Smart Forms & Surveys · TwinStack Solutions

GUIDE 4 · FORM DESIGN

Conditional questions in Salesforce forms: show fields only when they matter

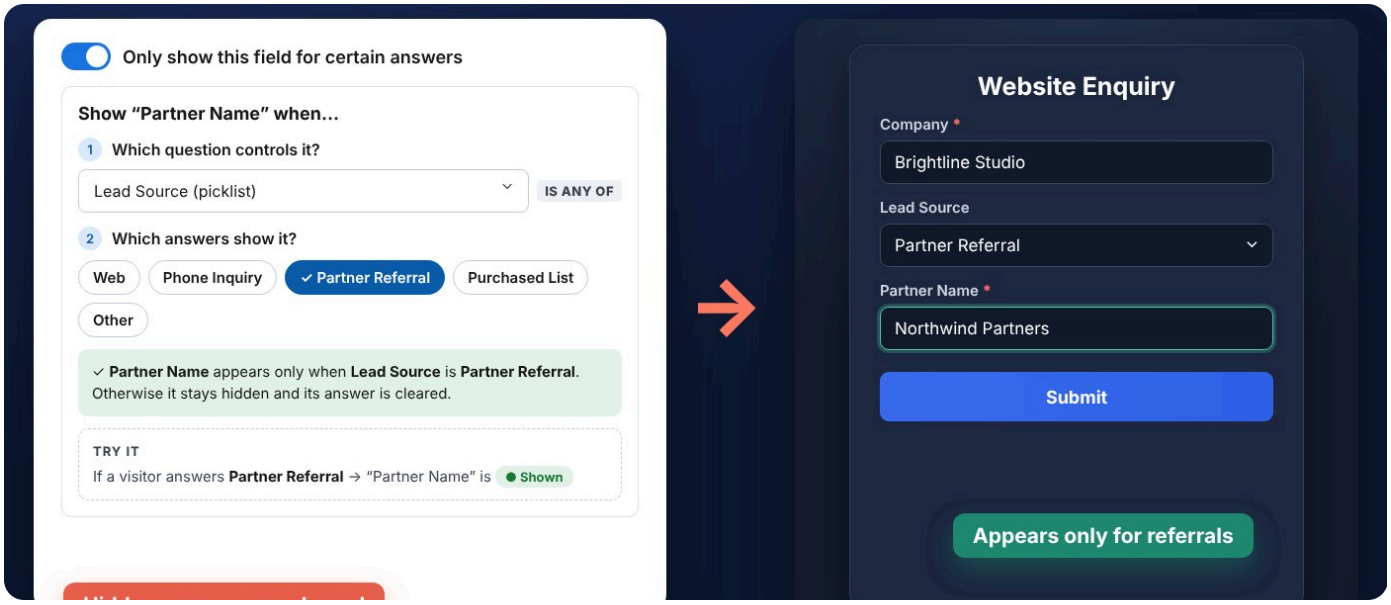
Shorter forms get finished. Show follow-up questions only to the people they apply to, and keep irrelevant answers out of your data.

Why conditional questions

Every extra question costs completions. If a question only applies to some visitors, such as "Which partner referred you?", ask it only when it applies. You get a shorter form for everyone else and cleaner records, because hidden questions don't leave stray answers behind.

How it works

A conditional question depends on a **controlling question**: a picklist or checkbox that is also on the form. You choose which answers make the dependent question appear. If the visitor picks a different answer, the question stays hidden and its answer is cleared.



Partner Name appears only when Lead Source is Partner Referral. Sample data.

Set it up

1. Make sure the controlling question (a picklist or checkbox) is on the form.

2. In the Form Builder, click the pencil on the question you want to hide.
3. Turn on **Only show this field for certain answers**.
4. Step 1: choose the controlling question. Step 2: tap the answers that should show it.
5. Check the summary and use **Try it** to test an answer, then click **Save changes** and **Save & generate form**.

On the form canvas, the question is tagged with its rule, for example *Shown when Lead Source is Partner Referral*.

Good examples

Controlling answer	Question to reveal
Lead Source = Partner Referral	Partner name
Enquiry type = Support	Product or order number
Attending in person = checked	Dietary or access needs
Rating = Poor	What could we do better?

> **TIP**
> Combine conditional questions with **Make this field required**. The follow-up is required only for the people who see it, so you always get the detail you need.

Test it before sharing

Switch to **Visitor view** in the Form Builder. Required fields are checked, and dependent questions appear when their controlling answer is chosen, exactly as visitors will see them.



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