

WEBFORMS & SALESFORCE

REQUEST A QUOTE

JEEP Renegade 1.6 multijet limited 5dr
36 Months | 10000 Miles/year

FIRST NAME *	COMPANY NAME
<input type="text"/>	<input type="text"/>
SURNAME *	COMPANY REGISTRATION NUMBER
<input type="text"/>	<input type="text"/>
PHONE NUMBER *	COMMENT
<input type="text"/>	<input type="text"/>
EMAIL *	
<input type="text"/>	

How to manage a form
and salesforce

WEBFORMS & SALESFORCE

To create a webform, click on “Manage Content > Content > Add content > Webform”.
 To edit a webform, click on “Manage Content > Webforms”.

TITLE	CREATED	STATUS	VIEW	OPERATIONS
Quotazione usato	07/27/2015 - 16:07	Open	Submissions Analysis Table Download	Edit Components Clear
Richiedi un preventivo per questa marca	09/21/2015 - 15:31	Open	Submissions Analysis Table Download	Edit Components Clear
Richiedi un preventivo	09/25/2015 - 16:32	Open	Submissions Analysis Table Download	Edit Components Clear

Then click on the “Components” button of the webform you want to edit, then you can add form field by enter a name and selecting a type of field.

+

Then click on “Add”. And complete the form.

Label *

This is used as a descriptive label when displaying this form element.

Field Key *

Enter a machine readable key for this form element. May contain only alphanumeric characters and underscores. This key will be used as the name attribute of the form element. This value has no effect on the way data is saved, but may be helpful if doing custom form processing.

- Date
- E-mail
- Faceted
- File
- Grid
- Hidden
- Layout Box
- Map
- Number
- Page break
- Phone Number
- Select options
- Textarea
- Textfield
- Time



Webform Fields to Salesforce Fields Mapping Table
 Legend: KEY is the Webform Field Key, VALUE is the Salesforce Web-T

KEY
+ lead_source
+ lead_channel
+ lead_record_type
+ lead_partnership_channel
+ lead_ruolo_corrispondente
+ lead_queue
+ lead_nome
+ lead_cognome
+ lead_ragione_sociale

For salesforce, you have to refer to the list of key on “Configuration > Web services > Salesforce webform

The “field key” (webform components) have to be the same as the key (Salesforce webform fields).

Pay attention : Don’t modificate the Salesforce Key, it is the same for all countries

WEBFORMS & SALESFORCE

For salesforce you have to enter the lead source (click on “Salesfoce Web2Lead” tab):

Form components Conditionals **Salesforce Web2Lead** Form validation E-mails Form settings

▼ SALESFORCE SETTINGS

Submit to Salesforce

Yes

No

If yes, the form will be sent via CURL to Salesforce.

Lead Source for this Webform

form online offerte.arval.it pubblco

Save Node Web2Lead Settings

Finally, you have to enter the recipient (click on “E-mails” tab):

Form components Conditionals Salesforce Web2Lead Form validation **E-mails** Form settings

SEND	E-MAIL TO	SUBJECT	FROM	OPERATIONS
<input checked="" type="checkbox"/>	direct@arval.it	Form submission from: Offer – Richiedi un preventivo	'Arval IT' <sales@arval.com>	Edit Clone Delete
<input checked="" type="checkbox"/>	db-offerte@arval.it	Form submission from: Offer – Richiedi un preventivo	'Arval IT' <sales@arval.com>	Edit Clone Delete
<input checked="" type="checkbox"/>	Address: email@example.com <input type="text"/>			Add
	Component value: E-Mail			

Save

Example :

Front

Email address

<https://www.arval.co.uk/request-quote>

EMAIL *

Webform component label

Webform component key

Email

lead_email

<https://www.arval.co.uk/node/270/webform/components/7?destination=node/270/webform>

View Edit Replicate Translate Webform Results

Form components Conditionals Salesforce Web2Lead Form validation E-mails Form settings

Label *

Email

This is used as a descriptive label when displaying this form element.

Form Key *

lead_email

Enter a machine readable key for this form element. May contain only alphanumeric characters and underscores. This key saved, but may be helpful if doing custom form processing.

User email as default
Set the default value of this field to the user email, if he/she is logged in.

Default value

The default value of the field. [Browse available tokens.](#)

Mapping SFDC key

Mapping SFDC Value

lead_email

email

https://www.arval.co.uk/admin/config/services/salesforce_webform

Legend: KEY is the Webform Field Key, VALUE is the Salesforce Web-To-Lead form field

Key	Value
lead_record_type	recordType
lead_web_source	WebToLead_Source_c
lead_channel	Lead_Channel_c
lead_contact_role_mono	Contact_role_mono_c
lead_sales_channel	Sales_Channel_c
lead_segment	00N2000000uRi
lead_last_name	last_name
lead_first_name	first_name
lead_company	company
lead_company_number	00N20000001EYz8
lead_postal_code	00N2000000uGLu
lead_phone	phone
lead_email	email
lead_comment	description

! same mapping for all forms in your website. Please do not change this part only if is necessary

- Key : keep the same structure : XXX_XXX
- Value : keep the data from xls provided by Guillaume