

SALES FORCE CONFIGURATION DRUPAL 8

DIGITAL CORPORATE
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ARVAL
BNP PARIBAS GROUP

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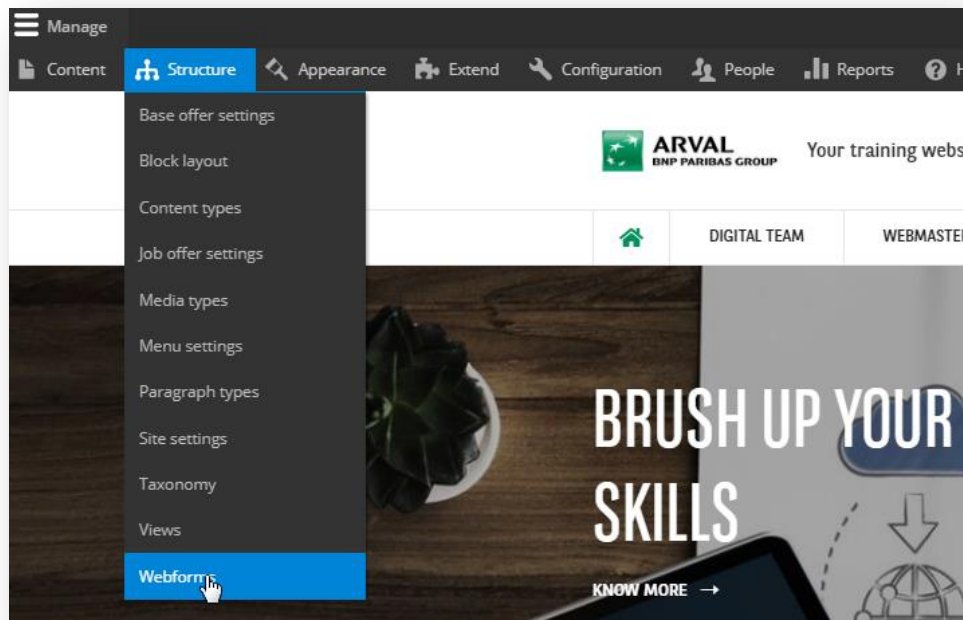
1 WEBFORMS



How to manage webforms

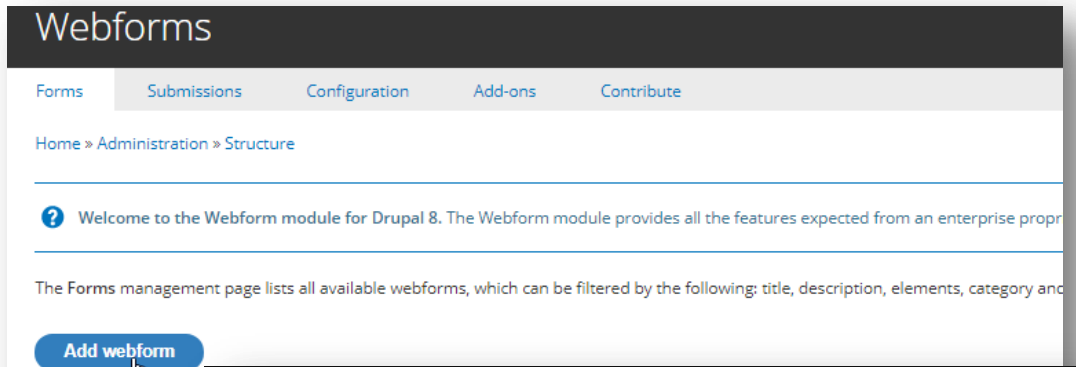
- Webforms are forms that you can build and embed into your content directly from the Drupal back-office.
- Building a webform is done by adding elements (textfields, numeric fields...) with few clicks.

1) To manage webforms, go to /admin/structure/webforms

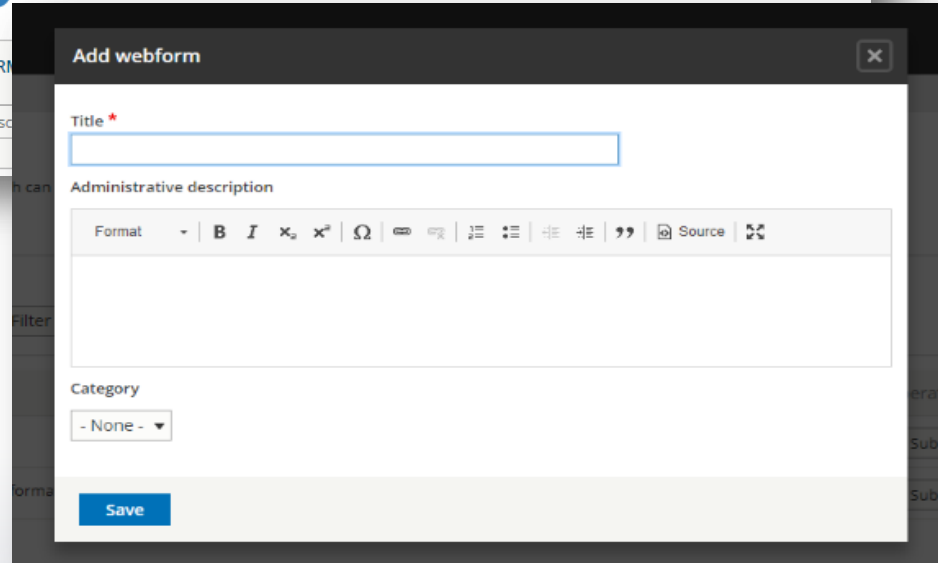


2) To add a new webform,

- click on the « add webform » button
- Give a title and description to your webforms



The screenshot shows the 'Webforms' administration page in Drupal 8. The breadcrumb trail is 'Home » Administration » Structure'. A welcome message states: 'Welcome to the Webform module for Drupal 8. The Webform module provides all the features expected from an enterprise product.' Below this, it says: 'The Forms management page lists all available webforms, which can be filtered by the following: title, description, elements, category and...'. A blue 'Add webform' button is highlighted with a mouse cursor.



The 'Add webform' modal form is displayed. It contains the following fields and elements:

- Title ***: A text input field.
- Administrative description**: A rich text editor with a toolbar containing options for Format, Bold (B), Italic (I), Strikethrough (x₂), Superscript (x²), Link (Ω), Unlink, Bulleted list, Numbered list, Indent, Outdent, Quote, and Source.
- Category**: A dropdown menu currently set to '- None -'.
- Save**: A blue button at the bottom.

You can add elements and pages to your webforms.

Elements are form elements (textfield, radio button...)

Select an element

Filter by element name Show preview

[Collapse all](#)

▼ BASIC ELEMENTS

Type	
Checkbox ?	Add element
Hidden ?	Add element
Password ?	Add element
Textarea ?	Add element
Text field ?	Add element

▼ ADVANCED ELEMENTS

Type	
Autocomplete ?	Add element
CAPTCHA ?	Add element
CodeMirror ?	Add element
Color ?	Add element
Email ?	Add element
Email confirm ?	Add element
Email multiple ?	Add element
Mapping ?	Add element

Elements can be reorganized by dragging and dropping them by clicking on the handlebar next to them.

[Add element](#) [Add page](#)

Title		Key	Type
+ page 1	Add element	page_1	Wizard page
+ Your age		your_age	Number
+ page 2	Add element	page_2	Wizard page
+ Your gender		your_gender	Radios
Submit button(s)		actions	Submit button(s)

[Save elements](#) [Reset](#)

You can edit/customize elements by clicking on their « edit » operation button.

The screenshot displays a webform management interface. The main area shows a table of elements with columns for Title, Key, Type, Required, Weight, Parent, and Operations. The 'email' element is highlighted, and its 'Edit' button is being clicked. The sidebar on the right provides detailed settings for the 'email' element, including a 'Change' button for the email type, a text input for the title (set to 'email'), a dropdown for the allowed number of values (set to 'Limited' and '1'), and expandable sections for description, display, validation, and encryption. At the bottom of the sidebar are 'Save' and 'Delete' buttons.

test microsite

View Test Results Build Settings Export Translate

Home » Administration » Structure » Webforms

✓ Webform test microsite created.

The Elements page allows users to add, update, duplicate and delete elements and wizard pages. [Watch video](#)

[Add element](#) [Add page](#) [Add layout](#)

Hide row weights

Title	Key	Type	Required	Weight	Parent	Operations
email	email	Email	<input type="checkbox"/>	0		Edit
Submit button(s)	actions	Submit button(s)				Customize

[Save elements](#) [Reset](#)

Edit email element

General Conditions Advanced Access Expand all

ELEMENT SETTINGS

Type
Email [Change](#)

Title *

Key: email

Allowed number of values

[ELEM DESCRIPTION/HELP/MORE](#)

[FORM DISPLAY](#)

[FORM VALIDATION](#)

[ENCRYPTION](#)

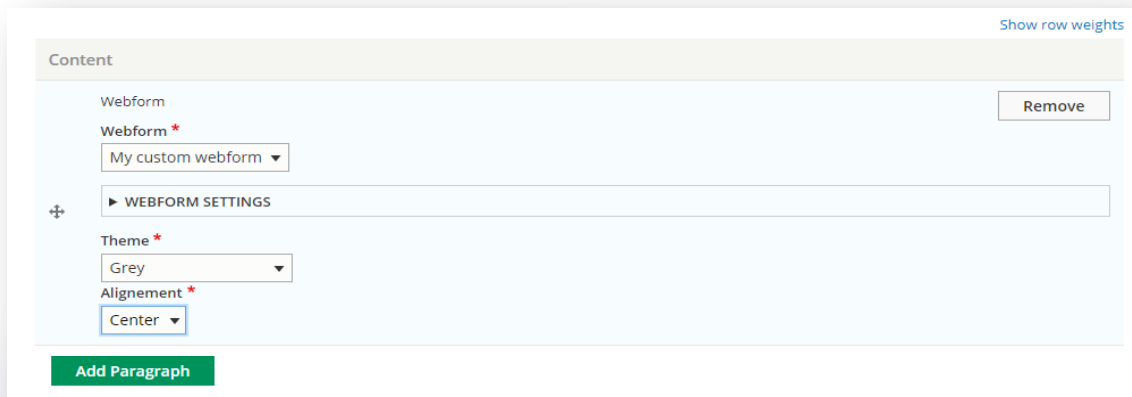
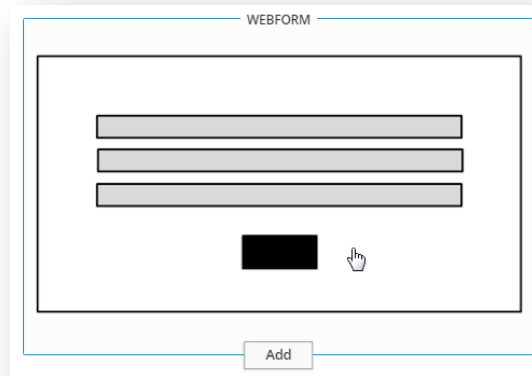
[Save](#) [Delete](#)

[Browse available tokens.](#)

The customization depends on each element but it is quite powerful. Don't hesitate to test all the possibilities.

Once you are done with your webworms, you need to embed it in your content.

To do so, edit a page created and add a paragraph : « webforms ».

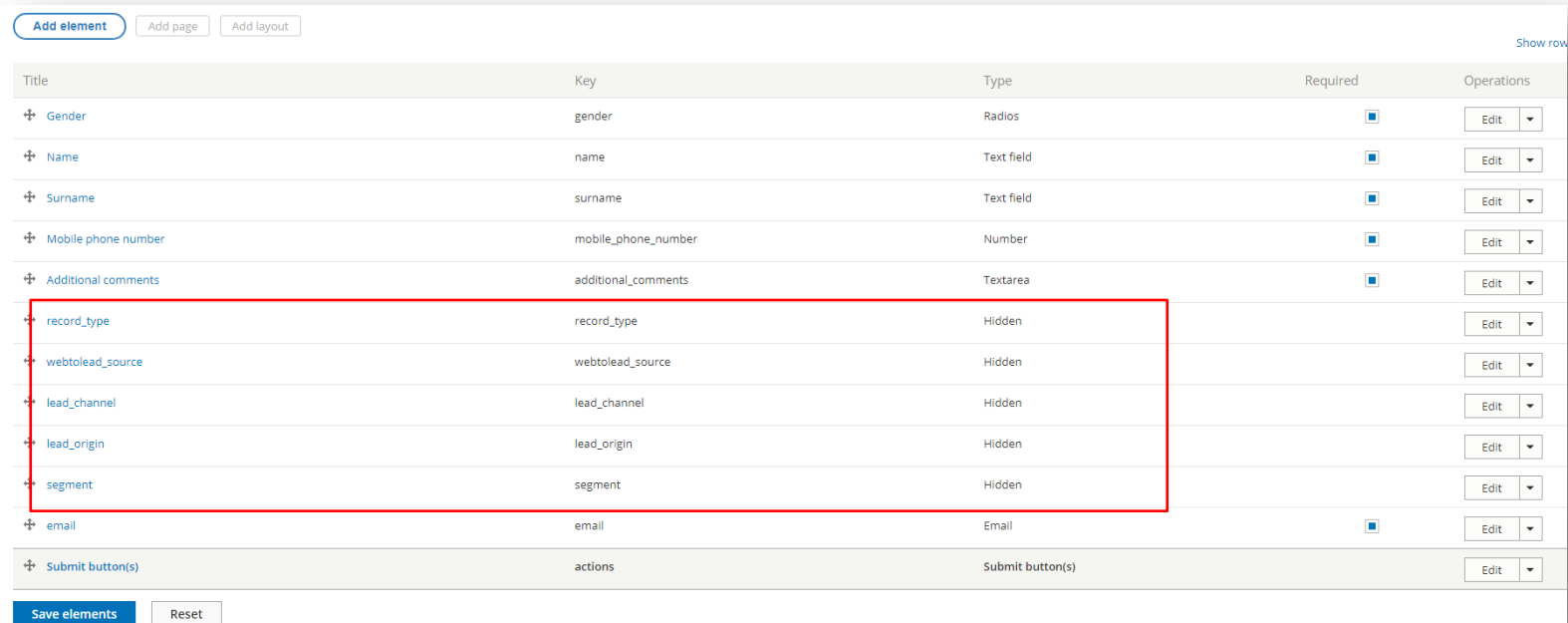


2 SALESFORCE



Minimal configuration for Salesforce in a webform

First of all, you have to create those 5 hidden field. They correspond to the minimum configuration to make Salesforce take in account your lead. After that you can add what you want/need.



The screenshot shows a configuration interface for a webform. At the top, there are buttons for 'Add element', 'Add page', and 'Add layout'. Below this is a table with columns: Title, Key, Type, Required, and Operations. The table lists various fields, including 'Gender', 'Name', 'Surname', 'Mobile phone number', 'Additional comments', and five hidden fields (record_type, webtolead_source, lead_channel, lead_origin, segment) which are highlighted with a red box. At the bottom, there are buttons for 'Save elements' and 'Reset'.

Title	Key	Type	Required	Operations
Gender	gender	Radios	<input checked="" type="checkbox"/>	Edit
Name	name	Text field	<input checked="" type="checkbox"/>	Edit
Surname	surname	Text field	<input checked="" type="checkbox"/>	Edit
Mobile phone number	mobile_phone_number	Number	<input checked="" type="checkbox"/>	Edit
Additional comments	additional_comments	Textarea	<input checked="" type="checkbox"/>	Edit
record_type	record_type	Hidden		Edit
webtolead_source	webtolead_source	Hidden		Edit
lead_channel	lead_channel	Hidden		Edit
lead_origin	lead_origin	Hidden		Edit
segment	segment	Hidden		Edit
email	email	Email	<input checked="" type="checkbox"/>	Edit
Submit button(s)	actions	Submit button(s)		Edit



Each of those field have to be set with their default Value Key that you have get from salesforce.

General Advanced

ELEMENT SETTINGS

Type
Hidden

Title ? *

Key: record_type

Default value ?

▶ FORM DISPLAY

▶ ENCRYPTION

[Browse available tokens.](#)

When you add field and you want it to be visible on salesforce, you have to add the key. This key is provided by Salesforce and can be modified only during the creation of you field. If you save it you will not be able to change to key.

Example of saved field

ELEMENT SETTINGS

Type
Textarea

Title ? *
Additional comments

Key: additional_comments

Add Email element

General Conditions Advanced Ac

ELEMENT SETTINGS

Type
Email

Title ? *
email

Key: email [Edit](#)

Add Email element

General Conditions Advanced Access

ELEMENT SETTINGS

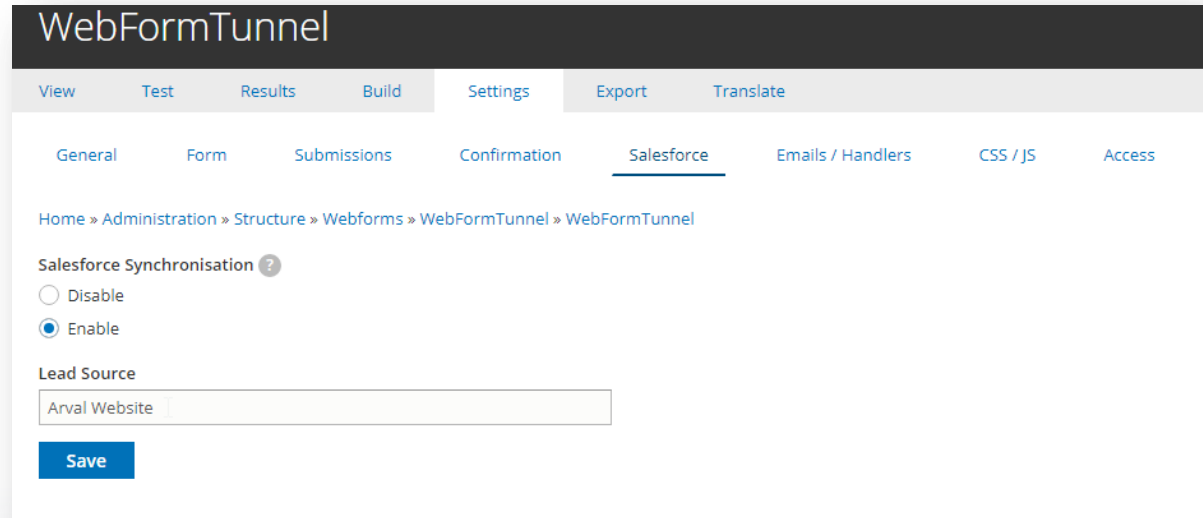
Type
Email

Key ? *
email

Title ? *
|

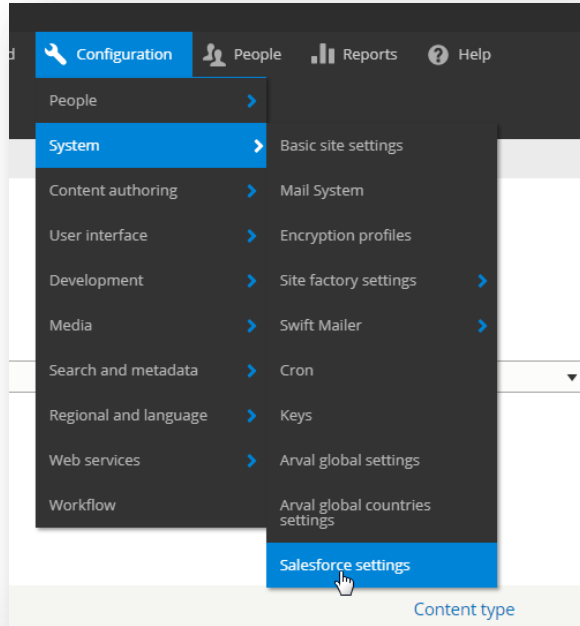
Last step before to save your webform you have to activate salesforce on it.

Settings > Salesforce > Enable + lead source

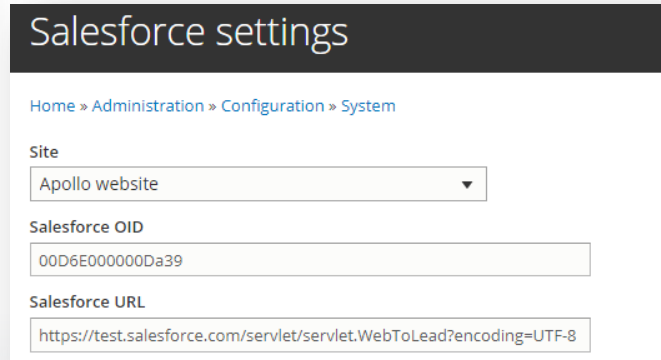


The screenshot shows the 'WebFormTunnel' settings page. The top navigation bar includes 'View', 'Test', 'Results', 'Build', 'Settings', 'Export', and 'Translate'. Below this, there are sub-tabs: 'General', 'Form', 'Submissions', 'Confirmation', 'Salesforce' (which is underlined), 'Emails / Handlers', 'CSS / JS', and 'Access'. A breadcrumb trail reads: 'Home > Administration > Structure > Webforms > WebFormTunnel > WebFormTunnel'. The main content area has two sections: 'Salesforce Synchronisation' with a help icon and two radio buttons ('Disable' and 'Enable', where 'Enable' is selected), and 'Lead Source' with a text input field containing 'Arval Website'. A blue 'Save' button is located at the bottom of the form.

Drupal configuration for Salesforce



After creation of your webform, you have to configure salesforce settings in the drupal.
First configure Salesforce OID and URL.
(you have to contact a Salesforce manager to get those information).



Mapping

This table reference all the fields that you've created in your webform.
As you can see in the screenshot, you have to link all of those with a salesforce ID.

▼ WEBFORM FIELDS TO SALESFORCE FIELDS MAPPING TABLE

email	email
name	last_name
surname	first_name
lead_request_url	Webform field
request-quote	Salesforce ID
gender	Gender__c
mobile_phone_number	phone
additional_comments	
record_type	recordType
webtolead_source	WebToLead_Source__c
lead_channel	Lead_Channel__c

To sum up - Process

+ activate salesforce in your webform

