Smart Forms & Surveys · TwinStack Solutions

GUIDE 8 · SURVEYS

Free Salesforce surveys and feedback forms: collect answers as records

Store survey and feedback answers as Salesforce records, so you can report on them next to the customers and cases they belong to.

Why store feedback as records

Feedback in a separate survey tool is easy to collect and hard to use. When each answer is a Salesforce record, you can filter it, report on it, assign follow-up and trigger Flows, alongside the rest of your data.

Design the object first

Smart Forms & Surveys builds questions from an object's fields, so the object defines the survey. Two common patterns:

- **Case:** good for complaints, support feedback and requests that need a response and an owner.
- **A custom Feedback object:** good for event or service surveys. Add one field per question.

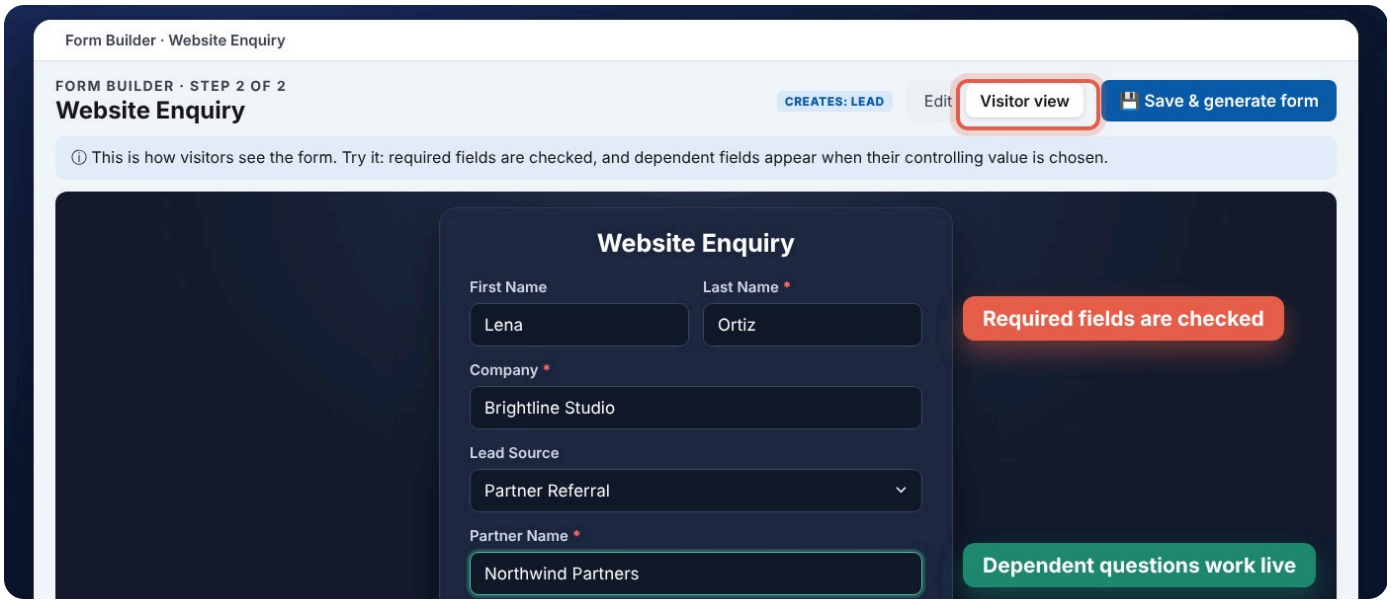
Question	Field type to use
How satisfied were you?	Picklist (for example Very satisfied … Very dissatisfied)
Would you recommend us?	Checkbox or picklist
Which session did you attend?	Picklist
What could we do better?	Long text area
Can we contact you?	Checkbox, with Email shown only when checked

> **TIP**
> Use picklists wherever you want a chart. Free text is great for detail and hard to report on.

Build it

1. On **Get started**, name the survey and choose your Feedback object (or Case).
2. Tick the question fields and put them in order with the arrows.

3. Rename fields as friendly questions and add placeholder text.
4. Add conditional follow-ups, such as "What went wrong?" only for a poor rating.
5. Check **Visitor view**, then save and share the link.



Visitor view shows exactly what respondents will see. Sample data.

Use the answers

Build a report grouped by your rating picklist, add a dashboard chart, and use a record-triggered Flow to alert the right team when a poor rating arrives.

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