Smart Forms & Surveys · TwinStack Solutions

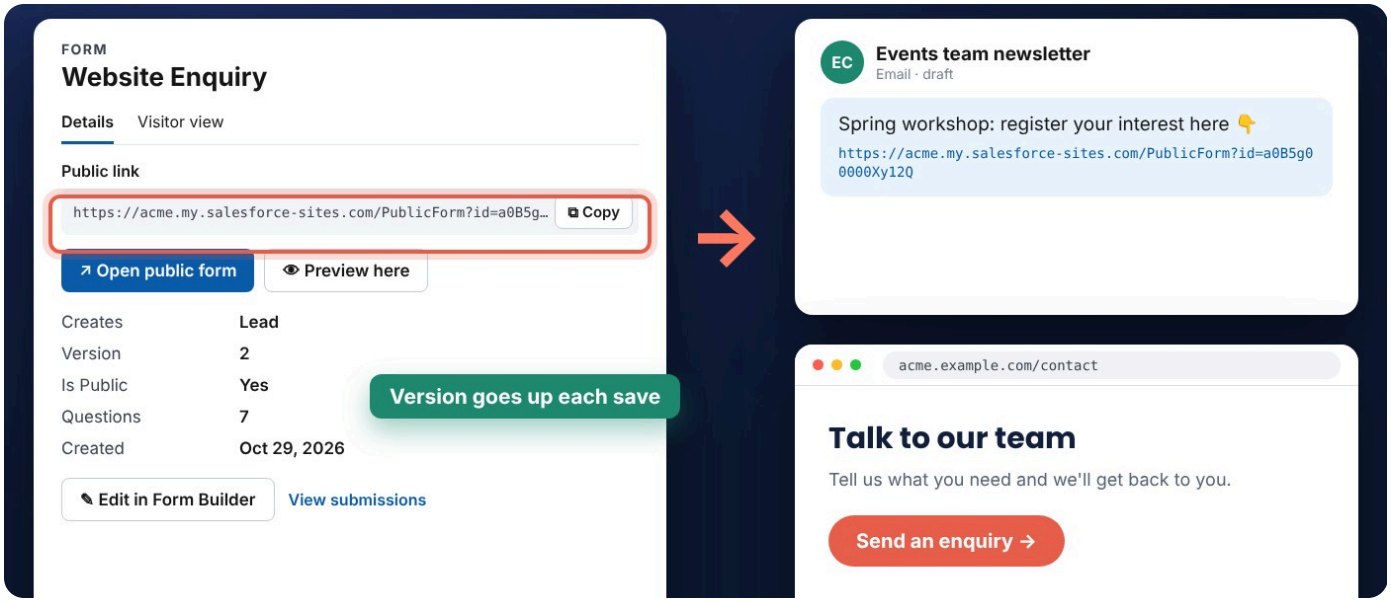
GUIDE 6 · SHARING

How to share a Salesforce form on your website, email or chat

Every form gets its own public link. Here is how to test it, share it in the right places, and change it safely later.

Find the link

Open **Forms** and select your form. The details panel shows the **Public link** with a **Copy** button, plus **Open public form** and **Preview here**. It also shows what the form creates, its version, whether it is public, and how many questions it has.



One public link per form, shared in a newsletter and as a website button. Sample data.

Test before you share

1. In the Form Builder, switch to **Visitor view** and try the required and conditional questions.
2. Copy the public link and open it in a private browser window, so you see it as a visitor with no login.
3. Send a test submission and check it in **Submissions**, including the record it created.

Where to put the link

Channel	How
Website	Add a button or menu link such as "Send an enquiry" or "Register" that points to the form link.
Email	Link a clear call to action in newsletters, event invitations and email signatures.
Chat and social	Paste the link into team chat, WhatsApp groups, community posts or social media.
Print and events	Turn the link into a QR code with any QR generator and add it to posters, flyers or slides.

TIP

Name forms so their purpose is obvious in Forms and Submissions, for example "Spring Workshop Registration" rather than "Form 3".

Changing a live form

Open **Forms**, select the form and click **Edit in Form Builder** (or use **Edit an existing form** on Get started). Add, remove, reorder or edit fields, then click **Save & generate form**. The version number goes up by one, so you can see that the form has changed.

GOOD PRACTICE

After editing a live form, repeat the private-window test. A new required field or rule changes what visitors must fill in.

Who can open it

Visitors don't need a Salesforce login or an account. The form is shared with the site guest user only when it is marked Is Public, through the sharing rule you created during setup.



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