

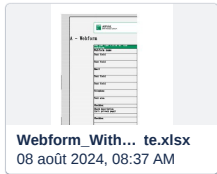
# Webform with Salesforce

- Elements creation (Webform fields)
- 1/ Visible fields
- 2/ Hidden fields
- 3/ Salesforce settings
- 4/ Emails/Handler
- 5/ Admin actions

## Elements creation (Webform fields) [↗](#)

When creating the fields make sure to put the corresponding **key** to your element.

The **key mapping** is available in the following file:



## 1/ Visible fields [↗](#)

Define the title of the webform	SOURCE	TRANSLATION
<b>Webform name</b>	<b>Request a quote MTR</b>	
Text field	First name Key	first_name
Text field	Last name Key	last_name
Email	Email Key	email
Text field	Company name Key	company
Text field	Company number Key	legal_identification_number
Telephone	Telephone number Key	phone
Text area	Comment Key	description
Checkbox	Privacy Statement	
Check description (url: privacy page)	I confirm that I have read and understood Arval's <a href="#">privacy statement</a> . Key	data_privacy_notice_consent_grant_c
Checkbox	I authorize Arval to send me information about Arval products and services promptly. Key	privacy_consent_grant_marketing_c
Hidden	Form URL Source Key	
Button	Request a quote	

When creating those fields in the back-office make sure to **modify the key** during the creation:

**ELEMENT SETTINGS**

**Type**  
Text field

**Title** ? \*  
Telephone

Key: telephone [\[Edit\]](#)

**Allowed number of values**

“Edit” to modify the key

**ELEMENT SETTINGS**

Type  
Text field

Key ? \*  
phone

Title ? \*  
Telephone

Allowed number of values

Telephone	Telephone number	phone
-----------	------------------	-------

⚠ Once created we cannot edit the key afterward.  
To modify a key we must delete and recreate the field.

**ELEMENT SETTINGS**

Type  
Text field Change

Title ? \*  
Telephone

Key: phone

Allowed number of values

## 2/ Hidden fields [↗](#)

**B - Hidden fields**

The following table is only for Webmaster team

Hidden	Value	Key	Mandatory?
Hidden	lead_record_type	To ask to Salesforce team	•
Hidden	form_url_source	lead_record_type	•
Hidden	lead_segment	{current page url}	•
Hidden	lead_channel	form_url_source	•
Hidden	lead_source	03	•
Hidden	webtolead_source	lead_segment	•
Hidden	lead_channel	Web	•
Hidden	lead_source	Anal Website	•
Hidden	webtolead_source	lead_source	•
Hidden	webtolead_source	To ask to Salesforce team	•
Hidden	webtolead_source	webtolead_source	•

Non-visible fields for users. Use to send information in the Leads.

Select an element ✕

Filter by element name

Hide preview

[Expand all](#)

**▼ BASIC ELEMENTS**

TYPE	PREVIEW	
Checkbox	<input type="checkbox"/> Checkbox	<span>Add element</span>
Hidden	Hidden element (less secure, changeable via JavaScript)	<span>Add element</span>
Password		<span>Add element</span>

When creating those fields in the back-office make sure to **modify the key & the value:**

form_url_source	Value	[current-page:url]
	Key	form_url_source

Add Hidden element

General   Advanced   Access

**ELEMENT SETTINGS**

Type  
Hidden

Key ? \*  
form\_url\_source

Title ? \*  
form\_url\_source

Default value ?  
[current-page:url]

**⚠ 5 hidden fields are mandatory to make the connection operational.**  
 Some informations are locale and unknown from our side.  
 To ask to Salesforce team directly.

The following table is only for Webmaster team			Mandatory?
lead_record_type	Value	To ask to Salesforce team	*
	Key	lead_record_type	
form_url_source	Value	[current-page:url]	*
	Key	form_url_source	
lead_segment	Value	G1	*
	Key	lead_segment	
lead_channel	Value	Web	*
	Key	lead_channel	
lead_source	Value	Arval Website	*
	Key	lead_source	

### 3/ Salesforce settings [↗](#)

- Go on settings => Salesforce
- Enable the synchronization
- Put the lead source: Arval website
- Save

View   Test   Results   Build   **Settings**   Export   Trar

General   Form   Submissions   Confirmation   **Salesforce**

Home » Administration » Structure » Webforms

**Salesforce Synchronisation ?**

Disable

**Enable**

**Lead Source**

Arval Website

Save

### 4/ Emails/Handler [↗](#)

- Go on settings => Emails/handler

- Add a handler
- Choose “Salesforce”

The screenshot shows the Drupal Webform administration interface. At the top, there is a navigation menu with tabs: View, Test, Results, Build, Settings, Export, Translate, and Clone. Below this is a sub-menu with tabs: General, Form, Submissions, Confirmation, Salesforce, and Emails / Handlers. The breadcrumb trail reads: Home » Administration » Structure » Webforms. There are two buttons: "+ Add email" and "+ Add handler". Below these buttons is a text instruction: "To send an e-mail to the e-mail filled in the job offers, add an e-mail handler with to:mail filled with [webform\_submi:". Below this is a table header "TITLE / DESCRIPTION".

A modal window titled "Select a handler" is open, showing a search filter "Filter by handler name" and a table of handlers:

HANDLER	DESCRIPTION	CATEGORY	OPERATIONS
Action	Trigger an action on a submission.	Action	Add handler
Debug	Debug webform submission.	Development	Add handler
Remote post	Posts webform submissions to a URL.	External	Add handler
Salesforce	Sends a webform submission via salesforce.	Notification	Add handler
Offer	Offer handler.	Offer	Add handler
Settings	Allows Webform settings to be overridden based on submission data, source entity fields, and conditions.	Settings	Add handler

## 5/ Admin actions [↗](#)

Last steps is to verify that Salesforce is active on Drupal settings.

A Jira ticket may be needed to ask admin to verify those informations.