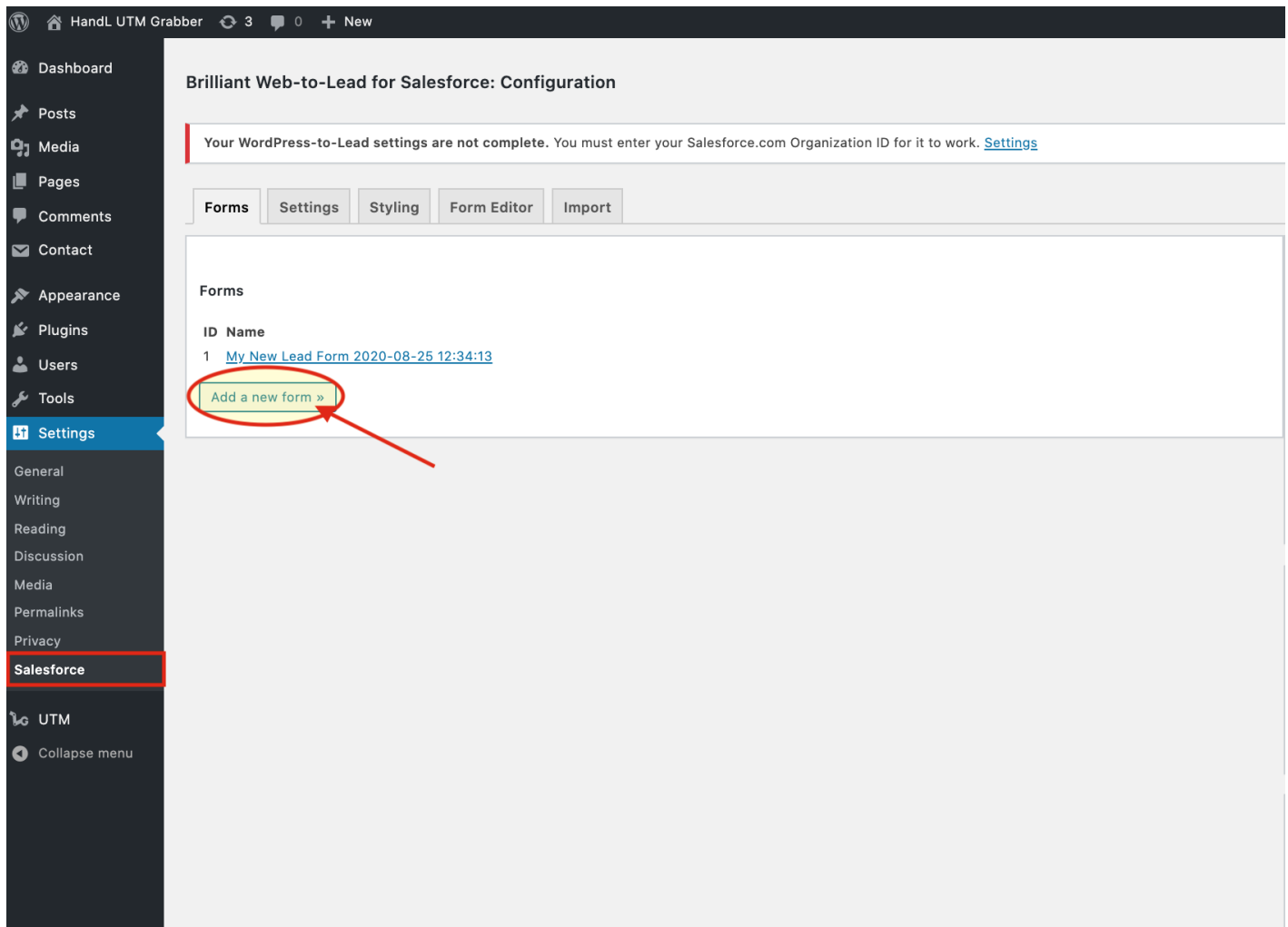


Sales Force Integration

1. Go to "Settings -> Salesforce" and Add a New Form



The screenshot shows the WordPress dashboard with the 'Brilliant Web-to-Lead for Salesforce: Configuration' page open. The left sidebar contains a menu with items like Dashboard, Posts, Media, Pages, Comments, Contact, Appearance, Plugins, Users, Tools, Settings, General, Writing, Reading, Discussion, Media, Permalinks, Privacy, Salesforce, UTM, and Collapse menu. The 'Settings' menu item is highlighted in blue. The main content area shows the configuration page with a warning message: 'Your WordPress-to-Lead settings are not complete. You must enter your Salesforce.com Organization ID for it to work. [Settings](#)'. Below this, there are tabs for Forms, Settings, Styling, Form Editor, and Import. The 'Forms' tab is selected, showing a table with one form: '1 My New Lead Form 2020-08-25 12:34:13'. Below the table, there is a button labeled 'Add a new form »' which is circled in red, with a red arrow pointing to it.

2. Click Add A Field

HandL UTM Grabber 3 0 + New

- Dashboard
- Posts
- Media
- Pages
- Comments
- Contact
- Appearance
- Plugins
- Users
- Tools
- Settings**
 - General
 - Writing
 - Reading
 - Discussion
 - Media
 - Permalinks
 - Privacy
 - Salesforce
- UTM
 - Collapse menu

city	Enabled <input type="checkbox"/>	Text	Label: City		9
	Required <input type="checkbox"/>		Value:		
	Delete <input type="checkbox"/>				
state	Enabled <input type="checkbox"/>	Text	Label: State		10
	Required <input type="checkbox"/>		Value:		
	Delete <input type="checkbox"/>				
zip	Enabled <input type="checkbox"/>	Text	Label: ZIP		11
	Required <input type="checkbox"/>		Value:		
	Delete <input type="checkbox"/>				
country	Enabled <input type="checkbox"/>	Text	Label: Country		12
	Required <input type="checkbox"/>		Value:		
	Delete <input type="checkbox"/>				
Campaign_ID	Enabled <input type="checkbox"/>	Hidden	Label: Campaign ID		13
	Required <input type="checkbox"/>		Value:		
	Delete <input type="checkbox"/>				

Add a field

Form Settings

Form Type:

☒ Web to Lead

☐ Web to Case

Lead Source:

Lead form on HandL UTM Grabber

3. Check for “Enabled”, select field type as “Hidden” and use the shortcode in “Value”

WordPress

HandL UTM Grabber

3

0

New

Dashboard

Posts

Media

Pages

Comments

Contact

Appearance

Plugins

Users

Tools

Settings

General

Writing

Reading

Discussion

Media

Permalinks

Privacy

Salesforce

UTM

Collapse menu

Campaign_c	Enabled	<input checked="" type="checkbox"/>	Hidden	Label:		15
	Required	<input type="checkbox"/>		Value:	[utm_campaig]	
	Delete	<input type="checkbox"/>				
Source_c	Enabled	<input checked="" type="checkbox"/>	Hidden	Label:		16
	Required	<input type="checkbox"/>		Value:	[utm_source]	
	Delete	<input type="checkbox"/>				
Term_c	Enabled	<input checked="" type="checkbox"/>	Hidden	Label:		17
	Required	<input type="checkbox"/>		Value:	[utm_term]	
	Delete	<input type="checkbox"/>				
Medium_c	Enabled	<input checked="" type="checkbox"/>	Hidden	Label:		18
	Required	<input type="checkbox"/>		Value:	[utm_medium]	
	Delete	<input type="checkbox"/>				
Content_c	Enabled	<input checked="" type="checkbox"/>	Hidden	Label:		19
	Required	<input type="checkbox"/>		Value:	[utm_content]	
	Delete	<input type="checkbox"/>				

Add a field

Form Settings

Form Type:

4. Save The Form

HandL UTM Grabber

3

0

New

Dashboard

Posts

Media

Pages

Comments

Contact

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Plugins

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Tools

Settings

General

Writing

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Media

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Salesforce

UTM

Collapse menu

Overrides the default message for this form.(leave blank to use the global setting)

Required fields text (override):

These fields are required.

Overrides the default message for this form (leave blank to use the global setting).

User CC email subject:

Subject of the email when sending out a copy to the user.(leave blank to use the global setting)

Captcha:

☒ Use global setting

☐ Enabled for this form

☐ Disabled for this form

Overrides the default captcha settings for this form.

Required Fields Text Location:

☒ Below Form

☐ Above Form

☐ None

Label Location (Content):

☒ Top Aligned

☐ Left Aligned

☐ Placeholders

Label Location (Sidebar):

☒ Top Aligned

☐ Left Aligned

☐ Placeholders

Layout (Content):

☒ One Column

☐ Two Columns

Auto Formatting:

☐ Do not automatically add a colon to labels

Salesforce.com Organization ID (override):

Overrides the default org_id for this form (leave blank to use the global setting).

Save Form

Revision #2

Created Tue, Aug 25, 2020 1:13 AM

Updated Tue, Aug 25, 2020 1:33 AM