Forms & Document Generation in Salesforce

Svet Voloshin

Why use forms?

- To collect information from customers. Forms are a great way to collect information from customers, such as their name, email address, and phone number. This information can then be used to follow up with customers, send them marketing materials, or add them to your CRM database.
- Forms are used in Salesforce to capture and store data related to customers, leads, accounts, and other business entities.
- Forms can also be used to automate various business processes, such as lead capture, customer service requests, and sales order processing.

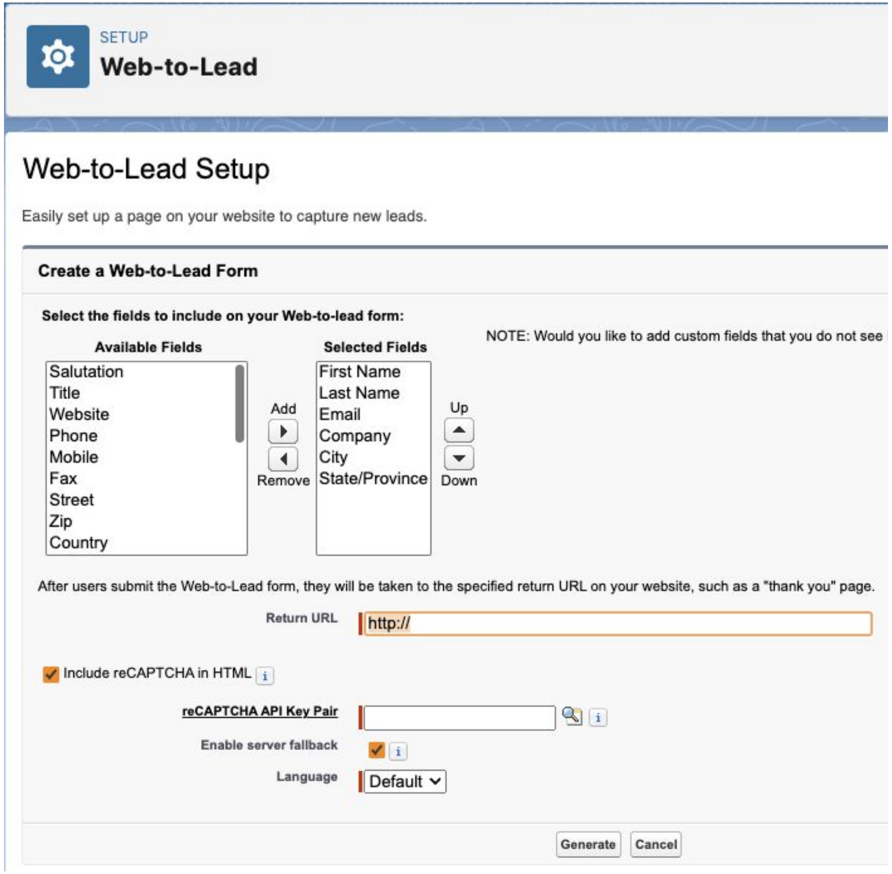
Native Salesforce Capabilities

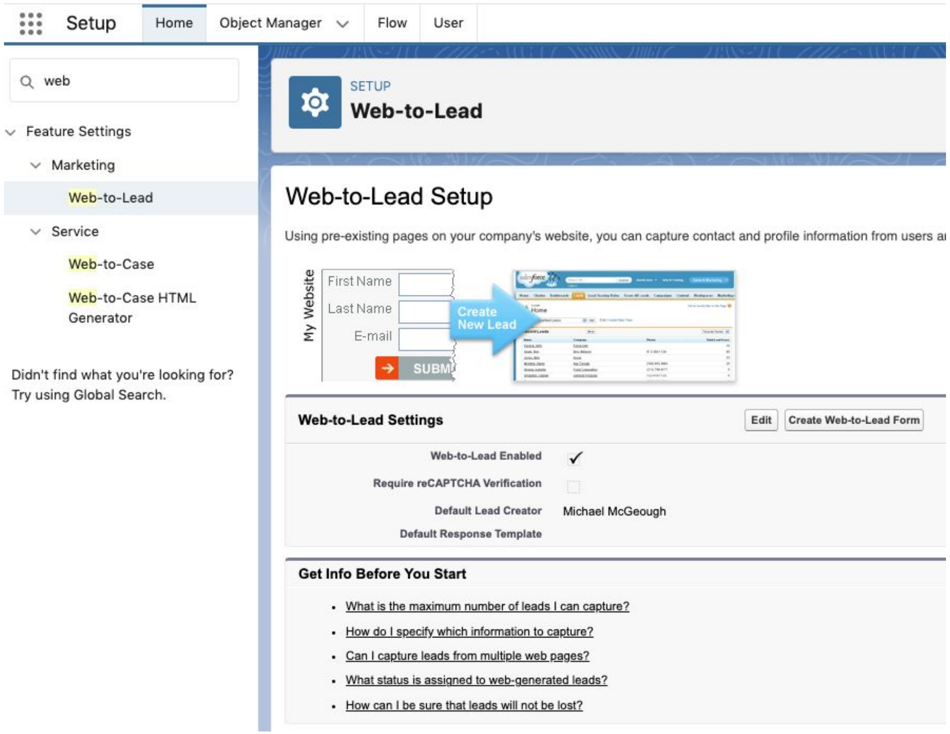
1. **Web-to-Lead Forms**: Web-to-Lead forms allow organizations to capture leads directly from their website and automatically create new records in Salesforce. These forms can be customized with fields that are specific to the organization's needs.
2. **Web-to-Case Forms**: Web-to-Case forms allow customers to submit support requests directly from the organization's website. These forms can be customized to include fields such as case type, severity, and description.
3. **Salesforce Surveys**: Salesforce Surveys allows organizations to create custom surveys to gather feedback from customers, partners, and employees. These surveys can be distributed via email or embedded in a website, and the data collected can be used to improve customer satisfaction and loyalty.
4. **Salesforce Communities Forms**: Salesforce Communities Forms allow customers, partners, and employees to submit data directly to Salesforce using custom forms. These forms can be used for a variety of purposes, such as customer feedback, event registration, and application submissions.

Web-to-Lead Forms

Capability/Limitation	Description
Purpose	Web-to-lead forms are used to capture lead information directly from an organization's website and automatically create new lead records in Salesforce.
Customization	Web-to-lead forms can be customized with fields that are specific to the organization's needs, such as name, email, phone number, company name, and lead source.
Validation	Salesforce provides validation rules to ensure that data entered through the web-to-lead form meets the organization's data quality standards.
Redirect	After the form is submitted, the user can be redirected to a custom confirmation page or a default Salesforce page.
Email Notifications	Salesforce can be configured to send email notifications to designated users when a new lead is created through the web-to-lead form.
Data Security	Web-to-lead forms use Salesforce's standard data security features to ensure that only authorized users have access to the captured lead information.
Limitations	• Web-to-lead forms are limited to creating leads only. • Web-to-lead forms have a limit of 500 submissions per day per organization. • There is no validation of data upon entry before committing data to the database. • There is no way to attach a file.

Web-to-Lead Form Setup

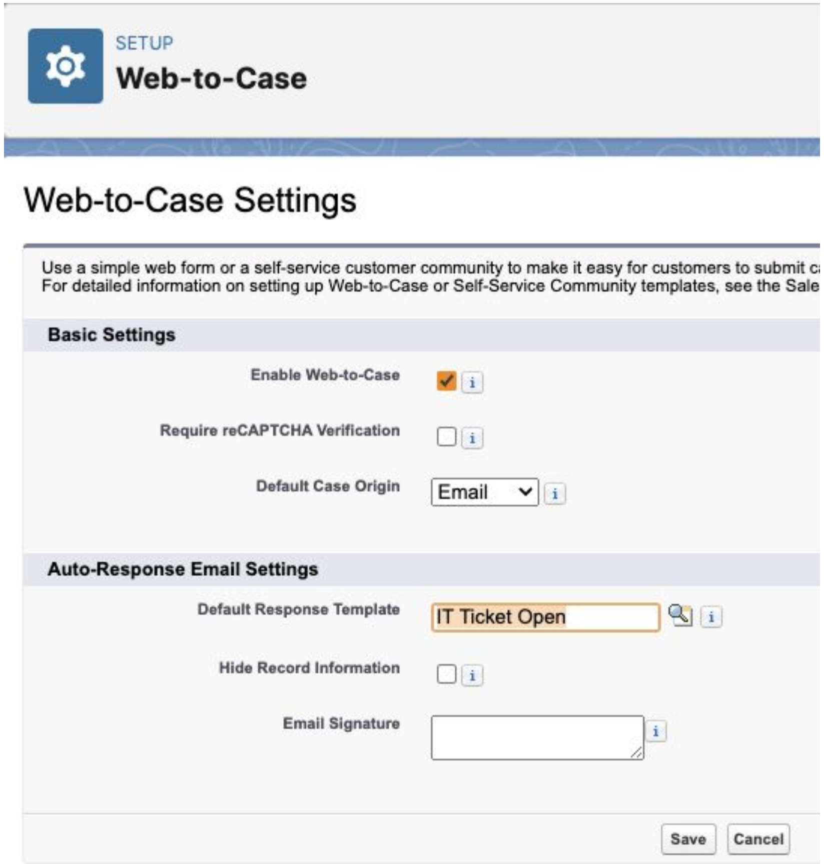


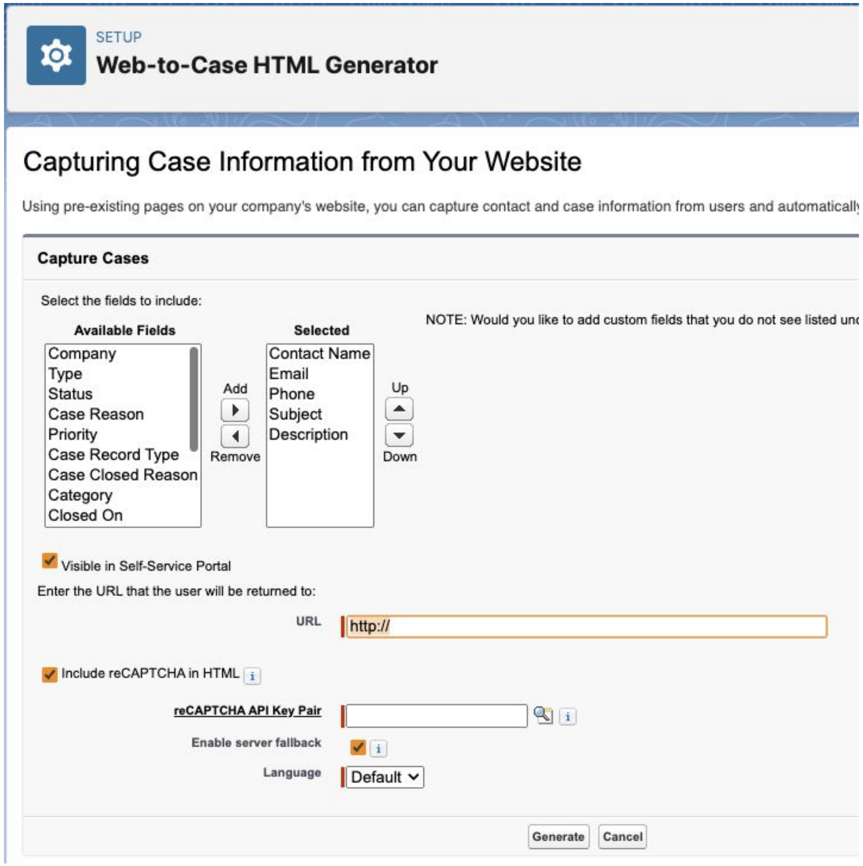


Web-to-Case Forms

Capability/Limitation	Description
Customization	Web-to-case forms can be customized to include fields that are specific to the organization's needs, such as case type, priority, and description.
Automated case creation	Web-to-case forms allow customers to submit support requests directly from the organization's website, and automatically create new cases in Salesforce.
Spam prevention	Web-to-case forms include built-in spam prevention features, such as CAPTCHA and ReCAPTCHA, to prevent spam submissions.
File attachments	Web-to-case forms allow customers to attach files to their support requests, such as screenshots or error logs.
Language support	Web-to-case forms support multiple languages, allowing organizations to provide support to customers in their preferred language.
Limitations	Web-to-lead forms are limited to creating cases only. Web-to-case forms are limited to a maximum of 5000 submissions per day per organization.

Web-to-Case Form Setup





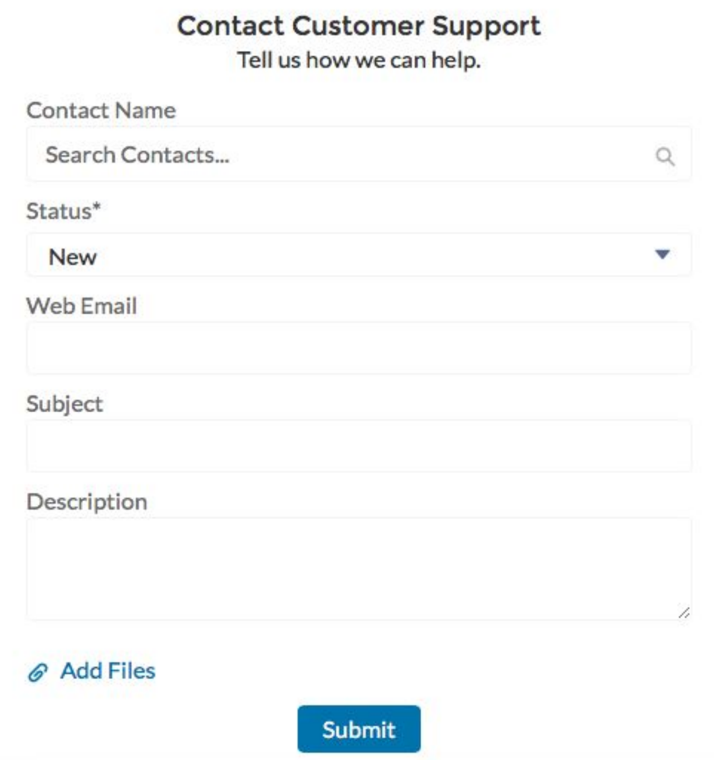
Experience Cloud: Contact Support Form

Documentation

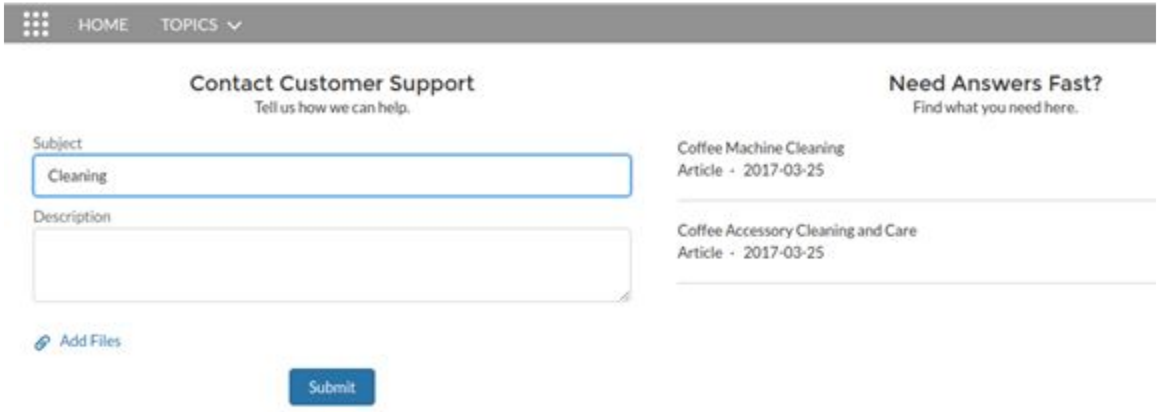
The Contact Support Form allows guest and authenticated users to create cases from a site. It works with the Case Deflection component to help site members find articles and discussions to answer questions as text is being entered into the form.

If you built your Experience Cloud site before Spring `18, you could be using the Create Case Form component. A revamped version, ushered in with Spring `18, has **split the component into two**: the **Contact Support Form** and the **Case Deflection** components.

We recommend you update your existing site to use the new components, as future updates and improvements will be made on Contact Support Form and Case Deflection. Moreover, the new components allow you to use the Case Deflection Dashboard to verify the efficacy of your site's case deflection.



Experience Cloud: Case Deflection



The Case Deflection component searches text as it's being entered into the Contact Support Form component, and returns relevant articles and discussions. If users don't get the answer they need, they can continue with their request for support.

NOTE: For guest users, a case deflection search matches article titles only. It doesn't return matches from the body of the article.

If you built your Experience Cloud site before Spring `18, you could be using the Create Case Form component. A revamped version, ushered in with Spring `18, has split the component into two: the Contact Support Form and the Case Deflection components. We recommend you update your existing site to use the new components, as future updates and improvements will be made on Contact Support Form and Case Deflection.

Why use third-party solutions?

1. **Customization**: Third-party solutions may offer more customization options than native Salesforce forms, allowing organizations to create forms that are tailored to their specific needs and branding.
2. **Advanced functionality**: Third-party solutions may offer advanced functionality that is not available in native Salesforce forms, such as **conditional logic**, **data validation, and multi-step forms**.
3. **Integration**: Third-party solutions may integrate with other Salesforce tools, such as marketing automation and analytics tools, to provide a more complete solution for lead generation and management.
4. **Support**: Third-party solutions may offer dedicated support and training resources to help organizations get the most out of their forms and other features.
5. **Cost**: Depending on the organization's needs, third-party solutions may be more cost-effective than hiring developers to build custom forms.

Top AppExchange Solutions

Formstack - Native form builder & data collection for Salesforce

By Formstack

Realize your Salesforce vision with Formstack Forms for Salesforce

4.73 Average Rating (186 Reviews)

Business Need

Websites

Supported Features

Native App | No Limits | Lightning Ready

More Details

Starting at $225 USD/user/month

Discounts available for nonprofits

Pricing Details

Get It Now | Test Drive | More

Forms for Salesforce is a 100% native Salesforce form builder. Dynamically prefill forms, generate and update records, and connect to any standard or custom object without leaving your Salesforce account.

Click "Get it Now" for a free 14-day trial!

FormAssembly: Web Form & Workflow Builder for Salesforce Data Collection

By FormAssembly

Secure Salesforce data collection made simple.

4.67 Average Rating (411 Reviews)

Industries

Government

Business Need

Surveys

Supported Features

No Limits | Lightning Ready

More Details

Starting at $167 USD/user/month

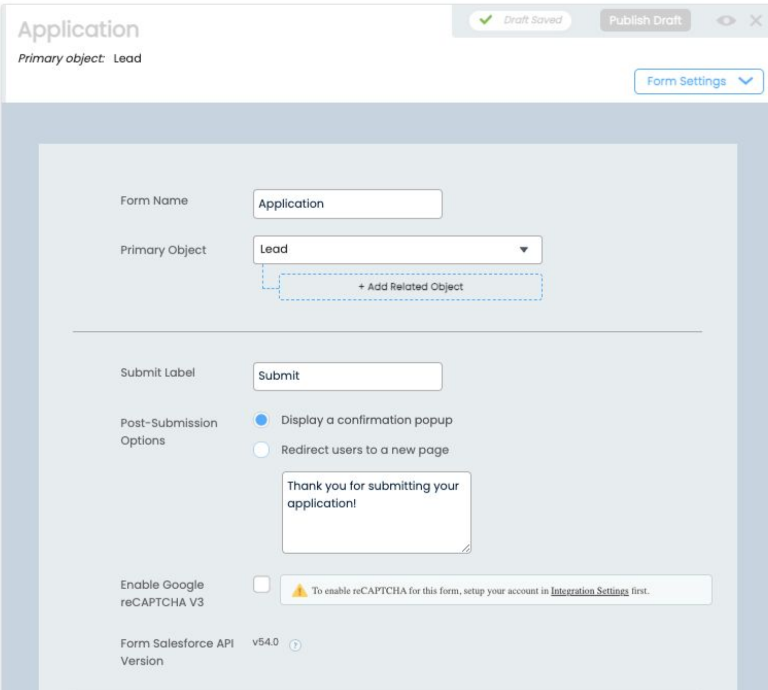
Discounts available for nonprofits

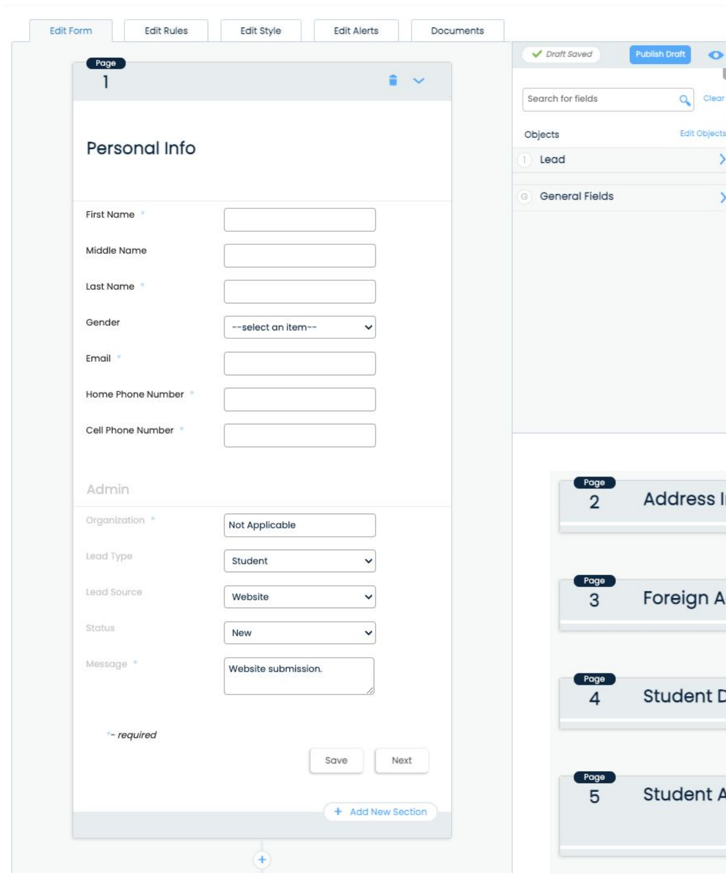
Pricing Details

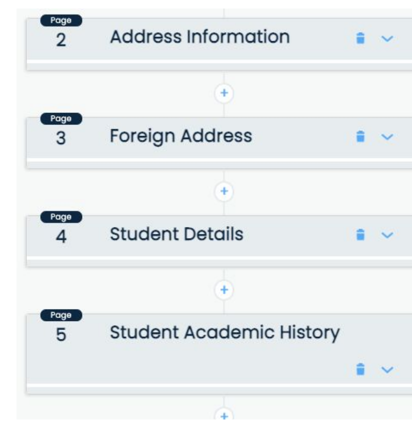
Get It Now | More

Solve data collection problems and save time, money, and effort with FormAssembly, the all-in-one data collection and workflow platform for Salesforce.
Join Today: www.formassembly.com/join

Formstack Form Building

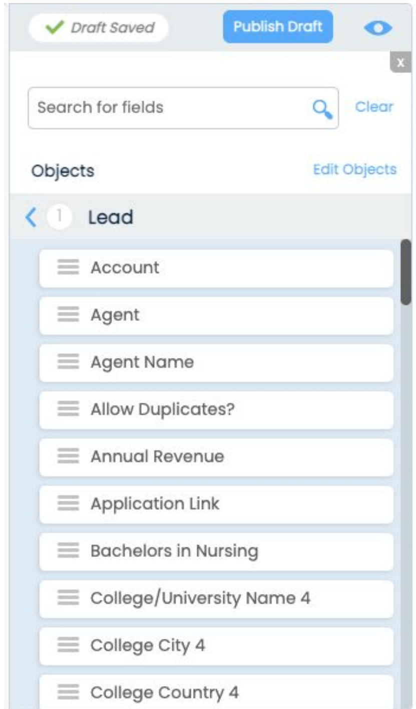


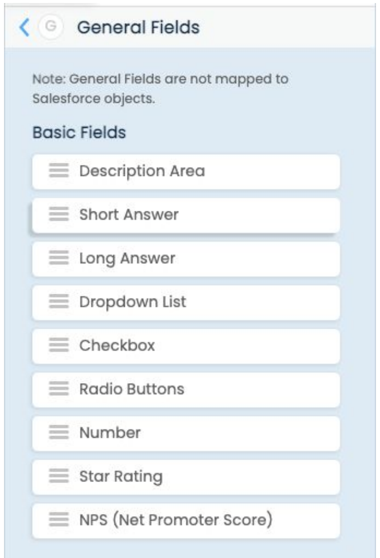


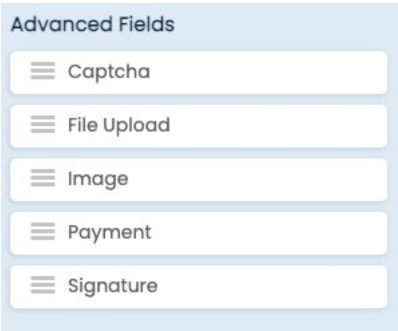


Formstack Form Building - Existing Fields

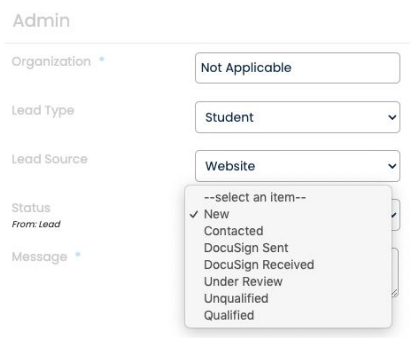
- Formstack fetches existing fields - **standard and custom**, which you can use via a drag-and-drop interface to build your forms.
- This is a **huge time saver**, since you don't have to recreate the fields in Formstack that have already been created in Salesforce.
- Your form is saved automatically, which is both good and bad.
    - Forms are saved immediately.
    - There is no "Undo" functionality.
- Form Validation can happen **one-page-at-a-time or on submission**.





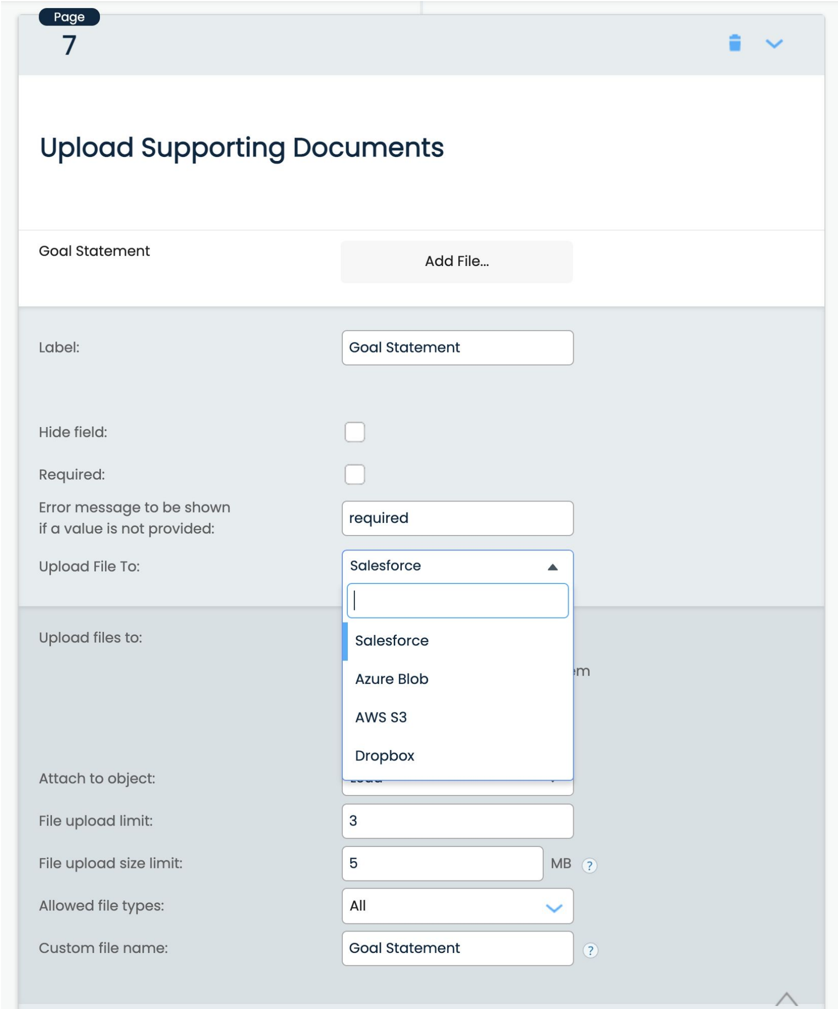


- Required fields can be preset and hidden from the front end.
- Picklist fields automatically fetch available picklist values.



File Attachments

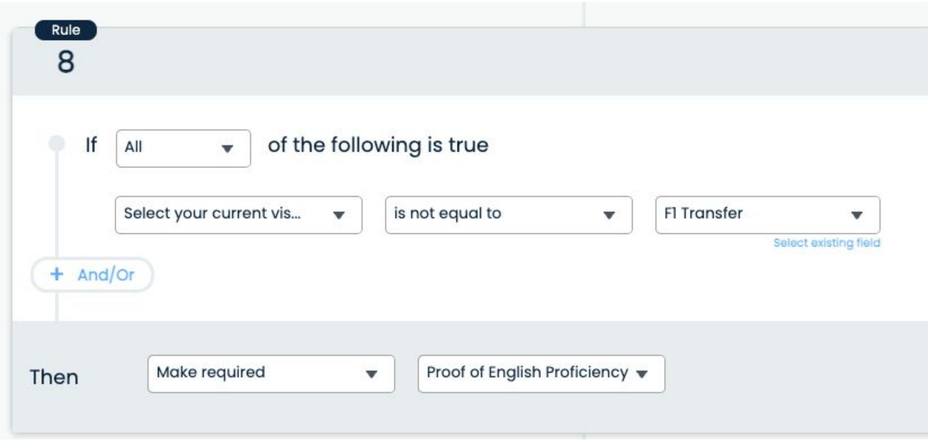
- Attach files anywhere throughout the form completion process.
- Limit: 25MB/file.
- Multiple files are allowed
- Can be required.
- Compatible with rules.
- Files are attached to the created record (default behavior).
- File can also be directly uploaded to Azure, AWS S3 or Dropbox (credentials required).

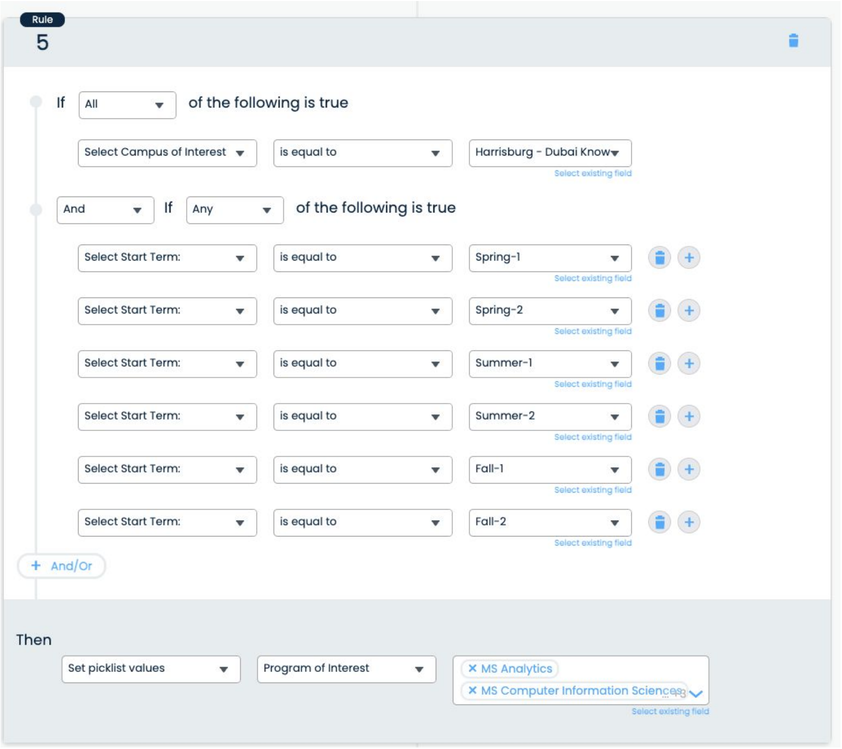


Formstack Form Building - Rules

Use Cases:

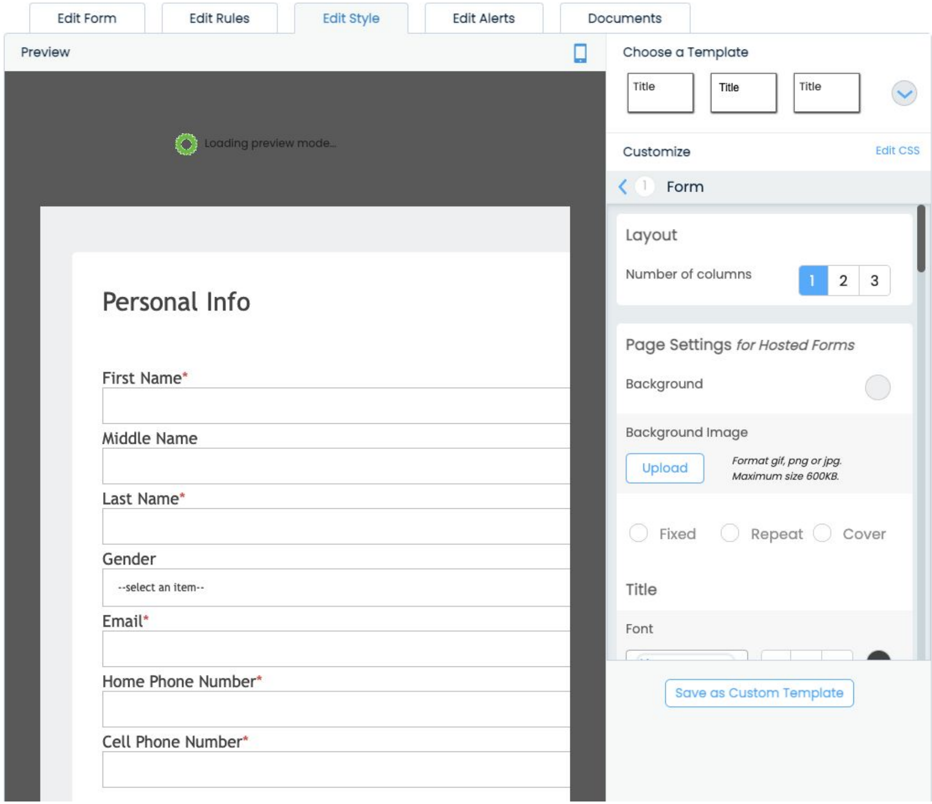
- Dependent picklists for unrelated fields
- Require certain files to be uploaded based on conditions.





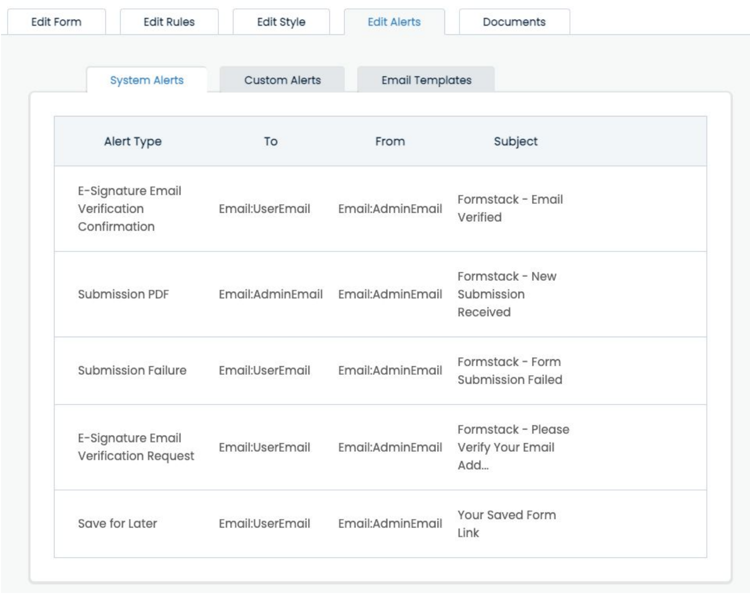
Formstack Form Building -Styling

- Inherit CSS
- Use predefined templates
- Build your own templates
- Rich customization options

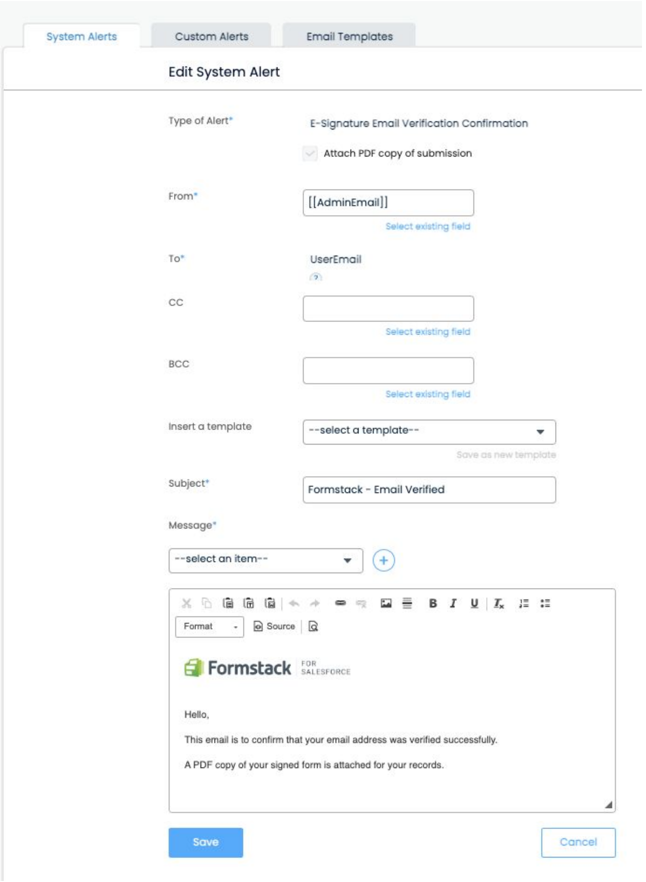


Formstack Form Building - Alerts

- Quickly set up your email alerts right within the application
- Salesforce alternative - Email Alerts, Flows and Autoresponse Rules
  - Takes longer to create
  - More cumbersome to maintain

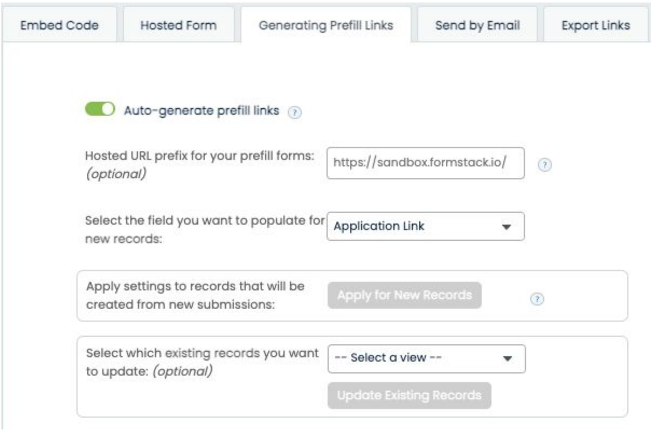


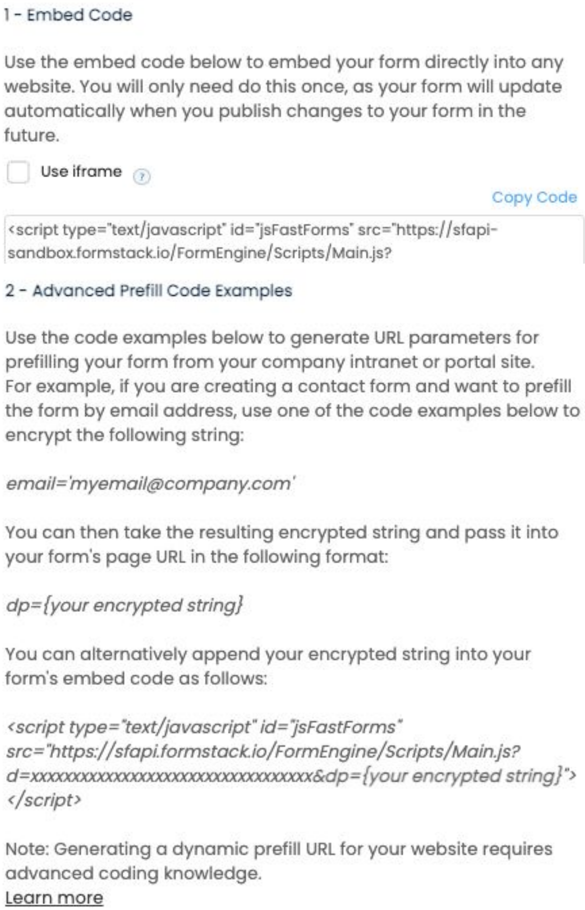
Alert Type	To	From	Subject
E-Signature Email Verification Confirmation	Email:UserEmail	Email:AdminEmail	Formstack - Email Verified
Submission PDF	Email:AdminEmail	Email:AdminEmail	Formstack - New Submission Received
Submission Failure	Email:UserEmail	Email:AdminEmail	Formstack - Form Submission Failed
E-Signature Email Verification Request	Email:UserEmail	Email:AdminEmail	Formstack - Please Verify Your Email Add...
Save for Later	Email:UserEmail	Email:AdminEmail	Your Saved Form Link



Publishing Options

- Embed Code - embed on your own website
- Hosted form
  - ready-to-use link that points to a page containing your form. This option is useful if you do not have a website available to use to host your form, or you're creating a form on a temporary basis.
- Generate Prefill Links
  - Toggle on the Auto-generate Prefill Links option to have a pre-filled link to your form generated for all new records for your form's primary object in a field of your choosing.
- Send by Email
  - The Send By Email tab provides the ability to distribute your forms to one or more recipients through email. This option is useful for distributing your forms to multiple persons as well as can be used to have your recipients update their existing information within your Salesforce instance.
- Export Links
  - The Export Links tab allows you to export a set of unique URLs to your forms that are pre-populated with existing record information. This option is useful for making your form links available in third-party tools such as marketing automation software or email campaign managers.





1 - Embed Code

Use the embed code below to embed your form directly into any website. You will only need do this once, as your form will update automatically when you publish changes to your form in the future.

Use iframe

Copy Code

```
<script type="text/javascript" id="jsFastForms" src="https://sfapi-sandbox.formstack.io/FormEngine/Scripts/Main.js?
```

2 - Advanced Prefill Code Examples

Use the code examples below to generate URL parameters for prefilling your form from your company intranet or portal site. For example, if you are creating a contact form and want to prefill the form by email address, use one of the code examples below to encrypt the following string:

email='myemail@company.com'

You can then take the resulting encrypted string and pass it into your form's page URL in the following format:

dp={your encrypted string}

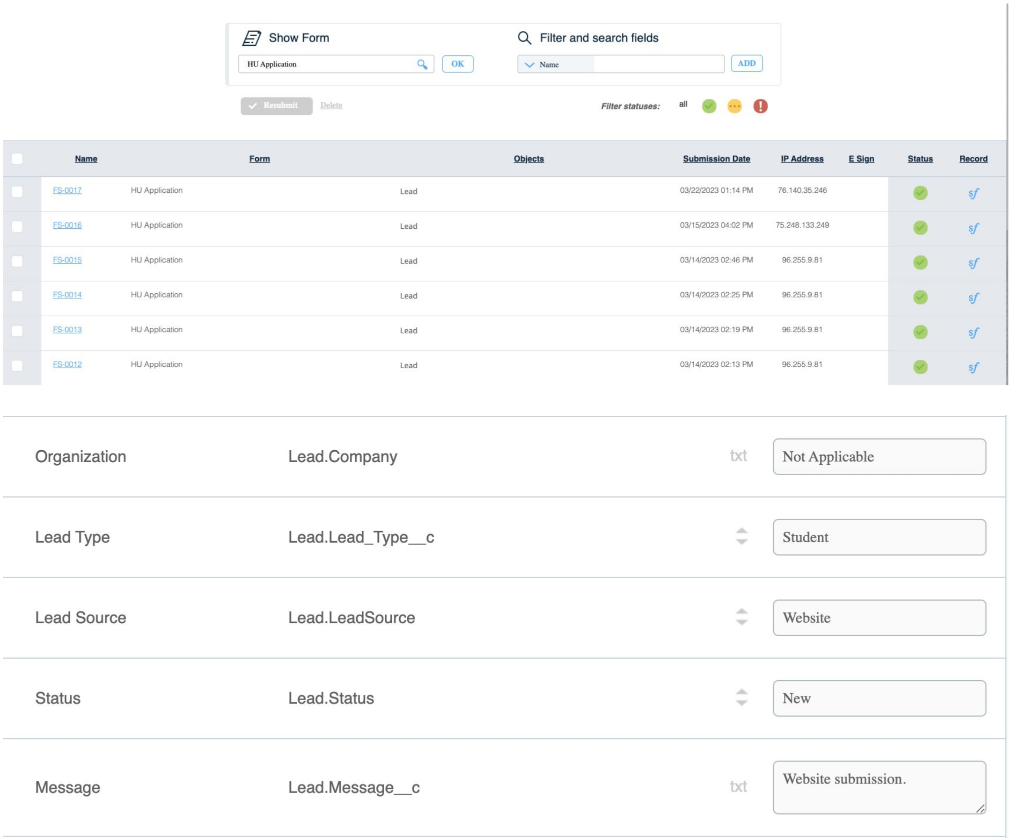
You can alternatively append your encrypted string into your form's embed code as follows:

```
<script type="text/javascript" id="jsFastForms" src="https://sfapi.formstack.io/FormEngine/Scripts/Main.js?d=xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx&dp={your encrypted string}"></script>
```

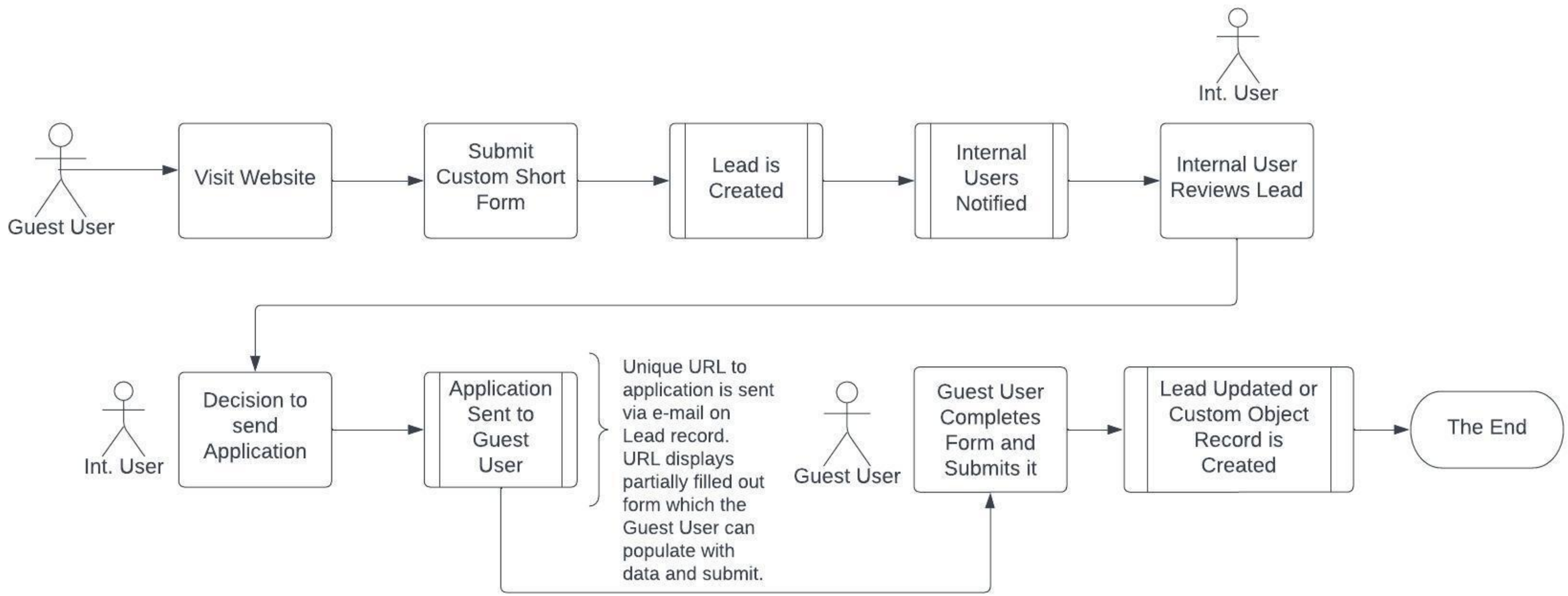
Note: Generating a dynamic prefill URL for your website requires advanced coding knowledge.
Learn more

Tracking Submissions

1. Submissions can be tracked from within the app. There is no need to go off-platform for this task.
2. Submitted values can provide instant insight into what is actually being entered and this is invaluable when it comes to debugging.
3. If a form fails, **it is possible to correct entered data without having to fill out the form anew**. Then one can submit the form from within the application (back end).

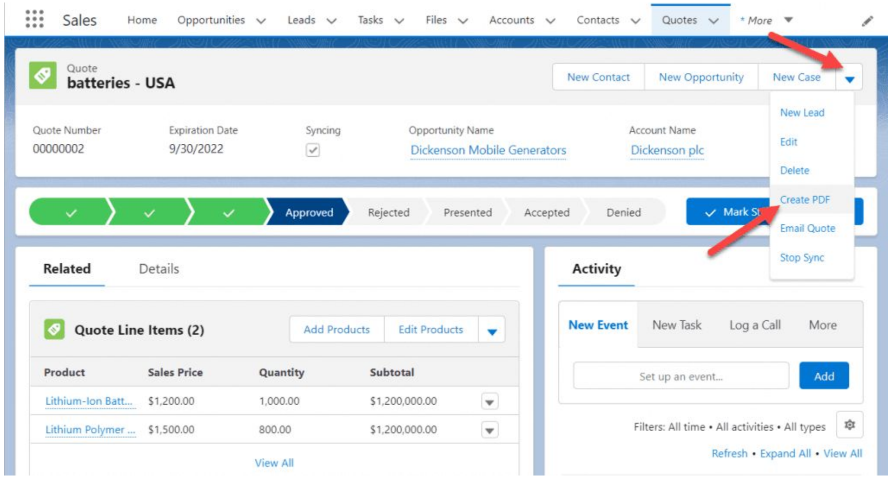


Form Submission Sample Flow



Salesforce Document Generation

- Create PDF on Salesforce Quotes is **the only** OOTB (out-of-the-box) feature
- This feature is often repurposed, which leads to loss of intended functionality (not recommended)
- The only viable option is to use third-party solutions, commonly found on AppExchange
- One can try to build it custom, but the coding effort will be enormous



Formstack Documents for Salesforce

Formstack Documents (formerly WebMerge) - Document Generation

By Formstack

Automate your document generation process from start to finish.

4.69 Average Rating (138 Reviews)

Industries

Government | Real Estate

Business Need

Finance

Supported Features

No Limits | Lightning Ready | Salesforce Mobile

More Details

Starting at $92 USD/company/month

Discounts available for nonprofits

Pricing Details

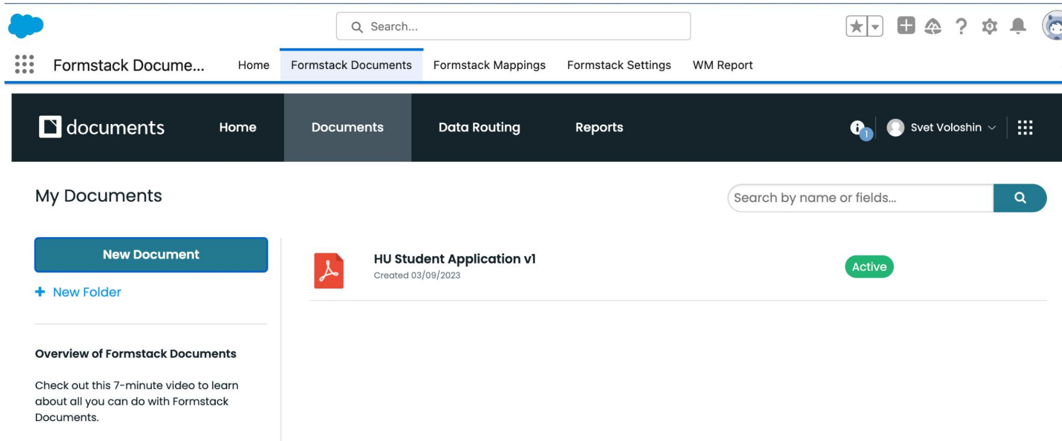
Get It Now | More

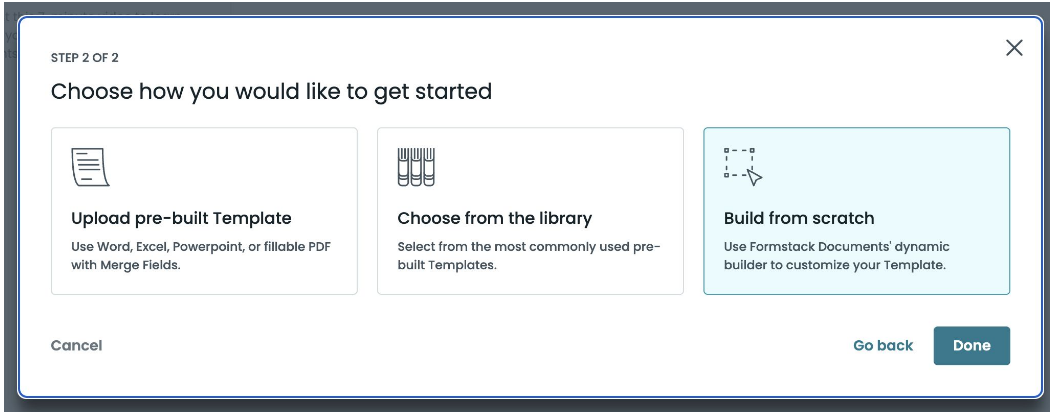
Formstack Documents automates your document generation so your sales team can easily generate contracts and proposals. Merge Salesforce data into documents and speed up your time to close by never copying and pasting data or contact information again!

- Partially native application (data leaves the platform)
- Tightly integrated with Formstack Forms
- Requires a separate license
- Formerly “WebMerge” - acquisition by Formstack

Formstack Documents UI

- Three ways to get started
  - Upload template
  - Choose from the library
  - Build from scratch



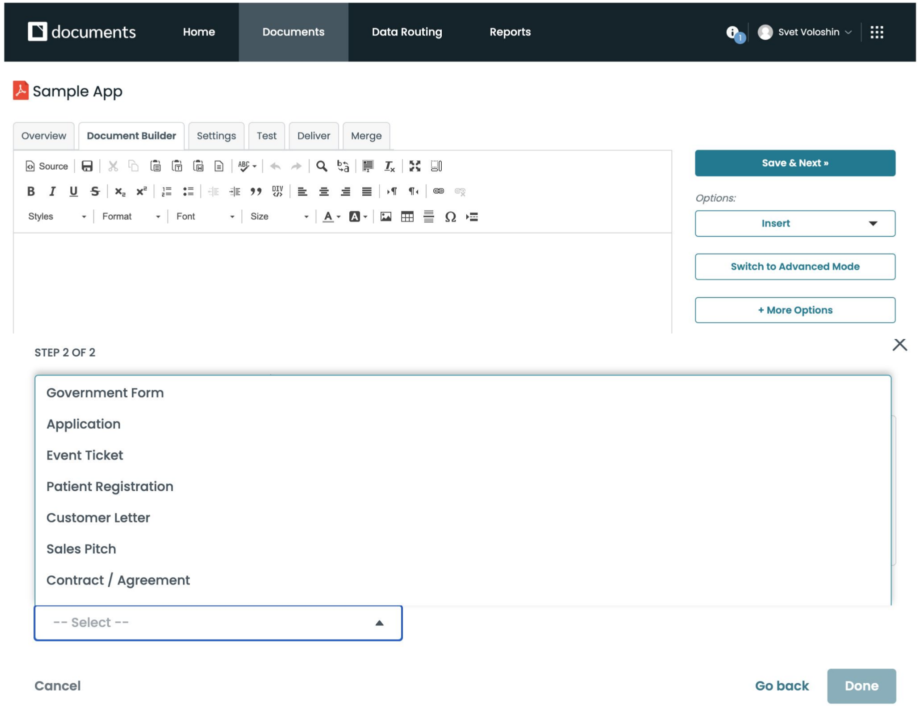


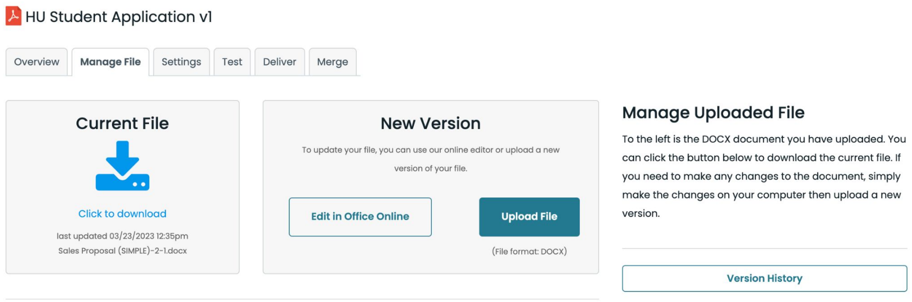
Formstack Doc Gen

- WYSIWYG Editor (what you see is what you get...)

- Pre-built template list

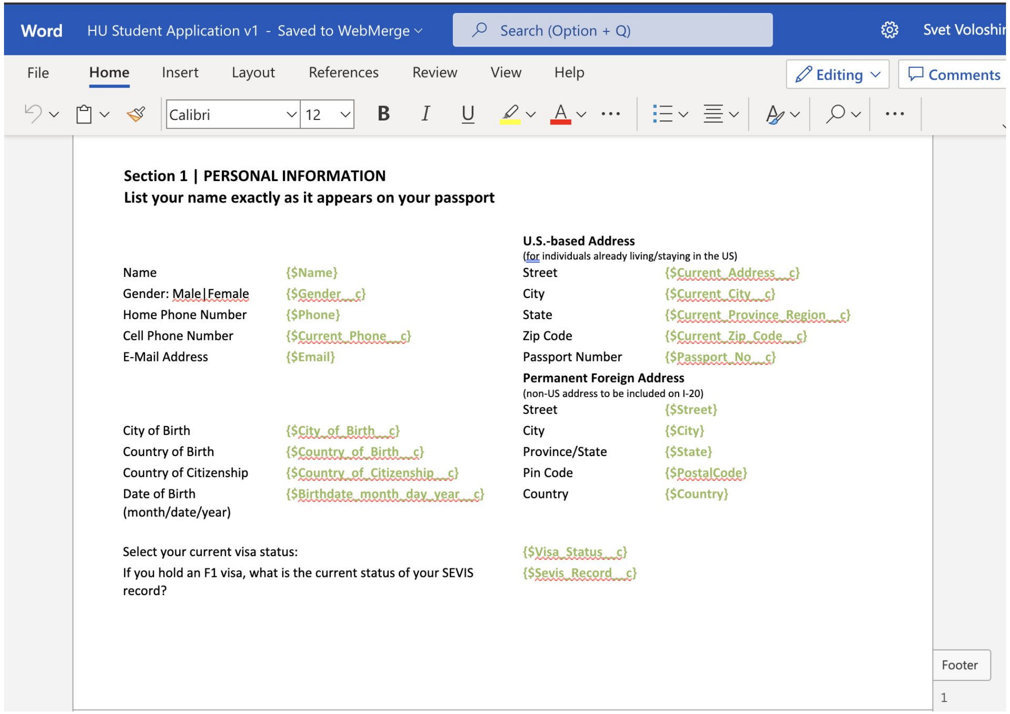
- Custom Template





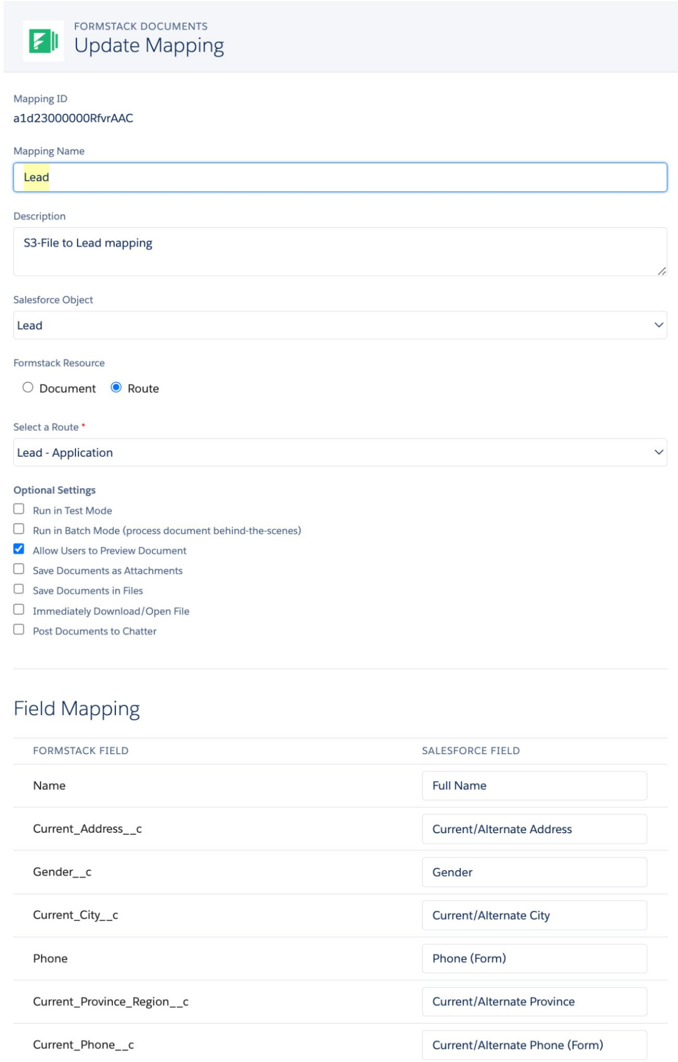
Doc Gen: Custom Template

- One can edit the template in Office online without leaving Salesforce
- No MS Word plugin or license is necessary
- One can also mark up the document in MS Word desktop version and upload.
- Merge field naming convention: {$FieldName__c}



Doc Gen Mappings

- Configure custom field mappings and automatic generation
- Example: when Lead meets certain criteria - generate document automatically without any user intervention.



FORMSTACK DOCUMENTS
Update Mapping

Mapping ID
a1d23000000RfvrAAC

Mapping Name
Lead

Description
S3-File to Lead mapping

Salesforce Object
Lead

Formstack Resource
Document
Route

Select a Route *
Lead - Application

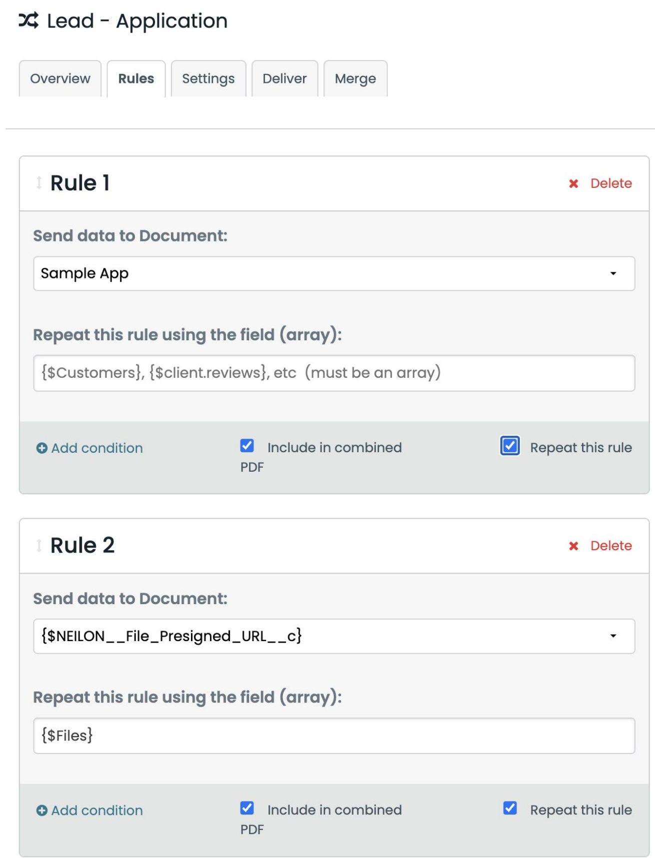
Optional Settings
- [ ] Run in Test Mode
- [ ] Run in Batch Mode (process document behind-the-scenes)
- [x] Allow Users to Preview Document
- [ ] Save Documents as Attachments
- [ ] Save Documents in Files
- [ ] Immediately Download/Open File
- [ ] Post Documents to Chatter

Field Mapping

FORMSTACK FIELD	SALESFORCE FIELD
Name	Full Name
Current_Address__c	Current/Alternate Address
Gender__c	Gender
Current_City__c	Current/Alternate City
Phone	Phone (Form)
Current_Province_Region__c	Current/Alternate Province
Current_Phone__c	Current/Alternate Phone (Form)

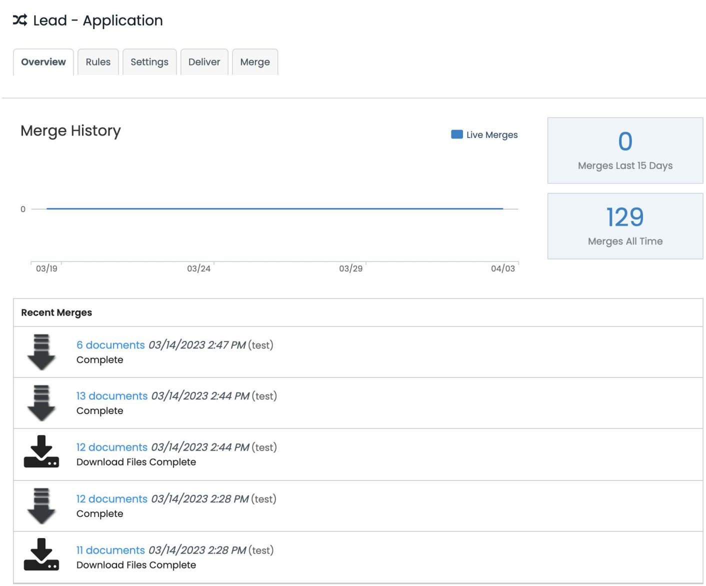
Doc Gen Rules

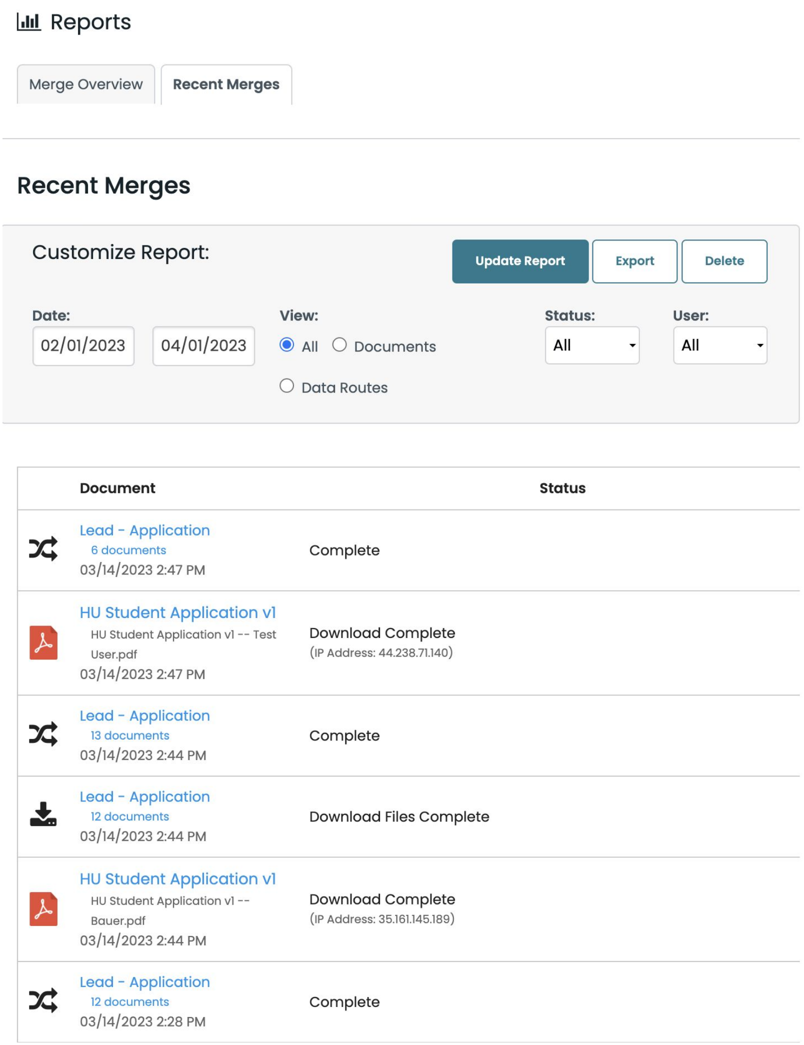
- Rules control which documents to send the data to.
- You can re-order the rules (important if you are combining documents) by hovering over the right corner of each rule and dragging the handle.



Reporting

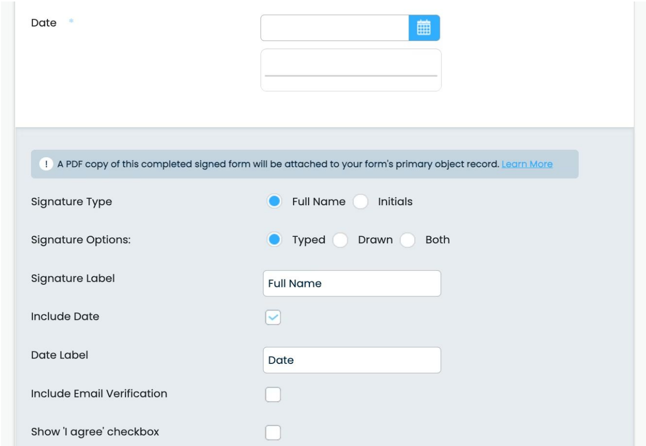
- Document generations are called “merges”
- Reporting is important to keep track of merges, since they are sold in “buckets”, e.g. 10,000 merges/month



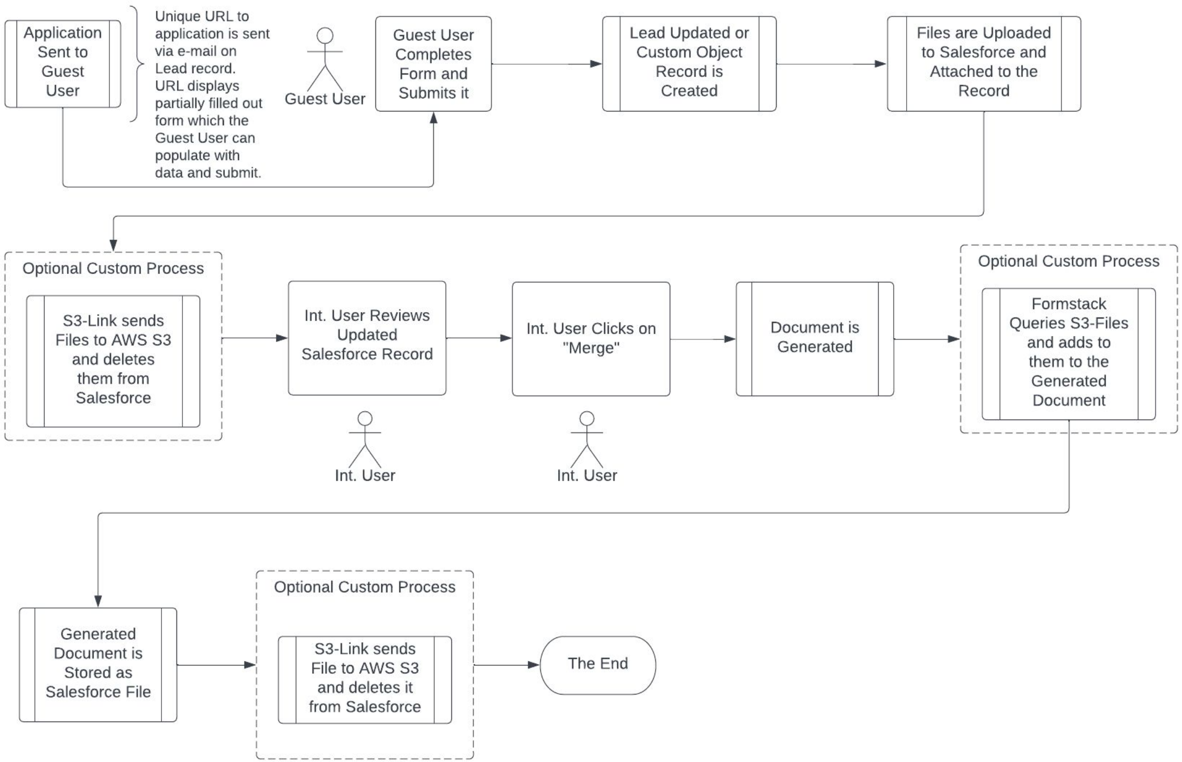


Formstack Doc Gen Signatures

- Doc Gen signature field is not the same as Formstack Sign (similar to DocuSign)
- They may or may not be legally binding (consult a lawyer)
- Special field is added to the Form and then encoded with Base64
- Signature field appears on generated document
- How To- Merging Signatures From a Formstack for Salesforce Form



Doc Gen Sample Flow



Key Takeaways

- Third-party forms are more robust than Salesforce OOTB (out-of-the-box) functionality
- Third-party forms can overcome Salesforce limits of 500 leads/day and 5000 cases/day, since they use Salesforce APIs
- One can build custom solutions for forms, such as a screen flow, but that would require the use of Customer Community (at minimum)
- It doesn't make sense to build document generation custom, as the development effort would be enormous and much more costly than using an AppExchange solution
- Doc Gen requires robust **File Management** strategy, otherwise one risks proliferation of files and exceeding Salesforce file storage limits
- The whole process can be almost entirely automated, but human intervention is recommended