

# Add a Connector Step

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### Introduction

The Connector Step allows you to exchange data between forms in your workflow and external sources.

You can edit or delete a connector by selecting it on the Map and opening the **Properties** panel with the **configure (cog) icon**.

The screenshot displays the 'Applicant Workflow' interface. On the left, a workflow map shows a 'CONNECTOR' step labeled 'Google Sheets' with a cog icon for configuration. Below it is an 'Add Step' button. On the right, the 'Google Sheets Connector Properties' panel is open, showing the 'DESCRIPTION' tab. The 'STEP TYPE' is 'Google Sheets', the 'STEP NAME' is 'Google Sheets', and the 'STEP DESCRIPTION' is 'Send data to a sheet'. The panel also has an 'AUTHORIZATION' tab and a 'Save' button.

**Note:** If you change the form associated with the connector in your workflow or change the type of connector in the Properties Panel, **the connector configuration will be lost**, and it will need to be reconfigured. We strongly recommend finalizing your forms and their arranged order on the workflow before finalizing your connectors, to avoid needing to reconfigure.

## Rules for Adding Connectors to Workflows

The position of the connector matters.

- To prefill, a step gathering prefill information must be placed before the step being prefilled.
- Connectors that submit data to your database(s) will be tied to the form you set in the Configure tab, and should be placed after this form step, as well as any additional steps where data is collected and processed for this connector.

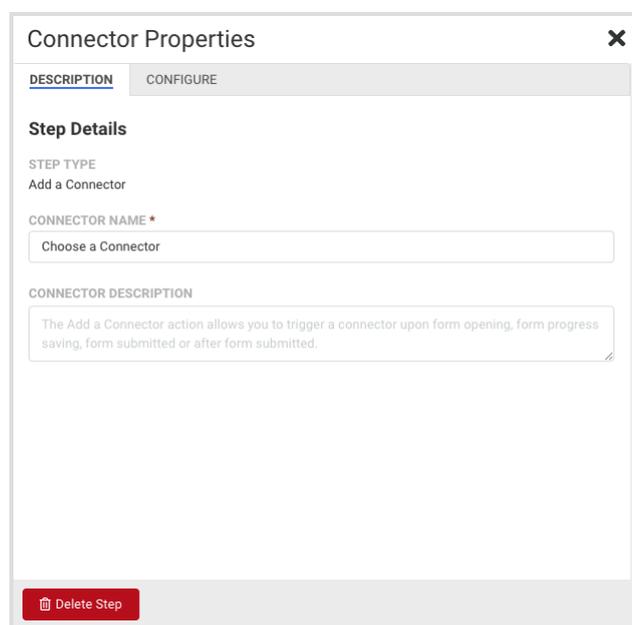
- If a connector is tied to a form and then runs **before** the next Redirect Step (either a redirect or another form), it will notify respondents of any connector errors and will prevent submission if an error occurs.
- If a connector is tied to a form and runs **after** the next Redirect Step (either a redirect or another form), it will **not** notify respondents of any connector errors.

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## Properties Panel Configuration

Adding a connector will automatically open the Properties panel so that you can configure the step. The Properties panel for this Step contains the following tabs: **Description**, **Configure**, and **Error Handling**.

You can delete any step by opening the Properties panel for the step and clicking the red " **Delete Step**" button at the bottom.



The screenshot shows a modal window titled "Connector Properties" with a close button (X) in the top right corner. It has two tabs: "DESCRIPTION" (selected) and "CONFIGURE". Under "Step Details", there is a "STEP TYPE" section with the text "Add a Connector". Below that is a "CONNECTOR NAME" field with a red asterisk and a dropdown menu showing "Choose a Connector". Under "CONNECTOR DESCRIPTION", there is a text area containing the text: "The Add a Connector action allows you to trigger a connector upon form opening, form progress saving, form submitted or after form submitted." At the bottom left of the modal is a red button with a trash icon and the text "Delete Step".

### Description Tab

This tab handles the details of the step itself, such as the Step Name and Step Description.

- **Step Name** - This field allows you to give the step a custom name, which can help you differentiate between your steps. It has a default value of "Choose a Connector" until manually changed or until a connector is selected in the Configure tab. If a connector is selected in the Configure tab, the default name will automatically change to match the connector.
- **Step Description** - You can use this field to add a description to your step.

### Configure Tab

When you first open the Configure tab, you will see the fields **Select Form Response Action** and **Select Connector**, followed by a **Configure Connector** button. These two fields determine which form is collecting data for the connector, and which connector this step executes.

- **Select Form Response Action**
  - This field contains a dropdown menu that lists:
    - All Form Steps located above this step in the Workflow Map

- A Form Step, if it is located directly after this step (for Prefill Connectors)
- A Form Step, if this step is located **immediately before** another Prefill Connector, which is directly above the Form Step in question
- You can also use the type-ahead input to narrow down the list of available steps. The dropdown menu will list the Step Names, not the names of the forms, so please keep this in mind when setting any custom Step Names.

- **Select Connector**

- This field is disabled until the Form Step has been selected in the field above. It contains a dropdown menu that shows all available connectors for this Step. The list of connectors will be affected by the placement of the step as well. For example, you will see a list of Prefill Connectors if this step is directly above a Form Step.

The screenshot shows a 'Connector Properties' dialog box with a close button (X) in the top right. It has two tabs: 'DESCRIPTION' and 'CONFIGURE'. The 'CONFIGURE' tab is active. Under the heading 'Connectors', there is a paragraph explaining their purpose and a link to 'Learn more about connectors'. Below this are two dropdown menus: 'SELECT FORM RESPONSE ACTION \*' and 'SELECT CONNECTOR'. At the bottom of the dialog are two buttons: 'Logs' and 'Configure Connector'.

- **Configure Connector**

- This button is disabled until a connector has been selected in the above field. Clicking on this button will open a **Connector Configuration** page where you can set up your connector.

**Note:** Before clicking **Configure Connector**, you must have pop-ups **enabled** in your browser. Otherwise, you will not be able to access the correct configuration screen for your connector.

## Error Handling Tab

By default, if the connector encounters an error, the workflow terminates. To override this behavior, you can configure the error to redirect the workflow to another step by selecting a step from the **Upon Connector Error...** dropdown menu.

The screenshot shows the 'Google Sheets Connector Properties' dialog box with the 'ERROR HANDLING' tab selected. The 'Error Handling' section contains a dropdown menu labeled 'UPON CONNECTOR ERROR, GO TO THIS STEP...' with the text 'Please select a step'. Below this is a note: 'Leaving this field empty will result in the workflow terminating upon a connector error.' There is a text area for 'CUSTOM MESSAGE' and a checkbox labeled 'Include connector generated error message below your custom error'. At the bottom, there is a 'Delete Step' button.

- **Custom Message**

- You can enter plain text (no HTML) into this text area to create your custom error message. The custom error message will be shown to the respondent if they encounter an error from the connector while responding to the form. The error will be styled according to the Form Theme's "**Error Color**" option.
- You can also choose to display the connector-generated error message below your custom error by checking the checkbox below the text area. This can be helpful when the generated error messages display useful information to the respondent, such as whether a credit card payment failed. This option is **highly recommended** for Payment Connectors.

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## Prefill Connectors and Workflow

To prefill a form within a workflow, you'll first need to configure the Form Step that will be prefilled. This is because a Connector Step shows a different list of available connectors based on which Form Step it is referring to. To show Prefill Connectors, you'll need to reference a Form Step **after** the Connector Step in the Workflow Path.

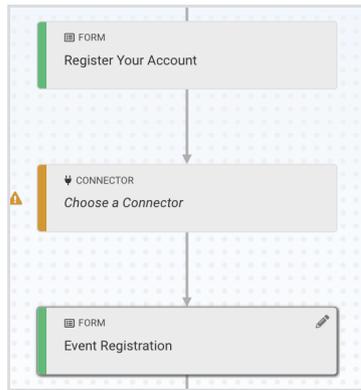
Prefill Connectors can run in one of two locations within a workflow:

1. You can run a prefill connector before a Form Step.
2. You can run a prefill connector at the start of a workflow.

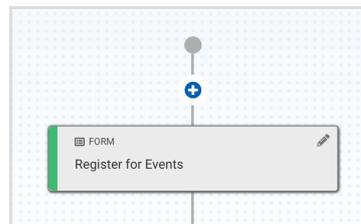
Follow the steps in the sections below to prefill one of these two locations.

### Prefilling Within a Workflow

1. Add a Form Step anywhere inside the workflow and configure the form that will be prefilled.



2. Once the Form Step has been added and configured, hover over the space above the Step in your workflow. A "+" icon will appear to add a new step.



Click on the "+" icon and then select to add a new Connector Step.

3. Under "**Select a Form Response**", choose the form that you will be prefilling.
4. Under "**Select Connector**", choose the prefill connector that you would like to run.
5. Click **Configure Connector** and set up your Prefill Connector.
6. Authenticate your Prefill Connector first.
7. Set up your Lookup.
  - Set the Salesforce field you'll be searching for on the left
  - Choose "**Equals**"
  - Set the rightmost field to "**a workflow parameter**"
8. For the **parameter**, use simple, case-sensitive text that does not contain numbers or special characters. If you've set up a Salesforce Prefill Connector before, this will function like an unsafe query parameter.

**LOOKUP #1**

Use this query to lookup a Contact record:

Email

Equals

a workflow parameter:

email

Enter the name of the query string parameter.

Enter the name of the workflow parameter. Use this parameter in the connector step properties to link this lookup to your workflow.

9. Finish setting up your Prefill Connector and **Save** before closing the configuration window.
10. Add your Workflow Parameters to the step.
  - In the Connector Properties panel, open the **Configure** tab and scroll to the bottom.
  - You'll see a section labeled Workflow Parameters.

### Workflow Parameters

If your prefill connector uses workflow parameters configure the value mapping below.  
[Learn more about Workflow Parameters.](#)

Add Parameter

- Click **Add Parameter**.
- On the left, fill the **Parameter** box with the parameter that you set for your Prefill Connector Lookup (step 8).
- On the right, you can use the **Formula Editor** in the **Value** box to create a formula or select a field from a previous form. This value will be your **search value**. The Lookup will search Salesforce for records where the **parameter** field matches the **search value**.

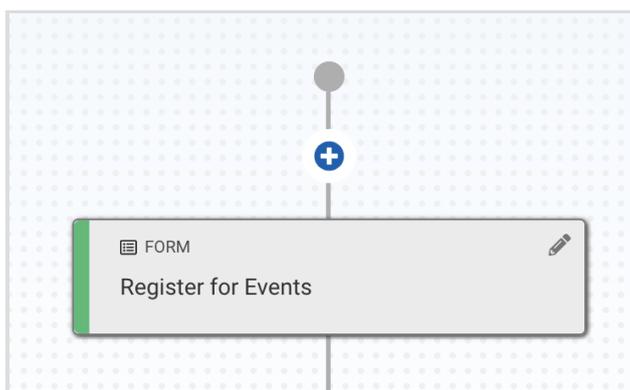
PARAMETER *	VALUE
email	%%step_1!tfa_5%% <span>f</span> <span>🗑️</span>

- Add as many parameters as needed.

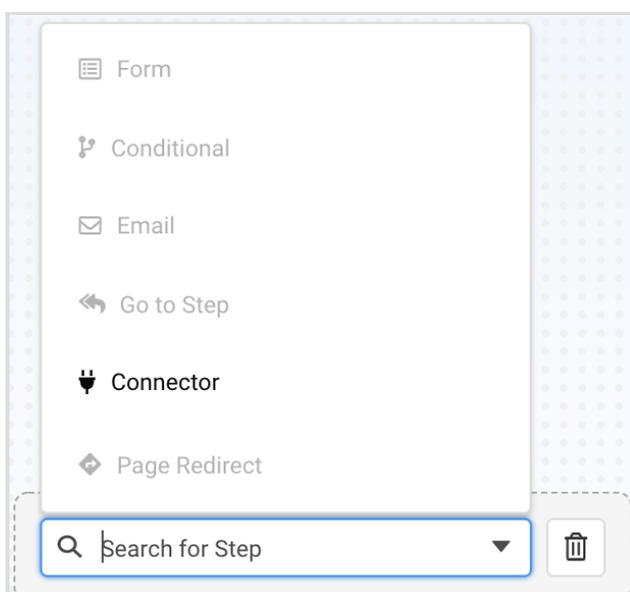
11. **Save** your workflow to complete the setup.

## Prefill When Workflow Starts

To add a Prefill Connector to the beginning of your workflow, you'll need to first add your starting form. Once your first Form Step has been added and configured, you can hover over the space above the Step. A "+" icon will appear to add a new step.



Click on the "+" icon and then select to add a new Connector Step.



When prefilling at the start of a workflow, you will need to append the prefill parameters to the end of your Workflow URL.

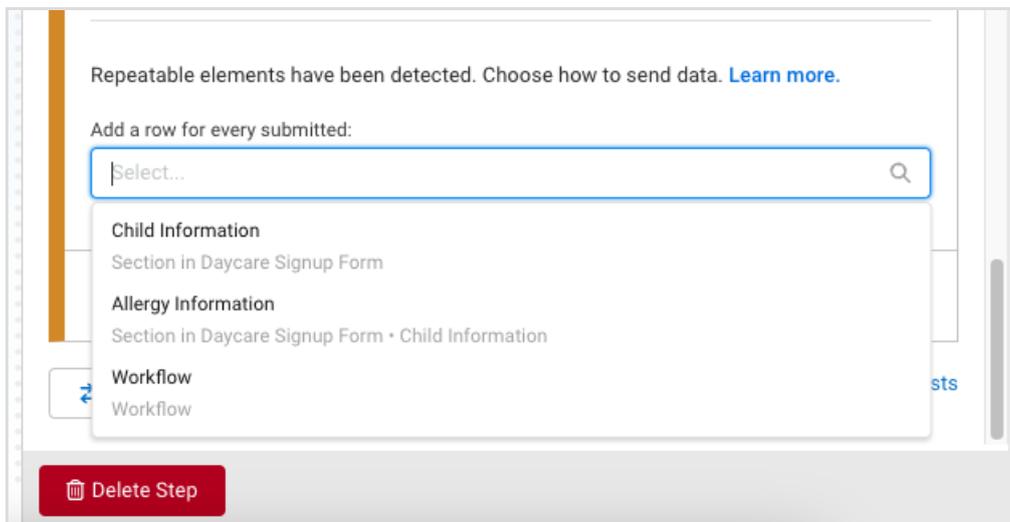
**Note:** Be sure to use the **Workflow URL**, rather than the URL of the form, so your respondents remain in your workflow rather than exit to just the form.

When starting a workflow with a Prefill Connector, use the traditional prefill parameters of **formula**, **secure query**, or **unsafe query**. Workflow Parameters will not work at the beginning of a workflow because there aren't any preceding steps to pull the information from.

## Repeatable Fields

For spreadsheet connectors, like Google Sheets and Microsoft Excel, the connector will detect repeatable sections mapped in the Configuration tab of the Connector Properties.

When repeatable sections are detected, an option to further configure the behavior of your spreadsheet will appear. Repeatable sections can be added to your spreadsheet as new rows or comma-separated values within a single cell. By default, each submission is contained within a single row, and each repeated section is contained within a single cell as comma-separated values. This behavior can be changed to create a new row each time the selected section is repeated.



Click the **X** to clear the default 'Workflow' selection, and choose a new option from the menu.

**Note:** If a repeatable field is within a repeatable section, only the repeatable section will display as a selectable option.

**Child Information**  
Section in Daycare Signup Form

**Allergy Information**  
Section in Daycare Signup Form • Child Information

**Workflow**  
Workflow

Select... 🔍

When a repeatable section is selected from the menu, for each instance, the repeatable section is submitted, and a new row will be created for the workflow response.

• **Example:**

- There is a patient intake form where all patient information is mapped to the Google Sheets Connector, with the repeatable section 'Allergy Details'.
- If the repeatable section 'Allergy Details' is selected in the configuration, for each allergy submitted for a patient, a new row will be entered into the spreadsheet.
- The patient information accompanying each allergy submitted will be copied into the appropriate cells of each line.

	A	B
1	Patient Name	Allergy Details
2	A. Smith	Codeine
3	B. Johnson	Gluten
4	B. Johnson	Peanut butter
5	C. Williams	Peanut butter
6	C. Williams	Bananas
7	C. Williams	Nightshades
8	C. Williams	Avocado

Information is duplicated where necessary when a repeatable element other than 'workflow' is selected, so data can be sorted with ease within your spreadsheet application.