Web to lead and Auto Response Rules

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

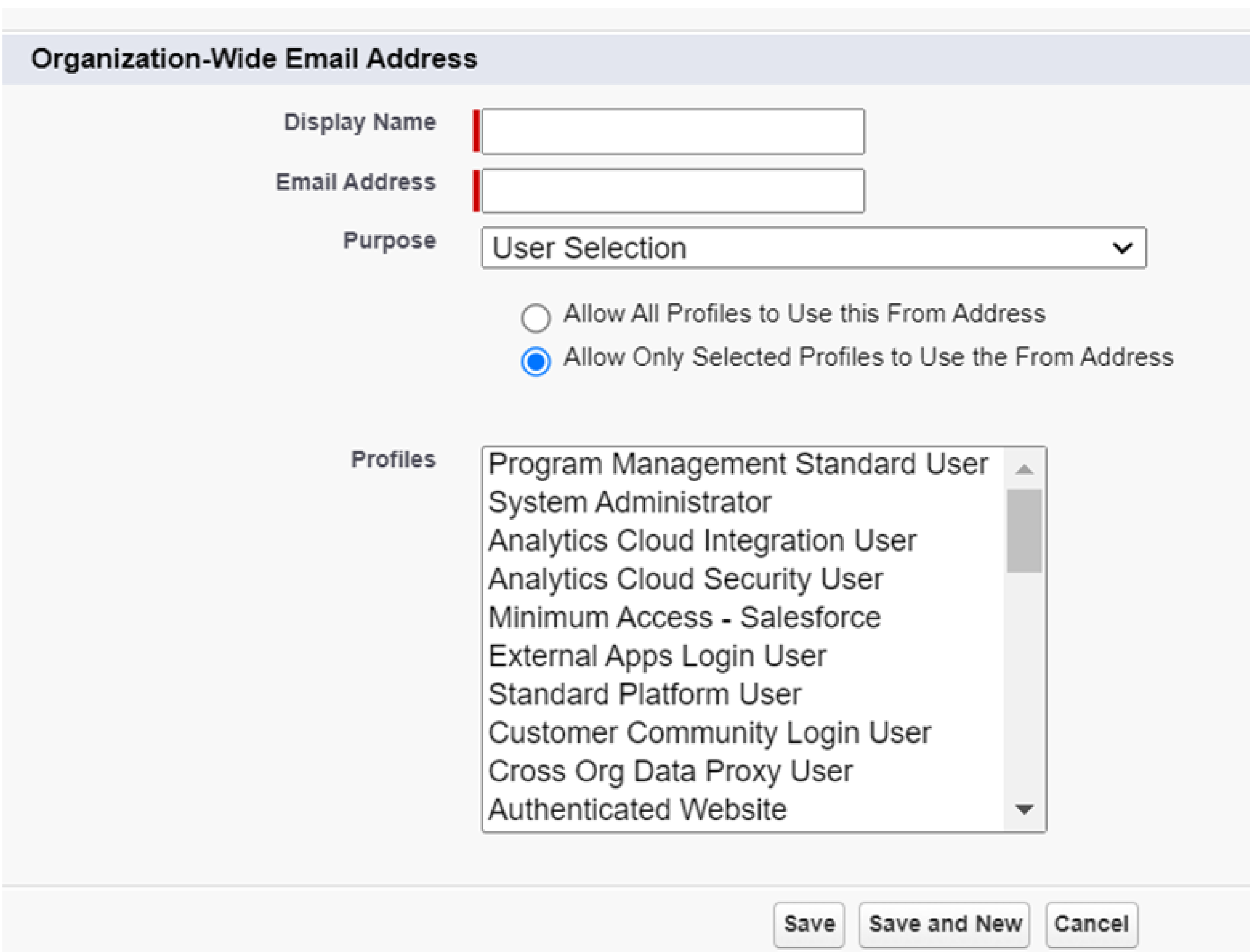
The organisation-wide email address allows you to associate an email address to user profiles. When you assign an organisation-wide email address for all the user profiles or selected user profiles, users can use the common email address while sending emails. Note that the users will share the same display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



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

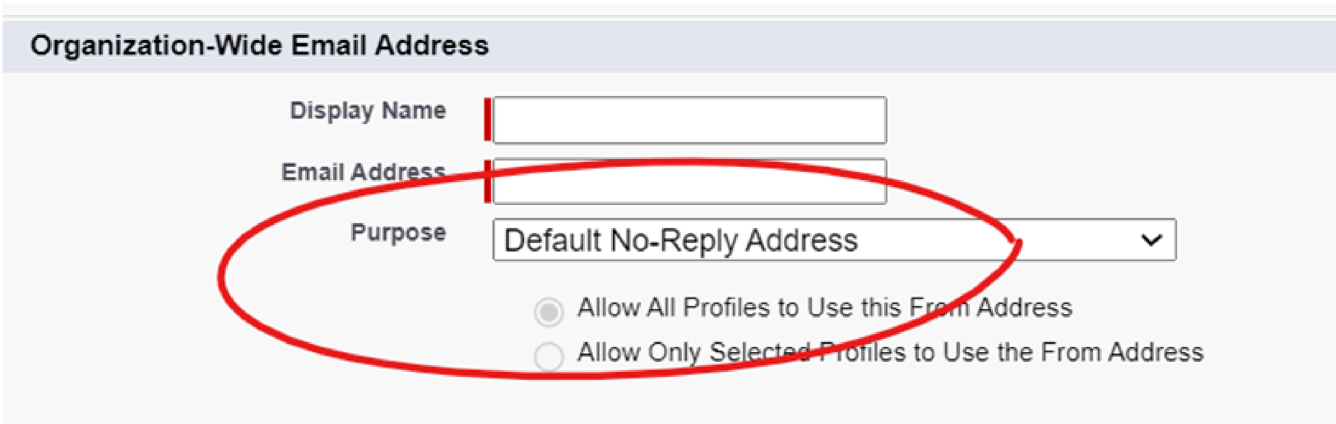
Default No Reply and it's Importance

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



Notes:

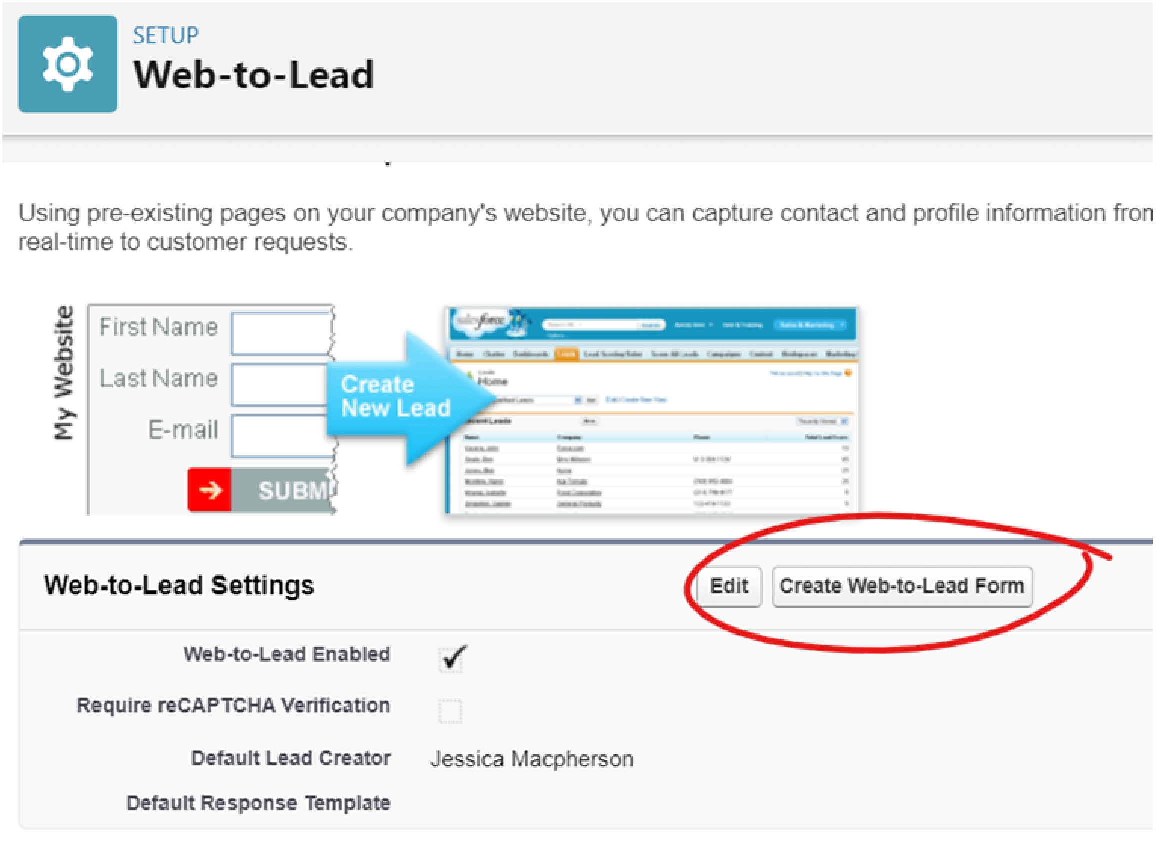
- noreply@salesforce.com is used only when there isn't a default No-Reply email address set for your org.
- noreply@salesforce.com can't be used with a custom email template and doesn't contain any customizable content. The email subject and body are automatically set and can't be changed.

How to setup web to lead Salesforce

1. From Setup, enter Web-to-Lead in the Quick Find box, then select Web-to-Lead.

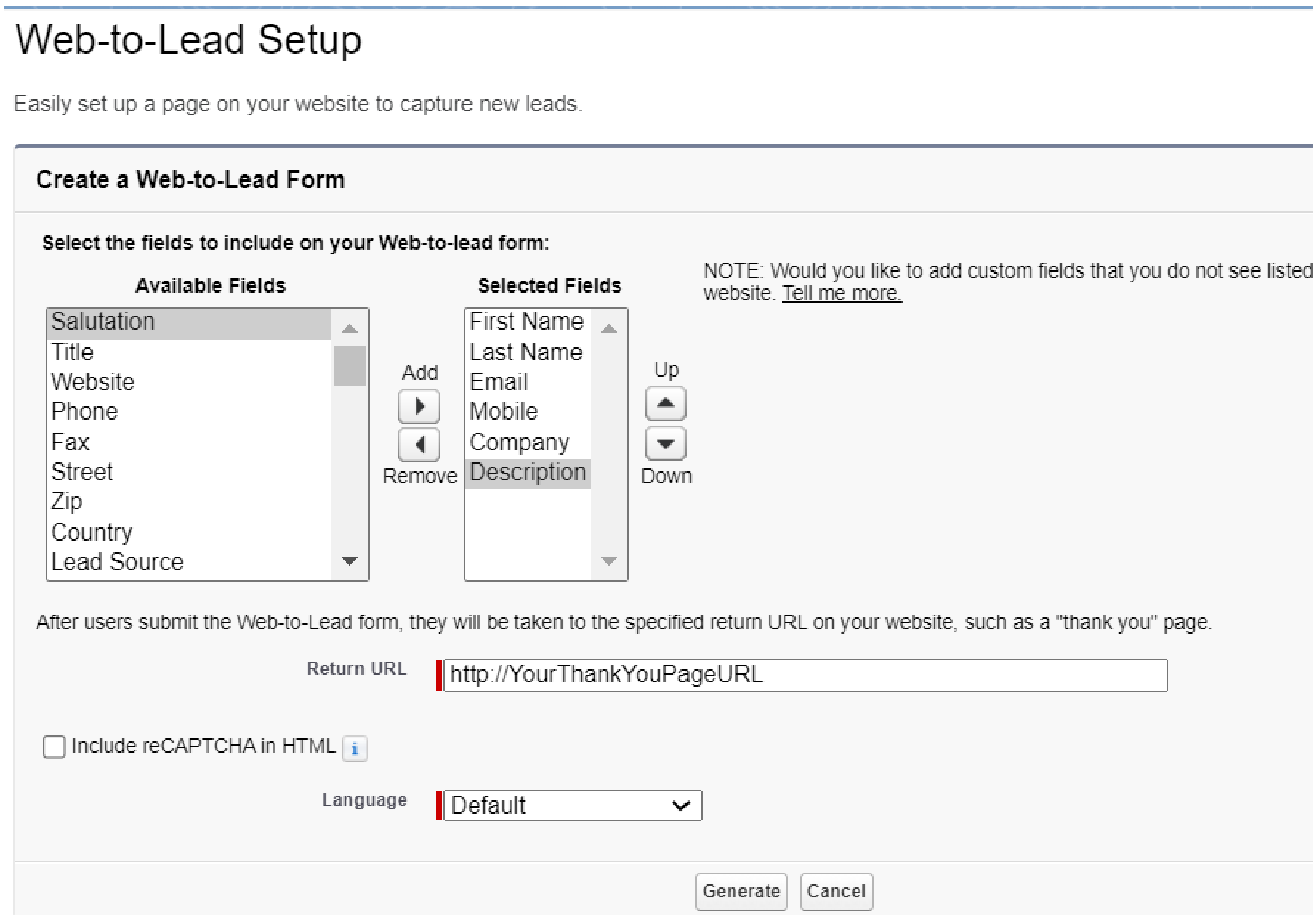
2. To enable or change Web-to-Lead settings, click Edit. (If you are using Web to Lead, directly Enable Web to Lead checkbox)

3. Click on Create Web -to-Lead Form



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)



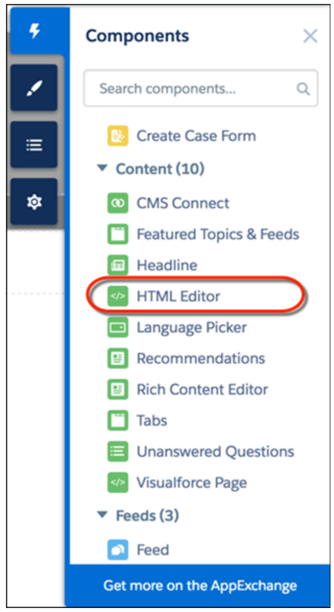
6. Click on Generate

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

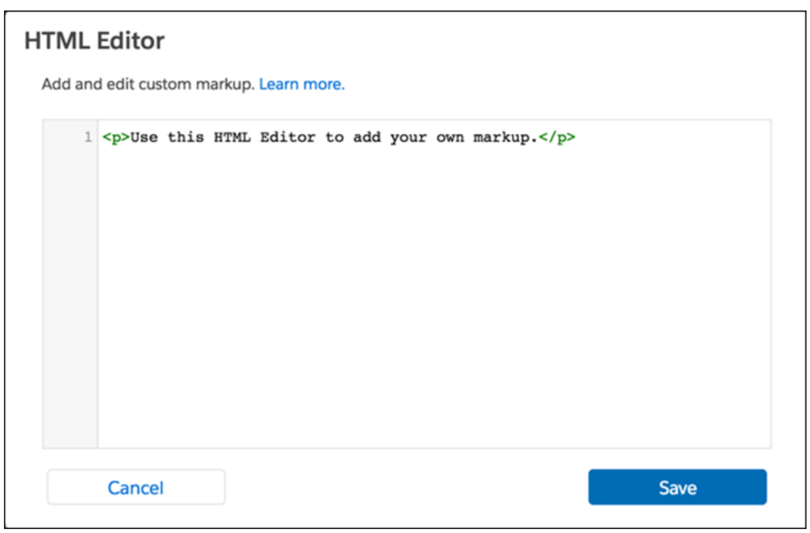
Lead record will be created in salesforce when User submits details from your website.

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">

```
<input type=hidden name="oid" value=[redacted]
<input type=hidden name="retURL" value="https://[redacted]g.my.site.com">
    <input type=hidden name="lead_source" value="Web">
```

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

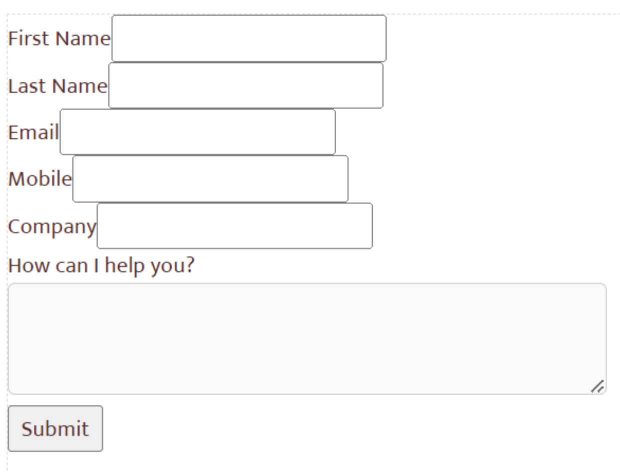
```
<label for="company">Company</label><input  id="company" maxlength="40" name="company" size="20" type="text" /><br>

<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



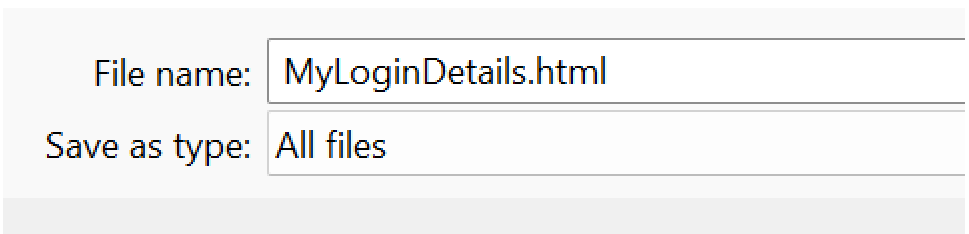
Tip

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"



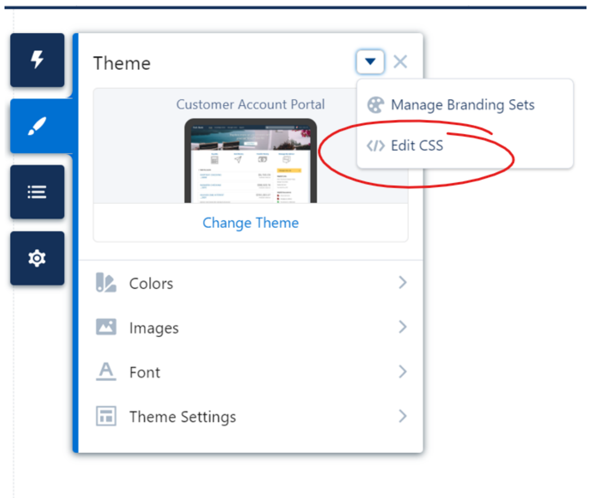
MAC -Open TextEdit → Format → Rich text file, enter your code and save your file with .html extension. Click 'Use HTML' when prompted

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)

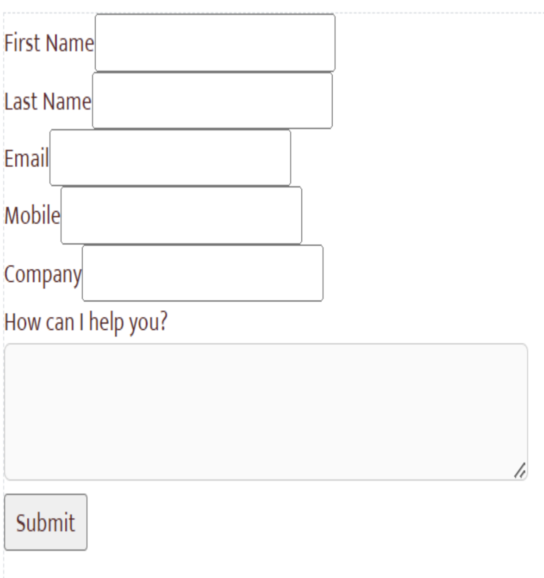
Add <div class="np-form"> in the HTML editor before the form tag and </div> after the form tag

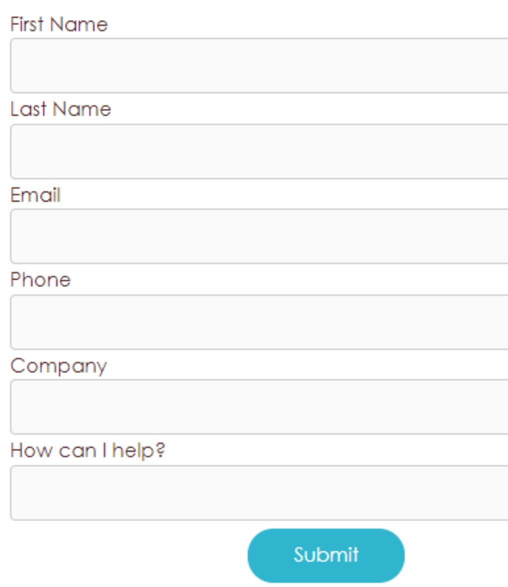
```
<!--  NOTE: Please add the following <FORM> element to your page.          -->
<!--  ----------------------------------------------------------------------  -->
<div class="np-form">
<form action="https://webto.salesforce.com/servlet/servlet.WebToLead?encoding=UTF-8" method="POST">
```

```
<label for="phone">Phone</label><input  id="phone" maxlength

<input type="submit" name="submit">

</form>
  </div>
```

3.Publish the site and test.

Tis is the result of adding the CSS to forms





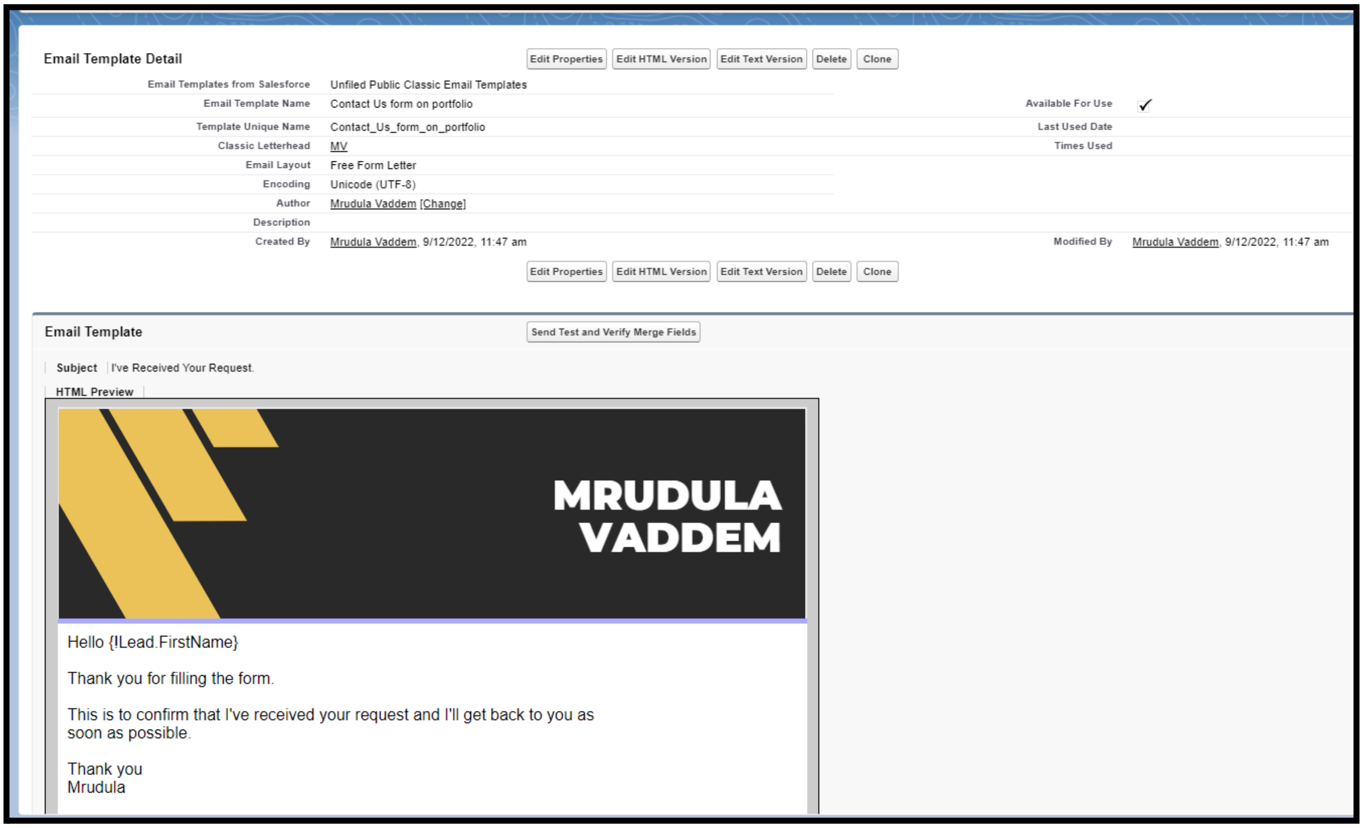
Notes

- 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

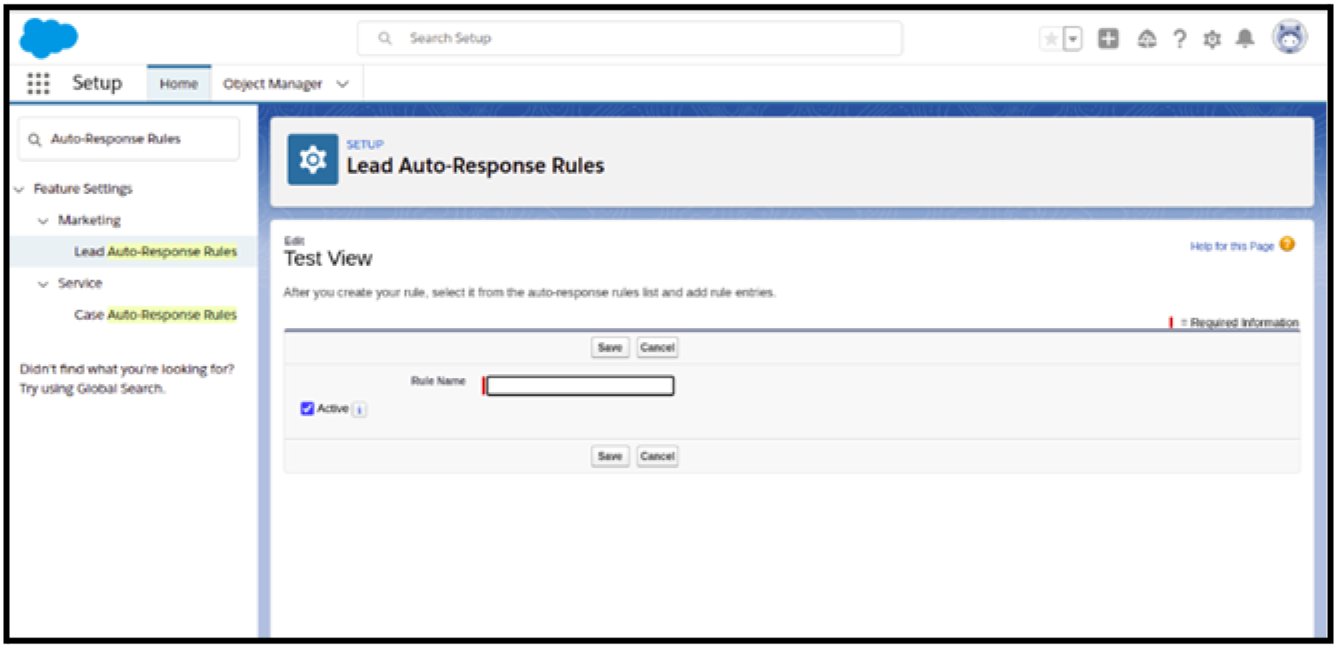
Create an Email Template to send out to user taht fills the form. Please refer the below image for the sample

(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.

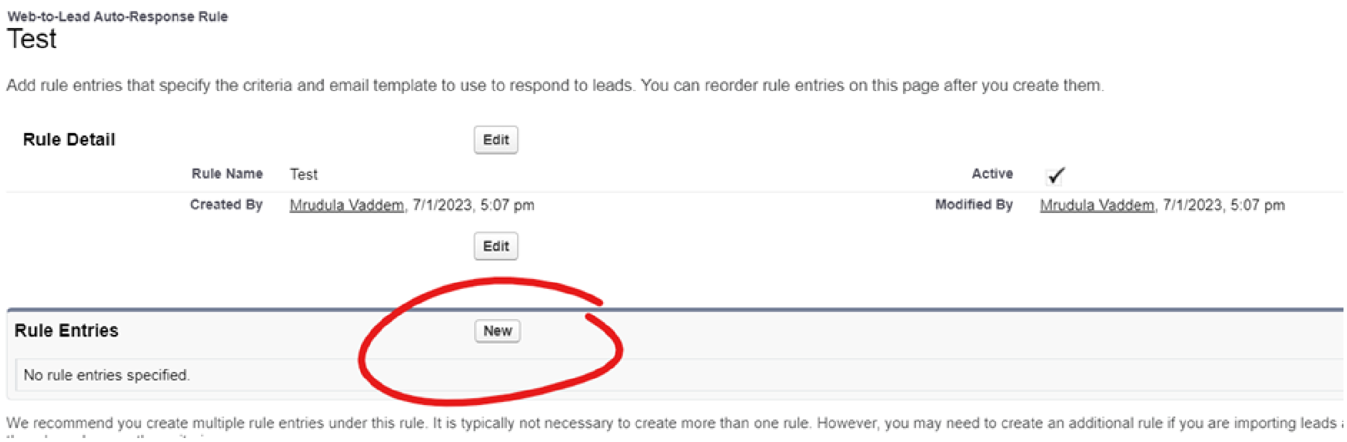
3. Enter a name for the rule.

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.

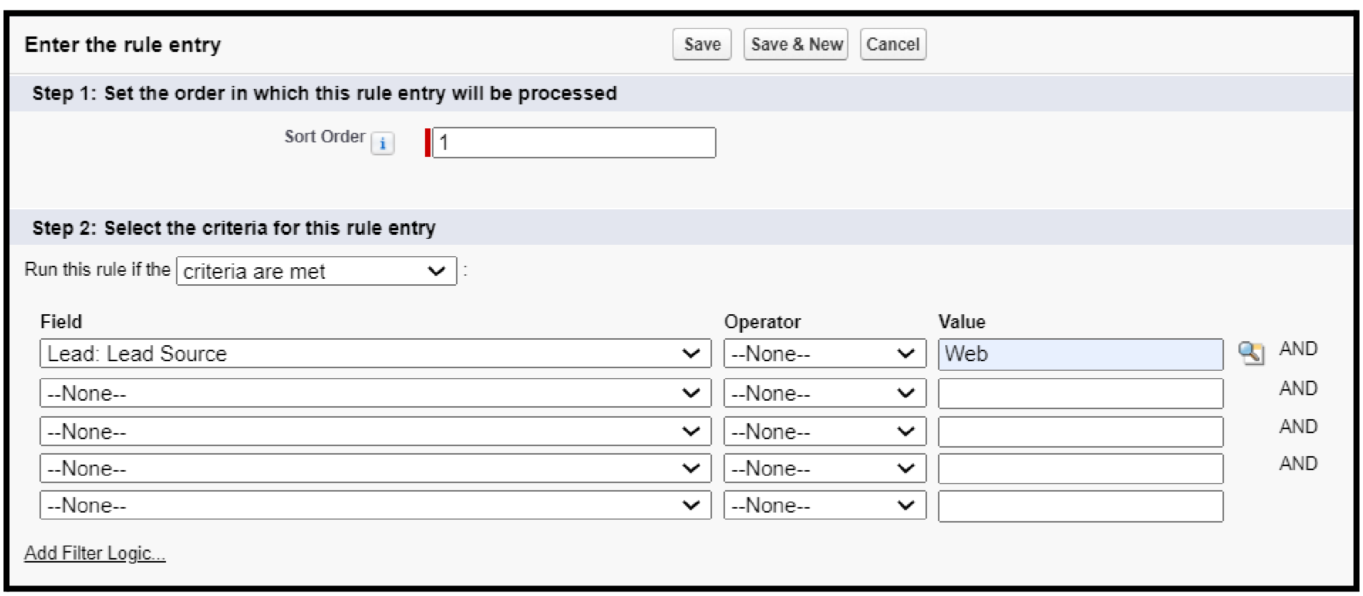
6. Click the name of the rule that you just created.

7. Click New in the Rule Entries section.



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.



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

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.

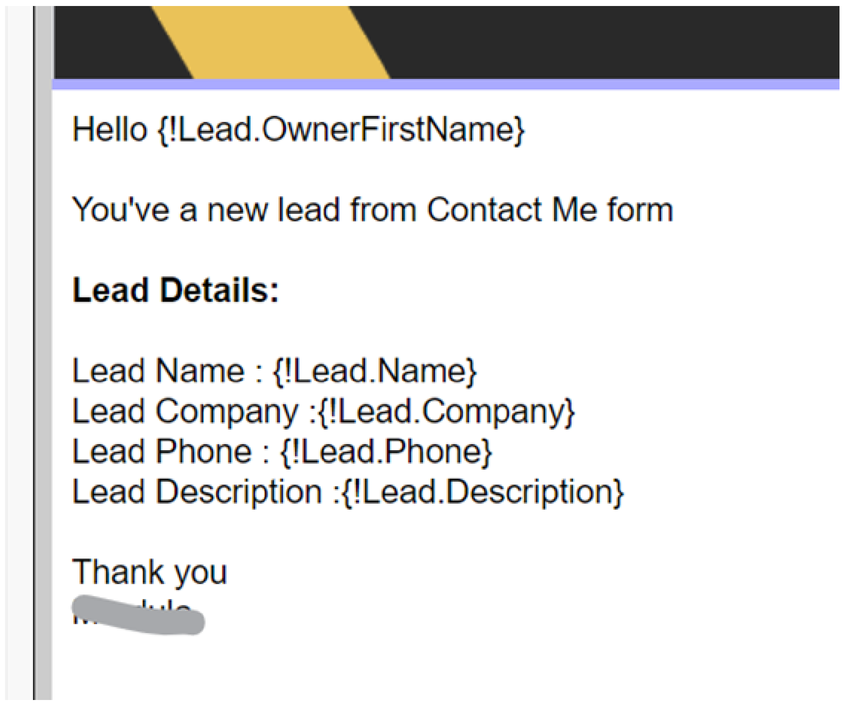
Pre-requisites

- 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



Hello {!Lead.OwnerFirstName}

You've a new lead from Contact Me form

Lead Details:

Lead Name : {!Lead.Name}
Lead Company :{!Lead.Company}
Lead Phone : {!Lead.Phone}
Lead Description :{!Lead.Description}

Thank you

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.

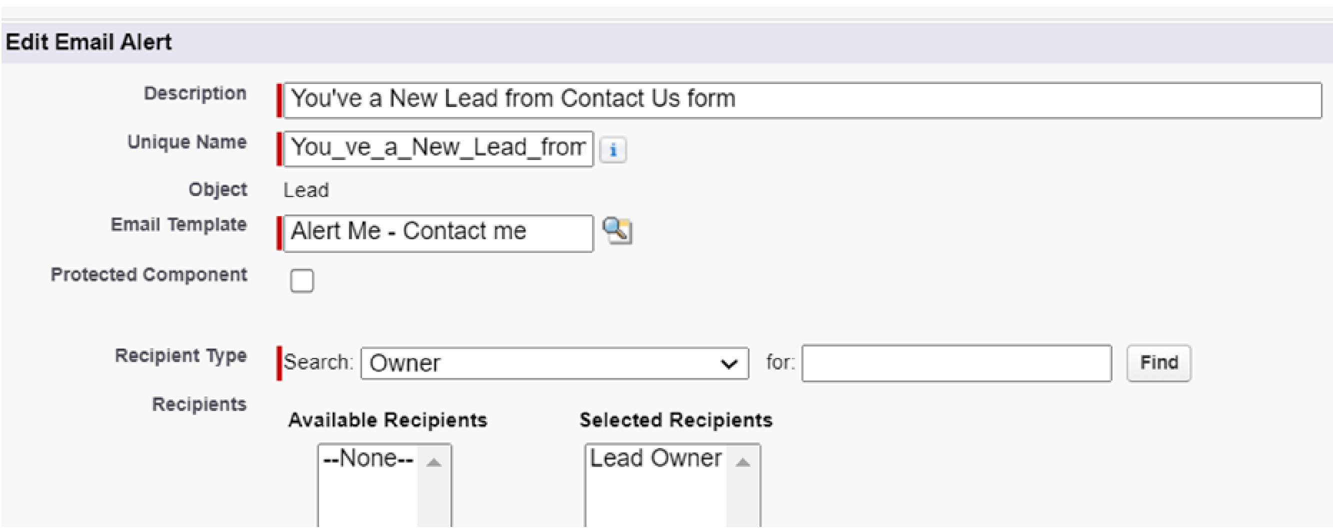
4. Name the Email Alert and click the Tab button. The Unique Name will populate.

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.



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:

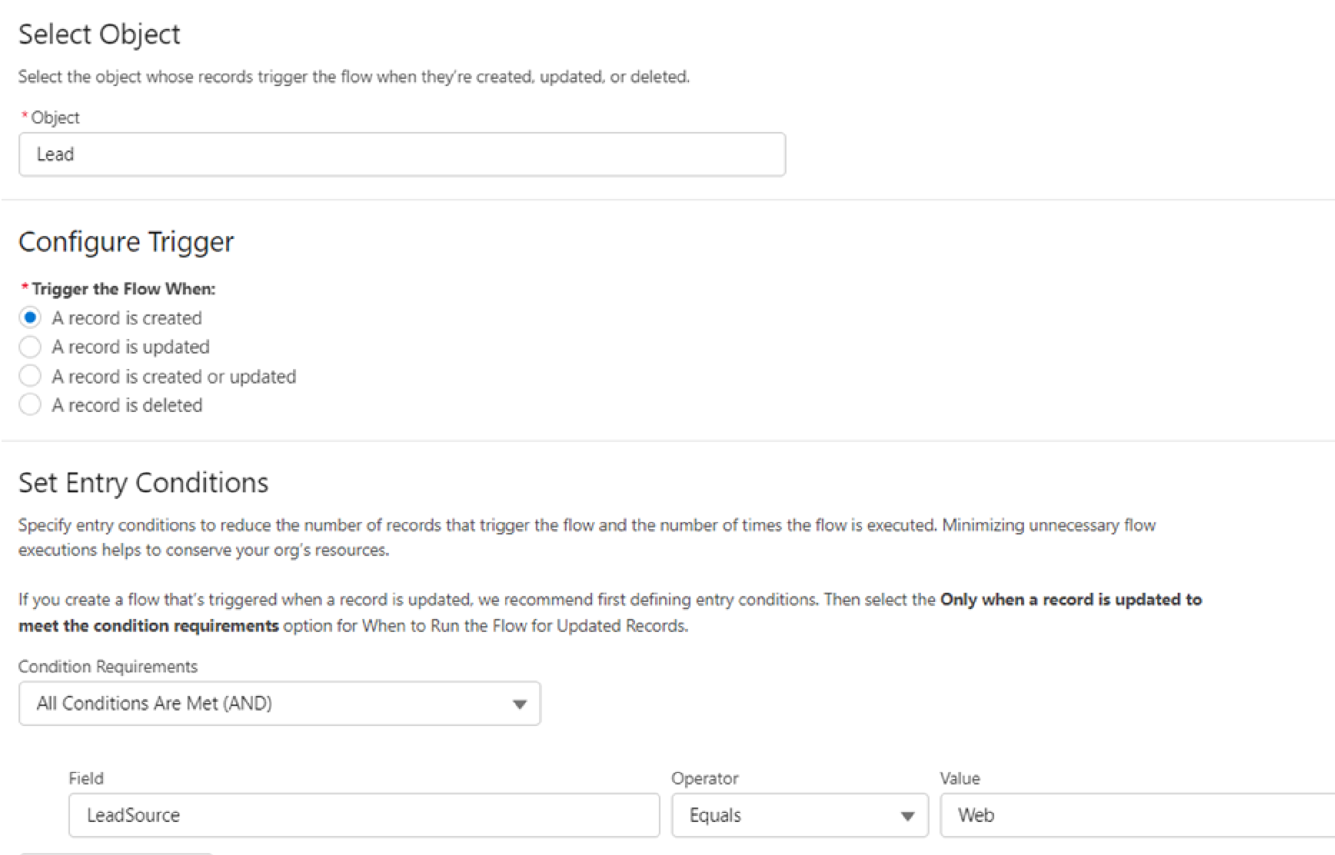
5. Object: Lead

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.



10. Under Toolbox, select Elements.

11. Drag and drop the Action element onto the Flow designer.

12. Below Filter By, select Type.

13. Select the Email Alert – "You've a New Lead from Contact Us form" (the email alert which we created earlier)

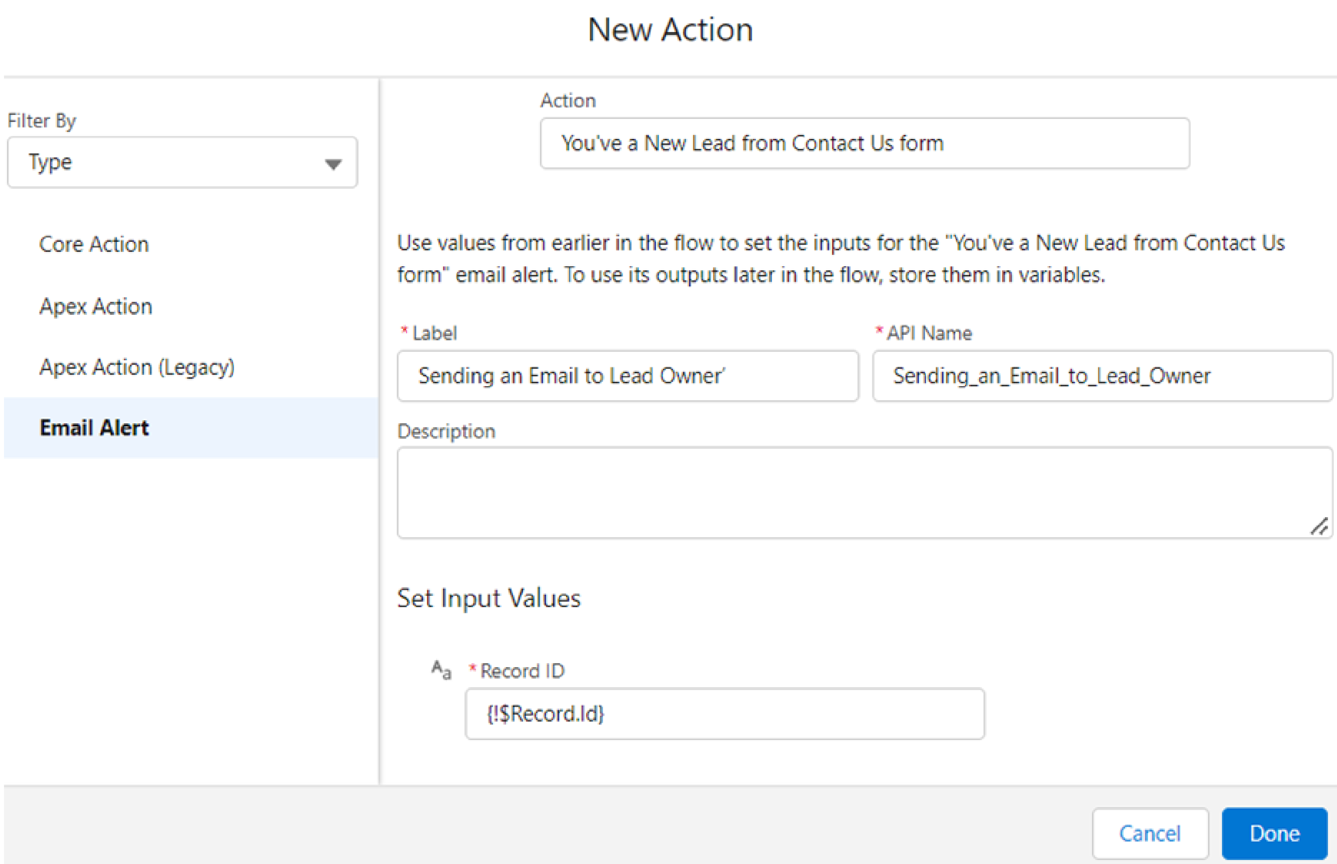
14. Label the new action 'Sending an Email to Lead Owner'

15. Set Input Values

16. {!$Record.Id}

17. Click Done.

18. Save the flow and Activate it



Thank You Page

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.