Smart Forms & Surveys · TwinStack Solutions

GUIDE 10 · COMPARISON

Stop re-keying form data into Salesforce: every method compared

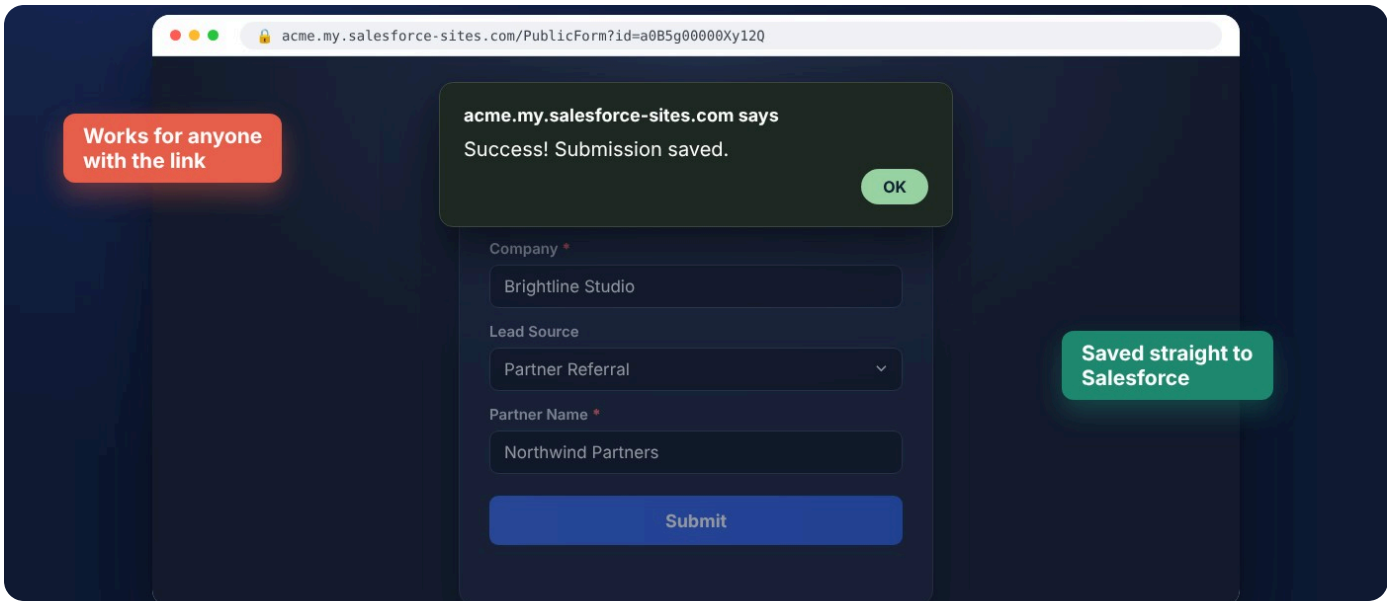
Five ways to get form answers into Salesforce, and the trade-offs of each.

The options

Method	How it works	Good for	Watch out for
Manual entry	Someone reads each response and types it in	Very low volumes	Delays, typos, missed responses, staff time
CSV import	Export responses and import with Data Import Wizard or Data Loader	Occasional batches	Data is out of date between imports; duplicates; manual clean-up
Web-to-Lead / Web-to-Case	Salesforce generates HTML you host on your website	Simple Lead or Case forms on your own site	Leads and Cases only; daily limits; form changes need HTML edits
Third-party form tool with a connector	A form service sends responses to Salesforce through an integration	Teams already using that tool	Extra subscription; data passes through another vendor; another login to manage
Smart Forms & Surveys	Native forms built in Salesforce and published on a Salesforce Site	Admin-built public forms for any object, at no cost	The app's standard form design; one-time Sites setup

Five questions to decide

1. **What should each response create?** Leads only, or Cases, Accounts and custom objects too?
2. **Who maintains the form?** An admin in Salesforce, or a web developer?
3. **Where should the data go?** Straight into your org, or through another vendor first?
4. **What does it cost?** Count subscriptions and the staff time spent re-keying or importing.
5. **What happens when something fails?** Can you see which responses didn't save, and why?



A visitor submits a public form with no login, and the response is saved to Salesforce. Sample data.

Where Smart Forms & Surveys fits

- Free to install and use, with no per-response charge.
- 100% native: no external callouts, OAuth tokens or third-party servers.
- Any object you can create records in, with conditional questions and form-only required fields.
- A Submissions log that shows the record created or the error, for every response.

WHEN ANOTHER METHOD IS BETTER

If your form must match your website's design pixel for pixel, Web-to-Lead's HTML or a dedicated form tool may suit you better. If you get only a few responses a year, manual entry may be fine.

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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