

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 shows the 'Settings' menu item highlighted. The main content area has a header 'Brilliant Web-to-Lead for Salesforce: Configuration' and a message: 'Your WordPress-to-Lead settings are not complete. You must enter your Salesforce.com Organization ID for it to work. [Settings](#)'. Below this is a tabbed interface with 'Forms', 'Settings', 'Styling', 'Form Editor', and 'Import'. The 'Forms' tab is active, showing a table with one form: '1 My New Lead Form 2020-08-25 12:34:13'. Below the table is a button 'Add a new form »' which is circled in red with an arrow pointing to it.

| ID | Name |
|----|--|
| 1 | My New Lead Form 2020-08-25 12:34:13 |

[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

Updated Tue, Aug 25, 2020 1:33 AM