Smart Forms & Surveys · TwinStack Solutions

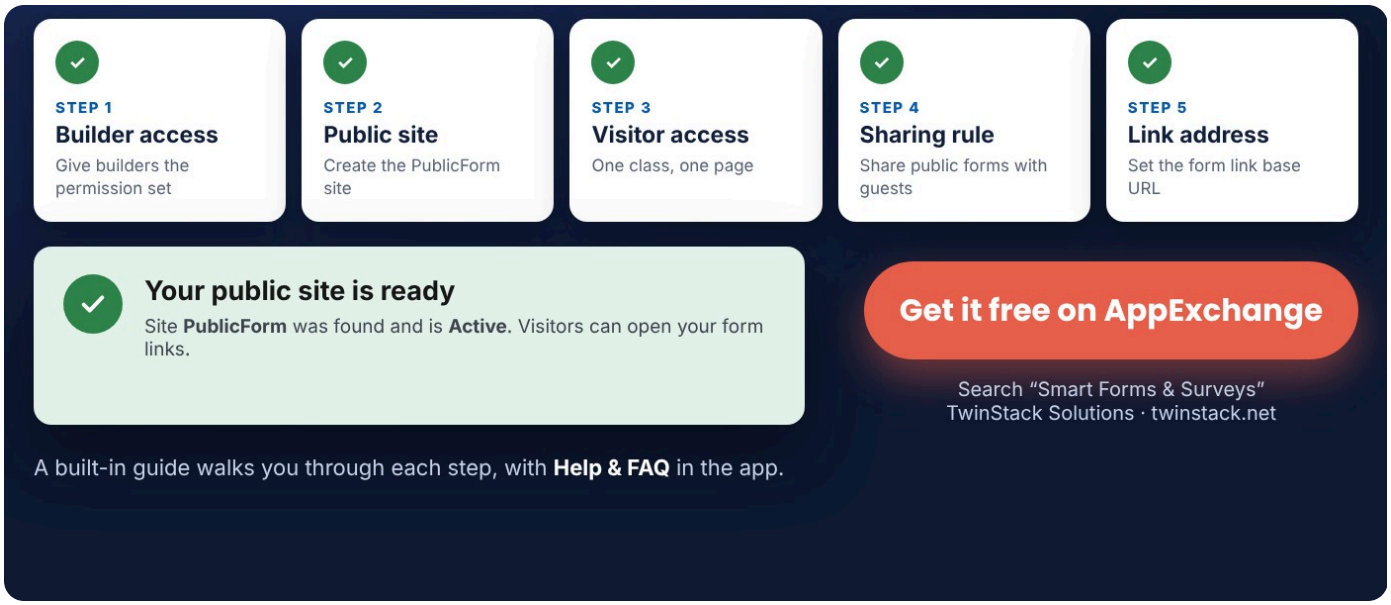
GUIDE 1 · SETUP

How to build public web forms in Salesforce: setup guide

From install to your first live form. The one-time setup takes about 10 minutes, and every form after that takes a few clicks.

Before you start

- You need System Administrator access to install the package and change settings in Setup.
- Install Smart Forms & Surveys (native) from AppExchange. It's free.
- Open the app from the App Launcher and go to **Get started**. Click **Setup instructions** to open the built-in guide, which follows the same five steps as this document.



The built-in guide covers five steps. When the site is found and active, the Get started card turns green. Sample data.

Step 1: Give builders access

In **Setup › Permission Sets**, open `FormBuilder_Admin`, click **Manage Assignments › Add Assignment**, and add yourself and anyone else who builds forms or reviews submissions.

> **WATCH OUT**
> Never assign `FormBuilder_Admin` to the site guest user. It grants access to all forms and submissions.

Step 2: Create the public site

A Salesforce Site gives your forms a public web address that visitors can open without logging in. In **Setup › Sites**:

1. Click **New**. (First time using Sites? If Salesforce asks you to register a Sites domain, do that first.)
2. Site Label: `PublicForm`. The Site Name fills in automatically.
3. Active Site Home Page: `PublicForm`.
4. Tick **Active**, leave the other fields as they are, and click **Save**.

Step 3: Let visitors open and submit forms

Anonymous visitors can only use what you enable here. The form needs just one class and one page. Open **Setup › Sites › PublicForm › Public Access Settings**:

1. Enabled Apex Class Access › Edit: add `twinforce.FormController`, then Save.
2. Enabled Visualforce Page Access › Edit: add `twinforce.PublicForm`, then Save.
3. Click **View Users** and open the guest user.
4. Permission Set Assignments › Edit Assignments: add `Form Builder Guest`, then Save.

> **WATCH OUT**
> Add only the class and page above. Other Form Builder classes are for signed-in builders and must not be open to the public.

Step 4: Share published forms with visitors

Visitors can only submit to forms shared with the guest user. In **Setup › Sharing Settings**, scroll to **Form Sharing Rules** and click **New**:

Setting	Value
Label	`Public Forms for Guests`
Rule Type	Guest user access, based on criteria
Criteria	`Is Public` equals `True`
Share with	`PublicForm Site Guest User`
Access Level	Read Only

Step 5: Set the form link address

The app adds each form's ID to this address to build its shareable link.

1. In **Setup › Sites**, copy your site's **Site URL**.
2. Go to **Custom Settings › Form Builder Settings › Manage**.
3. Under **Default Organization Level Value**, click **New** (or Edit).
4. Public Form Base Url: your Site URL followed by `?id=`, for example `https://your-org.my.salesforce-sites.com/PublicForm?id=`. Save.

> **NOTE**
> Set the organization-level value only. You don't need a separate value per user.

Check it and build your first form

1. Close the guide and click **Recheck** on Get started. When the card says **Your public site is ready**, you're done. The **Site name checker** can confirm the site name separately.
2. Under **Build a form**, type a form name and choose what each response should create, then click **Next: build form**.
3. Tick the fields you want, check **Visitor view**, and click **Save & generate form**.
4. Open **Forms**, copy the public link, and open it in a private browser window to send a test submission. It appears in **Submissions**.



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