Smart Forms & Surveys · TwinStack Solutions

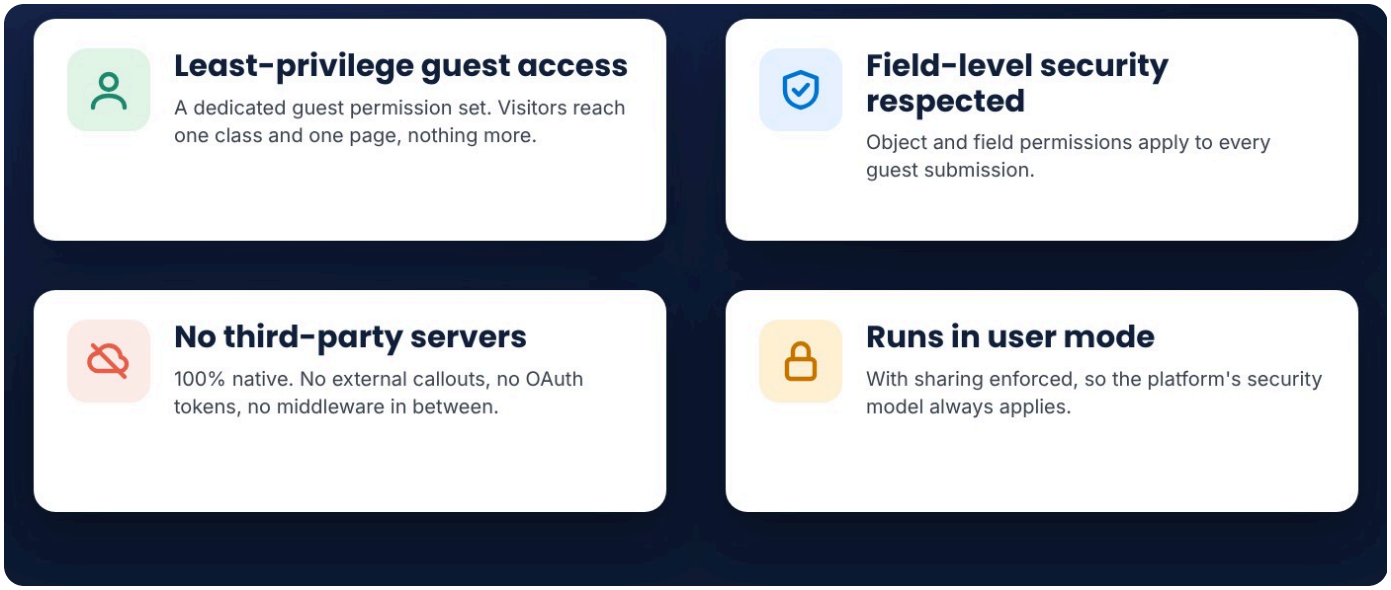
GUIDE 5 · SECURITY

Salesforce guest user security for public forms: what to check

A public form means anonymous visitors reach your org. Here is how Smart Forms & Surveys keeps that access narrow, and what to check after setup.

Who the guest user is

Every Salesforce Site has a **guest user**. Anyone who opens a public page on the site, without logging in, acts as that user. Whatever the guest user can reach, the public can reach. So the rule for public forms is simple: give the guest user the least access that still lets a form be submitted.



Four layers that keep public forms narrow. Sample data.

How the app keeps access narrow

- **A dedicated guest permission set.** `Form Builder Guest` is built for the guest user only, with least privilege.
- **One class and one page.** Visitors need just `twinforce.FormController` and `twinforce.PublicForm`. Other Form Builder classes are for signed-in builders.
- **Only public forms are shared.** A criteria-based sharing rule shares forms where Is Public is True with the guest user, read only.
- **Field-level security respected.** Object and field permissions apply to every guest submission; the app runs in user mode with sharing enforced.

- **No third parties.** The app is 100% native, with no external callouts, OAuth tokens or third-party servers.

Post-setup checklist

✓	Check
☐	`FormBuilder_Admin` is assigned only to staff who build forms, never to the guest user.
☐	Public Access Settings list only `twinforce.FormController` and `twinforce.PublicForm` from the app.
☐	The guest user has `Form Builder Guest` and no broader permission sets.
☐	The form sharing rule is criteria-based (Is Public = True) and Read Only.
☐	If a form's test submission fails, the guest user gets access to that form's object and fields only, not more.
☐	Nothing else in your org grants the guest user extra object or field access.
☐	A test submission from a private browser window saves and appears in Submissions.

WATCH OUT

Granting the guest user broad object or field access "to make it work" is the most common mistake with public sites. If a submission fails, give access to the specific object and fields the form needs, nothing more.

Review it regularly

Re-run the checklist when you add a form that creates a new object, when someone changes guest user settings, and after major Salesforce releases.

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