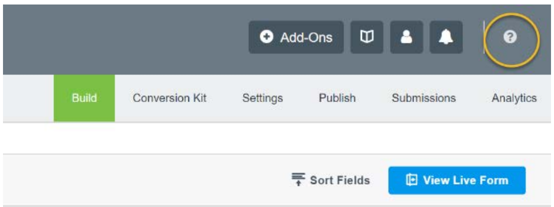
FORMSTACK ONLINE FORMS

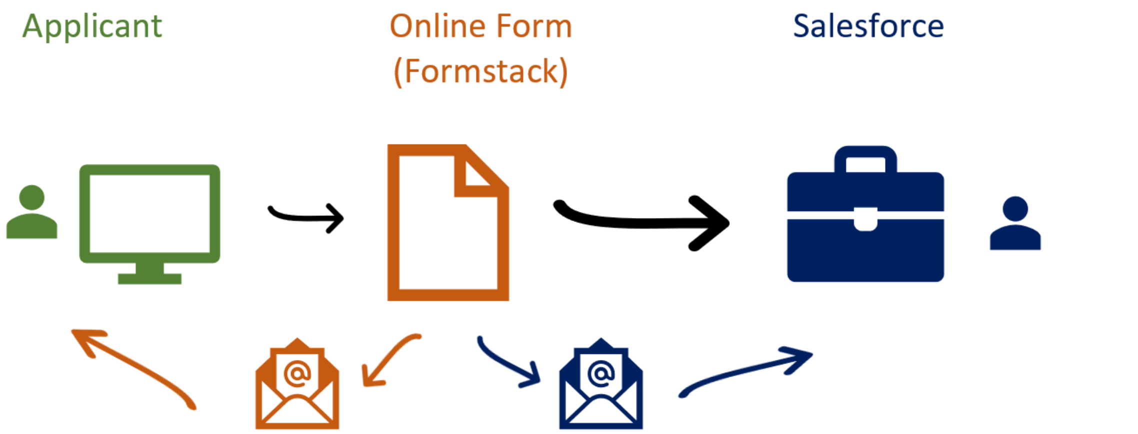
Introduction

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.

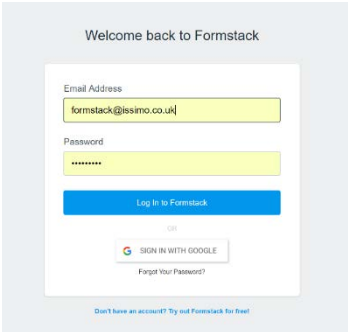


On submission applicant receives a custom email + copy of completed application form

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

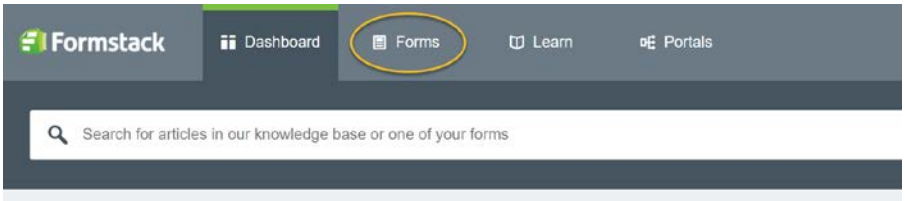
Logging into Formstack

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



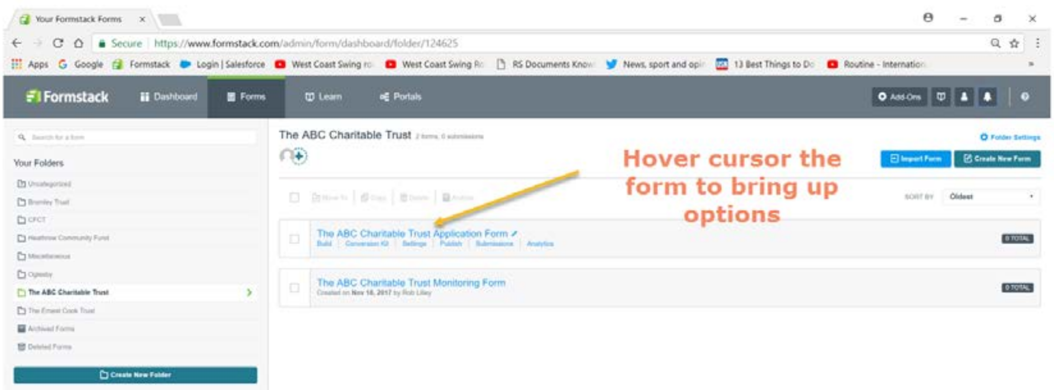
Navigating Around Formstack

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

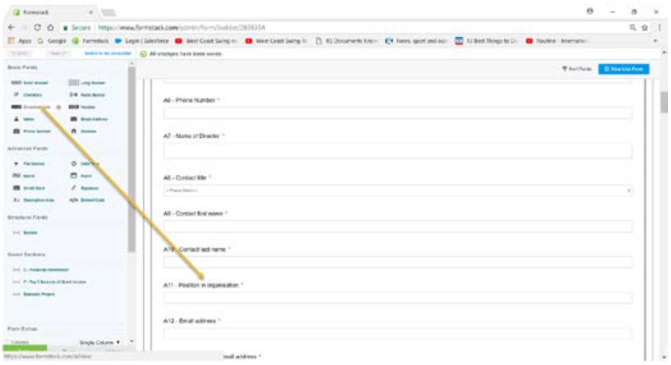
Submissions: View and export (to PDF, Excel etc) submissions

Build

From the build screen you can amend an existing form:

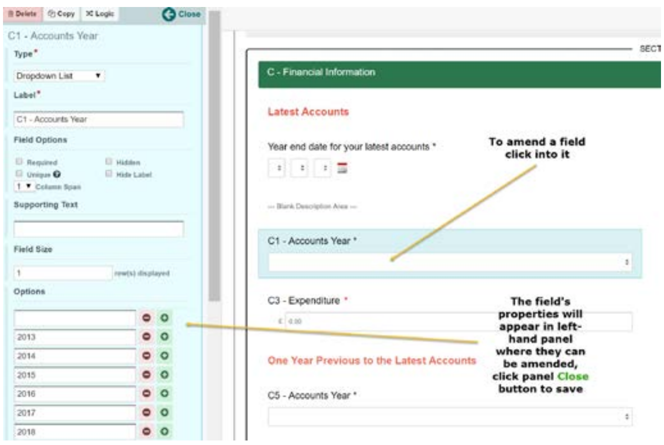
Add a Field

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.



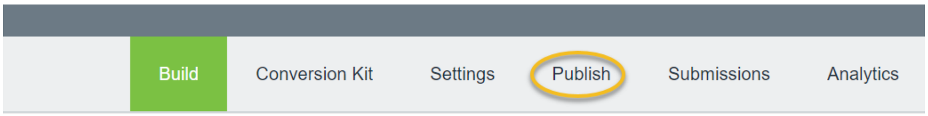
Caution: As a field on your form is probably mapped to a field on Salesforce. You cannot change the type of field it is (e.g. from date to number) without then updating the Salesforce integration mapping in Formstack for that form (under Formstack Settings > Salesforce integration). It's fine to change 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:

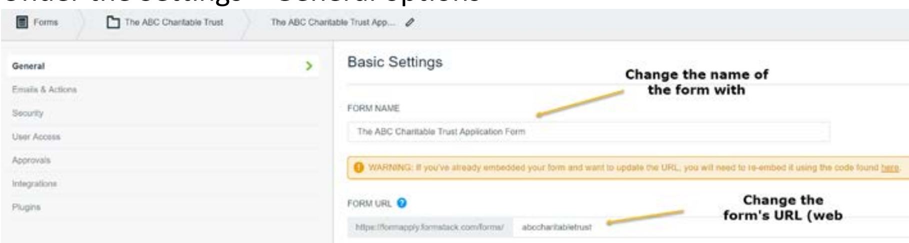
Change the name of the form and its web address

Disable the form

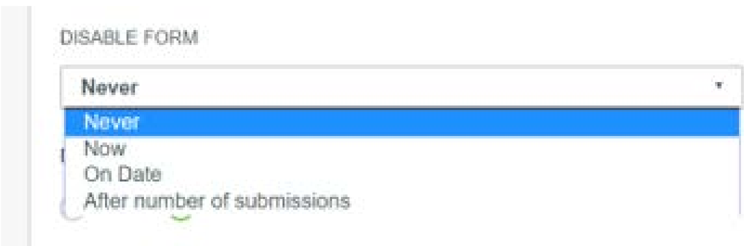
Set up and amend notification and confirmation emails

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

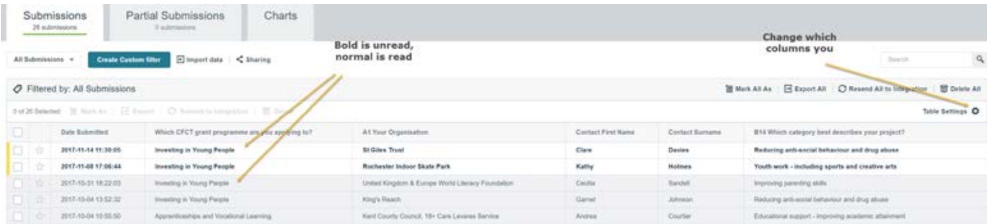
Under the submissions tab all the submissions for a particular form are held. Along with their file attachments. Under the Submissions tab you can:

View an individual submission

Edit an individual submission

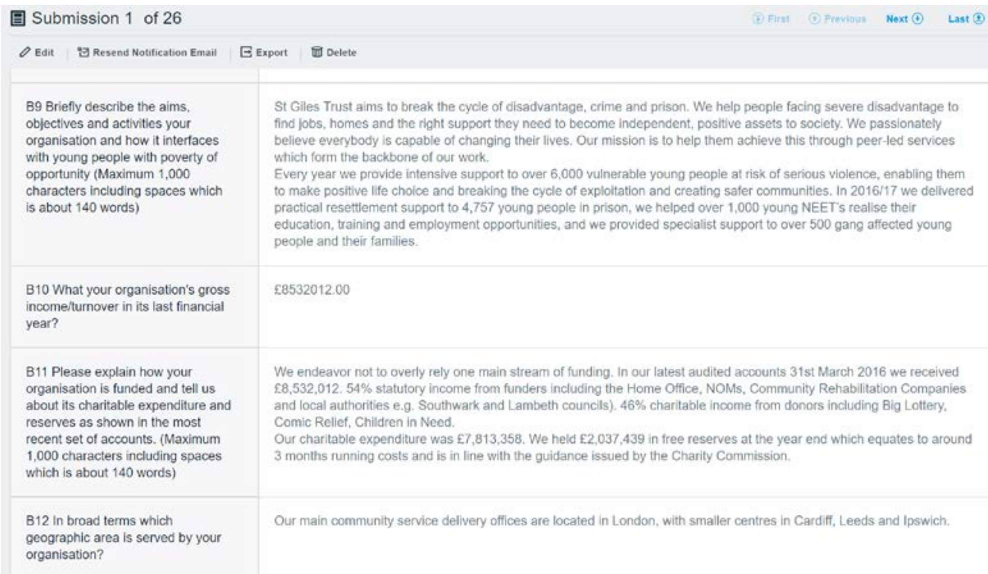
Export one or more submissions to PDF, CSV, EXCEL, RTF

Resend the submission into Salesforce

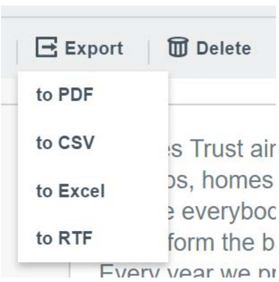


View an individual submission

Simply click into the submission and view

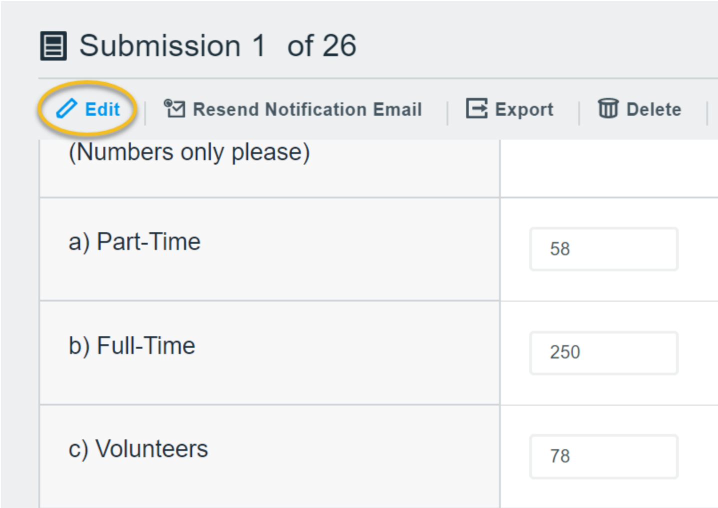


To export to PDF, CSV, EXCEL, RTF, click on the Export button



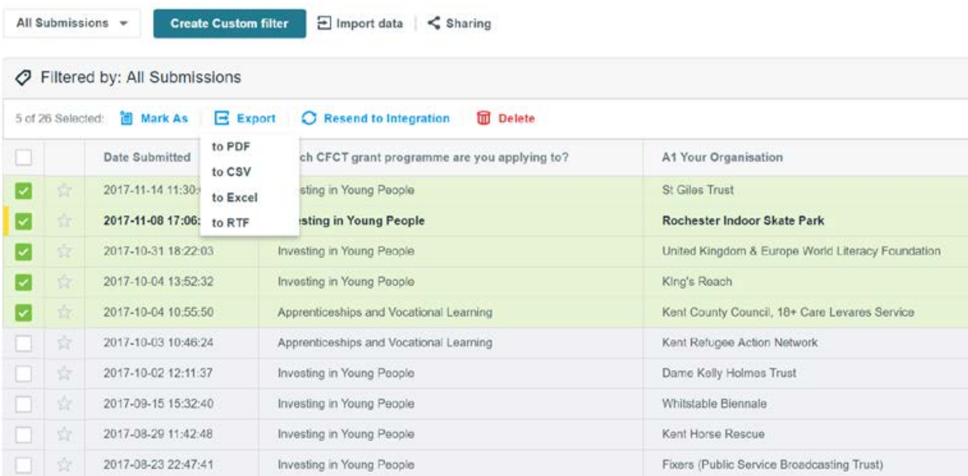
Edit an individual submission

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



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.



Resend the submission into Salesforce

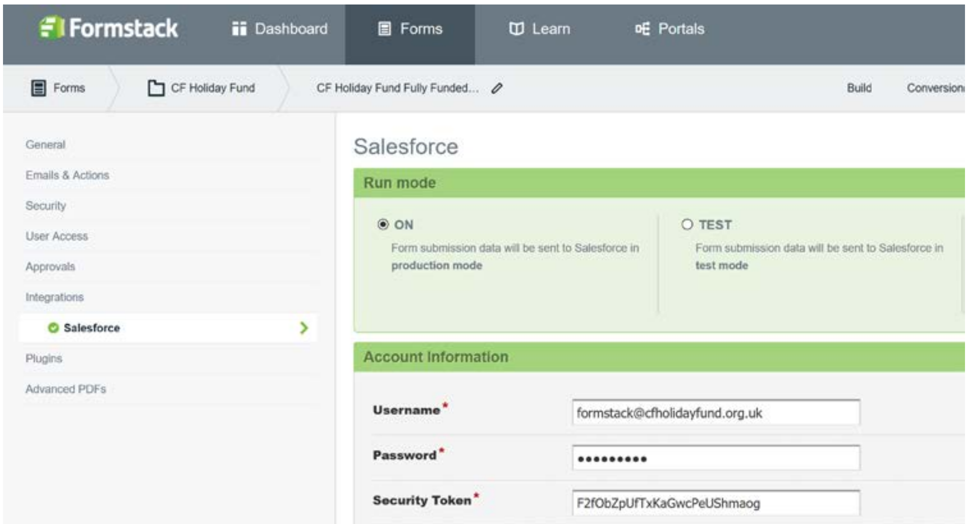
If for some reason you need to resend the submission into Salesforce, check the submission and click Resend to Integration.

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

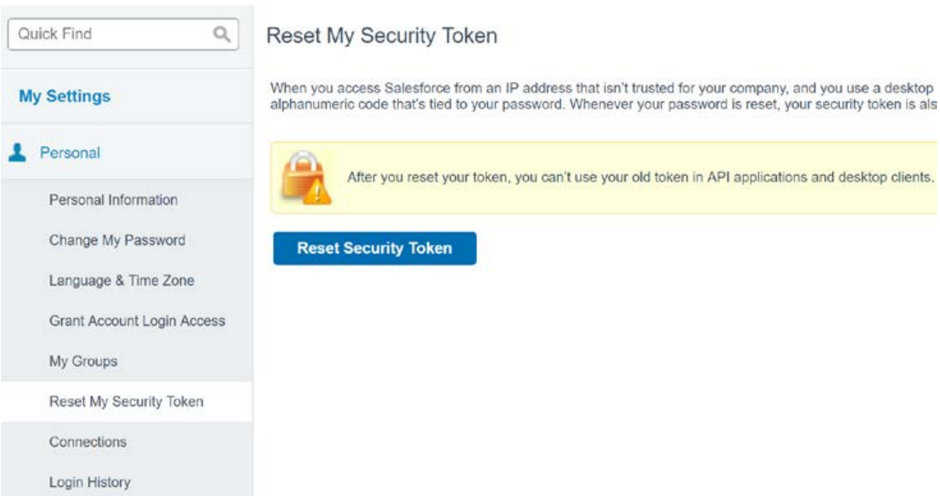


User id: formstack@cfholidayfund

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 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.

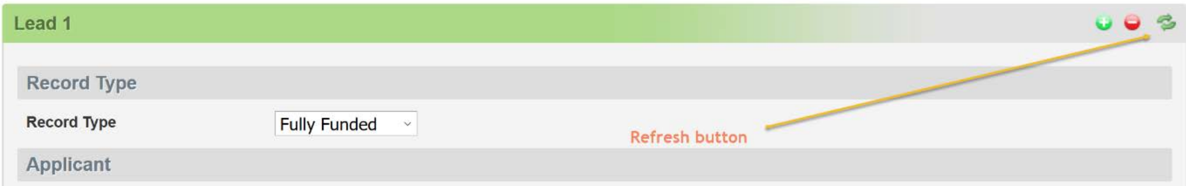
In the three cases above there are two distinct ways of working. With the application form, when submitted this *creates* a new ‘new application’ record in Salesforce. With the monitoring form and the 2nd stage application, an *existing* record is being *updated*.

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 fundemental 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

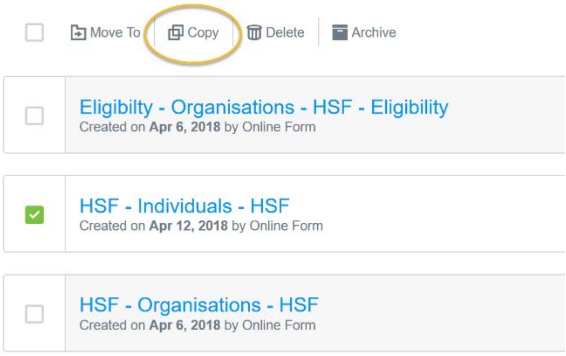
If a date field, date formats in both systems must be the same

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 pickists (dropdowns)

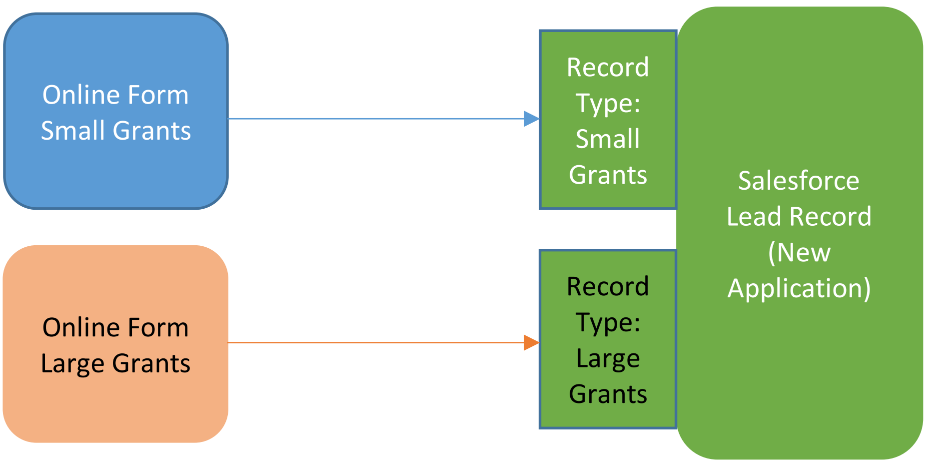
Adding a Question

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

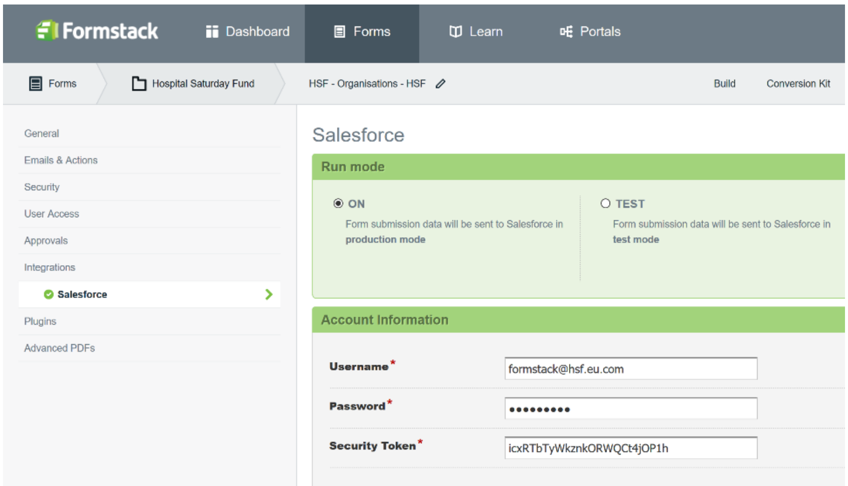
For Formstack to pick up the new field on Salesforce the refresh button on the Formstack Salesforce integration has to be pressed. Before you do this you must ensure that the Formstack login to Salesforce is set to the correct record type in Salesforce.



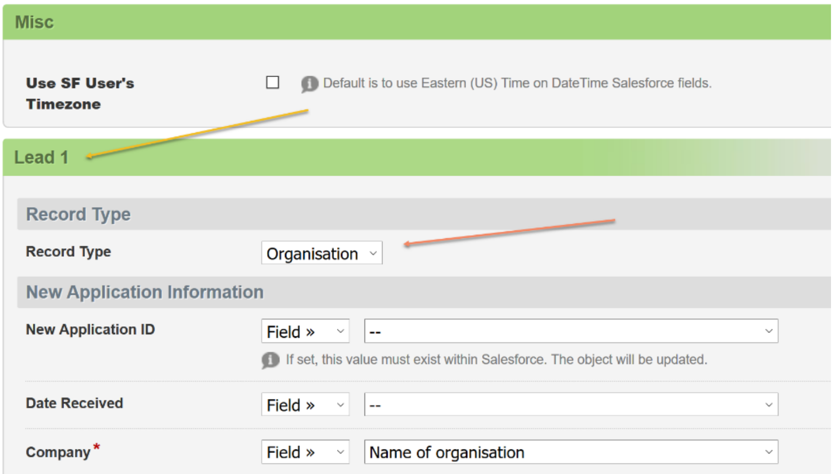
1. What object is the form being mapped to? E.g. Lead (New Application), Monitoring Report etc
2. Does this object have more than one record type? If No, ok to click refresh button, if Yes go to step 3
3. What is the default record type set to?

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

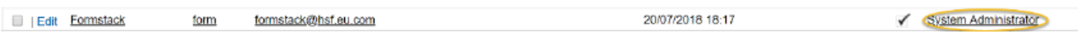
The Formstack login to Salesforce can be found in the Salesforce integration. In the example below it is: formstack@hsf.eu.com



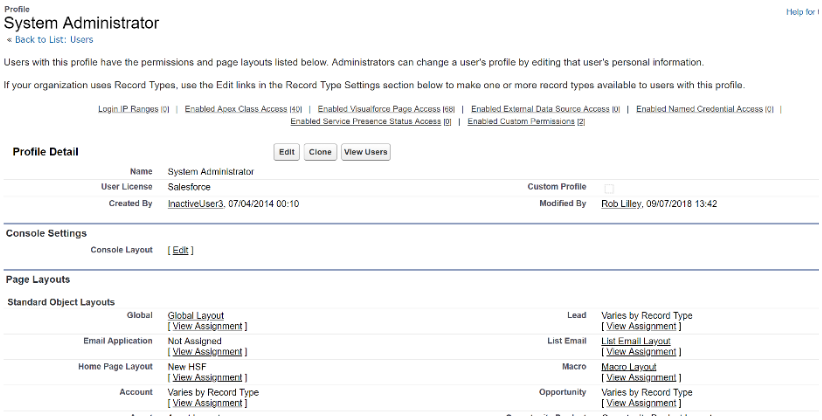
And in this example the online application form is being mapped to the Lead (New Application) Record using the Salesforce record type Organisation. So we need to check in Salesforce if Organisation is the Lead default record type for the log in: formstack@hsf.eu.com



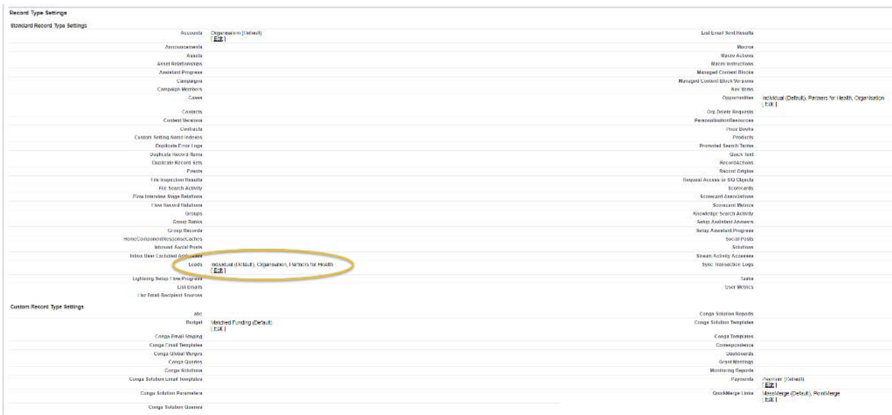
Log into Salesforce > Set Up > Manage Users > Users > Locate Formstack user and click on it's associated profile (normally named Administrator or Formstack)



You will see something like this:

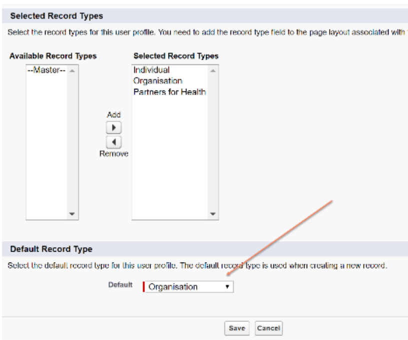


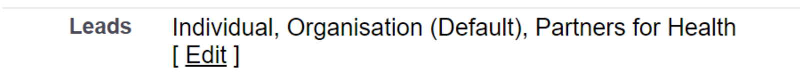
Navigate down until you reach the section **Record Type Settings**



As the form we are dealing with is an online application form and is mapped to the Lead (New Application) note which record type is the default one. In the case above it is Individual. As we are adding a field to the record type Organisation we need to change the default record type to Organisation.

Click Edit, change the default entry to one you want and save.





The record type is now set correctly and you can safely click the refresh button in the Formstack integration.

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.