Smart Forms & Surveys · TwinStack Solutions

GUIDE 2 · COMPARISON

Salesforce Web-to-Lead vs Smart Forms & Surveys: which should you use?

Both are free and both put website submissions into Salesforce. They suit different jobs. Here is how to choose.

The short answer

Use **Web-to-Lead** when you only need Leads, you have a web developer to host and style the HTML on your website, and your volumes fit the daily limit. Use **Smart Forms & Surveys** when you want admins to build and change forms inside Salesforce, need records other than Leads, or want conditional questions and a submission log without writing HTML.

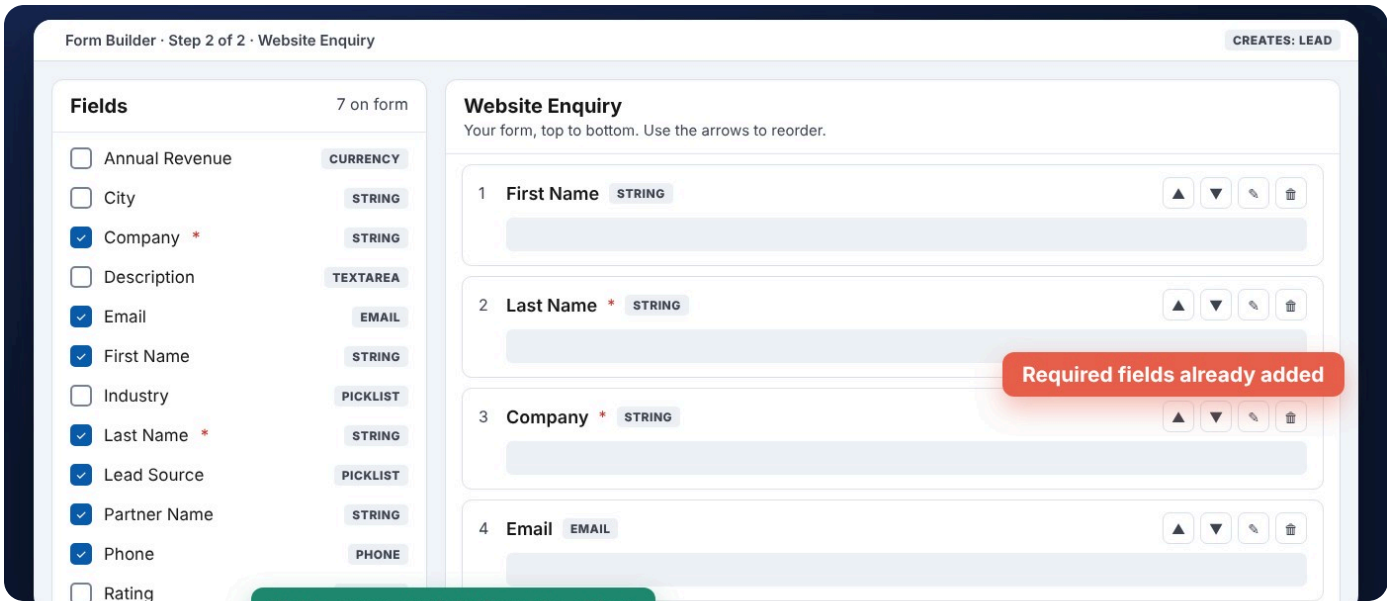
How Web-to-Lead works

Web-to-Lead is a standard Salesforce feature. In Setup you pick Lead fields and Salesforce generates an HTML snippet. Your web team pastes that HTML into your website and styles it. Each submission creates a Lead. A sister feature, Web-to-Case, does the same for Cases.

Salesforce documents a daily limit on Web-to-Lead requests (500 per 24 hours at the time of writing). Requests above the limit wait in a queue and are processed when the limit resets. Check the current Salesforce documentation for your edition.

How Smart Forms & Surveys works

An admin builds the form in the app, picks the object it creates, and shares the link. The form is hosted on a Salesforce Site in your own org, so there is no HTML to maintain. Every submission is logged in **Submissions** with what the visitor sent and the record it created.



Form Builder: tick fields from the object; required fields are already added. Sample data.

Side by side

	Web-to-Lead	Smart Forms & Surveys
Price	Included with Salesforce	Free app on AppExchange
What it creates	Leads (Web-to-Case for Cases)	Any object you can create records in, standard or custom
Where the form lives	HTML you host on your own website	A public Salesforce Site in your org; share the link anywhere
Who changes the form	Regenerate the HTML; usually your web team	An admin in the Form Builder; the version number goes up
Conditional questions	Needs custom code	Built in: show a field only for certain answers
Required on the form only	Needs custom code	Built in, without changing the object
Preview	Test on your website	Visitor view inside the builder
Submission log	The Lead itself	Submissions tab: what was sent, the record created, and errors
Styling	Fully yours, in your site's HTML and CSS	The app's standard public form design

TIP

You don't have to pick one. Many orgs keep Web-to-Lead for a long-standing website form and use Smart Forms & Surveys for everything else: event sign-ups, feedback, applications and intake.

Questions to ask before you choose

- Do responses need to create something other than a Lead?
- Who will change the form when a question changes: an admin or a web developer?
- Do you need questions that appear only for certain answers?
- Do you need a record of failed submissions and why they failed?
- Must the form match your website's design exactly?



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