

# 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 'Salesforce' item is highlighted with a red box. The main content area shows the 'Forms' tab selected, with a table listing forms. A red circle highlights the 'Add a new form »' button, and a red arrow points to it.

Brilliant Web-to-Lead for Salesforce: Configuration

Your WordPress-to-Lead settings are not complete. You must enter your Salesforce.com Organization ID for it to work. [Settings](#)

Forms Settings Styling Form Editor Import

Forms

| ID | Name   |
|----|--|
| 1  | <a href="#">My New Lead Form 2020-08-25 12:34:13</a> |

[Add a new form »](#)

## 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

Appearance

Plugins

Users

Tools

Settings

General

Writing

Reading

Discussion

Media

Permalinks

Privacy

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 by [Maruf](#)

Updated Tue, Aug 25, 2020 1:33 AM by [Maruf](#)