Smart Forms & Surveys · TwinStack Solutions

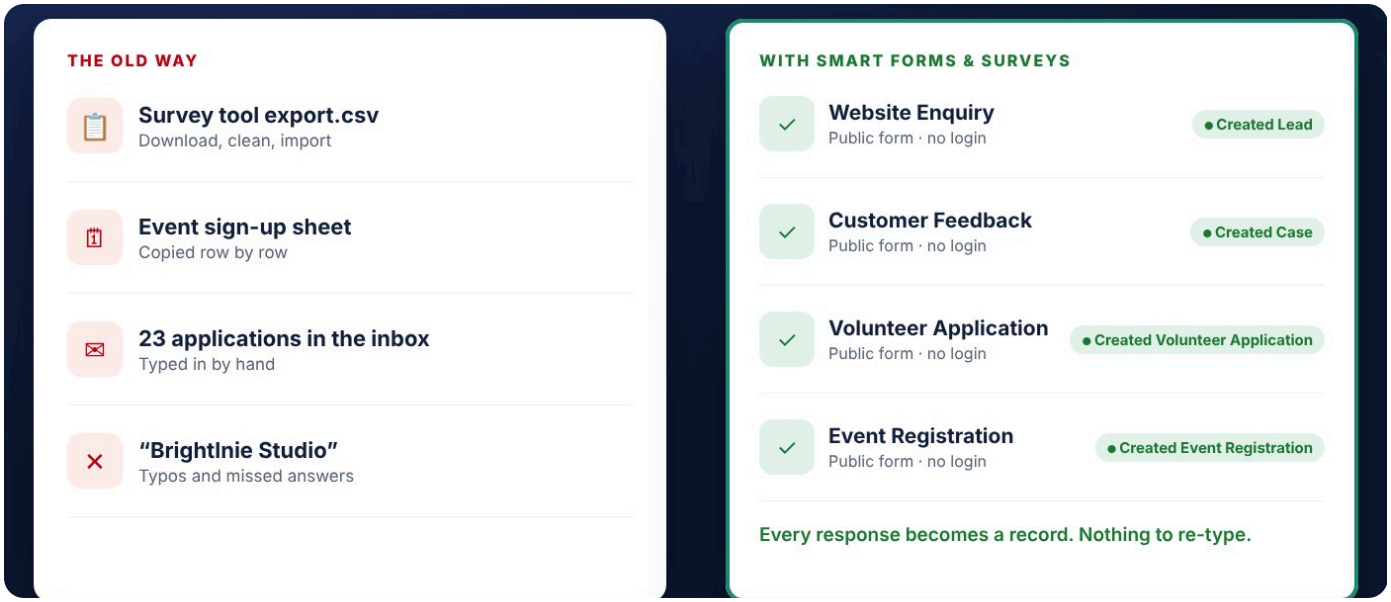
GUIDE 7 · NONPROFITS

Salesforce forms for nonprofits: volunteer, event and intake forms

Collect sign-ups and applications straight into Salesforce, without another subscription and without re-keying.

The nonprofit form problem

Volunteer sign-ups in one tool, event registrations in a spreadsheet, programme applications by email. Each one ends with someone copying answers into Salesforce, late and with typos. Smart Forms & Surveys is free and runs inside your Salesforce org, so every response lands as a record you can act on.



From scattered tools and re-keying to forms that create records. Sample data.

Forms worth moving first

Form	Typical record	Useful conditional question
Volunteer sign-up	A volunteer application or Contact-related custom object	Show "Which skills?" when "Interested in skilled volunteering" is checked
Event registration	Your event registration object	Show "Access needs" when "Attending in person" is checked
Programme or service intake	A case or intake object	Show follow-up questions for a chosen service
Membership application	A membership object	Show "Organisation name" for organisational members
General enquiry	Lead or Case	Show "Partner name" for referrals

NONPROFIT CLOUD AND NPSP

The form can create any object you can create records in. Pick the object your data model already uses. Test each form with a private browser window, because guest user access must allow that object and its fields.

Keep data clean from the start

- Use picklists for answers you report on, such as interests, programmes or locations.
- Make key fields required on the form only, without changing the object for staff.
- Use conditional questions so people only see what applies to them.
- Check **Submissions** and the **Has error** filter weekly in the first month.

Then let Salesforce do the rest

Because each response is a normal record, you can use list views for follow-up, reports for board updates, and record-triggered Flows to send confirmations or assign owners.



Get Smart Forms & Surveys free on AppExchange

Public web forms that create Salesforce records. Free, 100% native, no code.

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