



# 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	<ul style="list-style-type: none"><li>• Web-to-lead forms are limited to creating leads only.</li><li>• Web-to-lead forms have a limit of 500 submissions per day per organization.</li><li>• There is no validation of data upon entry before committing data to the database.</li><li>• There is no way to attach a file.</li></ul>

# Web-to-Lead Form Setup

 **SETUP**  
**Web-to-Lead**

## Web-to-Lead Setup

Easily set up a page on your website to capture new leads.

### Create a Web-to-Lead Form

Select the fields to include on your Web-to-lead form:

**Available Fields**

Salutation  
Title  
Website  
Phone  
Mobile  
Fax  
Street  
Zip  
Country

**Selected Fields**

First Name  
Last Name  
Email  
Company  
City  
State/Province


Up  
Down



NOTE: Would you like to add custom fields that you do not see


Add  
Remove

After users submit the Web-to-Lead form, they will be taken to the specified return URL on your website, such as a "thank you" page.


Return URL

☒ Include reCAPTCHA in HTML 

**reCAPTCHA API Key Pair**  

Enable server fallback ☒ 

Language

 **Setup** Home Object Manager Flow User

Feature Settings

Marketing


**Web-to-Lead**

Service

Web-to-Case

Web-to-Case HTML Generator

Didn't find what you're looking for?  
Try using Global Search.

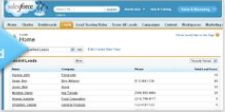
 **SETUP**  
**Web-to-Lead**

## Web-to-Lead Setup

Using pre-existing pages on your company's website, you can capture contact and profile information from users at

My Website

Create New Lead



### Web-to-Lead Settings

Web-to-Lead Enabled ☒

Require reCAPTCHA Verification ☐

Default Lead Creator Michael McGeough

Default Response Template


### Get Info Before You Start

- What is the maximum number of leads I can capture?
- How do I specify which information to capture?
- Can I capture leads from multiple web pages?
- What status is assigned to web-generated leads?
- How can I be sure that leads will not be lost?

# 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


 **SETUP**  
**Web-to-Case**


## Web-to-Case Settings

Use a simple web form or a self-service customer community to make it easy for customers to submit cases. For detailed information on setting up Web-to-Case or Self-Service Community templates, see the Sales and Service Setup Guide.



### Basic Settings


Enable Web-to-Case ☒ 


Require reCAPTCHA Verification ☐ 

Default Case Origin Email 


### Auto-Response Email Settings

Default Response Template IT Ticket Open  

Hide Record Information ☐ 

Email Signature  

Save Cancel

 **SETUP**  
**Web-to-Case HTML Generator**

## Capturing Case Information from Your Website

Using pre-existing pages on your company's website, you can capture contact and case information from users and automatically create cases in Salesforce.

### Capture Cases

Select the fields to include:

**Available Fields**

Company  
Type  
Status  
Case Reason  
Priority  
Case Record Type  
Case Closed Reason  
Category  
Closed On

**Selected**

Contact Name  
Email  
Phone  
Subject  
Description


Up  
Down



**NOTE:** Would you like to add custom fields that you do not see listed on this page? [Add Custom Fields](#)


☒ Visible in Self-Service Portal

Enter the URL that the user will be returned to:

URL http://

☒ Include reCAPTCHA in HTML 

reCAPTCHA API Key Pair   

Enable server fallback ☒ 

Language Default

Generate Cancel

# 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.

### Contact Customer Support

Tell us how we can help.

Contact Name


Status\*

New

Web Email

Subject

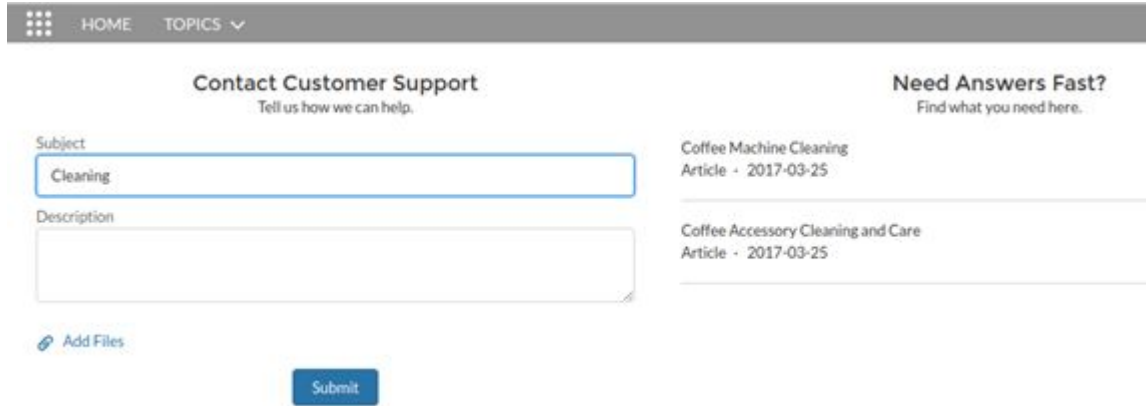
Description

 Add Files

Submit



# Experience Cloud: Case Deflection



The screenshot displays the 'Contact Customer Support' form in the Experience Cloud interface. The form includes a 'Subject' field with the text 'Cleaning' and a larger 'Description' field. Below the description field is an 'Add Files' link with a paperclip icon. A blue 'Submit' button is positioned at the bottom of the form. To the right of the form, under the heading 'Need Answers Fast?', there is a list of suggested articles. The first article is 'Coffee Machine Cleaning' with a date of '2017-03-25'. The second article is 'Coffee Accessory Cleaning and Care' with a date of '2017-03-25'. The top navigation bar shows 'HOME' and 'TOPICS' with a dropdown arrow.

HOME TOPICS ▾

**Contact Customer Support**  
Tell us how we can help.

Subject  
Cleaning

Description

[Add Files](#)

**Submit**

**Need Answers Fast?**  
Find what you need here.

Coffee Machine Cleaning  
Article · 2017-03-25

Coffee Accessory Cleaning and Care  
Article · 2017-03-25

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](http://www.formassembly.com/join)

# Formstack Form Building

Application

Primary object: Lead

Form Settings

Form Name

Application

Primary Object

Lead

+ Add Related Object

Submit Label

Submit

Post-Submission Options

☒ Display a confirmation popup

☐ Redirect users to a new page

Thank you for submitting your application!

Enable Google reCAPTCHA V3

☐

To enable reCAPTCHA for this form, setup your account in [Integration Settings](#) first.

Form Salesforce API Version

v54.0

Edit Form

Edit Rules

Edit Style

Edit Alerts

Documents

Page 1

Personal Info

First Name \*

Middle Name

Last Name \*

Gender

--select an item--

Email \*

Home Phone Number \*

Cell Phone Number \*

Admin

Organization \*

Not Applicable

Lead Type

Student

Lead Source

Website

Status

New

Message \*

Website submission.

~ required

Save

Next

+ Add New Section

Page 2

Address Information

Page 3

Foreign Address

Page 4

Student Details

Page 5

Student Academic History

# 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**.

The screenshot shows the Formstack interface with a 'Draft Saved' status and a 'Publish Draft' button. A search bar for fields is visible. The form titled 'Lead' contains the following fields: Account, Agent, Agent Name, Allow Duplicates?, Annual Revenue, Application Link, Bachelors in Nursing, College/University Name 4, College City 4, and College Country 4.

The 'General Fields' panel lists fields that are not mapped to Salesforce objects. The fields include: Description Area, Short Answer, Long Answer, Dropdown List, Checkbox, Radio Buttons, Number, Star Rating, and NPS (Net Promoter Score).

The 'Advanced Fields' panel lists specialized fields: Captcha, File Upload, Image, Payment, and Signature.

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

The 'Admin' section shows configuration for the form. Fields include Organization (set to 'Not Applicable'), Lead Type (set to 'Student'), Lead Source (set to 'Website'), Status (set to 'Lead'), and Message. A dropdown menu for the Status field is open, showing options: New, Contacted, DocuSign Sent, DocuSign Received, Under Review, Unqualified, and Qualified.

# 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).

The screenshot displays a web form titled "Upload Supporting Documents" within a header bar that includes a "Page 7" indicator and a blue icon. The form is organized into two main sections. The top section, labeled "Goal Statement", contains an "Add File..." button. The bottom section contains various configuration options: "Label:" with a text field containing "Goal Statement"; "Hide field:" with an unchecked checkbox; "Required:" with an unchecked checkbox; "Error message to be shown if a value is not provided:" with a text field containing "required"; "Upload File To:" with a dropdown menu currently showing "Salesforce" and a list of options including "Salesforce", "Azure Blob", "AWS S3", and "Dropbox"; "Upload files to:" with a text field; "Attach to object:" with a text field; "File upload limit:" with a text field containing "3"; "File upload size limit:" with a text field containing "5" and a "MB" unit indicator; "Allowed file types:" with a dropdown menu set to "All"; and "Custom file name:" with a text field containing "Goal Statement".

# Formstack Form Building - Rules

## Use Cases:

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

Rule 8

If All of the following is true

Select your current vis... is not equal to FI Transfer

+ And/Or

Then Make required Proof of English Proficiency

Rule 5

If All of the following is true

Select Campus of Interest is equal to Harrisburg - Dubai Know

And If Any of the following is true

Select Start Term: is equal to Spring-1

Select Start Term: is equal to Spring-2

Select Start Term: is equal to Summer-1

Select Start Term: is equal to Summer-2

Select Start Term: is equal to Fall-1

Select Start Term: is equal to Fall-2

+ And/Or

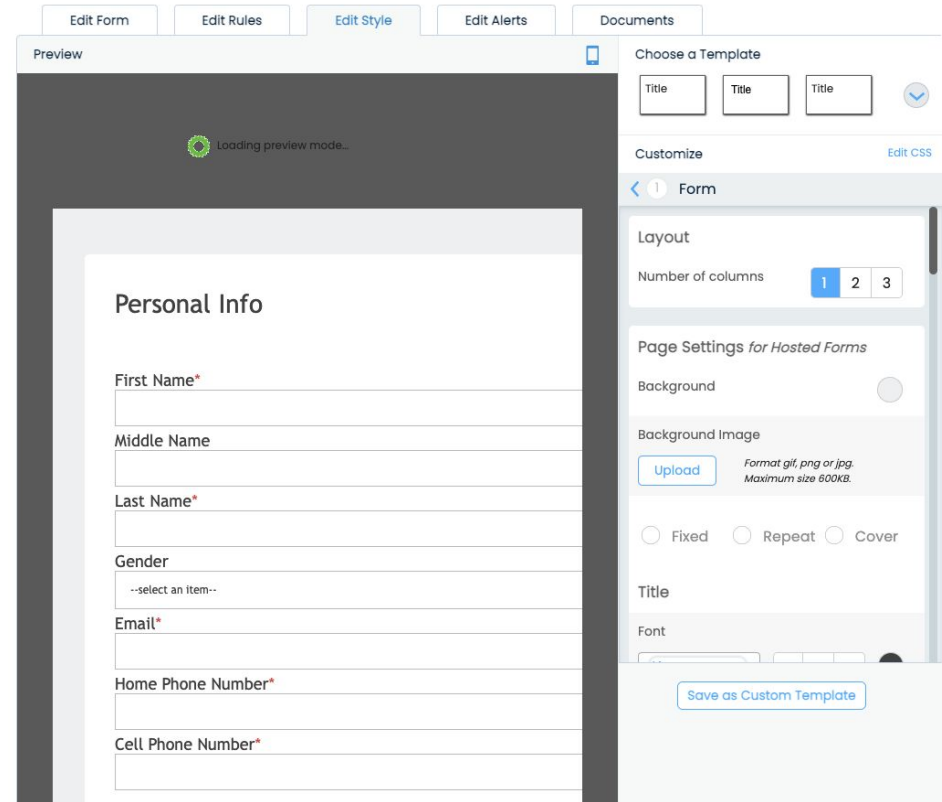
Then Set picklist values Program of Interest

MS Analytics

MS Computer Information Sciences

# Formstack Form Building -Styling

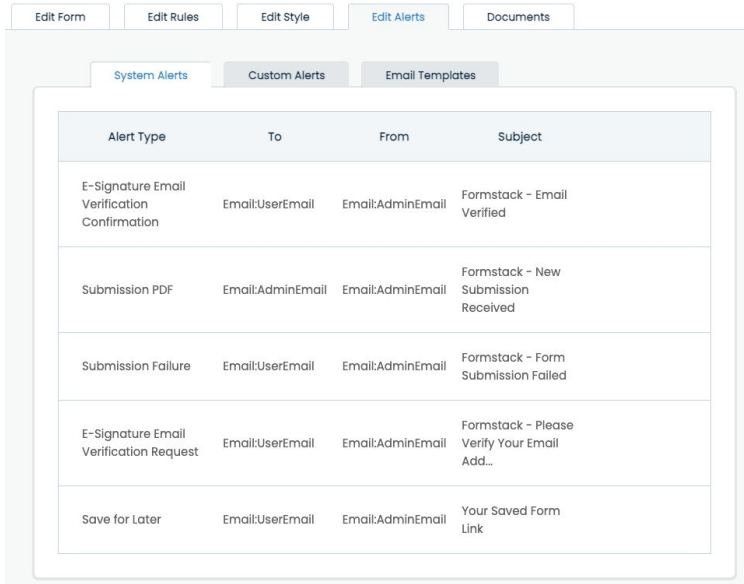
- Inherit CSS
- Use predefined templates
- Build your own templates
- Rich customization options





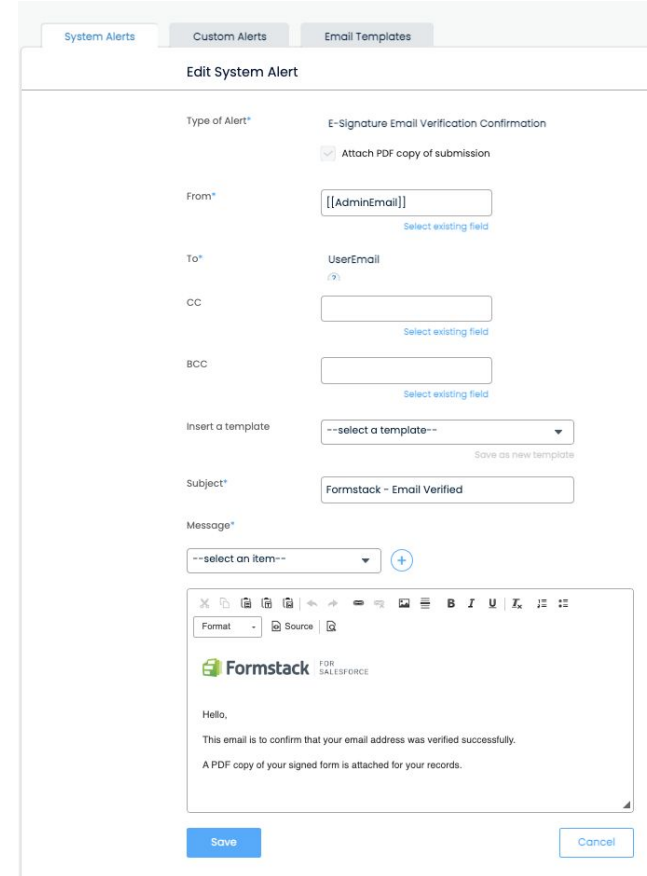
# Formstack Form Building - Alerts

- 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



The screenshot shows the 'Edit Alerts' tab in the Formstack interface. It features a table with columns for Alert Type, To, From, and Subject. The table lists five different alert types, including E-Signature Email Verification Confirmation, Submission PDF, Submission Failure, E-Signature Email Verification Request, and Save for Later. Each row shows the corresponding email addresses for the recipient (To) and sender (From), as well as the subject line.

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



The screenshot shows the 'Edit System Alert' interface for an 'E-Signature Email Verification Confirmation' alert. The form includes fields for Type of Alert, Attach PDF copy of submission, From, To, CC, BCC, Insert a template, Subject, and Message. The 'From' field is set to '[[AdminEmail]]', the 'To' field is set to 'UserEmail', and the 'Subject' is 'Formstack - Email Verified'. The 'Message' field contains a preview of the email content, including the Formstack logo and a confirmation message.

**Edit System Alert**

Type of Alert\* E-Signature Email Verification Confirmation

☒ Attach PDF copy of submission

From\* [[AdminEmail]]  
[Select existing field](#)

To\* UserEmail  
[Select existing field](#)

CC  
[Select existing field](#)

BCC  
[Select existing field](#)

Insert a template --select a template--  
[Save as new template](#)

Subject\* Formstack - Email Verified

Message\*  
--select an item-- +

**Formstack** FOR SALESFORCE

Hello,

This email is to confirm that your email address was verified successfully.

A PDF copy of your signed form is attached for your records.

**Save** **Cancel**

# 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.

Embed Code

Hosted Form

Generating Prefill Links

Send by Email

Export Links

Auto-generate prefill links

Hosted URL prefix for your prefill forms:  
(optional)

https://sandbox.formstack.io/

Select the field you want to populate for  
new records:

Application Link

Apply settings to records that will be  
created from new submissions:

Apply for New Records

Select which existing records you want  
to update: (optional)

-- Select a view --

Update Existing Records

## 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=xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx&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).

Show Form

Filter and search fields

HU Application

OK

Name

ADD

Result

Update

Filter statuses: all

Name	Form	Objects	Submission Date	IP Address	E Sign	Status	Record
<a href="#">FS-0017</a>	HU Application	Lead	03/22/2023 01:14 PM	76.140.35.246			<a href="#">f</a>
<a href="#">FS-0016</a>	HU Application	Lead	03/19/2023 04:02 PM	75.248.133.249			<a href="#">f</a>
<a href="#">FS-0015</a>	HU Application	Lead	03/14/2023 02:46 PM	96.255.9.81			<a href="#">f</a>
<a href="#">FS-0014</a>	HU Application	Lead	03/14/2023 02:25 PM	96.255.9.81			<a href="#">f</a>
<a href="#">FS-0013</a>	HU Application	Lead	03/14/2023 02:19 PM	96.255.9.81			<a href="#">f</a>
<a href="#">FS-0012</a>	HU Application	Lead	03/14/2023 02:13 PM	96.255.9.81			<a href="#">f</a>

Organization

Lead.Company

txt

Not Applicable

Lead Type

Lead.Lead\_Type\_\_c

Student

Lead Source

Lead.LeadSource

Website

Status

Lead.Status

New

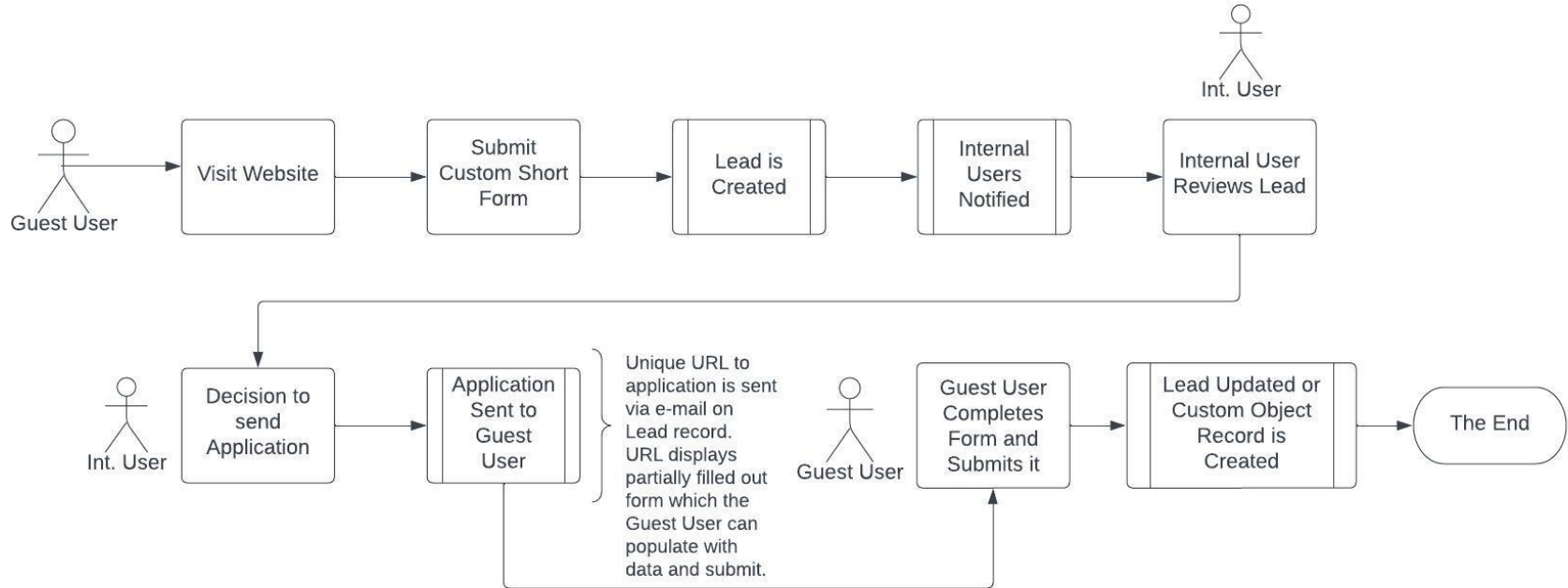
Message

Lead.Message\_\_c

txt

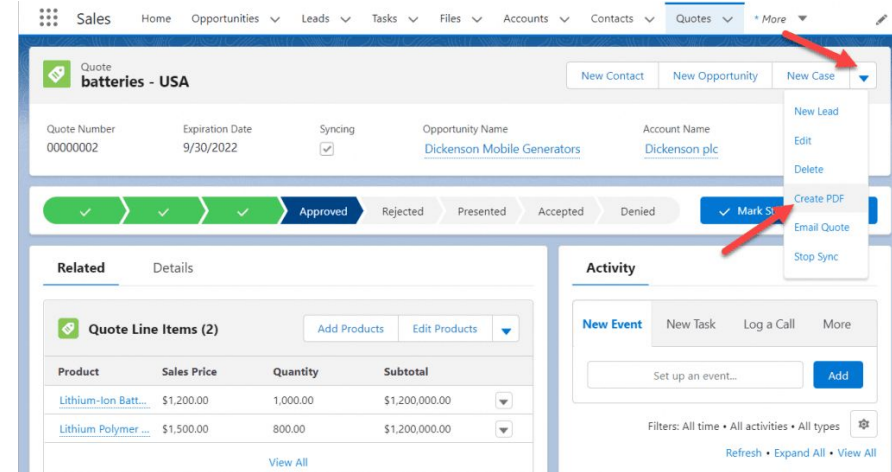
Website submission.

# 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](#)

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!

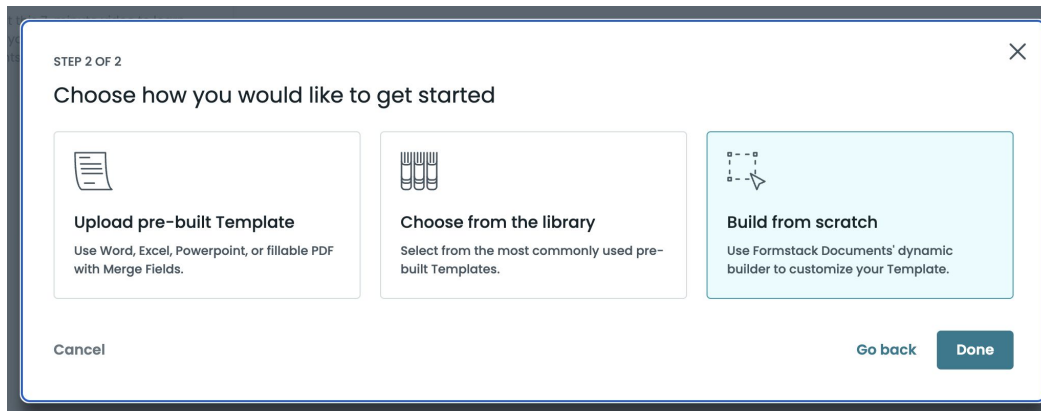
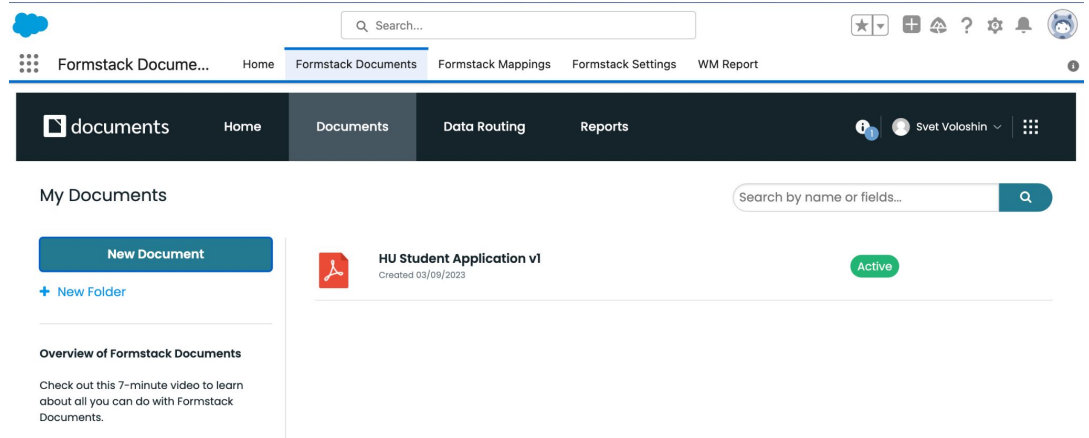
Get It Now

More ▾

- 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

The screenshot displays the Formstack Doc Gen interface. At the top, a navigation bar includes 'documents', 'Home', 'Documents', 'Data Routing', and 'Reports'. The user 'Svet Voloshin' is logged in. The main area is titled 'Sample App' and features tabs for 'Overview', 'Document Builder', 'Settings', 'Test', 'Deliver', and 'Merge'. The 'Document Builder' tab is active, showing a WYSIWYG editor with a toolbar for text formatting (bold, italic, underline, link, unlink, text color, background color) and a list of pre-built templates: Government Form, Application, Event Ticket, Patient Registration, Customer Letter, Sales Pitch, and Contract / Agreement. A dropdown menu at the bottom of the list shows '-- Select --'. To the right of the editor, there are buttons for 'Save & Next', 'Options' (with a dropdown menu), 'Insert', 'Switch to Advanced Mode', and '+ More Options'. Below the editor, there are 'Cancel', 'Go back', and 'Done' buttons. The bottom section, titled 'HU Student Application v1', has tabs for 'Overview', 'Manage File', 'Settings', 'Test', 'Deliver', and 'Merge'. The 'Manage File' tab is active, showing two panels: 'Current File' and 'New Version'. The 'Current File' panel shows a download icon and a 'Click to download' link, with text indicating the file was last updated on 03/23/2023 at 12:35pm and is named 'Sales Proposal (SIMPLE)-2-1.docx'. The 'New Version' panel shows an 'Edit in Office Online' button and an 'Upload File' button, with text indicating the file format is DOCX. To the right of these panels, there is a section titled 'Manage Uploaded File' with text explaining that the left panel shows the uploaded DOCX document and that users can click the button below to download the current file. At the bottom right, there is a 'Version History' button.



# 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}`

The screenshot shows a Microsoft Word document titled "HU Student Application v1 - Saved to WebMerge". The ribbon includes File, Home, Insert, Layout, References, Review, View, and Help. The document content is as follows:


**Section 1 | PERSONAL INFORMATION**  
List your name exactly as it appears on your passport

Name	{Name}	<b>U.S.-based Address</b> (for individuals already living/staying in the US)	
Gender: Male Female	{Gender__c}	Street	{Current_Address__c}
Home Phone Number	{Phone}	City	{Current_City__c}
Cell Phone Number	{Current_Phone__c}	State	{Current_Province_Region__c}
E-Mail Address	{Email}	Zip Code	{Current_Zip_Code__c}
		Passport Number	{Passport_No__c}
		<b>Permanent Foreign Address</b> (non-US address to be included on I-20)	
City of Birth	{City_of_Birth__c}	Street	{Street}
Country of Birth	{Country_of_Birth__c}	City	{City}
Country of Citizenship	{Country_of_Citizenship__c}	Province/State	{State}
Date of Birth (month/date/year)	{Birthdate_month_day_year__c}	Pin Code	{PostalCode}
		Country	{Country}
Select your current visa status:			{Visa_Status__c}
If you hold an F1 visa, what is the current status of your SEVIS record?			{SEVIS_Record__c}

Footer: 1

# 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  
a1d2300000RfrAAC

Mapping Name

Description

Salesforce Object

Formstack Resource  
☐ Document ☒ Route

Select a Route \*

Optional Settings  
☐ Run in Test Mode  
☐ Run in Batch Mode (process document behind-the-scenes)  
☒ 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	<input type="text" value="Full Name"/>
Current_Address__c	<input type="text" value="Current/Alternate Address"/>
Gender__c	<input type="text" value="Gender"/>
Current_City__c	<input type="text" value="Current/Alternate City"/>
Phone	<input type="text" value="Phone (Form)"/>
Current_Province_Region__c	<input type="text" value="Current/Alternate Province"/>
Current_Phone__c	<input type="text" value="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.

Lead - Application

Overview

Rules

Settings

Deliver

Merge

## Rule 1

✕ Delete

Send data to Document:

Sample App

Repeat this rule using the field (array):

{Customers}, {client.reviews}, etc (must be an array)

⚙ Add condition

☒ Include in combined  
PDF

☒ Repeat this rule

## Rule 2

✕ Delete

Send data to Document:

{NEILON\_\_File\_Presigned\_URL\_\_c}

Repeat this rule using the field (array):

{Files}

⚙ Add condition

☒ Include in combined  
PDF

☒ Repeat this rule

# 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

Lead - Application

Overview Rules Settings Deliver Merge

### Merge History



### Recent Merges

	6 documents 03/14/2023 2:47 PM (test) Complete
	13 documents 03/14/2023 2:44 PM (test) Complete
	12 documents 03/14/2023 2:44 PM (test) Download Files Complete
	12 documents 03/14/2023 2:28 PM (test) Complete
	11 documents 03/14/2023 2:28 PM (test) Download Files Complete

## Reports

Merge Overview

Recent Merges

### Recent Merges

Customize Report:

Update Report

Export

Delete

Date:

02/01/2023

04/01/2023

View:

☒ All ☐ Documents

☐ Data Routes

Status:

All

User:

All

Document	Status
<a href="#">Lead - Application</a> 6 documents 03/14/2023 2:47 PM	Complete
<a href="#">HU Student Application v1</a> HU Student Application v1 -- Test User.pdf 03/14/2023 2:47 PM	Download Complete (IP Address: 44.238.71.140)
<a href="#">Lead - Application</a> 13 documents 03/14/2023 2:44 PM	Complete
<a href="#">Lead - Application</a> 12 documents 03/14/2023 2:44 PM	Download Files Complete
<a href="#">HU Student Application v1</a> HU Student Application v1 -- Bauer.pdf 03/14/2023 2:44 PM	Download Complete (IP Address: 35.161.145.189)
<a href="#">Lead - Application</a> 12 documents 03/14/2023 2:28 PM	Complete

# 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](#)

Date

1 A PDF copy of this completed signed form will be attached to your form's primary object record. [Learn More](#)

Signature Type ☒ Full Name ☐ Initials

Signature Options: ☒ Typed ☐ Drawn ☐ Both

Signature Label

Include Date ☒

Date Label

Include Email Verification ☐

Show 'I agree' checkbox ☐


New Client Agreement -- ABC Company (2).pdf - Adobe Reader

File Edit View Window Help

3 / 3 96% Tools Sign Comment

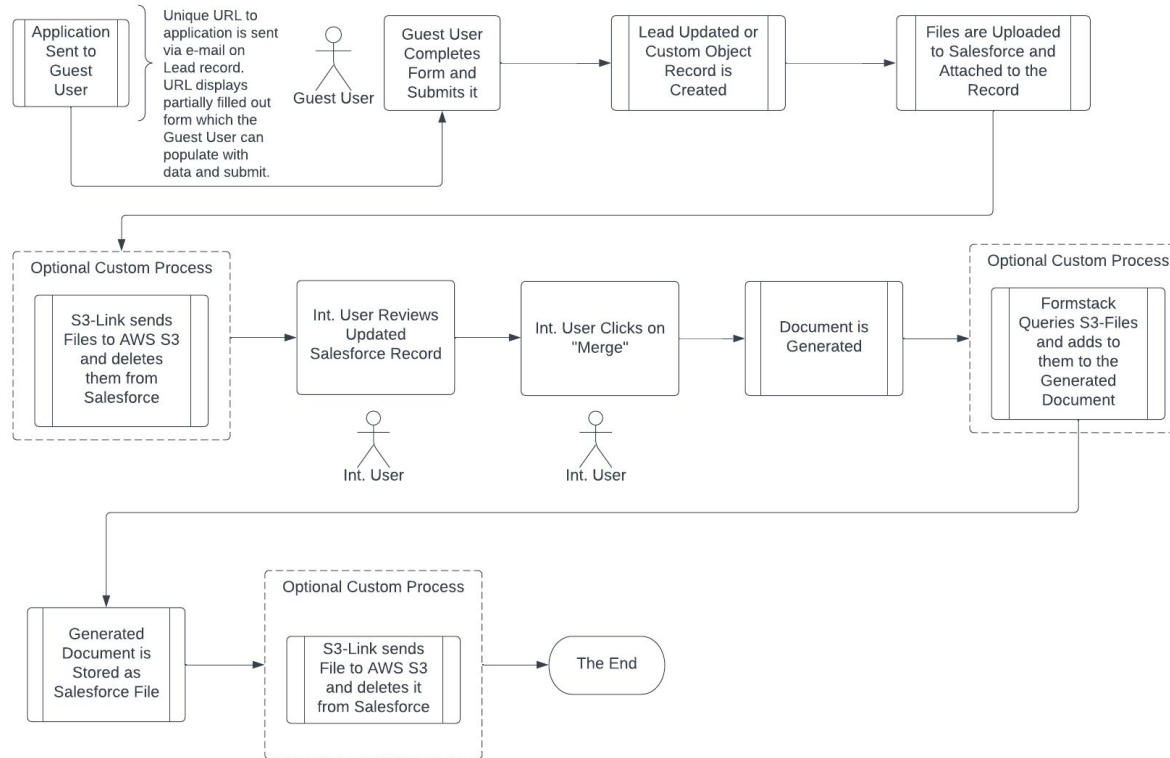
**Signing the Contract**

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date indicated below:



John Smith, President, Client

# 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

