FormAssembly Creation: A 3 Step Guide

There are 3 steps to creating your form. **First,** think about your form's content and complexity. **Then,** you should meet with Amy to build your form together. **Lastly,** you should review and test your form to make sure it is ready to go.

STEP 1: PLAN

When you initially realize that you need a form, start planning out the elements of your form before you do anything else. This is the best way to set up the work.

- Notice the tags included below in this FormAssembly guide (pages 5-6). Those tags are used to organize forms by FJC use case/program. Which tag matches the type of data collection you are catalyzing?
- Look at other forms on FormAssembly with the same tag (page 5) to help you think about your form's format and questions.
- Go through the section of the FormAssembly Guide that is relevant to the type of data collection you are jumpstarting and look through the questions. Consider the questions you would like to keep and which new ones you'll need to add; think about which question types you want to use in your form (go to pages 13-28 for options).
- Decide if you would like your form mapped to Salesforce (mapping allows the information from your form to be automatically updated in Salesforce upon submission), and let Amy know before the meeting
- Decide if you would like your form to be pre-filled with information from Salesforce
- Schedule a meeting with Amy

STEP 2: MEET

This meeting is the time to set Amy up to build your form

- Pick which questions and standard language you want in your form
- Decide which tag best categorizes your form
- Choose the best format to ask your questions
- Decide which questions are required
- Choose who will be receiving the FormAssembly email notifications, and what all processing messages should say
- Will your form…
    - Need conditional logic?
    - Require a payment process?
    - Need file uploads?

STEP 3: REVIEW

After your form is created, you should take time to review it and make sure it is just the way you like it!

- Show the form to your team and supervisor
- Review the form to make sure all the questions you want are in place
- Test your form to ensure that the conditional logic is working properly
- Ask others to test your form – it is always good to get another set of eyes on it!
- Make sure your notifications are set up