

# Salesforce + FormAssembly

Strengthen Your Salesforce Foundation with Trusted Data



Marketing Operations

Send all submissions to Salesforce...

How Salesforce teams build better data collection to power automation, AI workflows, and better outcomes.

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# Ready to get more out of Salesforce?

Salesforce powers some of the most important workflows in modern organizations. But as the platform evolves with automation and AI tools like Agentforce, the expectations placed on CRM data are rising.

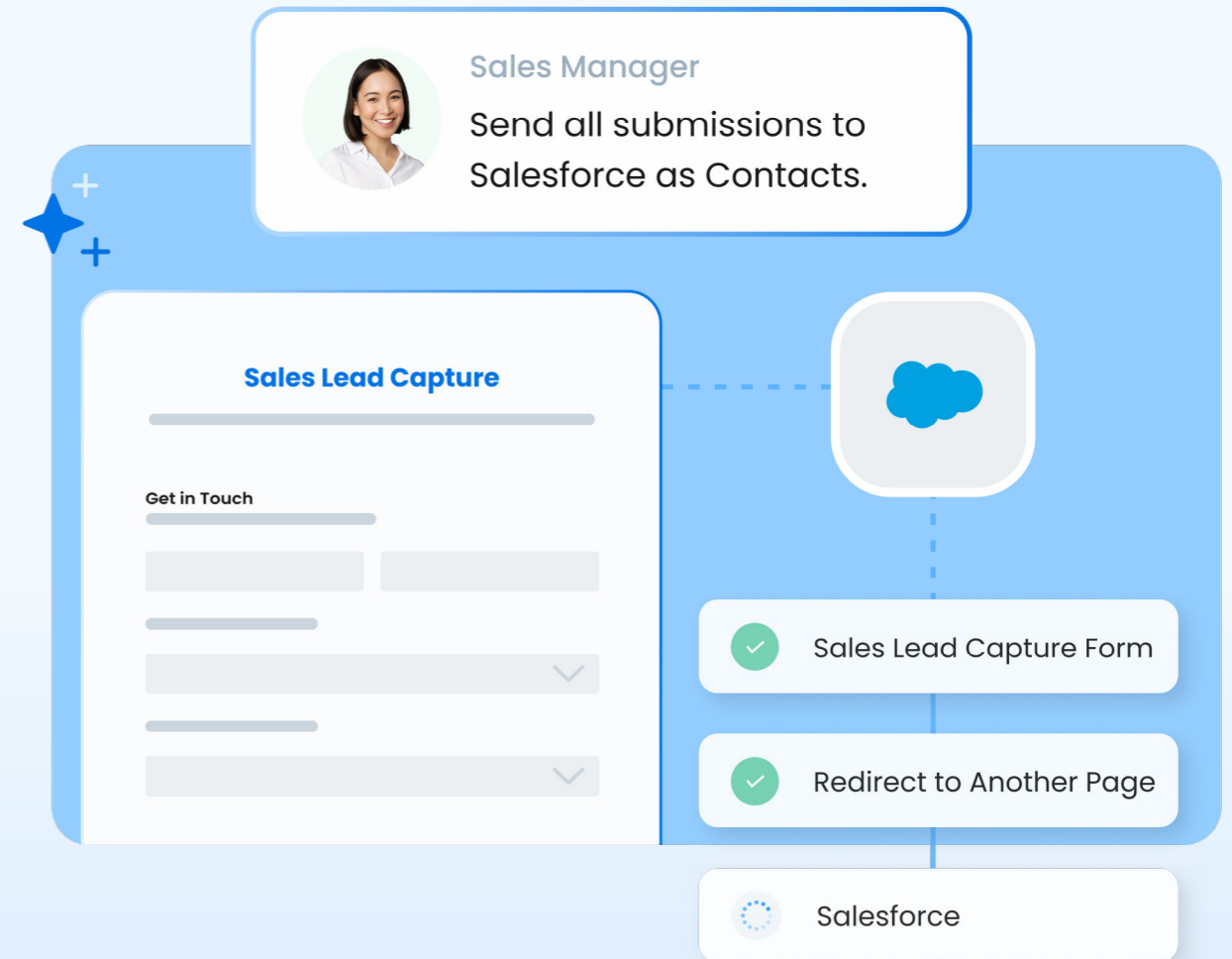
Success in Salesforce now depends on the quality of the data flowing into it.

When data collection processes rely on manual entry, disconnected tools, or limited forms, teams often face duplicate records, incomplete data, and broken workflows. Simply put, poor inputs slow automation and limit the impact of AI.

FormAssembly helps solve this problem.

Built for Salesforce, FormAssembly enables teams to capture structured, validated data and send it directly to Salesforce objects. The result is cleaner data, stronger workflows, and better outcomes across the organization.

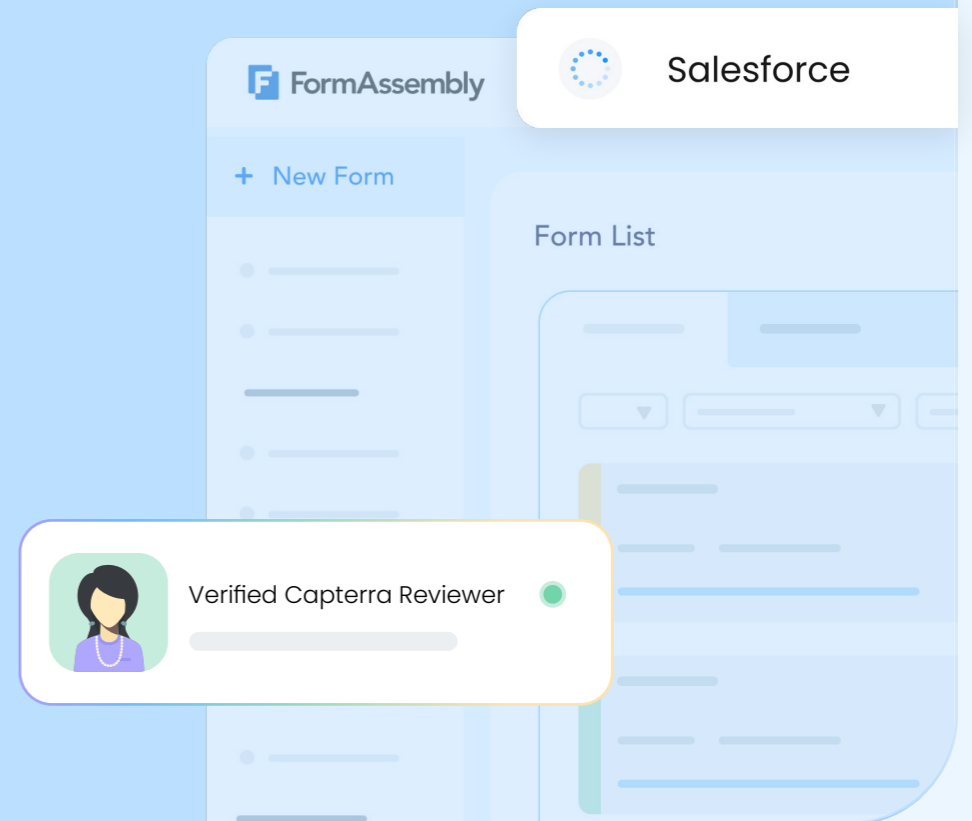
In this guide, you'll see how Salesforce teams use FormAssembly to streamline data collection, improve data quality, and power more efficient processes.



“FormAssembly’s Salesforce Connector is robust. We have a very customized Salesforce instance, so this is an important feature for us.

**With the Connector getting more development and features, it just keeps getting better.”**

—Chantelle A., [Verified Capterra Reviewer](#)



Trusted by 5,500+ Industry Leaders, including: 350+ 5-star reviews on Salesforce AppExchange



# Your Salesforce Workflows Are Only as Strong as Your Data

Many teams rely on Salesforce’s native Web-to-Lead forms to collect information. While useful for simple use cases, they are limited in the types of records they support, how data is validated, and how information is updated once it reaches Salesforce.

As Salesforce continues to evolve with automation and AI-powered tools like Agentforce, these limitations become more noticeable. Strong workflows and intelligent automation require clean, structured, and reliable data from the start.

## Common Salesforce data collection challenges




- Tedious manual data entry**: Screenshot of a Salesforce form with fields for Email (Jonathan@helloworld.com), Name (Jonathan), Address, Birthdate, and a Marketing Ops button.
- Duplicate or incomplete Salesforce records**: Screenshot of a Salesforce interface showing a 'Lookup Query' dropdown, an 'Email' field, and a message 'If no record found'.
- Limited native forms that only create records**: Screenshot of a Salesforce 'START WORKFLOW' dialog with a 'Complete' button and an 'Exit Builder' button.
- Disconnected tools that require complex integrations**: Screenshot of a 'Default Report' interface with a search bar and a blue button.
- Poor data validation before information reaches Salesforce**: Screenshot of a 'Validation Rules' dialog for an 'Application' form, showing a 'Start Date' field with a validation message: 'This date must be between 9/1/2025-1/1/2026'.
- Workflows and automations breaking due to messy data**: Screenshot of a workflow diagram showing a 'FORM' step connected to a 'CONNECTOR' step, with a warning icon indicating a failure.

# Native Salesforce Forms Aren't Built for **Modern Workflows**

Native forms are limited in the objects they support, how data can be validated, and how records can be updated. As Salesforce teams build more complex workflows and automation, these limitations create extra work for admins and increase the risk of messy CRM data.

Modern Salesforce teams need a better way to collect structured, reliable data and connect it directly to their CRM.

FormAssembly helps teams build flexible data collection workflows that send validated information directly to Salesforce, supporting cleaner data, stronger automation, and better outcomes.

 <b>Capability</b>	 <b>Web-to-Lead</b>	 <b>FormAssembly</b>
Objects	Leads & Cases	Any object
Record handling	Create only	Create + Update
Logic	Limited	Advanced
Validation	Basic	Advanced
File uploads	Limited	Native

# How FormAssembly Helps

FormAssembly is a secure, scalable data collection platform built specifically for Salesforce teams. We help organizations capture the information they need and connect it directly to their CRM with clean, structured data.

Instead of relying on manual processes or limited native forms, FormAssembly allows teams to build flexible forms and workflows that send validated data directly into Salesforce. This ensures the information entering your CRM is accurate, consistent, and ready to power automation.

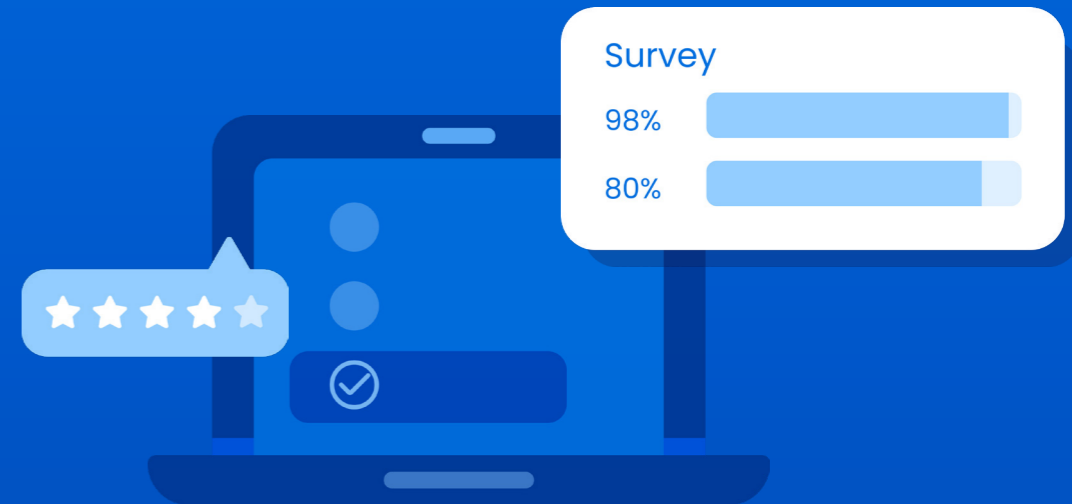
With an intuitive form builder and powerful Salesforce integration, teams can quickly deploy new data collection workflows without relying on developers or complex integrations. Admins gain greater control over how data enters Salesforce, while teams across the organization benefit from faster, more reliable processes.

The result is better data, stronger workflows, and a foundation that supports automation, reporting, and AI-driven initiatives.

## Did you know?

**98%** of teams relying on manual workflows report inefficiencies in how data is collected, routed, and managed.

**80%** of organizations report data accuracy and integrity issues caused by disconnected tools and siloed systems.



Source: FormAssembly, Data Collection in 2025 Report

# Capabilities That Help Salesforce Teams Move Faster

FormAssembly gives Salesforce teams the tools to collect clean, reliable data and connect it directly to their CRM. With flexible forms, powerful Salesforce connectors, and enterprise-grade security, teams can build data collection workflows that scale with their organization.



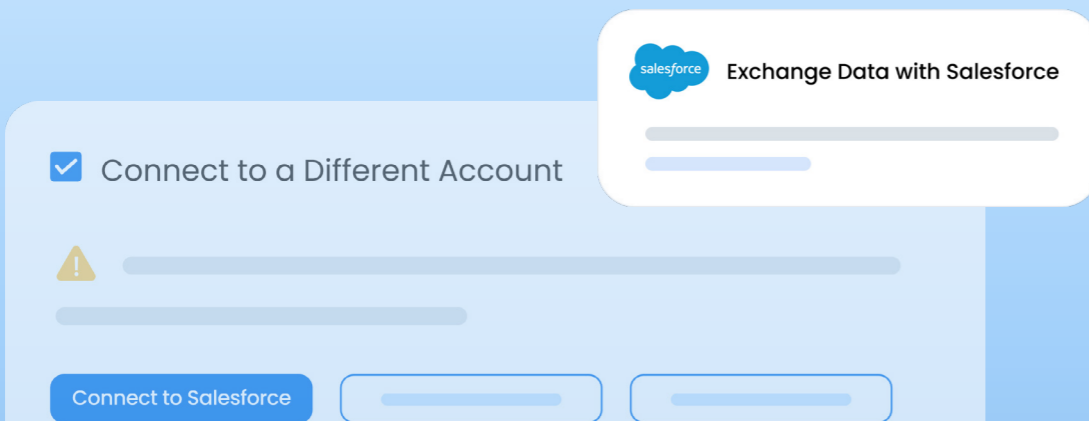
## Build Flexible Data Collection Workflows

Create powerful forms quickly with an intuitive drag-and-drop builder—or generate them even faster using FormAssembly’s agentic AI assistant, Fai. Teams can prompt Fai to help build forms, structure fields, and accelerate development, helping admins deliver new workflows faster.

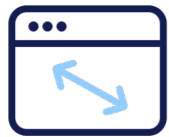


## Connect Forms Directly to Salesforce

FormAssembly’s bi-directional Salesforce connectors allow teams to create and update records across standard and custom objects. Prefill forms with existing Salesforce data, map responses directly to Salesforce fields, and ensure information flows into the right objects automatically.



# Capabilities That Help Salesforce Teams **Move Faster**



## Design Responsive, Intelligent Experiences

Just because you're outside of the Salesforce environment doesn't mean you lack control. Leverage conditional logic and hidden fields to offer audiences forms that respond to their inputs. Leverage data from multiple sources with Return Variables to architect truly smart flows that live outside of your CRM.



## Keep Salesforce Data Clean and Up to Date

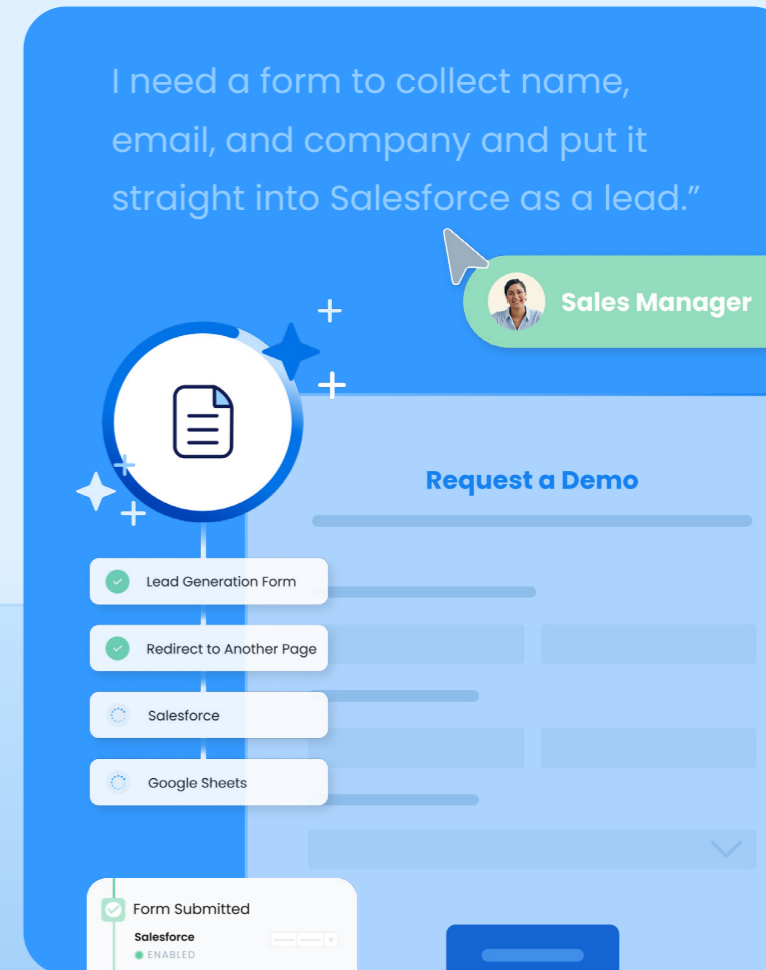
Features like Dynamic Picklists and record lookup help ensure users respond to live, accurate Salesforce data. The Save Connector can capture partial responses, while file uploads can be mapped directly to Salesforce Files to maintain complete records.



## Support Secure, Scalable Data Collection

FormAssembly supports organizations with strict compliance and security requirements. Authentication options, granular access controls, and secure handling of sensitive data help teams protect information while maintaining visibility and control.

I need a form to collect name, email, and company and put it straight into Salesforce as a lead."



**Request a Demo**

- Lead Generation Form
- Redirect to Another Page
- Salesforce
- Google Sheets

Form Submitted  
Salesforce ENABLED

**Sales Manager**

# How Organizations Build Better Workflows Across Industries

Organizations across industries rely on Salesforce to power their most important workflows. But the effectiveness of those workflows depends on the quality of the data behind them.






FormAssembly helps teams capture clean, structured data and connect it directly to Salesforce, ensuring every process—from intake to action—runs more efficiently. The following examples show how organizations are improving data quality, reducing manual work, and driving better outcomes with Salesforce-connected data collection.



# Nonprofit

Nonprofits rely on Salesforce to manage relationships with donors, volunteers, and community partners. FormAssembly helps organizations capture accurate data and connect it directly to Salesforce so teams can spend less time managing data and more time advancing their mission.

## Essential Use Cases

-  Collect donor and volunteer registrations
-  Build Salesforce-connected donation forms
-  Manage event registrations and signups
-  Prefill forms for returning donors or volunteers
-  Streamline fundraising workflows connected to Salesforce Elevate



Donor Name	Amount
Keith C.	\$150.00
Jane	\$270.00
Hang	\$320.00
Benjamin S.	\$450.00

**Nonprofit**

Success Stories

DONATE

See how Big Brothers Big Sisters is transforming data collection and scaling impact with FormAssembly.



Results from Nonprofit case studies:

**35k** hours of manual data entry saved yearly on applications

**100k+** youth served across the US yearly

**\$8k** saved yearly over previous form builder

**143** local agencies onboarded with FormAssembly






*"We're using FormAssembly to collate everything together so that staff can do their jobs more effectively."*

Big Brothers Big Sister

# Higher Education

Higher education institutions use Salesforce to manage relationships across the entire student lifecycle. FormAssembly helps schools collect structured data throughout admissions, enrollment, and alumni engagement while supporting compliance requirements.

## Essential Use Cases

-  Capture student applications and admissions information
-  Collect event and orientation registrations
-  Manage alumni engagement and donations
-  Gather student feedback and surveys
-  Keep student and alumni contact information up to date



### Student Registration Form

Fill out the form carefully for registration.

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**Student Information**

First Name\*

Middle Name

Last Name\*

Birthdate\*

[Next](#)

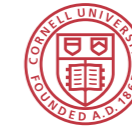


## Higher Education

### Success Stories



**Helping higher education teams reduce manual work and drive better outcomes across enrollment and payments.**



Reduced form build time from days to hours (Cornell University)

**160%** increase in online payments received (Westmont College)

**850%** increase in new student enrollment (Olivet Nazarene University)

**40** hours a week of manual data entry eliminated (Westmont College)

**50%** decrease in manual work (Olivet Nazarene University)






*“One form is saving someone from having to go into about eight different objects.”*

Cornell University

# Financial Services

Financial services organizations manage large volumes of sensitive customer data and rely on Salesforce to support client relationships and internal workflows. FormAssembly enables secure data collection that connects directly to Salesforce, helping teams streamline onboarding and maintain accurate customer records.

## Essential Use Cases

-  Capture new client or lead information
-  Streamline client onboarding processes
-  Collect service requests and support inquiries
-  Enable Salesforce-connected customer portals
-  Manage account updates and document submissions

## Financial Services

### Success Stories

See how financial services organizations are reducing operational workload and improving customer support efficiency with FormAssembly.

KASASA 

**70** hours of work saved monthly  
(Kasasa)

**60%** reduction in helpline call  
volume (InLoop)






*“It’s not just about data collection, it’s also about being able to distribute information we have across teams.”*


Kasasa

# Healthcare

Healthcare organizations must balance efficient operations with strict security and compliance requirements. FormAssembly provides a secure way to collect sensitive information and connect it to Salesforce systems used for patient engagement, research, and program management.

## Essential Use Cases

-  Collect patient intake and information updates
-  Gather research and clinical program data
-  Send secure HIPAA release forms
-  Register participants for health programs or events
-  Capture patient feedback and surveys



### Unlock report

Unlocking the report will unmask all sensitive data contained in the responses.

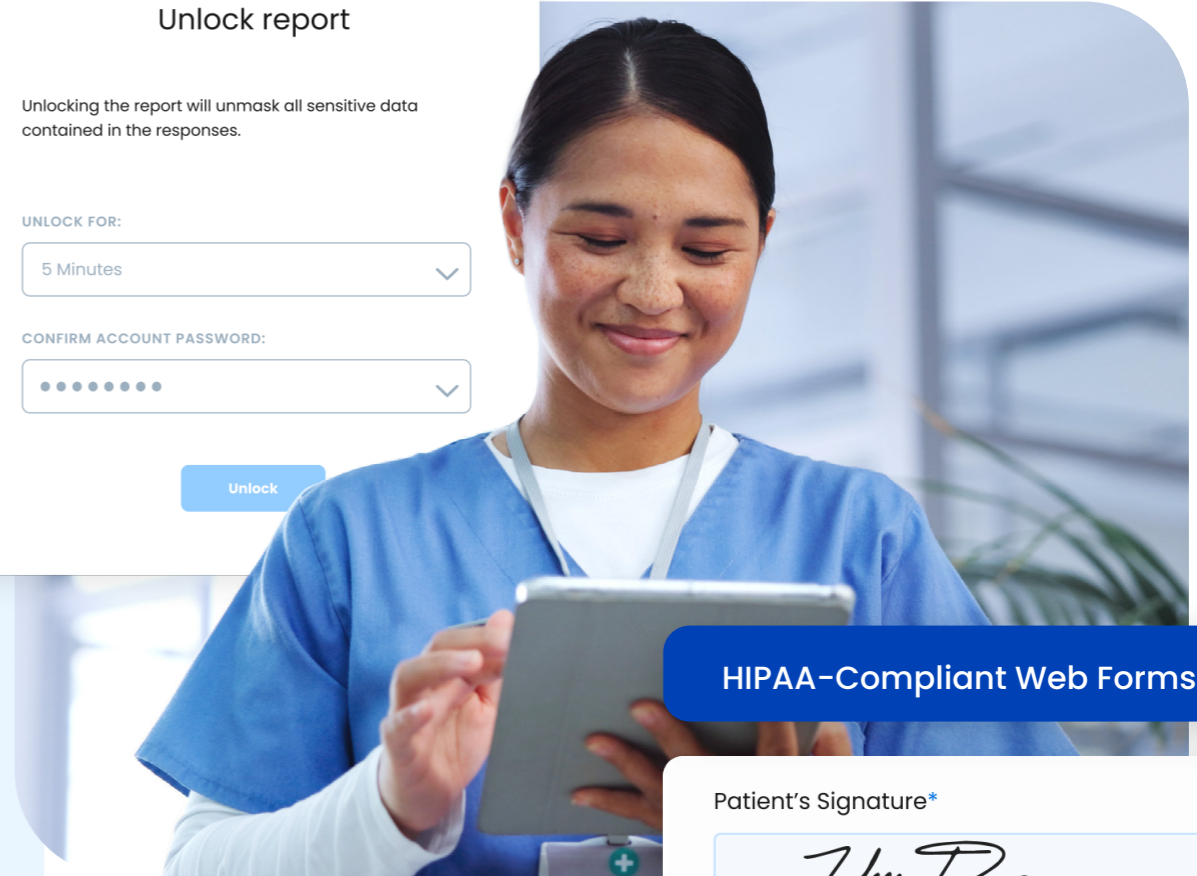
UNLOCK FOR:

5 Minutes
▼

CONFIRM ACCOUNT PASSWORD:

••••••••
▼

Unlock



**HIPAA-Compliant Web Forms**

Patient's Signature\*


17

By signing this form you agree that all the information in this form is accurate to the best of your knowledge.

**Healthcare**

Success Stories



See how Continuum Clinical improved efficiency and scaled data collection with FormAssembly.



**20%** reduction in staff workload

**2,000+** responses collected

**30+** forms deployed






*“As we’ve used FormAssembly in a more advanced way, we’re not only cleaning contact and location data from research sites but are now surveying them and capturing data in a way that assists us with recruitment strategies.”*

# Government

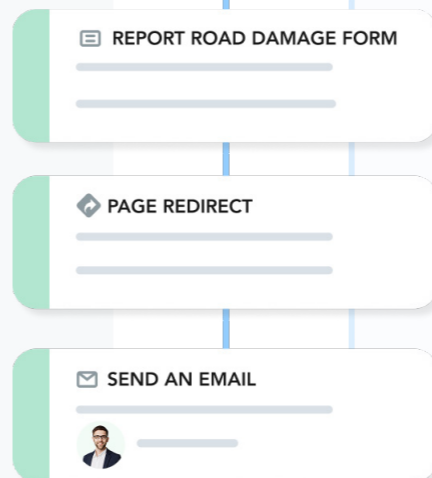
Government agencies use Salesforce to manage programs, services, and citizen engagement. FormAssembly helps agencies modernize data collection by replacing paper processes with secure digital workflows that connect directly to Salesforce.



## Essential Use Cases

-  Collect applications for public programs
-  Gather incident reports and service requests
-  Capture citizen contact information
-  Enable digital registration for government services
-  Replace paper forms with automated workflows

## Report Road Damage Form



### Form Instructions

Placeholder for form instructions, consisting of several horizontal bars of varying lengths representing text lines.

## Government

### Success Stories



Helping government agencies reduce manual work, improve response rates, and drive measurable cost savings.



**75%** increase in form responses  
(Multnomah County case study)

**\$76k** in hourly wages saved per week  
(major metropolitan city)

**25%** decrease in manual data entry  
(Multnomah County case study)

*“When we spin up a new sandbox for a new project, all we have to do is reconnect FormAssembly, and it works. It’s minutes versus hours trying to reconfigure a form test environment to work with new apps we are building.”*

# How to Get Started

Strengthening your Salesforce data foundation starts with the right tools for collecting and connecting trusted data.

FormAssembly Atlas makes it easy for teams to build secure forms, connect workflows to Salesforce, and capture structured data that supports automation, reporting, and AI-driven processes.

Organizations can [choose a plan](#) that fits their team size, security needs, and workflow complexity.

## Choose the Plan That Fits Your Team



### Atlas Explorer

A great starting point for individuals and small teams building secure forms and workflows.



### Atlas Team

Designed for groups that need advanced workflows, collaboration, and expanded integration capabilities.



### Atlas Enterprise

Enterprise-grade security, governance, and scalability for organizations managing complex or sensitive data collection processes.



### Government Cloud

A dedicated environment designed for federal, state, and local government organizations with strict compliance requirements.

# Contact Us!

Whether you want to start building right away or explore how FormAssembly fits into your Salesforce environment, getting started is simple.



## Start a Trial

Launch a trial in FormAssembly Atlas and begin building forms and workflows immediately.

[Start your Trial](#)



## Book a Personalized Demo

See how FormAssembly can help your organization collect better data, streamline workflows, and strengthen your Salesforce foundation.

[Request a Demo](#)