Smart Forms & Surveys · TwinStack Solutions

DATA SHEET

What is Smart Forms & Surveys? Free, native public web forms for Salesforce

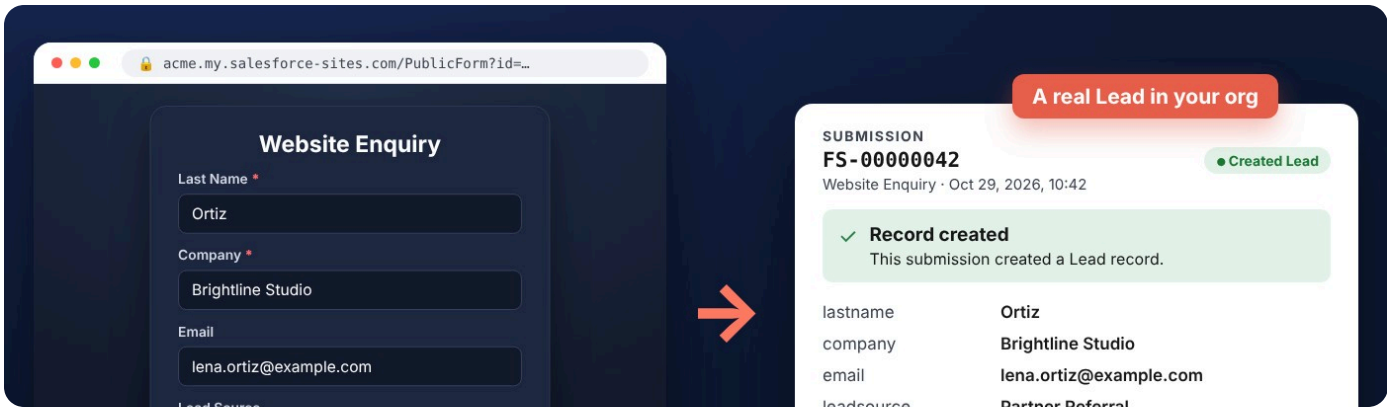
Build a form, share one link, and every response becomes a Salesforce record in the object you choose. No login for visitors, no code, no third-party servers.

Free
No license fee, no per-response charge

100% native
No external callouts or OAuth tokens

~10 minutes
One-time guided setup per org

Any object
Standard or custom



A public Website Enquiry form and the Lead record its submission created. Sample data.

What it does

Smart Forms & Surveys lets Salesforce admins build public web forms and surveys inside Salesforce and publish them on a Salesforce Site. Anyone with the link can fill in a form without logging in. Each submission creates a record in the object you chose when you built the form, so the answers are ready to use in reports, list views, Flow and assignment rules straight away.

Key features

Feature	What you get
Guided setup	A built-in, 5-step guide for Salesforce Setup: builder access, public site, visitor access, sharing rule and link address. A green card confirms the site is ready.
Any object	Choose what each response creates: a Lead, Case, Account, Contact or any custom object you can create records in.

Form Builder	Tick fields from the object (custom fields included), reorder them with arrows, rename questions and add placeholder text. Required fields are added for you.
Required on this form only	Make a field required on one form without changing the field or the object.
Conditional questions	Show a question only when a picklist or checkbox has certain answers. Hidden answers are cleared.
Visitor view	Preview exactly what visitors see, with required and dependent fields working, before you share.
Forms list	Every form has its own public link (Copy, Open, Preview) and a version number that goes up each time you save changes.
Submissions	What each visitor sent (readable or raw JSON), the record it created with a link, and a Has error filter for anything that didn't save.

Plus **Help & FAQ** inside the app: the whole process at a glance and step-by-step guides for everyday tasks.

Security

- 100% native: no external callouts, OAuth tokens or third-party servers.
- Visitors use a dedicated, least-privilege guest permission set, with access to one Apex class and one Visualforce page.
- Object and field-level security are respected on guest submissions; the app runs in user mode with sharing enforced.
- Only forms marked Is Public are shared with the guest user, through a read-only sharing rule.

What you'll need

- A System Administrator for the one-time setup
- Salesforce Sites (the guide shows how to create the site)
- The `FormBuilder_Admin` permission set for form builders

Popular uses

- Website enquiries → Leads
- Support and feedback → Cases
- Partner or client intake → Accounts
- Registrations and applications → custom objects

Get Smart Forms & Surveys free on AppExchange
Public web forms that create Salesforce records. Free, 100% native, no code.
Get it free

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