If you are doing any amendments, as a precaution, copy the form to create a backup, just in case something goes wrong.



Form Amendments That Do Not Effect Salesforce Integration

Here is a list of things you can do that *do not* effect Salesforce:

- ✚ Reordering fields, in the same section or within sections
- ✚ Reordering of sections
- ✚ The question text (Field Label Text), supporting text, required or not
- ✚ Adding, changing logic to existing fields
- ✚ Adding, amending, removing Section headers and Description fields

Form Amendments That Do Effect Salesforce Integration

Here is a list of things you can in Formstack that do effect Salesforce:

- ✚ Adding and removing fields
- ✚ Adding entries in picklists (dropdowns)

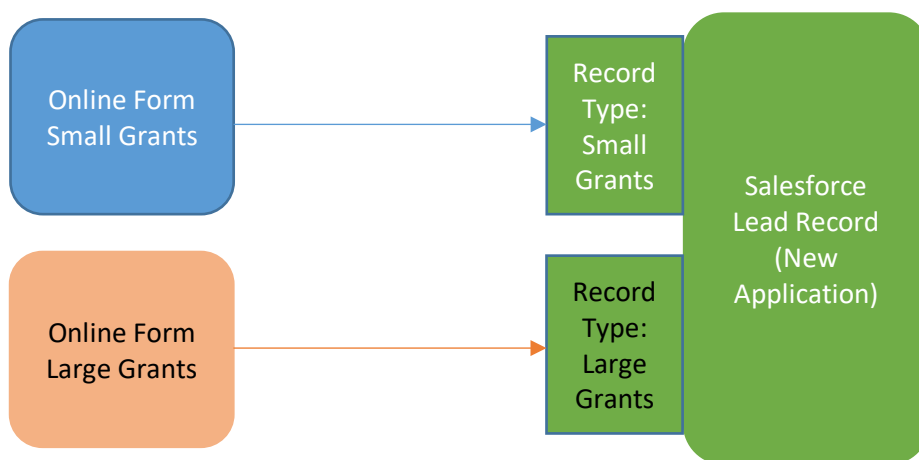
Adding a Question

1. As a precaution before making any changes, copy your online form to make a backup
2. Add the question in your form on Formstack: go to Form > Builder
3. Add the corresponding field in Salesforce: Go to Object > Fields
4. Refresh the Salesforce Integration (in Formstack in order to pick up the new field in Salesforce) *
5. Map the field: Form > Settings > Salesforce Integration
6. Test

* Caution: refreshing the salesforce integration may loose all of most of existing mapping if the record type is not first checked. See next section 'Checking the Default Record Type'

Checking the Default Record Type

For Formstack to pick up the new field on Salesforce the refresh button on the Formstack Salesforce integration has to be pressed. Before you do this you must ensure that the Formstack login to Salesforce is set to the correct record type in Salesforce.



1. What object is the form being mapped to? E.g. Lead (New Application), Monitoring Report etc
2. Does this object have more than one record type? If No, ok to click refresh button, if Yes go to step 3
3. What is the default record type set to?

In order to check this, you must have Salesforce administrator rights.

The Formstack login to Salesforce can be found in the Salesforce integration. In the example below it is: formstack@hsf.eu.com

The screenshot shows the Formstack interface for configuring a Salesforce integration. The top navigation bar includes 'Formstack', 'Dashboard', 'Forms', 'Learn', and 'Portals'. The main content area is titled 'Salesforce' and contains two sections: 'Run mode' and 'Account Information'. The 'Run mode' section has two radio buttons: 'ON' (selected) and 'TEST'. The 'Account Information' section has three input fields: 'Username' (formstack@hsf.eu.com), 'Password' (masked with dots), and 'Security Token' (icxRTbTyWkznKORWQCt4jOP1h). A left sidebar lists various settings categories, with 'Salesforce' highlighted under 'Integrations'.

And in this example the online application form is being mapped to the Lead (New Application) Record using the Salesforce record type **Organisation**. So we need to check in Salesforce if **Organisation** is the Lead default record type for the log in: formstack@hsf.eu.com

This screenshot shows the 'Misc' and 'Lead 1' configuration sections. The 'Misc' section has a checkbox for 'Use SF User's Timezone' which is unchecked. The 'Lead 1' section has a 'Record Type' dropdown menu set to 'Organisation'. Below this is the 'New Application Information' section with fields for 'New Application ID', 'Date Received', and 'Company'. The 'Company' field is set to 'Name of organisation'. Red arrows point from the text above to the 'Organisation' dropdown and the 'Company' field.

Log into Salesforce > Set Up > Manage Users > Users > Locate Formstack user and click on it's associated profile (normally named **Administrator** or **Formstack**)

The screenshot shows the Salesforce user profile page. The top navigation bar includes 'Edit', 'Formstack', 'form', and 'formstack@hsf.eu.com'. The date and time are 20/07/2018 18:17. The user profile is 'system Administrator' and is circled in yellow.

Picklist Entries

If you are adding an entry to a picklist (dropdown) menu you must add the exact same text as the entry in Formstack to the corresponding field in Salesforce.

New Applications > Conversion > Request

If you are adding a new field on the Lead record you will need to also add the corresponding entry to the Account, Contact or Request record. That is to where the field on the Lead record is mapped to.