



Web to lead and Auto Response Rules

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Overview

In this document, we are learning how to use Web to Lead functionality on an Experience Cloud. For this exercise, we create a web to lead form to capture the

details from the end user and create a Lead in our org, send an automatic email to the end user using Lead automation rules, and also send the lead owner a notification using a flow.

What is Salesforce Web to Lead?

Salesforce web to lead is used to capture the leads from your website and save in Salesforce. This is built-in functionality in Salesforce. A web-to-lead form is an essential component of marketing and sales automation. Its purpose is to capture data submitted by website visitors, such as contact information and product interest, and store it as a "Lead" record in Salesforce.

Pre-Requisites

- A Thank you page or a confirmation page on the site
- A Classic Email Template
- Verified OrganisationWide Email address

Organisation-Wide Email Address and Default No Reply

The organisation-wide email address allows you to associate an email address to user profiles. When you assign an organisation-wide email address for all the user profiles or selected user profiles, users can use the common email address while sending emails. Note that the users will share the same display name and email address.

You can set up multiple organisation-wide email addresses, but you can use only one organisation-wide email address to send emails. When an organisation-wide email address is not set up then the logged-in user email address is used to send emails.

In short, organisation-wide email addresses are used to send emails to all users in an organisation or a specific group of users in Salesforce. This can be useful for sending announcements, updates, or other important information to all users within

the organisation. Additionally, organisation-wide email addresses can be used to send emails to a specific group of users, such as all sales reps or all customer service agents. This can be helpful for sending targeted communications to specific groups of users within the organisation. - Source ChatGPT

How to set up OWE in salesforce?

1. Go to Setup > Email > organisation-Wide Email Addresses.
2. Click New/Add
3. Specify the display name and the email address in the corresponding fields.
4. Specify whether to use this address for all or selected profiles. Select the profiles as necessary.
5. Click Save.

The screenshot shows the 'Organization-Wide Email Address' configuration page in Salesforce. The page has a light blue header with the title 'Organization-Wide Email Address'. Below the header, there are several fields and options:

- Display Name:** A text input field.
- Email Address:** A text input field.
- Purpose:** A dropdown menu currently set to 'User Selection'.
- Profile Selection:** Two radio buttons:
 - Allow All Profiles to Use this From Address
 - Allow Only Selected Profiles to Use the From Address
- Profiles:** A list box containing the following profiles:
 - Program Management Standard User
 - System Administrator
 - Analytics Cloud Integration User
 - Analytics Cloud Security User
 - Minimum Access - Salesforce
 - External Apps Login User
 - Standard Platform User
 - Customer Community Login User
 - Cross Org Data Proxy User
 - Authenticated Website

At the bottom right of the page, there are three buttons: 'Save', 'Save and New', and 'Cancel'.

Reference: https://help.salesforce.com/s/articleView?id=sf.orgwide_email.htm&type=5

Default No Reply and it's Importance

In Salesforce, the "Default No Reply" email address is used as the sender address for automated emails that are sent from the system, such as emails sent from workflow rules or approval processes. This email address is important because it helps to ensure that emails sent from the system are not marked as spam and are more likely to be delivered to the intended recipient.

Using the "Default No Reply" email address also helps to prevent emails from being sent from unverified addresses, which can cause issues with email deliverability and damage the reputation of the sending domain.

Overall, the "Default No Reply" email address is an important feature in Salesforce that helps to ensure that automated emails sent from the system are delivered to the intended recipient and are not marked as spam.

- 1 Go to Setup > Email > organisation-Wide Email Addresses.
- 2 Click New/Add
- 3 Under Special Purpose organisation-Wide Email Addresses, click Add.
- 4 Enter a display name. This is what customers see as the email's Sender Name.
- 5 Enter your No-Reply email address

Organization-Wide Email Address

Display Name

Email Address

Purpose **Default No-Reply Address** ▼

Allow All Profiles to Use this From Address

Allow Only Selected Profiles to Use the From Address

Notes:

- noreply@salesforce.com is used only when there isn't a default No-Reply email address set for your org.
- noreply@salesforce.com can't be used with a custom email template and doesn't contain any customizable content. The email subject and body are automatically set and can't be changed.

How to setup web to lead Salesforce

1. From Setup, enter Web-to-Lead in the Quick Find box, then select Web-to-Lead.
2. To enable or change Web-to-Lead settings, click Edit. (If you are using Web to Lead, directly Enable Web to Lead checkbox)
3. Click on Create Web -to-Lead Form

SETUP Web-to-Lead

Using pre-existing pages on your company's website, you can capture contact and profile information from real-time to customer requests.

My Website

First Name

Last Name

E-mail

Create New Lead

Name	Company	Phone	Created
John Doe	ABC Corp	123-456-7890	10/26/2011
Jane Smith	XYZ Inc	987-654-3210	10/26/2011
Bob Johnson	DEF LLC	555-123-4567	10/26/2011
Alice Brown	GHI Corp	444-555-6666	10/26/2011
Charlie Davis	JKL Inc	333-444-5555	10/26/2011

Web-to-Lead Settings

Web-to-Lead Enabled

Require reCAPTCHA Verification

Default Lead Creator: Jessica Macpherson

Default Response Template

4. Select the fields you want on the form. (For your personal portfolio, select: FirstName, LastName, Email, Mobile, Company, Description- please refer the below image)
5. Give the redirect URL, Eg: Your sites thank you page or any other url that fits your purpose. (More about Thank you page in the end of this document)

Web-to-Lead Setup

Easily set up a page on your website to capture new leads.

Create a Web-to-Lead Form

Select the fields to include on your Web-to-lead form:

Available Fields		Selected Fields	
Salutation		First Name	
Title		Last Name	
Website		Email	
Phone		Mobile	
Fax		Company	
Street		Description	
Zip			
Country			
Lead Source			

NOTE: Would you like to add custom fields that you do not see listed website. [Tell me more.](#)

After users submit the Web-to-Lead form, they will be taken to the specified return URL on your website, such as a "thank you" page.

Return URL

Include reCAPTCHA in HTML [i](#)

Language

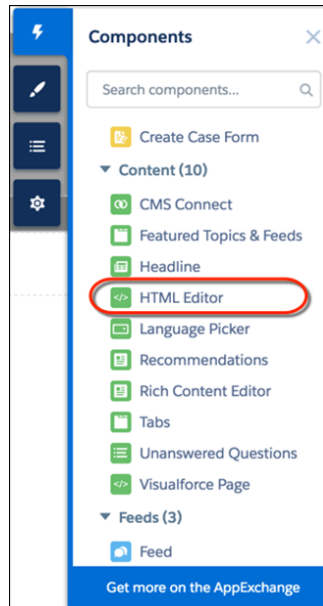
6. Click on Generate

Paste the above HTML code in your website. (Follow tip below)

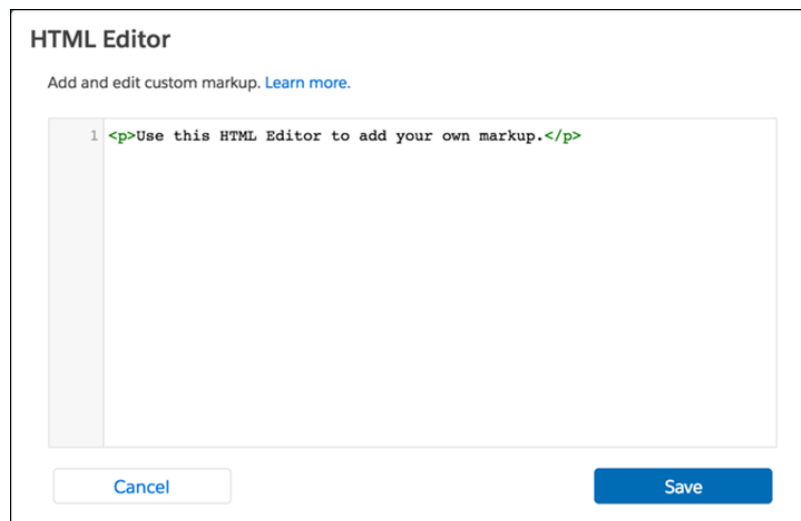
Lead record will be created in salesforce when User submits details from your website.

How to add HTML code to the portfolio?

1. In Experience Builder, drag the HTML Editor component from the Components panel onto the page.



2. Add and format HTML content. Add your code in between the page break attributes.



3. Add the below tag in your hidden fields section, under your retURL line (We will use this field in our auto response rules and in the flow to send a notification to Lead Owner)

```
<input type=hidden name="lead_source" value="Web">
```



```
14  
15 <input type=hidden name="oid" value="XXXXXXXXXXXX" />  
16 <input type=hidden name="retURL" value="https://XXXXXXXXXX.g.my.site.com">  
17 <input type=hidden name="lead_source" value="Web">
```

4. Change the Field Label for 'Description' to 'How can I help you?'

```
<label for="company">Company</label><input id="company" maxlength="40" name="company" size="20" type="text" /><br>  
<label for="description">How can I help you?</label><textarea name="description"></textarea><br>  
<input type="submit" name="submit">  
</form>
```

5. If you want to make fields required, simply add 'required' at the end of the individual tag.

```
<label for="email">Email</label><input id="email" maxlength="80" name="email" size="20" type="text" required/><br>  
<label for="company">Company</label><input id="company" maxlength="40" name="company" size="20" type="text" required/><br>
```

6. Publish and Test the site.

You should be able to see the form as below

First Name

Last Name

Email

Mobile

Company

How can I help you?

Submit

Tip

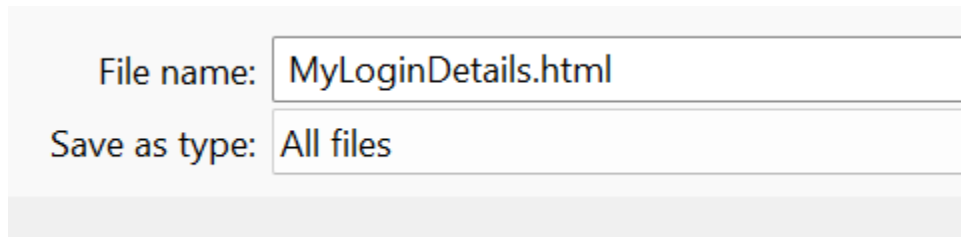
Add your <meta> and <script> tags to 'Head Markup' section under settings. Please follow the help page-

https://help.salesforce.com/s/articleView?id=sf.community_builder_page_head.htm&type=5

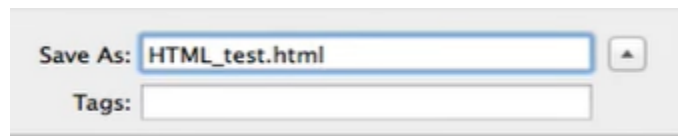
Tips on running the file from personal computers

Save this html as .html file in your windows or MAC computers and run(Double click) this file. This HTML file is going to open in your default browser. Lead Records will be created this way too.

Windows- Open Notepad, enter your html code and save the file with any file name ending with “.html”



MAC -Open TextEdit → Format → Rich text file, enter your code and save your file with .html extension. Click 'Use HTML' when prompted

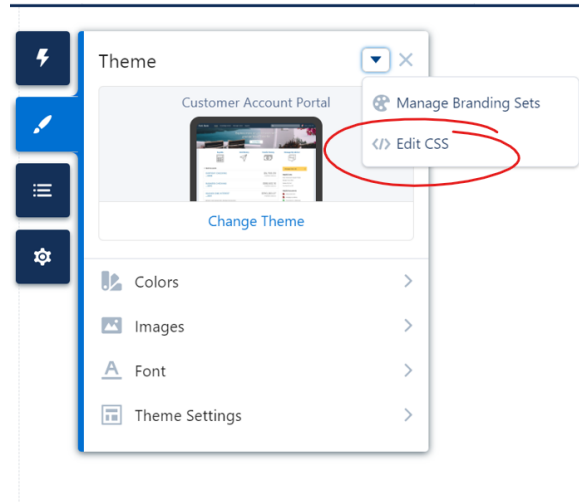


How to add CSS to the form?

CSS makes the front-end of a website shine and it creates a great user experience. Without CSS, websites would be less pleasing to the eye and likely much harder to navigate. In addition to layout and format, CSS is responsible for font colour and more.

There are two steps involved in this. First, we add CSS to Experience Cloud and then we call the CSS on the form.

1. Experience Cloud Themes → Drop Down → Edit CSS → Add your CSS here. (If you don't have a CSS file handy, Use the file thats attached at the end of the document)



CSS File

```
.np-form input[type=text],input[type=tel],input[type=email], select, textarea,
input[type="number"], input[type="date"] {
  width: 96%;
  padding: 12px;
  border: 1px solid #ccc;
  border-radius: 4px;
  resize: vertical;
  background: #fafafa;
}
.np-form select {
  width: 101%;
}
.np-form label {
  padding: 0px 0px 0px 0px;
  display: inline-block;
  font-size:15px;
}
.np-form span{
  color:red;
}
.np-form input[type=submit], input[type=button] {
  background-color: #30B5CE;
  box-shadow: 0 2px 0 0 #30B5CE;
  color:#fff;
  padding: 10px 35px;
  border: none;
  border-radius: 4px;
  cursor: pointer;
```

```

float: center;
  position: relative;
  left: 45%;
  top:70%;
margin-top:6px!important;
font-size:15px;
border-radius: 300px;
}

.np-form input[type=submit]:hover {
  background-color: #30B5CE; ;
}

.np-form {
font-family:"Century Gothic", sans-serif;
}

.np-form {
border-radius: 5px;
background-color: #fff ;
padding: 20px;
}

.np-form .col-25 {
float: left;
width: 100%;
margin-top: 10px;
}

.np-form .col-75 {
float: left;
width: 100%;
margin-top: 10px;
}

/* Responsive layout - when the screen is less than 600px wide, make the two columns stack on
top of each other instead of next to each other */
@media screen and (max-width: 1062px) {
.np-form .col-25, .np-form .col-75, .np-form input[type=submit] {
width: 100%;
margin-top: 0;
}
.np-form select {
width: 101%;
}
}

```

2. Call this CSS on the form. (np-form is the name of the CSS file here)

Add `<div class="np-form">` in the HTML editor before the form tag and `</div>` after the form tag

```
<!-- NOTE: Please add the following <FORM> element to your page. -->
<!-- ----->
<div class="np-form">
<form action="https://webto.salesforce.com/servlet/servlet.WebToLead?encoding=UTF-8" method="POST">
```

```
<label for="phone">Phone</label><input id="phone" maxlength
<input type="submit" name="submit">
</form>
</div>
```

3.Publish the site and test.

This is the result of adding the CSS to forms

The image displays two versions of a web form side-by-side. The left version is a basic, unstyled form with labels for 'First Name', 'Last Name', 'Email', 'Mobile', 'Company', and 'How can I help you?' (with a text area), and a 'Submit' button. The right version is a more modern, styled version of the same form, featuring rounded input fields, a blue 'Submit' button, and a clean, minimalist layout.

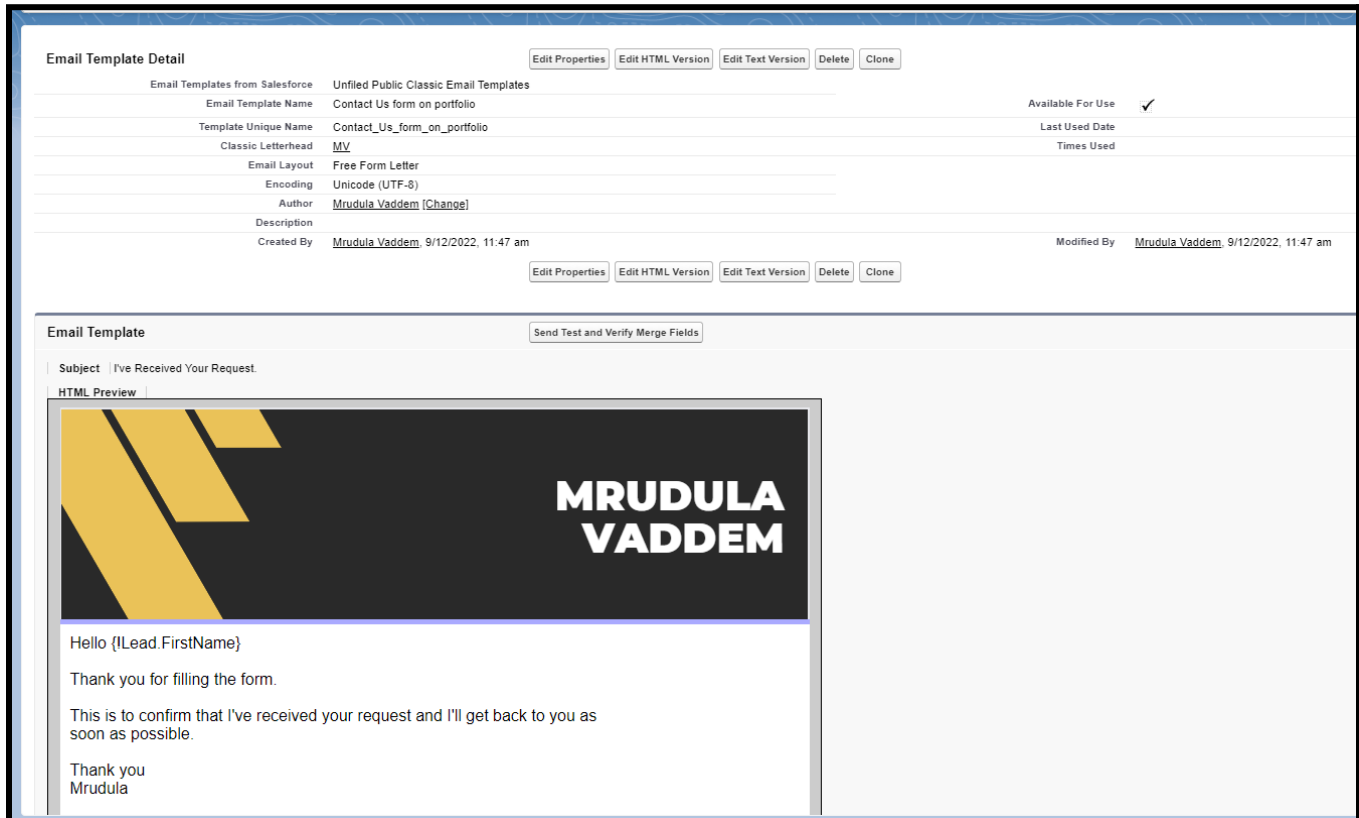
Notes

- In the generated code, you can edit the CSS as per requirement so that it should look as per the theme of the website.
- HTML editor in the experience page does not support javascript and CSS.

To set up Web-to-Lead auto-response rules

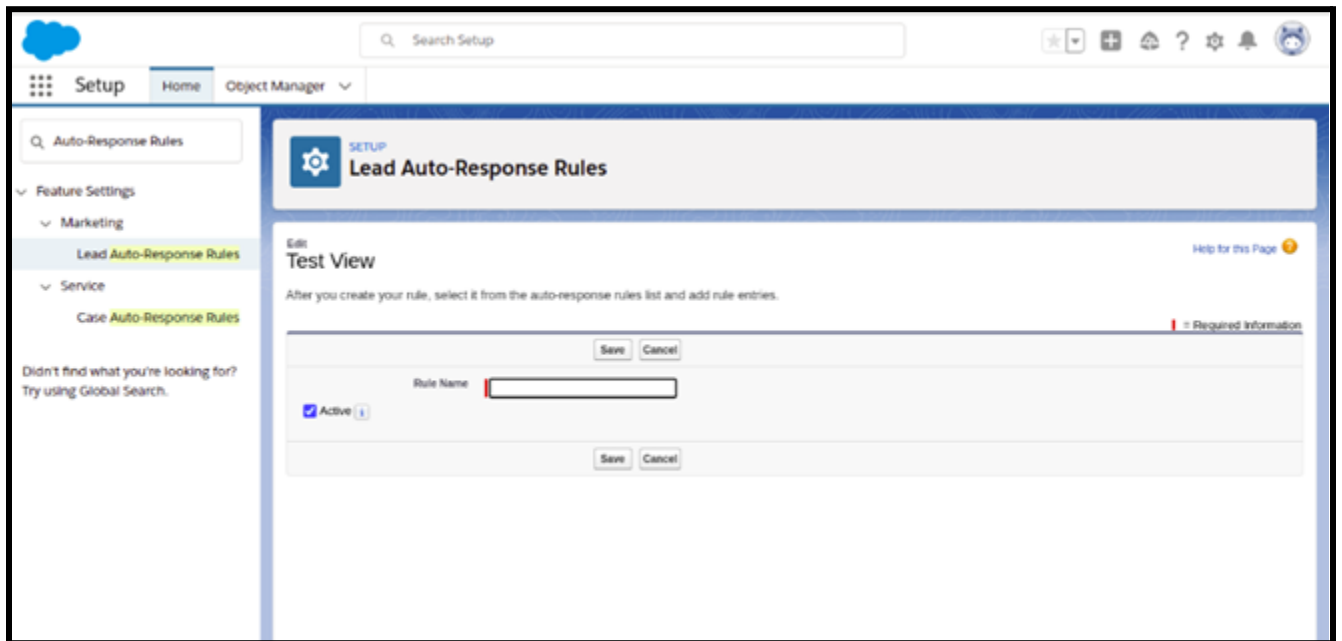
Create an Email Template to send out to user taht fills the form. Please refer the below image for the sample

(Please refer 'Sample Email Template' section below if you need help in creating n email template)



Auto-Response rule will not trigger if the records are created manually through UI

1. From Setup, enter Auto-Response Rules in the Quick Find box, then select Lead Auto-Response Rules.



2. Click New.

3. Enter a name for the rule.

4. Select the Set this as the active Web-to-Lead Auto-Response rule box to make the rule the active auto-response rule. You can only have one active auto-response rule, but the rule can contain many rule entries.

5. Click Save.

6. Click the name of the rule that you just created.

7. Click New in the Rule Entries section.

Web-to-Lead Auto-Response Rule
Test

Add rule entries that specify the criteria and email template to use to respond to leads. You can reorder rule entries on this page after you create them.

Rule Detail Edit

Rule Name	Test	Active	✓
Created By	Mrudula Vaddem, 7/1/2023, 5:07 pm	Modified By	Mrudula Vaddem, 7/1/2023, 5:07 pm

Edit

Rule Entries New

No rule entries specified.

We recommend you create multiple rule entries under this rule. It is typically not necessary to create more than one rule. However, you may need to create an additional rule if you are importing leads :

8. Enter a number to indicate the order the rule entry should be processed in relation to other rule entries.

9. Select your own criteria or attributes a lead must meet to receive this template.

Enter the rule entry Save Save & New Cancel

Step 1: Set the order in which this rule entry will be processed

Sort Order i

Step 2: Select the criteria for this rule entry

Run this rule if the :

Field	Operator	Value	
Lead: Lead Source	--None--	Web	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

[Add Filter Logic...](#)

10. Enter the email name and address of the sender. (The specified email address should be either from your verified organisation-wide email address or the email ID specified in your Salesforce user profile. And the email address should be different from the routing email address which is used for Email-to-Case.)

11. Choose an email template to use when the selected attributes apply. Select the one that you'd like to send to the person filled the form



The screenshot shows two steps in a configuration process:

- Step 3: Specify the name and address to include on the auto-response message From line**
 - Name:** Mrudula
 - Email Address:** mrudulavaddem@gmail.com
 - The sender email address must be either one of your verified [organization-wide email addresses](#) or the email address in your Salesforce user profile.
- Step 4: Select the template to use**
 - Email Template:** Contact Us form on portfolio

Buttons for 'Save' and 'Cancel' are visible at the bottom right.

12. Click Save.

Email Notification to Lead Owner

Who doesn't want to get notified when they have a new lead?

We can't notify the lead owner using Auto-response rules. There are multiple solutions on salesforce to achieve this but we are going to go with Flows.

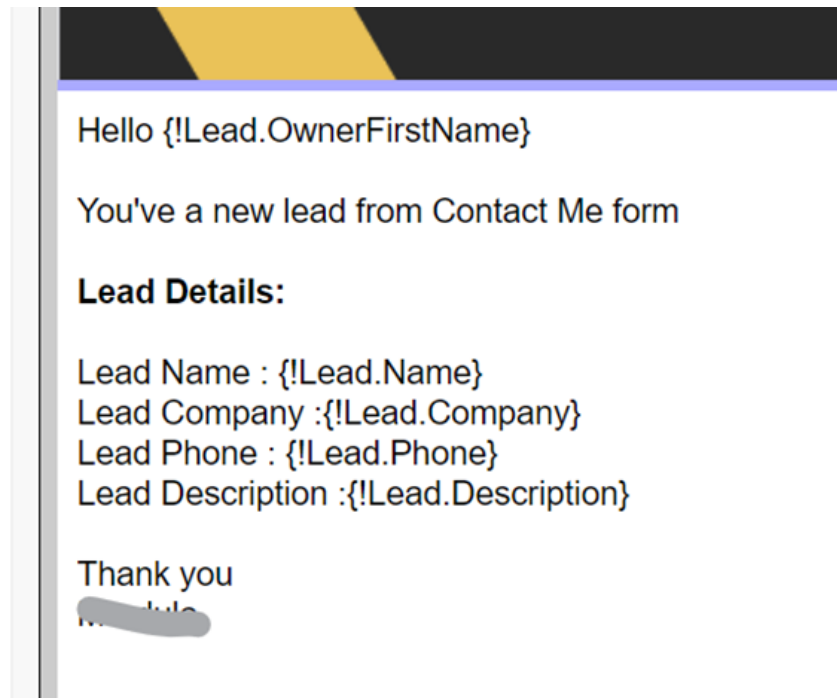
Pre-requisites

- A Classic Email Template (Different than what we used to alert end user)
- An Email Alert

Sample Email Template

1. Click Setup
2. Search Classic Email Templates in the Quick Find
3. Click New Template.
4. Select HTML in Step 1 and click Next.
5. Make it "Available for Use"

6. In the Email Template Information Form type in a name for the Email Template and a Unique Template Name. I'm calling it "Alert Me
7. Choose an existing letterhead, Select Freeform in email Layout and Fill the Subject field
8. Click Next.
9. Fill in the body. Refer the image below



Email Alert

1. Click Setup.

2. In the Quick Find box, type Email Alerts.
3. Select Email Alerts, click on the New Email Alert button.
4. Name the Email Alert and click the Tab button. The Unique Name will populate.
5. For Object select Lead.
6. For the Email Template choose the Email Template you created to send to lead owner
7. For Recipient Type select Owner: Lead Owner.
8. Click Save.

Edit Email Alert

Description: You've a New Lead from Contact Us form

Unique Name: You_ve_a_New_Lead_from ⓘ

Object: Lead

Email Template: Alert Me - Contact me ⓘ

Protected Component:

Recipient Type: Search: Owner ▼ for: Find

Recipients

Available Recipients	Selected Recipients
--None-- ▲	Lead Owner ▲

Flow

1. Click Setup.

2. In the Quick Find box, type Flows.
3. Select Flows then click on the New Flow.
4. Select the Record Triggered Flow option and click on Next and configure the flow as follows:
5. Object: Lead
6. Trigger the Flow When: A record is created
7. Set Entry Criteria- All conditions are met: Lead Source Equals Web
8. Optimise the Flow For: Action and Related Records
9. Click Done.

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Lead

Configure Trigger

* Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Field

LeadSource

Operator

Equals

Value

Web

10. Under Toolbox, select Elements.
11. Drag and drop the Action element onto the Flow designer.
12. Below Filter By, select Type.

Thank you page/confirmation page, after form submission and an auto response rule go hand in hand. Both help in maintaining the quality of your service and make the end user feel valued.

A thank you page is the page your visitors, leads, and customers see right after filling out and submitting a form on a landing page/web page.

Visitors who submit forms are your BEST website visitors. If you only have a confirmation message, your visitors essentially become stranded after they submit a form. Take advantage of this opportunity to guide your visitors to more information that you want them to read. Think about things that you want them to know before you follow up with them.

Create a separate page on Experience Cloud without adding it only to the navigation bar. Use the URL of this page as your **retURL** on your web to lead html code.

A sample thank you should look like this.




Thank You!

Your application has been successfully submitted

You should receive an automatic confirmation in your inbox - If you cannot find it please check your spam.

Please take a min to read about our [cause](#)

Please follow us on 

For any further queries, please contact me on mrudula@salesforce.com

