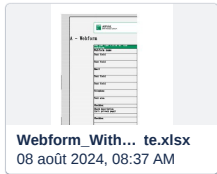# Webform with Saleforce

- Elements creation (Webform fields)
- 1/ Visible fields
- 2/ Hidden fields
- 3/ Saleforce 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:

Webform_With... te.xlsx
08 août 2024, 08:37 AM

1/ Visible fields 🔗

A - Visible fields

Define the title of the webform	SOURCE	TRANSLATION
Webform name	Request a quote MTR	
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 privacy statement.	
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

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

2/ Hidden fields 🔗

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

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

| 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 operationnal.
Some informations are locale and unknow from our side.
To ask to Saleforce team directly.

The following table is only for Webmaster team			Mandatory?
lead_record_type	Value	To ask to Saleforce 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/ Saleforce settings 🔗

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

| View | Test | Results | Build | Settings | Export | Tran |

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 "Saleforce"

5/ Admin actions 🔗

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

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