

Salesforce Forms & Surveys

CONNECTED TO ANY SALESFORCE OBJECT

salesforce

Automate the way you collect data
and run your business operations

Table of Contents

ABOUT US

About 123FormBuilder	03
How do 123FormBuilder and Salesforce work together?	04

INDUSTRIES & USE CASES

Healthcare	06
Financial	08
Manufacturing	10
Events & Trainings	12
Nonprofit Organizations	14
Travel, Transport & Hospitality	16
Government & Public Institutions	18

FEATURES & BENEFITS

Web-to-Anything	21
Dynamic Prefill (real-time & URL prefill)	24
Document Generation	26
123FormBuilder & Salesforce Community Forms	28
Form Migration	30

Table of Contents

Extend Your Data Collection Process	32
-------------------------------------	----

CUSTOMER STORIES

Testimonials	35
--------------	----

PGA European Tour and 123FormBuilder - Optimizing Event Management for Success	36
--	----

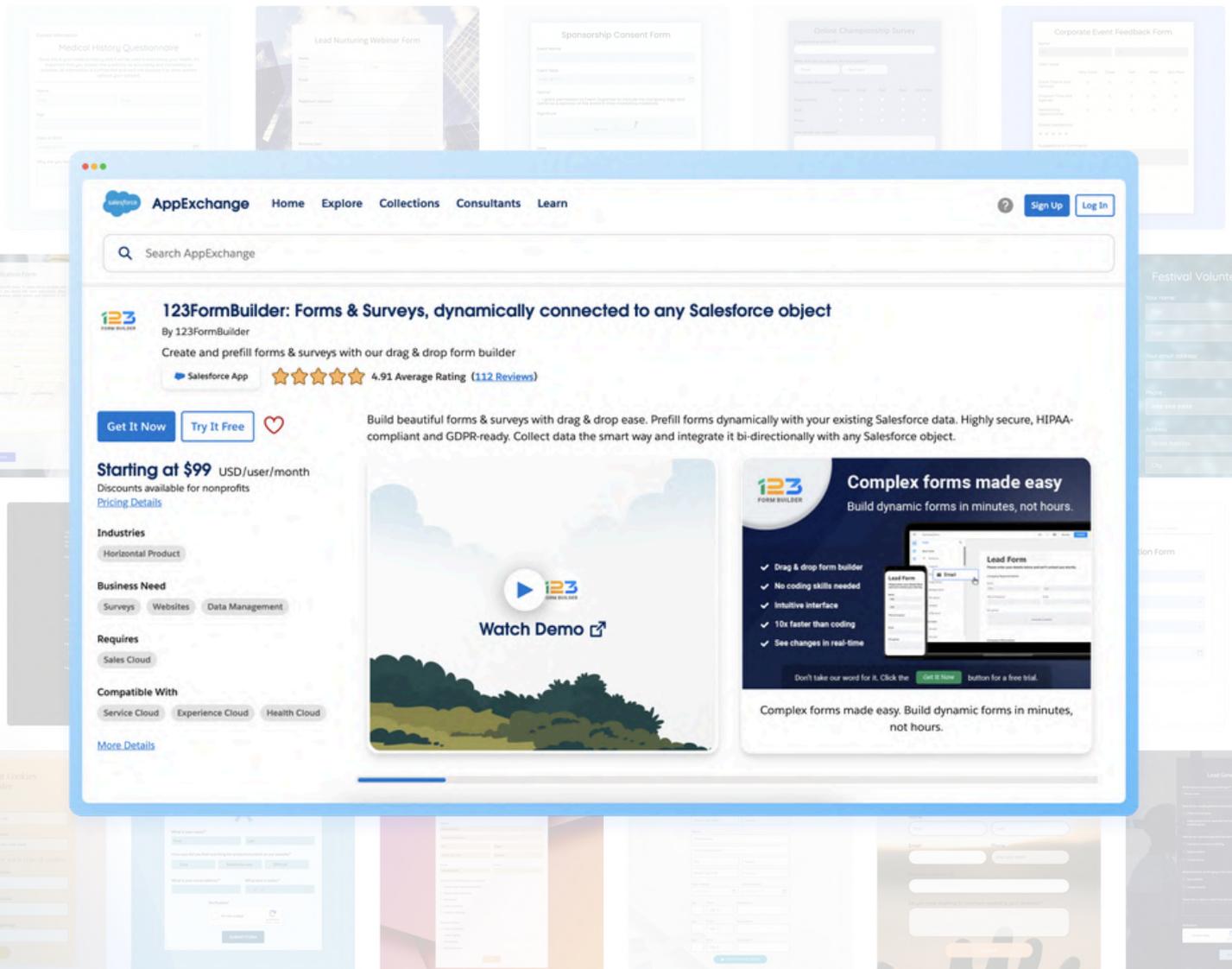
Transforming Non-Profit Operations: Great Jobs KC's Journey with 123FormBuilder and Salesforce	37
--	----

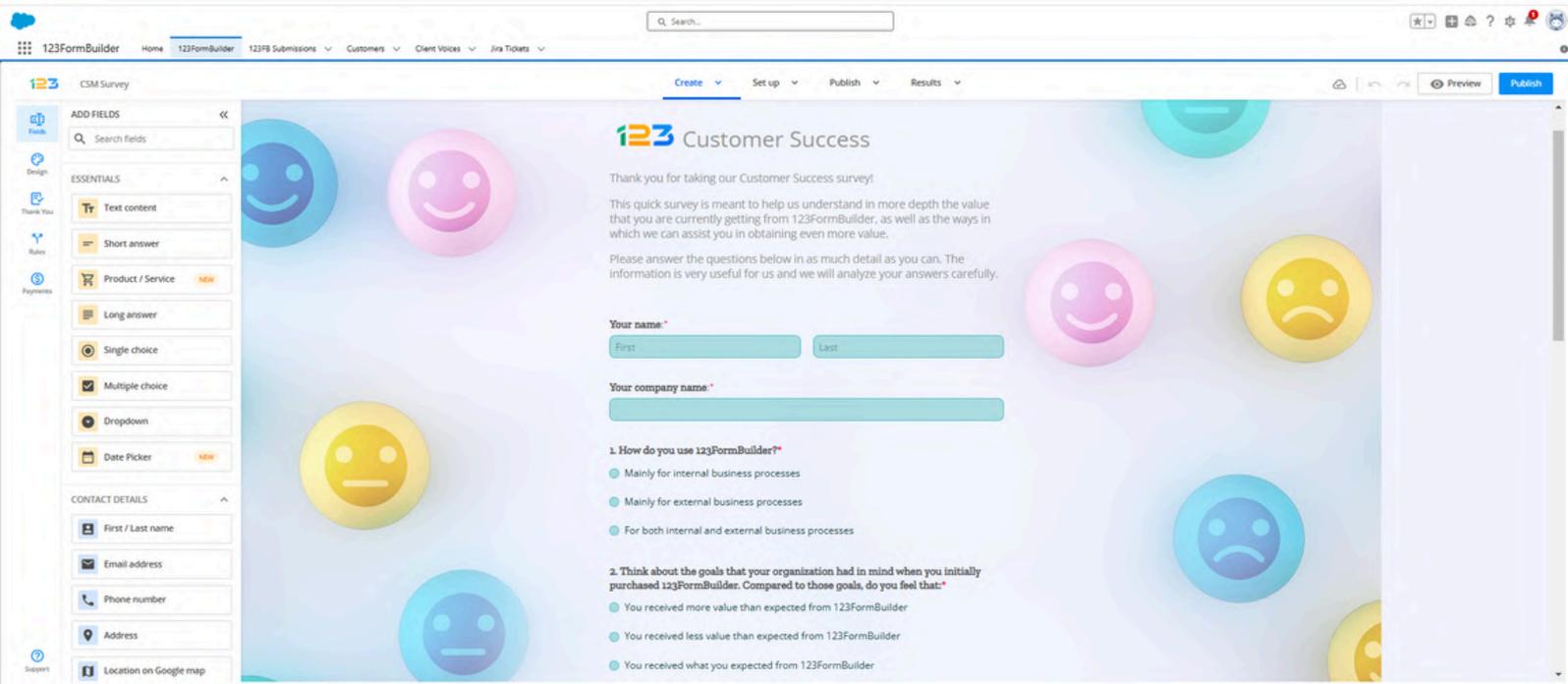
Streamlining Festival Management with 123FormBuilder and Salesforce: Winter Film Festival	39
---	----

About 123FormBuilder

123FormBuilder is a product with over 10 years of experience on the market and a Salesforce ISV partner. We are here to empower people who need to collect, manage and communicate their data across different systems, enable growth in various types of organizations and industries, and automate business processes.

The form building platform is designed to help you build a wide range of online forms, surveys and quizzes, through a user-friendly interface and 3,000+ form templates.





HOW DO 123FORMBUILDER AND SALESFORCE WORK TOGETHER?

The 123FormBuilder - Salesforce integration helps users collect and manage their data in a faster and more efficient way.

You can create and update records in standard or custom objects, prefill form fields with existing Salesforce data, generate documents, and do a lot more!

Access 123FormBuilder in the Salesforce AppExchange, and install the Lightning-Ready app in your Salesforce org.

Sign up for a free trial and follow the simple installation steps to get started.



INDUSTRIES & USE CASES



Healthcare



Financial



Manufacturing



NPOs



Government & Public Institutions



IT & Software



Healthcare

INDUSTRIES & USE CASES

HEALTHCARE

Transforming Patient Interactions with Secure Forms

- Allow patients to update the personal information stored in their medical records inside the Health Cloud.
- Prefill form fields with the patient data pulled from different related objects based on the Patient ID.
- Enable patient record updates in a highly secure environment with forms that comply to the Health Insurance Portability and Accountability Act.



Step 1

Data review triggered from the patient record



Step 2

Patient ID used to prefill form with existing data



Step 3

Updated data provided by the patient



Step 4

All updates pushed back to the Health Cloud



Step 5

PDF document attached to the record



Financial

INDUSTRIES & USE CASES

FINANCIAL

Driving Data Efficiency in Finance Operations

- Collect financial information securely and push it to your Financial Services Cloud, to update existing records or to create new ones.
- Create quotes, invoices, purchase orders, packing slips and any other supporting documents.
- Automate financial workflows in which multiple parties are involved, gather signatures and keep everybody in the loop.



Step 1

Suppliers and buyers eligibility check



Step 2

Registration process



Step 3

Invoices uploaded through the form



Step 4

All data sent to the Financial Services Cloud



Step 5

Notification routing



Manufacturing

INDUSTRIES & USE CASES

MANUFACTURING

Data-Driven Solutions for Smarter Manufacturing

- Collect and manage production data seamlessly, updating your manufacturing system with work orders, production schedules, and inventory lists.
- Streamline maintenance requests and service orders by automatically pushing them to your CRM, ensuring prompt notifications and task tracking for all stakeholders.
- Gain real-time insights into production metrics and customer feedback, enabling informed decisions that enhance operational efficiency.



Step 1

Inquiry Submission



Step 2

Submitted inquiries are automatically logged in Salesforce



Step 3

Support Ticket Creation in Salesforce



Step 4

Real-Time Notifications



Step 5

Resolution Tracking and Feedback



Events & Trainings

INDUSTRIES & USE CASES

EVENTS & TRAININGS

Streamlined Data for Memorable Experiences

- Gather new leads at events through mobile and offline lead generation forms, branded with your own identity.
- Digitize feedback surveys to automate data collection and data reporting.
- Automate complex end-to-end processes in which your Salesforce data is the central piece.



Step 1

New training event created in Salesforce



Step 2

Feedback survey sent automatically



Step 3

Feedback collected at the end of the event



Step 4

Reporting on data done in real time



Step 5

All data pushed to Salesforce



Nonprofit Organizations

INDUSTRIES & USE CASES

NONPROFIT ORGANIZATIONS

Data Solutions for Nonprofit Growth and Outreach

- Gather new leads at events through mobile and offline lead generation forms, branded with your own identity.
- Digitize feedback surveys to automate data collection and data reporting.
- Automate complex end-to-end processes in which your Salesforce data is the central piece.



Step 1

Design a friendly registration form



Step 2

Have volunteers register themselves



Step 3

Push all information into Salesforce



Step 4

Send onboarding materials automatically



Travel, Transport & Hospitality

INDUSTRIES & USE CASES

TRAVEL, TRANSPORT AND HOSPITALITY

Enhancing Guest Experiences with Effortless Data Collection

- Simplify the booking process for customers who are looking to schedule their next trip.
- Easily collect data from the guests who are arriving at your property and send it to Salesforce.
- Have real-time visibility over your customers' booking and visit status.



Step 1

Person books a trip through your form



Step 2

Collected data is pushed to your Salesforce records



Step 3

Booking details are automatically sent to the customer



Step 4

Travel agent is notified and starts processing the booking



Government & Public Institutions

INDUSTRIES & USE CASES

GOVERNMENT & PUBLIC INSTITUTIONS

Data Solutions for Transparent and Accessible Governance

- Transform your paper-based data collection processes into digitized end-to-end workflows.
- Collect data in a quick and streamlined way and have all information centralized in one place.
- Simplify communication between public institutions and citizens through forms integrated with Salesforce Communities.



Step 1

Build and brand your digital forms



Step 2

Collect data from citizens



Step 3

Push information into Salesforce



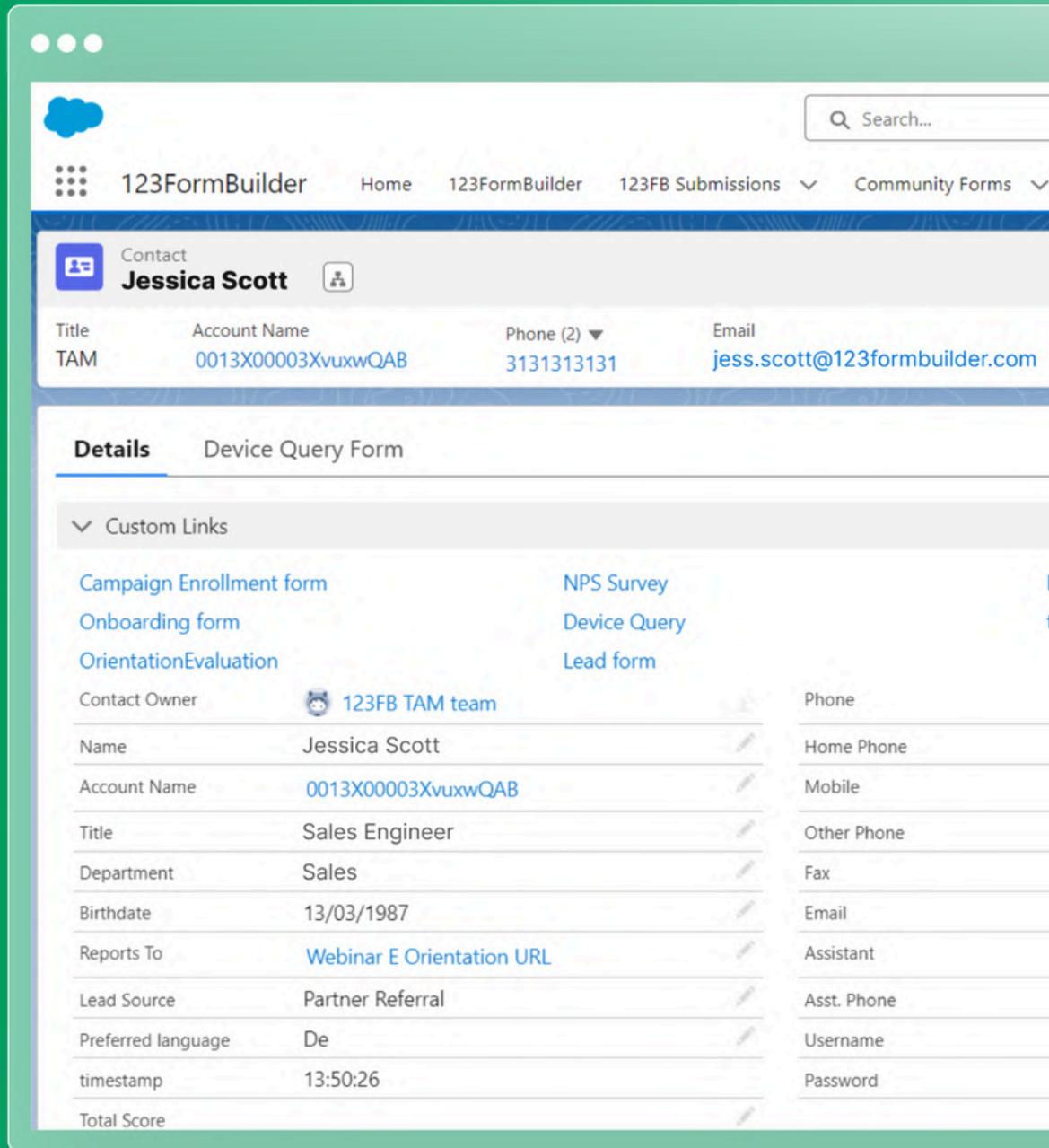
Step 4

Keep citizens updated on their request status



Step 5

Route information to the right people



FEATURES & BENEFITS

Web-to-Anything

Create and update records in any Salesforce standard and custom object. Use standard and custom fields, related objects, attachments and files, lookups with multiple filters, conditional logic and more.



Lead Generation Forms

With 123FormBuilder you can easily capture new leads in both online and offline mode, and personalize every element of the lead generation forms. This way, your sales process will attract and convert more visitors. Your field agents will also be able to capture more leads, in a faster way, right from their mobile devices, as well as handle different lead opportunities at the same time.

Lead Generation Survey

Which department are you working in?*

Please select

How do you usually generate new leads?*

CRM entry by hand Marketing automation tool

Separate lead capture forms Other:

How do you typically approach lead generation?*

Interactive content marketing Event or webinar registration

Gated content Other:

Contact forms

Which channels are bringing in the most leads for the team?*

Social Media Email marketing

Google Awards Other:

Please tell us about a recent lead generation campaign in your department.*

Verification*

I'm not a robot 

reCAPTCHA
Privacy - Terms

SUBMIT FORM



Forms that update existing Accounts with new Contacts

When visiting your clients, you are collecting different types of information, either for existing Accounts or for new ones.

123FormBuilder for Salesforce allows you to easily keep your client records updated.

Existing information from Accounts and Contacts that you already have can automatically be prefilled inside your form. This way, you can have at hand all the info that matters and provide new details gathered during your on-field visits.

Client Record Form

Please fill in the required information.

Client's Name

Date of Birth

Email

Phone

Address

Verification*

 I'm not a robot 
reCAPTCHA
Privacy - Terms



Partnership Agreement Form

Efficient data collection for enterprises and institutions is needed in order to deal with complex organizational structures and large amounts of data.

Automate time-consuming processes and make them part of automated workflows that optimize your operations even more. You can easily capture digital signatures, generate official documents and route them to the parties involved.

Partnership Agreement Form

Partner 1 Name*

First Last

Partner 2 Name*

First Last

Partnership Name and Purpose*

Terms of Agreement*
State the terms that will guide and conduct this partnership agreement

The following partnership agreement form should be used following the local and national norms that govern partnership agreements. Any change inquiries to the partnership agreement need to be accompanied by a change request form two weeks before each monthly audit.

This partnership agreement form is valid through the following term*

DD/MM/YYYY 

Partners contribution*

Partner 1 **Partner 2**

Verification*

I'm not a robot 
reCAPTCHA
Privacy - Terms

Dynamic Prefill (Real-Time & URL Prefilling)

Our dynamic prefill feature enables the automated self-customization of forms, based on your existing Salesforce data.

A single form allows you to pull Salesforce data, view and edit it, and have all new information pushed right back into Salesforce.

The prefilling of forms can be achieved either through custom form URLs or in real time, as the user types or makes selectors inside the form.

WHAT YOU CAN DO USING FORMS PREFILLED IN REAL TIME?



On-site Client Visits

Empower field agents to automatically pull existing client data and update it in real time during a client visit.



Salesforce Community Forms

Prefill embedded forms with the data that you already have about Community members, and make their experience remarkable.



Authentication Systems

Build a mini-authentication system and prefill forms only when the username and password match an existing Salesforce record.

https://salesforce.123formbuilder.com/form-5820450/?eID=0033X00004HwX1v

Language: English

01. About my agency

02. Orientation Evaluation



Staff Orientation Evaluation

Your Employee Name*

Martin

Green

Employee ID

CWRU# 00000828

Department

Marketing

Job title

Marketing Specialist

Date of hire/transfer

08/01/2023

Supervisor Name

Jen

Ben

Date orientation ends

10/30/2023

Employee Email

martin@123formbuilder.com

Employee Contact ID

0033X00004HwX1vQAC

Supervisor Contact ID

0033X00004FN7qQAG

Supervisor Email

ben@wssdf.com

Email address

Review period

1 month 2 months 3 months Extension

Form is completed by:

Employee Supervisor

Verification*

I'm not a robot



Previous

Save for later

SUBMIT FORM

Real-time Prefill

URL Prefill Record

123FormBuilder Home 123FormBuilder 123FB Submissions Community Forms Schools Custom Objects Reviews JuliacOS Donations

15.1 CWRU - Staff Orientation Evaluation - URL prefill...

Create Set up Publish Results

Form Prefilling

Employee details

Triggers: Please select

Load data: When the form is loaded

Prevent data load in memory:

Map form fields with your Salesforce fields:

Form Fields	Salesforce Fields
Your Employee Name - First Name	First Name
Your Employee Name - Last Name	Last Name
Department	Department
Date of hire/transfer	Date of hire
Date orientation ends	Date orientation ends
job title	job Title
Supervisor Contact ID	Reports To ID
Employee ID	Employee ID
Employee Contact ID	Contact ID
Employee Email	Email

+ Add new mapping

The form URL that you need to use is:
https://salesforce.123formbuilder.com/form-5820450/?eID=your_value

WHAT CAN YOU DO USING FORMS PREFILLED THROUGH **CUSTOM URLS**?



Events & Fundraising

Simplify registration through Salesforce email templates containing custom URLs.



Healthcare

Update patient medical records with ease during a medical examination or home visit.



Marketing & Sales

Generate personalized quotes that are prefilled with previous client data from your Salesforce org.

Document Generation

Every organization is similar to a puzzle, made of different pieces and processes that are working together in order to accomplish a goal. The bigger the company, the more difficult it becomes to synchronize each activity, improve certain processes, and automate the generation of documents.

Create, automate and customize documents, contracts or business agreements. Decrease the risk of human errors and time-intensive administrative tasks across various industries, and company departments.

Use forms that serve as document templates, merge them with your Salesforce data, provide new information, and generate documents that get routed for signatures to the right persons, and then get pushed back to Salesforce.

1

HEALTHCARE

Secure the authorization for disclosure of PHI

Automatically generate an authorization agreement for disclosure of patient health information, for your patients or other organizations that might request it during a special case.

2

INSURANCE

Automate the request process for insurance authorization

Provide your clients with an online authorization form that they can fill out in minutes, and simply generate the agreement once they submit the information.

3

REAL ESTATE

Simplify the verification process for online rental

Use online forms to create records of your tenants' history, store their data inside Salesforce and generate rental contracts.

123FormBuilder & Salesforce Communities

As a Salesforce user or system integrator, you have most likely heard about or are already using Salesforce communities. Here is a quick overview of how communities and online forms can blend together, in order to empower your data collection processes and to improve the user experience of your community members.

The 123FormBuilder - Salesforce Community Cloud integration allows you to prefill community forms in real time with existing member data, create and update standard and custom objects, generate documents, route notifications and design your community forms to accommodate any business and administrative needs.

BENEFITS



Quickly set up online communities with drag-and-drop Salesforce components and a friendly form building editor.



Easily collect various types of data from your community members and integrate it with third-party systems.



Personalize the user experience of your members with the right form templates and community themes.



Upload, share and store documents and media files in the same place, in order to make them easily accessible.



Increase community engagement by prefilling community forms with existing user data from your Salesforce org.



Gather digital signatures from the right people, and generate documents right from your Salesforce community.

COMMUNITY FORMS FOR DIFFERENT INDUSTRIES



Healthcare

Patient community with registration forms and medical history records

1

Financial

Internal portal for insurance agents



Government

Process automation & form digitization in public institutions

3

Education

Students portal with college admissions, grant applications, alumni section



Retail

Customer portal with member profiles and order management

5

HR

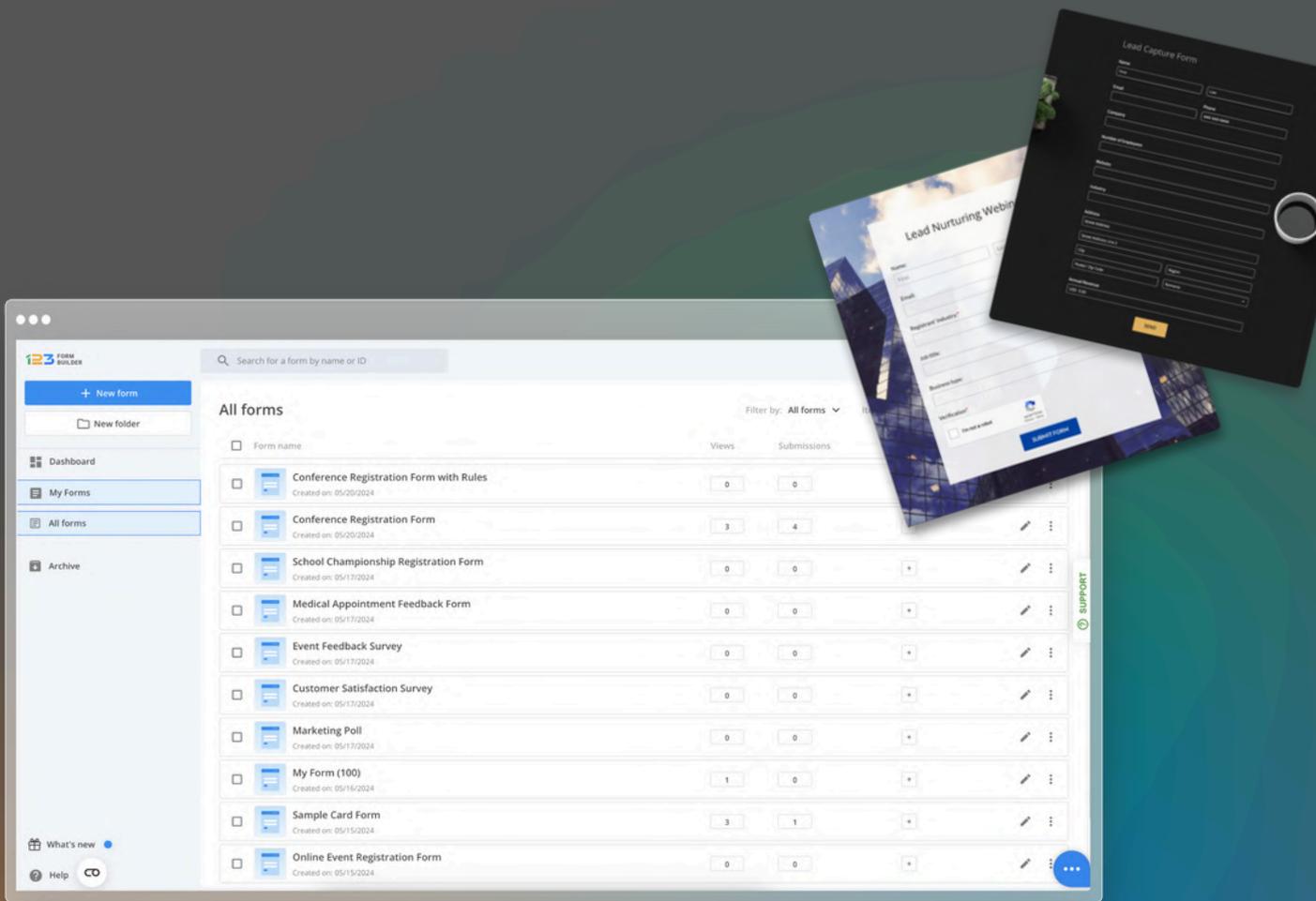
Employee community for internal collaboration



NPOs

Volunteer portal for sharing resources

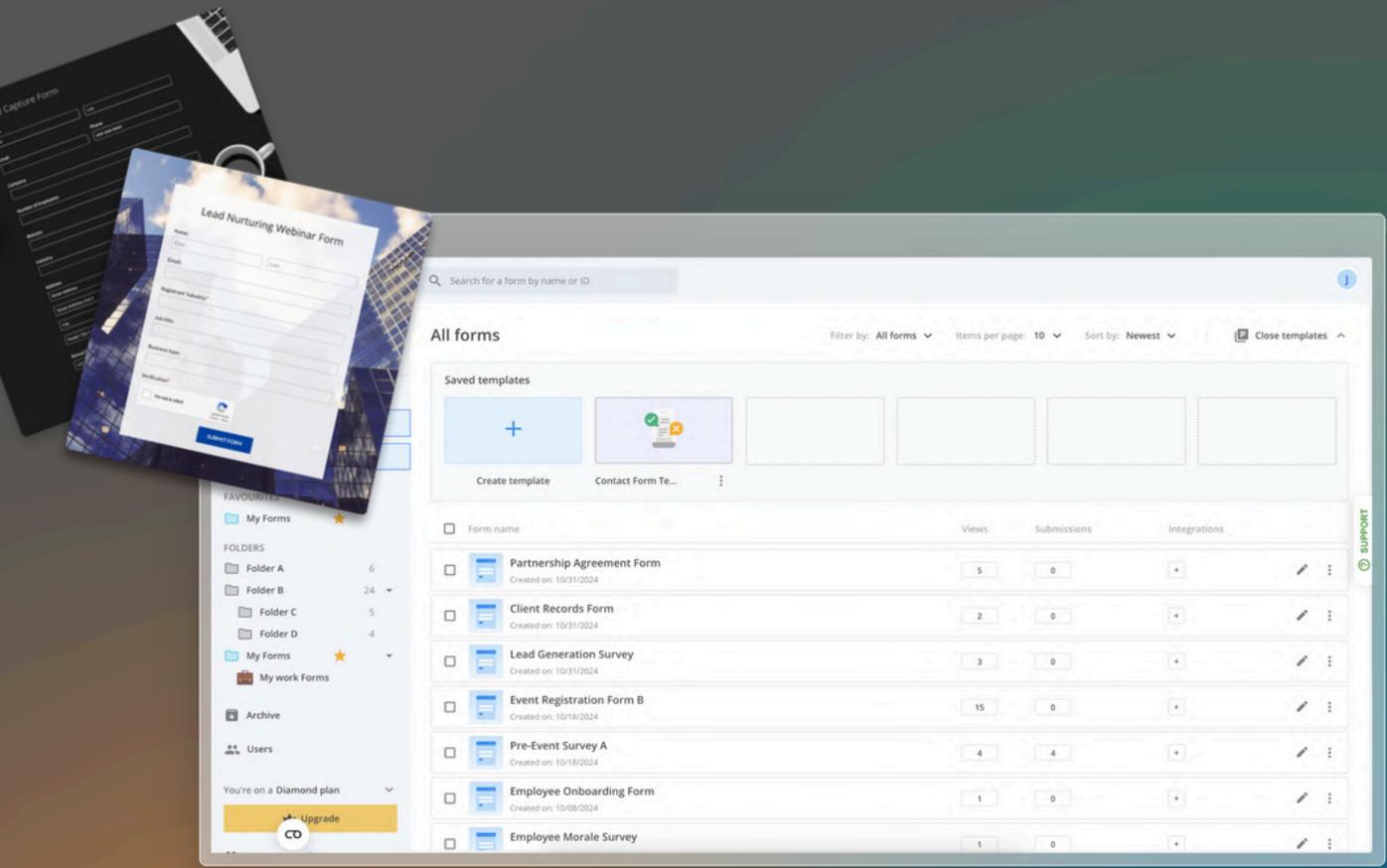
7



Form Migration

Different scenarios may require you to transfer a form from one Salesforce org to another one.

For example, after you have completed setting everything up in your Sandbox org, you need to turn to your Production environment. Or if you are a consultant and are preparing the Salesforce implementation for a customer, you need to turn everything in live production at the end.



The steps required for this process are simple.

Firstly, you pick the form you want to move, go to the org in which you want to migrate the form and generate a migration code.

You establish the code availability for the time frame you have specified and copy the code in the original org.

Once you copy the code, the form will be transferred to the new org.

Extend Your Data Collection Processes With More Functionalities

DIGITIZE PAPER FORMS

Scan or take a picture of your existing paper forms and quickly import them into 123FormBuilder dashboard to start collecting data online.

BUILD ONLINE FORMS EASILY

Start creating online forms by using one of our templates or directly from scratch by simply dragging elements onto the form.

DATA ROUTING

Keep your employees and team members in the loop with new form submissions by creating automated notifications.

CONDITIONAL LOGIC

Collect data faster and more efficiently by displaying or hiding questions based on previous answers.

PAYMENT FORMS

Start collecting money or donations through different secure payment systems.

USER PERMISSIONS

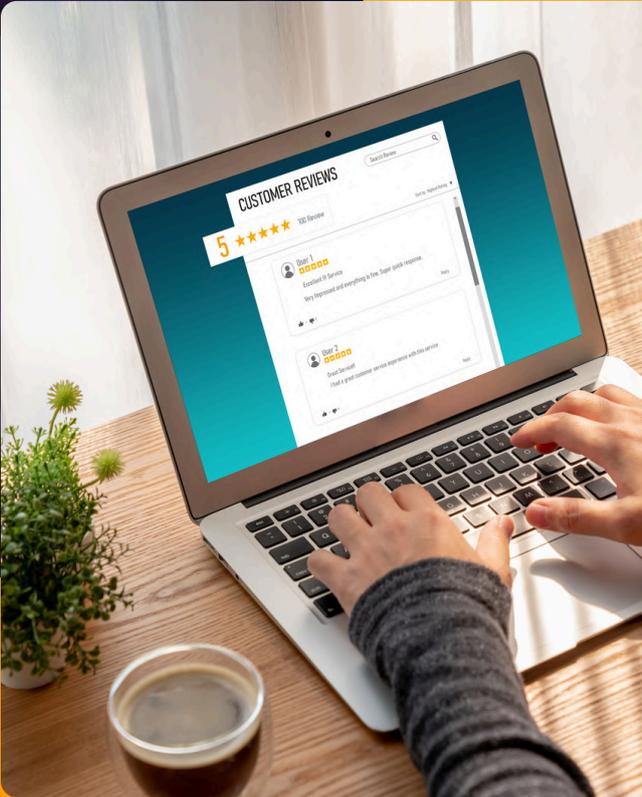
Assign forms and submissions to the right people or organize forms into folders so that each department accesses the right information.

DATA SECURITY

Create GDPR and HIPAA compliant forms and encrypt your data, in order to collect and manage information in a highly secure environment.

IMPORT EXISTING FORMS

Save time and resources by importing the forms you have been using on other platforms with a few clicks.



CUSTOMER STORIES

WHAT OUR CLIENTS SAY



Peter Rudd

CRM Admin

[PGA European Tour](#)



I love the look and feel of 123 forms. With our old document signing tool, making the forms look good was more difficult, but with 123FormBuilder, it is easy to build nice-looking forms.



Liam Laird

Marketing Associate

[Ascend Analytics](#)



Seamless Integration and lots of smart features. 123FormBuilder natively integrates with Salesforce and supports custom objects and fields, in addition to supporting lots of edge cases that would stump other form builders.



Mark Wheeler

Director

[Stratiform](#)



Stratiform is a partner of 123FormBuilder and has successfully implemented the solution for various clients, including two major NPOs in Melbourne that use it for EOI and beneficiary data collection. Highly recommended!

PGA EUROPEAN TOUR AND 123FORMBUILDER - OPTIMIZING EVENT MANAGEMENT FOR SUCCESS



The European Tour, a premier organization representing top professional golfers, has transformed its operations by moving from traditional “print, fill-out, scan, and email” forms to efficient online forms via 123FormBuilder. This digital shift has enhanced professionalism in the eyes of Tour members and improved the processing of essential information.

Solution

With 123FormBuilder, the European Tour now manages a range of operations online, including:

- Membership Applications: Simplifies joining procedures for new members.
- Tournament Entry and Registration: Eases administrative tasks for event participation.
- Player Data Consent and Caddie Details: Ensures compliance and streamlined data collection.
- Qualifying School Entry (and payment): Makes payments and entries seamless.

Results

- Professional Appearance: Improved the Tour’s image with a sleek, digital process.
- Streamlined Data Processing: Key information is now easily handled and processed, improving administrative efficiency.
- High Engagement: Over 1,000 submissions have been received, with more anticipated as the Tour expands its digital offerings.
- Continuous Improvement: New form features are easily applied, enabling ongoing enhancements to meet changing needs.

TRANSFORMING NON-PROFIT OPERATIONS: GREAT JOBS KC'S JOURNEY WITH 123FORMBUILDER AND SALESFORCE



Great Jobs KC, a non-profit offering scholarships and job training, transformed its operations by integrating 123FormBuilder with Salesforce. This case study highlights how the organization streamlined its growing application process and improved engagement with applicants and staff.

Solution

With the help of Dupont Circle Solutions, Great Jobs KC implemented 123FormBuilder to manage scholarships and job training applications. Key features include:

- Application Forms: Simplified application process.
- Pre-filled Data: Reduced redundancy for applicants.
- Surveys: Engaged Scholars and staff with feedback tools.
- Salesforce Integration: Centralized data for better tracking.

Results

- 9,500 Monthly Submissions: Efficient handling of growing demand.
- Streamlined Operations: Reduced administrative burden.
- Enhanced Engagement: Continuous feedback and improved community connection.
- Scalability: Adapted to the organization's growth needs.

By integrating 123FormBuilder with Salesforce, Great Jobs KC enhanced efficiency, scalability, and engagement, empowering the organization to focus on its mission.

STREAMLINING FESTIVAL MANAGEMENT WITH 123FORMBUILDER AND SALESFORCE: WINTER FILM FESTIVAL CASE STUDY



The Winter Film Festival manages over 3,000 film submissions annually, alongside volunteer sign-ups, judging, and event attendance. To handle this efficiently, they turned to 123FormBuilder integrated with Salesforce, automating key processes and reducing administrative burden.

Key Features and Benefits

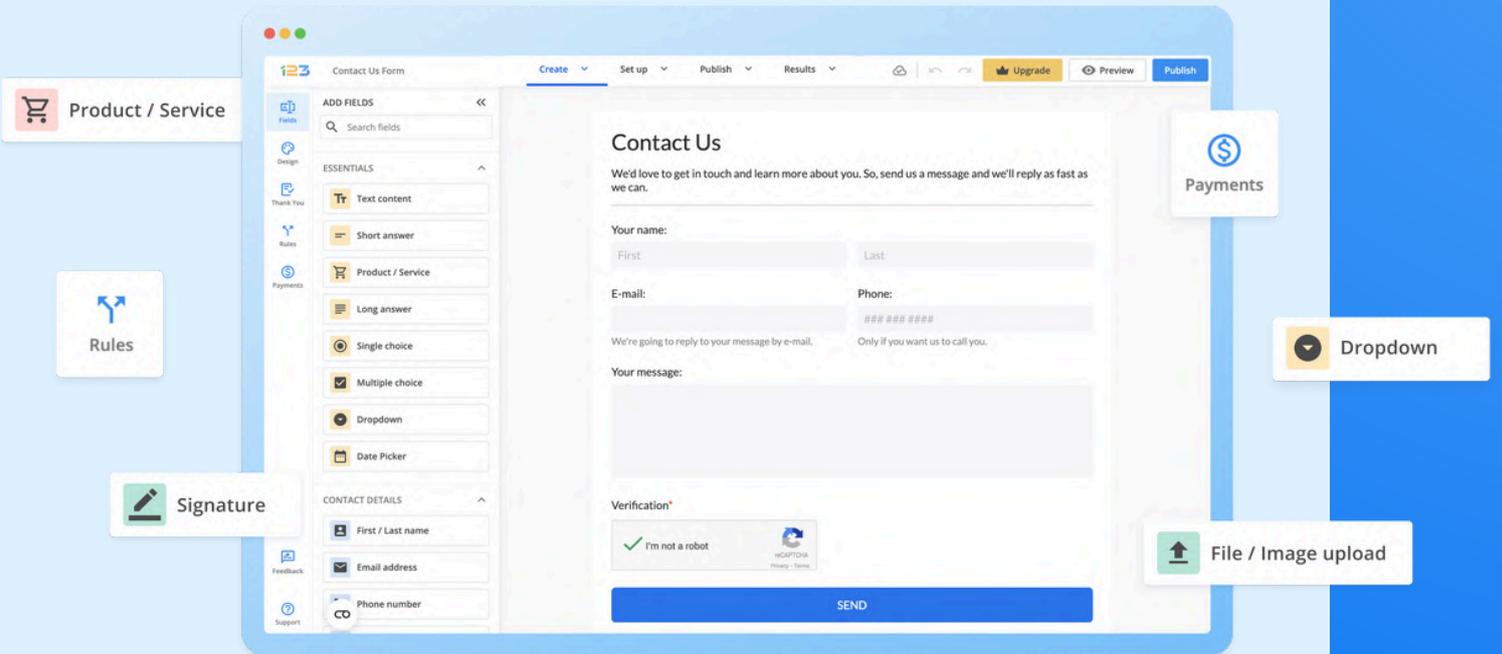
- **Film Management:** Filmmakers submit details through forms, streamlining event scheduling and communications.
- **Judging Submissions:** Secure forms allow 50+ judges to easily review and score films.
- **Salesforce Integration:** Automatically updates 200,000+ responses annually, reducing manual data entry.
- **Efficiency:** Automation frees the team to focus on event production, eliminating errors from manual uploads.
- **Data Security & Scalability:** Secure, scalable forms handle high volumes during peak months.

In conclusion, the Winter Film Festival uses 123FormBuilder integrated with Salesforce to organize the entire festival. This single solution automates submissions and judging, reducing administrative burdens and allowing the team to focus on creating a memorable event.



Trusted by 35,000+ clients, in all industries





Contact us for further inquiries

Get in Touch