

# Workflow Assignments

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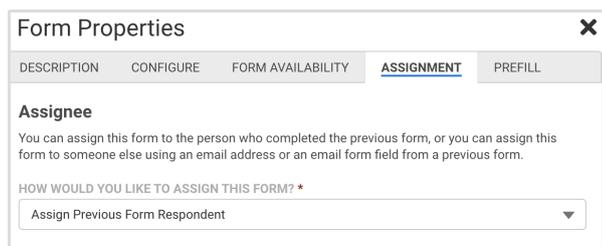
### Introduction

When using FormAssembly Workflow to create a customer journey, you may require data from multiple form respondents. Our Workflow Assignments feature adds the ability to easily assign someone to a Form Step in your Workflow Builder. This way, you can collect data from a number of respondents, all within one Workflow Response.

## Assigning a Step

Before we begin, please note that Workflow Assignments can only be made on Form Steps. You cannot assign any other step types to multiple respondents.

1. Click on any Form Step in your Workflow Builder and open the Form Properties.
2. In Form Properties, select the **Assignment** tab.



The screenshot shows the 'Form Properties' dialog box with the 'ASSIGNMENT' tab selected. The 'Assignee' section contains the text: 'You can assign this form to the person who completed the previous form, or you can assign this form to someone else using an email address or an email form field from a previous form.' Below this is a dropdown menu labeled 'HOW WOULD YOU LIKE TO ASSIGN THIS FORM? \*' with the option 'Assign Previous Form Respondent' selected.

3. You can now select how to assign the form: **Assign Previous Form Respondent**, **Assign with an Email Address**, or **Assign Dynamically with a Form Field**. Please refer to the sections below to learn about each assignment option.
4. Click **Save** to apply your changes.

## Assign Previous Form Respondent

The default assignment option is to assign a previous form respondent. This option will continue with the same form respondent who filled out the previous Form Step. This assignment option requires that you not have any Page Redirect Steps between this step and the previous form action. If you do have a Page Redirect Step, a warning will appear under the dropdown menu.

⚠ When assigning the previous respondent be sure to remove any Page Redirect steps between this step and the previous form action.

## Assign with an Email Address

This assignment option allows you to assign the step to a **set email address**. This option can be used when you have a specific person or email that should be assigned the Form Step, such as an internal approval of the data.

**Assignee**

You can assign this form to the person who completed the previous form, or you can assign this form to someone else using an email address or an email form field from a previous form.

HOW WOULD YOU LIKE TO ASSIGN THIS FORM? \*

Assign with an Email Address ▼

EMAIL ADDRESS OF THE PERSON YOU WOULD LIKE TO ASSIGN \*

Must be a valid email address. Multiple assignees are not currently supported.

When this option is selected, a new Notification Settings section will appear below the dropdown menu.

**Notification Settings**

You can change the requester name and email address and add a reason for the Approval. Requester details and reason will be included in the email sent to the Approver.

REQUESTER NAME *	REQUESTER EMAIL ADDRESS *
Test <span>f</span>	test@formassembly.com
	Sender email will be no-reply@formassembly.com until this email address is verified. <a href="#">Resend verification email</a>
REPLY-TO NAME	REPLY-TO EMAIL ADDRESS
%%step_1!tfa_1%% <span>f</span>	%%step_1!tfa_2%% <span>f</span>
REASON FOR REQUEST	
<input type="text"/>	

In this section, you'll need to fill in the following information:

- **Requester Name:**
  - The name of the person who is requesting that this form be filled out by the new respondent.
- **Requester Email Address:**
  - The email address of the person requesting that this form be filled out by the new respondent.
  - **Note:** Once the configuration for the step is saved, a verification email will be sent to the entered email address if needed.
- **Reply-To Name:**
  - Replies to the notification email will go to the name listed here.
- **Reply-To Email Address:**
  - Any replies to the notification email will be sent to the address configured here. Set this field either manually or with the Formula Editor. With the Formula Editor, email fields set within a form can be used as reply-to email addresses.

- **Reason For Request:**

- The reason this form is being filled out by the new respondent.

These fields will be used to generate an email request, which will be sent to the set email address. The email recipient can use the **View Request** button in the email to continue as the new workflow respondent. Please note that this email request expires after 48 hours. If the email recipient attempts to open an expired link, they will see a Link Expired message and instructions to return to their email for a new link.

**Note:**

- As an added security measure, when configuring a Requester Email, the email address entered requires verification before the Requester Email is updated. Emails will be sent from "no-reply@formassembly.com" until the new email address is verified. Emails are verified per FormAssembly instance.
- If an email has not been verified:
  - a pending verification message appears under the changed field
  - the email address entered receives an email with a link to complete the verification
  - the validation link expires after 24 hours
- The Reply-To Email does **not** require verification.

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## Assign Dynamically with a Form Field

This assignment option allows you to dynamically assign the Form Step based on a previous form field. To use this option, the following conditions must be met:

1. There must be a form field with email validation in a previous Form Step.
2. The email collection field must be on a form on the same path as the form being assigned.

When this option is selected, an Email Field will appear below the dropdown menu.

**Assignee**

You can assign this form to the person who completed the previous form, or you can assign this form to someone else using an email address or an email form field from a previous form.

HOW WOULD YOU LIKE TO ASSIGN THIS FORM? \*

Assign Dynamically with a Form Field ▼

EMAIL FIELD \*

Select an Option ▼

Use the Email Field to select the email collection field from a previous Form Step. This email collection field should be a text input field with email validation and must be in a Form Step on the same path as the one being assigned.

A new Notification Settings section will also appear.

### Notification Settings

You can change the requester name and email address and add a reason for the Approval. Requester details and reason will be included in the email sent to the Approver.

<p>REQUESTER NAME *</p> <input type="text" value="Test"/>	<p>REQUESTER EMAIL ADDRESS *</p> <input type="text" value="test@formassembly.com"/>
<p>Sender email will be no-reply@formassembly.com until this email address is verified. <a href="#">Resend verification email</a></p>	
<p>REPLY-TO NAME</p> <input type="text" value="%step_1!tfa_1%"/>	<p>REPLY-TO EMAIL ADDRESS</p> <input type="text" value="%step_1!tfa_2%"/>
<p>REASON FOR REQUEST</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	

In the Notification Settings section, you'll need to fill in the following information:

- **Requester Name:**
  - The name of the person who is requesting that this form be filled out by the new respondent.
- **Requester Email Address:**
  - The email address of the person requesting that this form be filled out by the new respondent.
- **Reply-To Name:**
  - Replies to the notification email will go to the name listed here.
- **Reply-To Email Address:**
  - Any replies to the notification email will be sent to the address configured here. Set this field either manually or with the Formula Editor. With the Formula Editor, email fields set within a form can be used as reply-to email addresses.
- **Reason For Request:**
  - The reason this form is being filled out by the new respondent.

These fields will be used to generate an email request, which will be sent to the set email address collected by the Email Field. The email recipient can use the **View Request** button in the email to continue as the new workflow respondent. Please note that this email request expires after 48 hours. If the email recipient attempts to open an expired link, they will see a Link Expired message and instructions to return to their email for a new link.

**Note:**

- As an added security measure, when configuring a Requester Email, the email address entered requires verification before the Requester Email is updated. Emails will be sent from "no-reply@formassembly.com" until the new email address is verified. Emails are verified per FormAssembly instance.
- If an email has not been verified:
  - a pending verification message appears under the changed field
  - the email address entered receives an email with a link to complete the verification
  - the validation link expires after 24 hours
- The Reply-To Email does not require verification.