Smart Forms & Surveys · TwinStack Solutions

USE-CASE EXAMPLE · NONPROFIT

Use-case example: volunteer sign-ups straight into Salesforce

How a community food bank could replace a sign-up spreadsheet with a public form that creates a volunteer record for every applicant.

ILLUSTRATIVE EXAMPLE

Harbourside Community Pantry is a fictional organisation. This is an example of how a team could use Smart Forms & Surveys, not a customer story, and it makes no claims about measured results.

The organisation

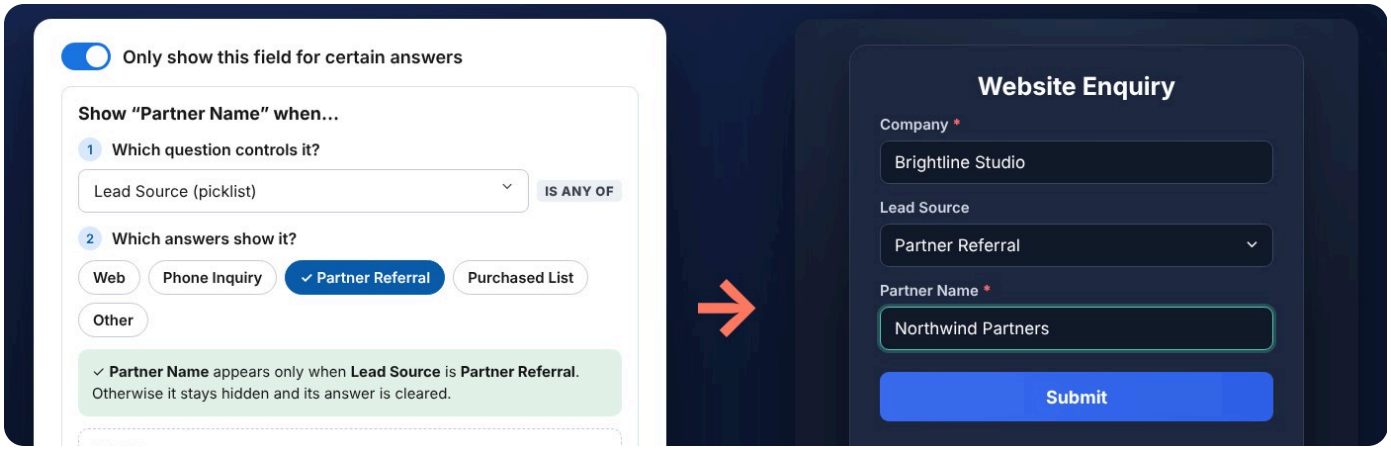
Harbourside Community Pantry (fictional) runs weekly food distribution with a pool of volunteers. Its Salesforce org already has a custom **Volunteer Application** object that coordinators use to review and schedule new volunteers.

The challenge

- Sign-ups arrive through a shared spreadsheet and by email.
- A coordinator copies each one into Salesforce by hand, often days later.
- Skilled volunteers (drivers, translators) are hard to spot, because the spreadsheet asks everyone the same long list of questions.

How they could set it up

Setting	Their choice
Form	Volunteer Sign-up
Each response creates	Volunteer Application (custom object)
Questions	First name, last name, email, phone, availability (picklist), preferred location (picklist), interested in skilled volunteering (checkbox), skills (picklist)
Required on this form only	Phone and availability, so coordinators can always follow up
Conditional question	Skills appears only when "Interested in skilled volunteering" is checked
Shared on	A "Volunteer with us" button on the website and in the monthly newsletter



A conditional rule like the one the pantry would use to show a follow-up question only when it applies. Sample data.

What changes for the team

- **No re-keying.** Every sign-up arrives as a Volunteer Application record, ready for the coordinator's list view.
- **Shorter form for most people.** Only skilled volunteers see the skills question.
- **Nothing slips through.** The coordinator checks **Submissions** and the **Has error** filter each week.
- **Room to automate.** If they want, a record-triggered Flow they build can send a welcome email or assign the record to the right location's coordinator.

Try it in your org

1. Create (or reuse) the object that holds volunteer applications, with a field for each question.
2. On Get started, name the form and choose that object.
3. Tick the fields, add the conditional skills question, and check Visitor view.
4. Save, copy the public link, and send a test sign-up from a private browser window.

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