Smart Forms & Surveys · TwinStack Solutions

USE-CASE EXAMPLE · B2B SALES

Use-case example: website enquiries that arrive as Leads

How a B2B supplier could turn its "Contact us" page into a Salesforce form that creates a Lead, and asks for the partner's name only on referrals.

ILLUSTRATIVE EXAMPLE

Westfield Industrial Supply 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

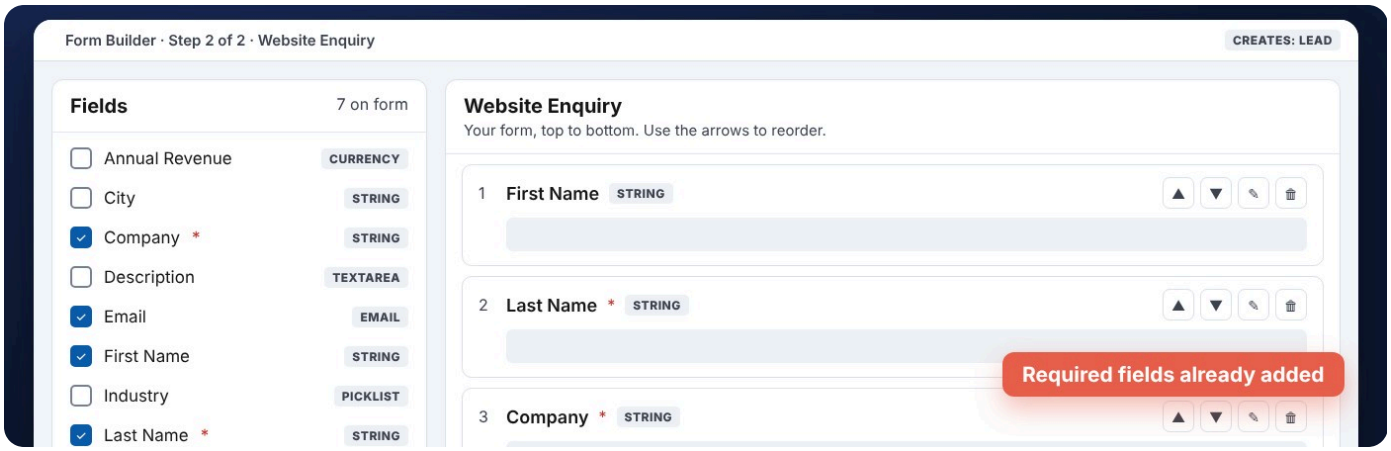
Westfield Industrial Supply (fictional) sells equipment to manufacturers. Many new customers come through partner referrals, and sales managers want to know which partner sent each one.

The challenge

- The website's contact form sends an email to a shared inbox.
- Someone creates Leads from those emails by hand, and the referring partner is often left out.
- The web team has to make any change to the form, so small fixes wait for weeks.

How they could set it up

Setting	Their choice
Form	Website Enquiry
Each response creates	Lead
Questions	First name, last name (required), company (required), email, phone number, lead source (picklist), partner name
Required on this form only	Phone number, renamed from "Phone" with the placeholder "So we can call you back"
Conditional question	Partner Name appears only when Lead Source is Partner Referral
Shared on	A "Send an enquiry" button on the website's contact page



The Form Builder: tick fields from the Lead object and put them in order. Sample data.

What changes for the team

- **Leads, not emails.** Each enquiry is a Lead straight away, so the existing lead assignment rules and queues apply.
- **Partner credit.** Referred enquiries carry the partner's name; everyone else never sees the question.
- **Admin-owned form.** A Salesforce admin changes questions in the Form Builder; the version number shows when it changed.
- **A clear audit trail.** Submissions shows what each visitor sent and the Lead it created, with a link to open it.

Try it in your org

1. On Get started, name the form and choose **Lead**. Last Name and Company are added for you.
2. Tick Email, Phone and Lead Source; rename Phone and make it required on this form.
3. Add the Partner Name rule, preview in Visitor view, and save.
4. Point your website's contact button at the form's public link.

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