Smart Forms & Surveys · TwinStack Solutions

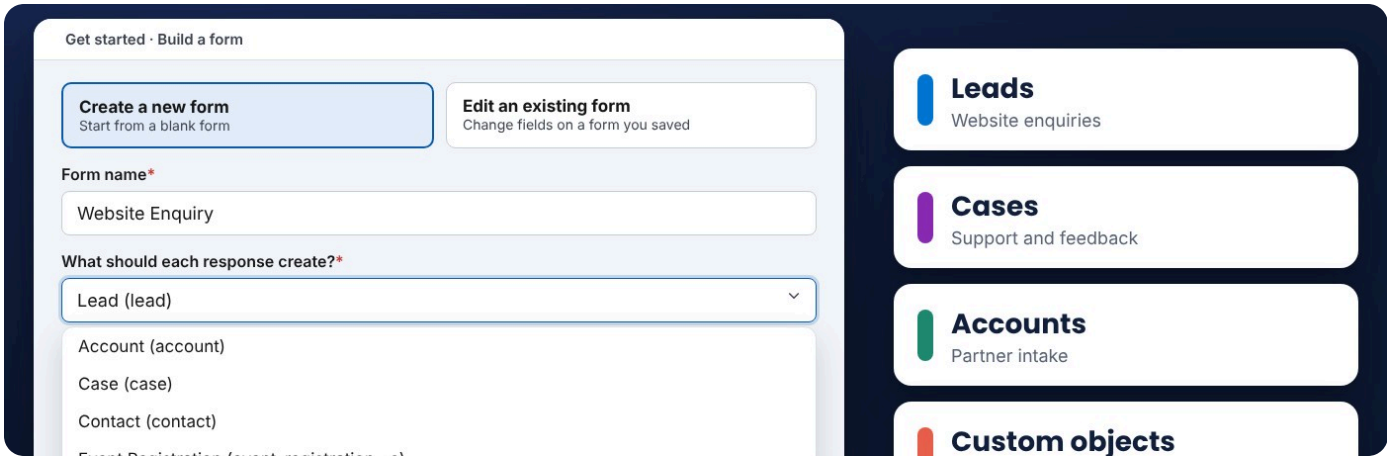
GUIDE 3 · OBJECTS

How to create any Salesforce record from a public web form

Leads, Cases, Accounts or your own custom objects: choose what each response creates, and make sure the fields line up.

Choose the object first

On **Get started › Build a form**, type a form name and pick an object under **What should each response create?**. The list shows every object you can create records in, including custom objects. Each submission creates one record of that type. An existing form keeps its object, so create a new form if you need a different one.



Pick any object you can create records in, standard or custom. Sample data.

Which object for which form?

Form	Object it might create
Contact us, request a demo	Lead
Support request, complaint, feedback	Case
New partner or supplier sign-up	Account
Event registration	Your event registration object
Volunteer, membership or job application	A custom application object

> **TIP**
> If the record you need doesn't exist yet, create a custom object for it first, with the fields you want to ask. It then appears in the object list.

Build the questions from the object's fields

- The **Fields** panel lists the object's fields, custom fields included, with their type (string, picklist, email, phone, currency and so on).
- The object's **required fields are already added** to the form, so records don't fail for a missing required field.
- Tick the extra fields you want and use the arrows to set the order.
- Click the pencil on a question to rename it, add placeholder text, or make it required on this form only.

> **NEED ANOTHER QUESTION?**
> Create the field on the object first. It then shows up in the Form Builder's field list.

Check the guest user can write those fields

Object and field-level security are respected on guest submissions. If the guest user can't create the object or edit a field, the submission won't save as you expect. Check the guest's access for the object and every field on the form, and test with a private browser window.

After the record is created

Because each response is a normal Salesforce record, everything you already use works: list views, reports, dashboards, assignment rules, queues and record-triggered Flows. Open **Submissions** to see the record each response created, with a link to open it.



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