SALES FORCE CONFIGURATION DRUPAL 8

DIGITAL CORPORATE
September 2019

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1 WEBFORMS

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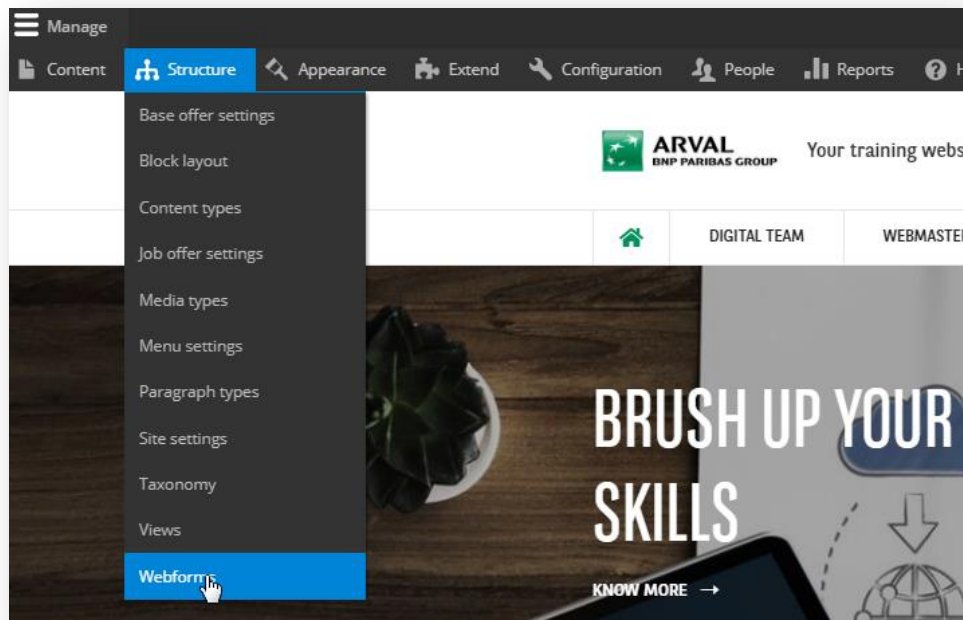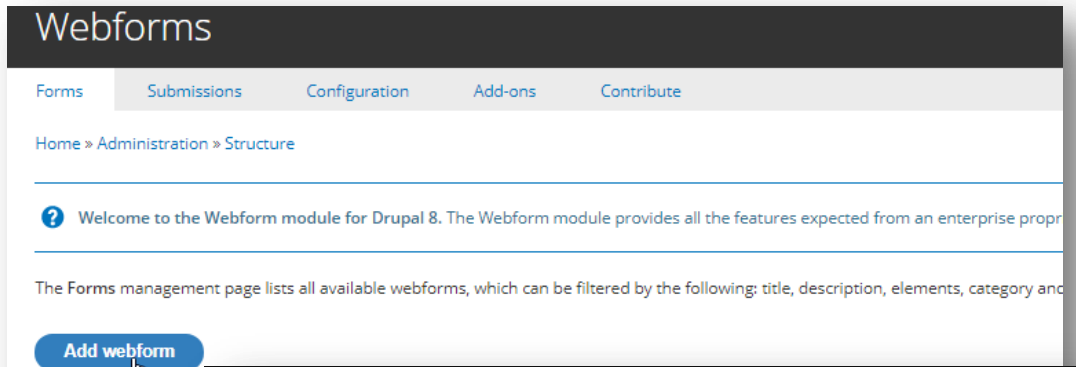
How to manage webforms

- 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.

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

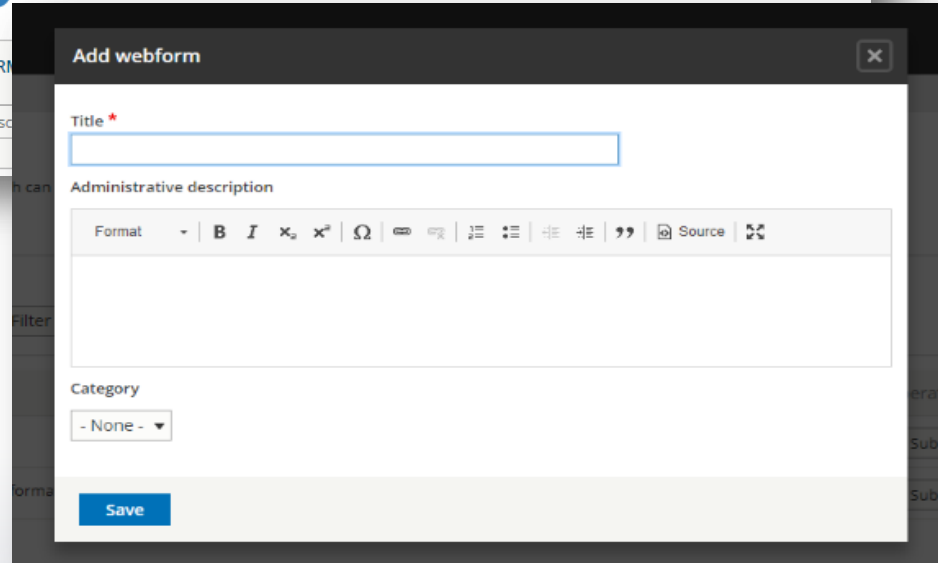**2) To add a new webform,**

- click on the « add webform » button

- Give a title and description to your webforms

You can add elements and pages to your webforms.

Elements are form elements (textfield, radio button…)

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

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)

Add element   Add page

Save elements   Reset

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

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.

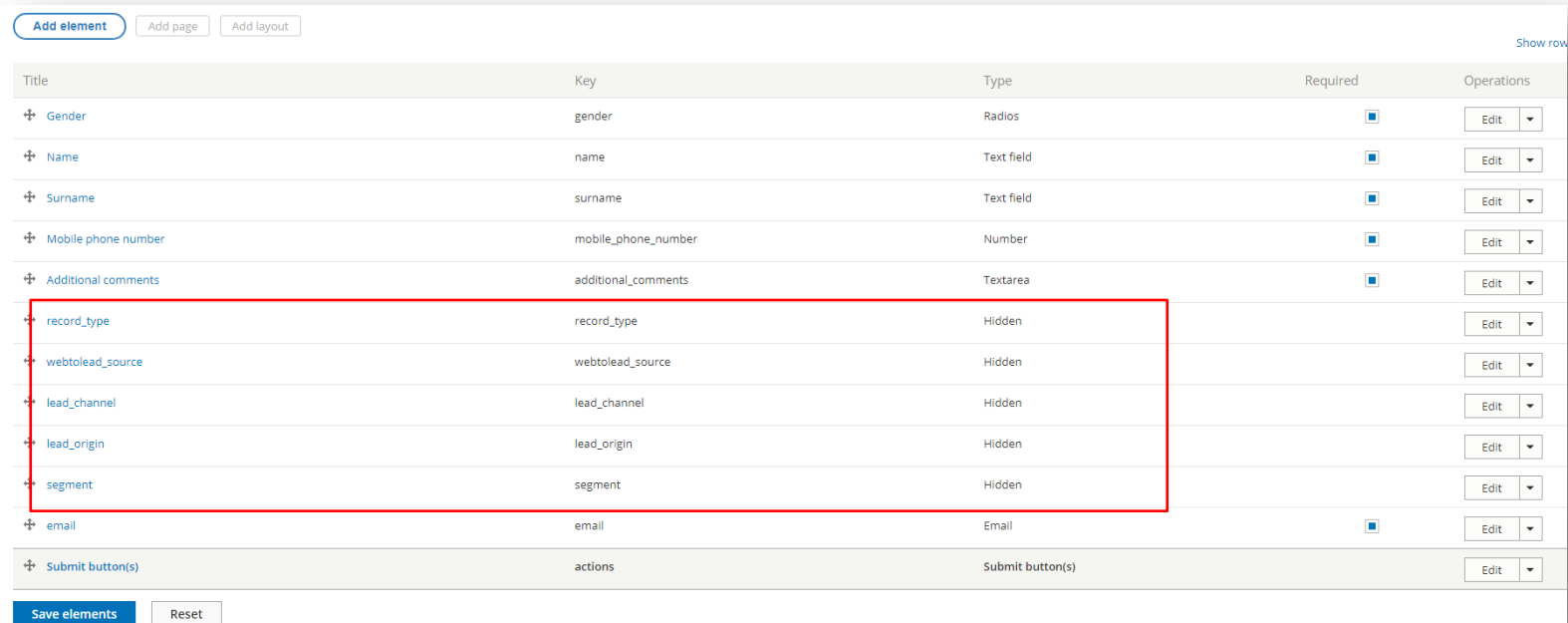To do so, edit a page created and add a paragraph : « webforms ».

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2 SALESFORCE

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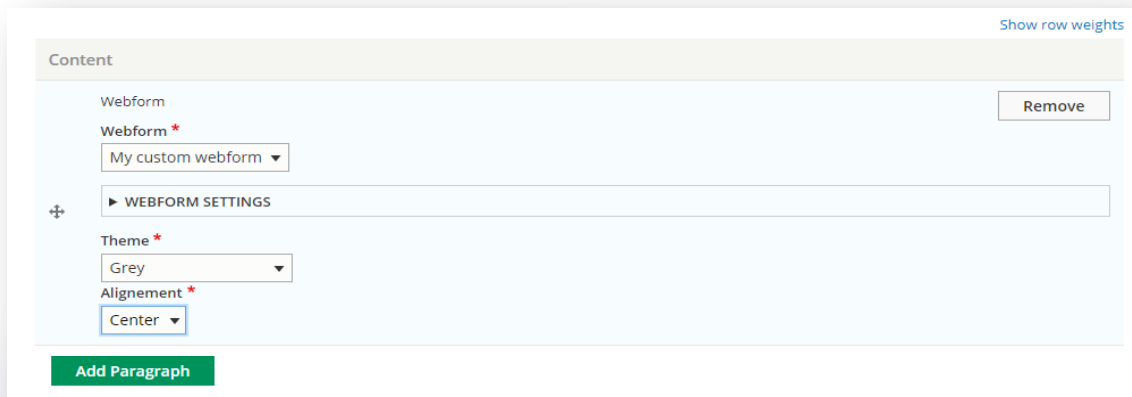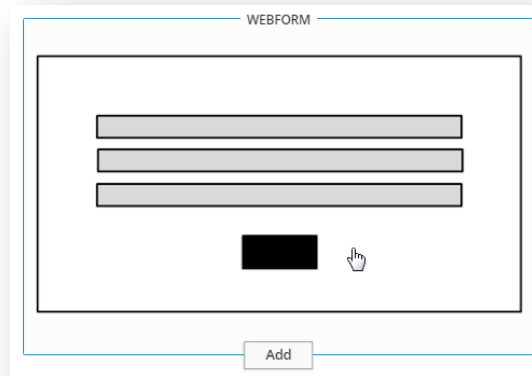
Minimal configuration for Salesforce in a webform

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.

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

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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
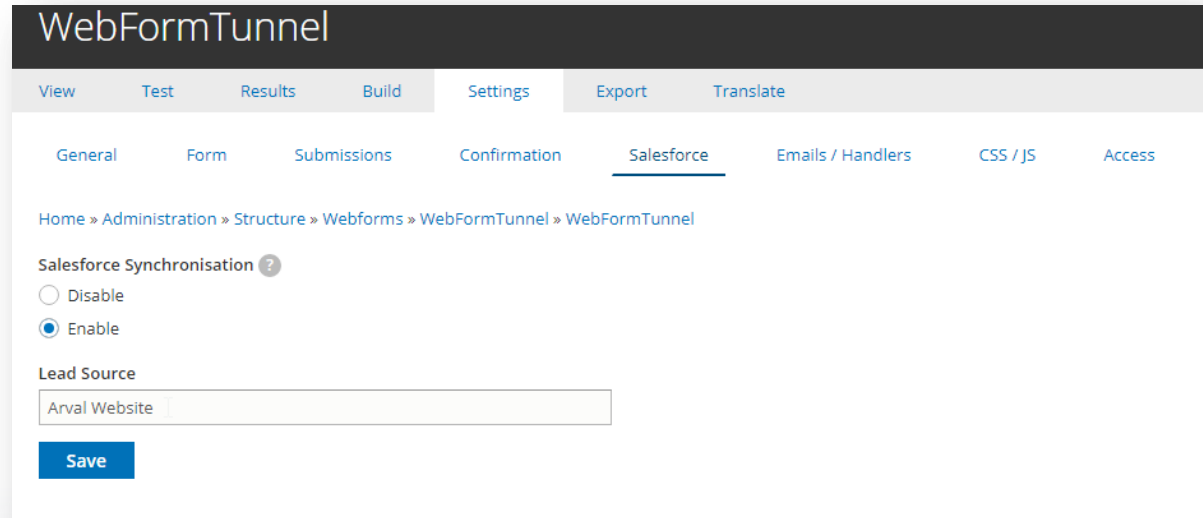
Last step before to save your webform you have to activate salesforce on it.
Settings > Salesforce > Enable + lead source

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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).

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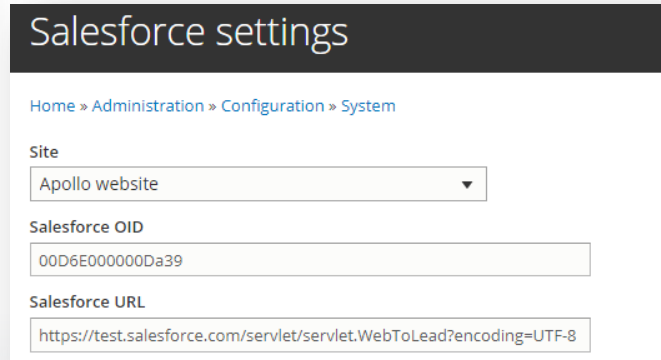
Mapping

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.

To sum up - Process

+ activate salesforce in your webform

FORM

- Field 1 (normal) → Key Salesfoce 1
- Field 2 (normal) → Key Salesfoce 2
- Field 3 (normal) → Key Salesfoce 3
- Field 4 (normal) → Key Salesfoce 4
- Field 5 (hidden) → Key Salesfoce 5
  + default value

Drupal setting

Key Salesfoce 1 : ID- salesforce 1
Key Salesfoce 2 : ID- salesforce 2
Key Salesfoce 3 : ID- salesforce 3
Key Salesfoce 4 : ID- salesforce 4
Key Salesfoce 5 : ID- salesforce 5

Provided by salesfoce managers

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