



Web to lead with reCAPTCHA 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.

Disclaimer

Web to Lead Scripts and forms do not work on Experience Cloud.

Google reCAPTCHA can be embedded on Experience Cloud using Lightning Web Components which is not covered in this document. (WIP)

If you are adding Web-to-Lead on your personal portfolio, skip the recaptcha session and continue with the rest. Please follow this process of adding reCAPTCHA only if the form is hosted somewhere else.

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
- ReCAPTCHA API Keys

Steps to register for an API key with Google Account

Note: Recaptcha testing is work in progress on Experience Cloud

1. Login to your company's google account
2. Once logged in, register for the reCaptcha with google. Here is the quicklink: <https://www.google.com/recaptcha/admin/create>
3. Enter the Label.

Note: Use the label that will make it easy for you to identify the site in future. Please refer the snip below

4. Select the reCAPTCHA V2 radio button
5. Enter your website's domain in the Domains box. Enter the URL for your website without http://. (Don't forget to give your domain name, otherwise, your captcha box won't work and will give you an error. The domain name has to be of that site, which will host your web-to-lead form)
6. Check the Accept the reCAPTCHA Terms of Service
7. Press the Register button

Label ⓘ

Test For OM

11 / 50

reCAPTCHA type ⓘ

☐ reCAPTCHA v3 Verify requests with a score

☒ reCAPTCHA v2 Verify requests with a challenge

☒ "I'm not a robot" Checkbox Validate requests with the "I'm not a robot" checkbox

☐ Invisible reCAPTCHA badge Validate requests in the background

☐ reCAPTCHA Android Validate requests in your android app

Domains ⓘ

+ oceanmindorg.my.site.com

Owners

mrudulavaddem@gmail.com (You)

+ 👤 Enter email addresses

☒ **Accept the reCAPTCHA Terms of Service**

By accessing or using the reCAPTCHA APIs, you agree to the Google APIs [Terms of Use](#), Google [Terms of Use](#), and to the Additional Terms below. Please read and understand all applicable terms and policies before accessing the APIs.

reCAPTCHA Terms of Service ▼

☒ **Send alerts to owners** ⓘ

CANCEL SUBMIT

8. Google then generates your API keys and displays them.

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.

Organization-Wide Email Address

Display Name

Email Address

Purpose

User Selection

☐ Allow All Profiles to Use this From Address

☒ Allow Only Selected Profiles to Use the From Address

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

Save

Save and New

Cancel

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

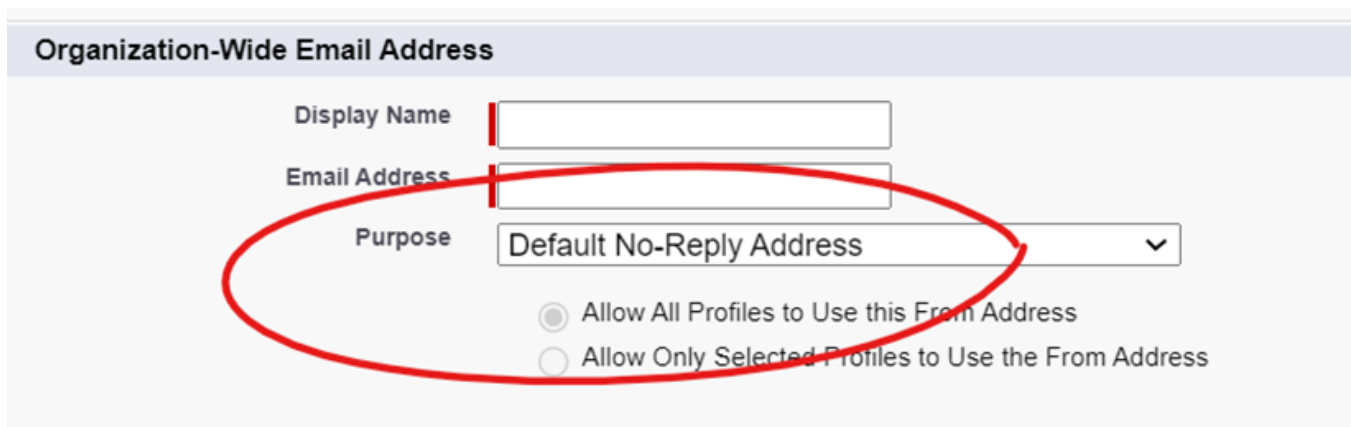
Default No Reply and it's Importance

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

The screenshot shows the Salesforce Setup interface for Web-to-Lead. At the top, there's a 'SETUP Web-to-Lead' header. Below it, a text block explains: 'Using pre-existing pages on your company's website, you can capture contact and profile information from real-time to customer requests.' Below this, there's a diagram showing a 'My Website' form with fields for 'First Name', 'Last Name', and 'E-mail', and a 'SUBMIT' button. An arrow labeled 'Create New Lead' points from the website form to a 'Web-to-Lead' table. The table has columns for 'Name', 'Company', 'Phone', and 'Email Address'. Below the table, there's a 'Web-to-Lead Settings' section. In this section, the 'Web-to-Lead Enabled' checkbox is checked. The 'Require reCAPTCHA Verification' checkbox is unchecked. The 'Default Lead Creator' is set to 'Jessica Macpherson'. The 'Default Response Template' is empty. The 'Edit' and 'Create Web-to-Lead Form' buttons are circled in red.

Web-to-Lead Settings

Setting	Value
Web-to-Lead Enabled	<input checked="" type="checkbox"/>
Require reCAPTCHA Verification	<input type="checkbox"/>
Default Lead Creator	Jessica Macpherson
Default Response Template	

4. Select the fields you want on the form
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)

Create a Web-to-Lead Form

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

Available Fields

- Salutation
- Title
- Website
- Phone
- Mobile
- Fax
- Street
- Zip
- Country

Selected Fields

- First Name
- Last Name
- Email
- Company
- City
- State/Province

NOTE: Would you like to add custom fields that you do not currently gather additional information from your website. [Tell me](#)

Add

Remove

Up

Down

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

reCAPTCHA API Key Pair i

Enable server fallback ☒ i

Language

Generate Cancel

6. Press the Lookup icon next to the reCAPTCHA API Key Pair field.

Lookup

You can use "*" as a wildcard next to other characters to improve your search results.

Search Results

API Key Pair Nickname	Site Key
Ocean_Mind_Mrudula	61...GhY

7. Press the New button on the Lookup screen. (If you don't see the New button, go back and check the Show Quick Create checkbox in the User Interface.)
8. Enter the API Key Pair Nickname. Tip: Don't enter a name with spaces, follow API name format
9. Enter the Site Key and Enter the Secret (key) from the google reCAPTCHA that we saved earlier
10. Save.

You should be back on the Web-to-Lead Setup page and your new reCAPTCHA key is listed.

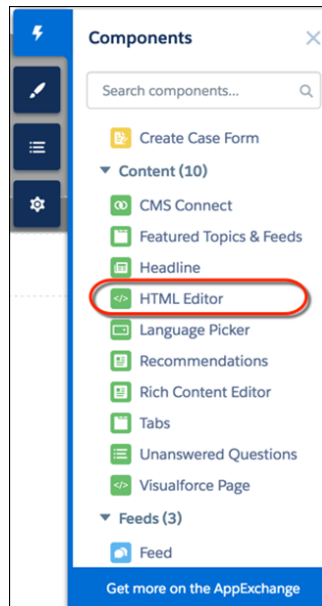
11. Click on Generate

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

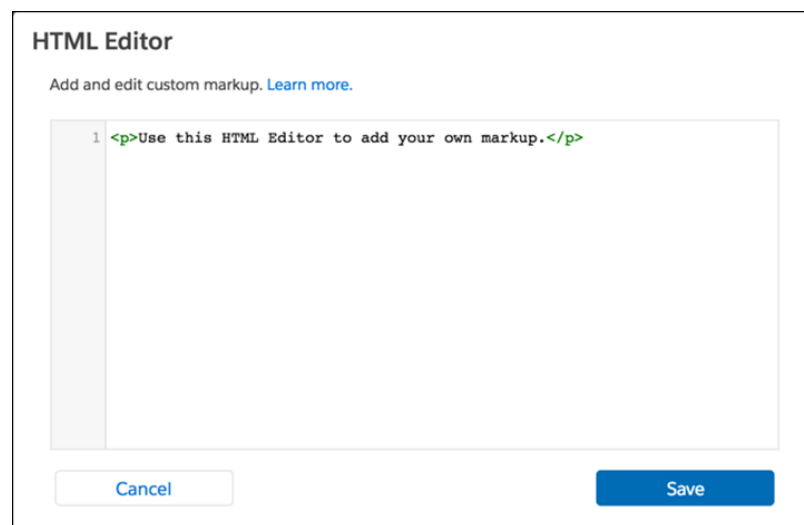
Lead record will be created in salesforce when User submits details from your website.

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="LeadSource" value="Web">`

```
14
15 <input type=hidden name="oid" value="00000000000000000000000000000000">
16 <input type=hidden name="retURL" value="https://www.my.site.com">
17   <input type=hidden name="lead_source" value="Web">
```

4. Publish and Test the site.

Tip

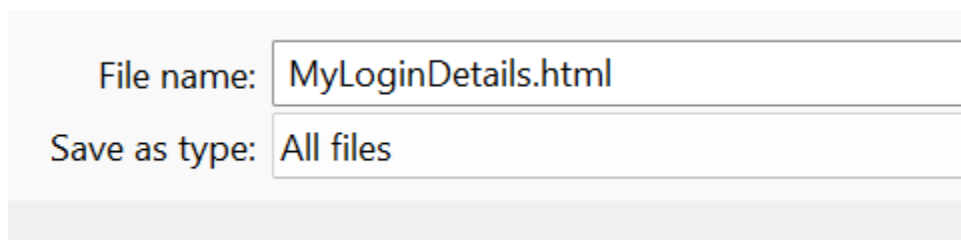
Add your <meta> and <script> tags to 'Head Markup' section under settings. Please follow the help page–

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

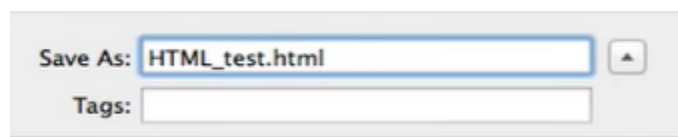
Tips on running the file from personal computers

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



This is the result of our html code without any branding.

First Name
Last Name
Email
Company
City
State/Province

☐ I'm not a robot


reCAPTCHA
[Privacy](#) - [Terms](#)

Submit

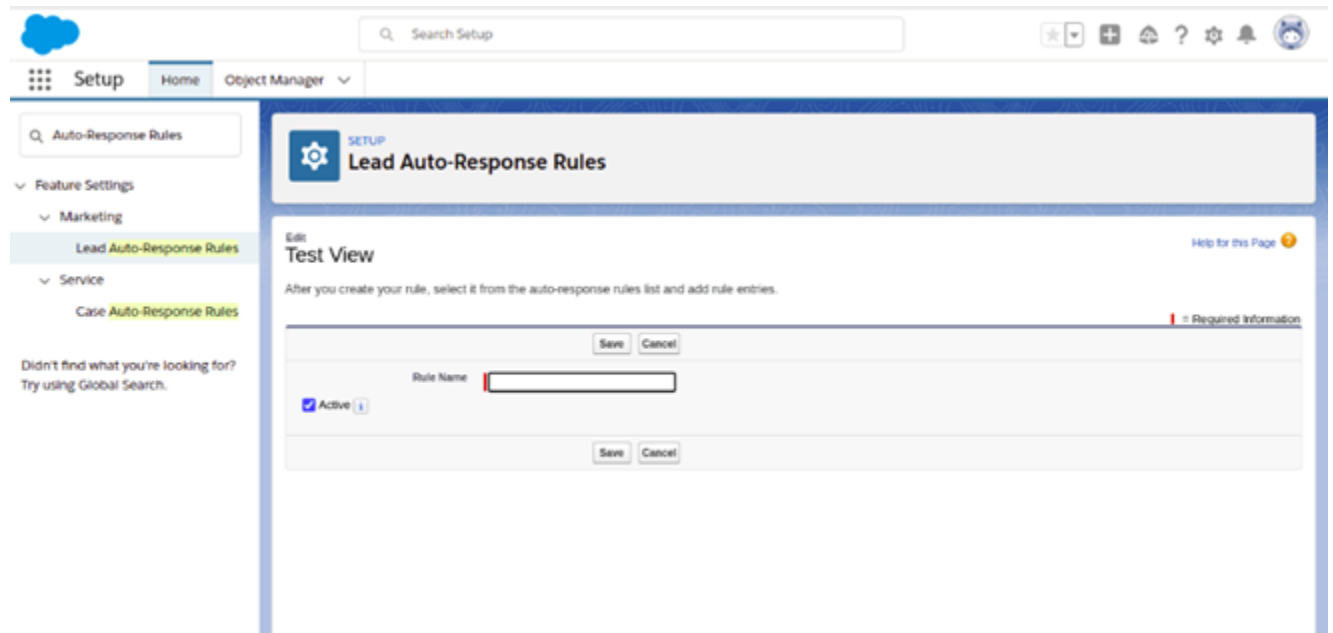
Notes

- 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. Be mindful while adding it to this reCAPTCHA code to the html component on Experience builder

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

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. (You can ignore Lead type field and only select Lead Source as Web)

Enter the rule entry Save 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 Type	equals	Referrer	AND
Lead: Lead Source	equals	Web	AND

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.


Step 3: Specify the name and address to include on the auto-response message From line

Name 

Email Address 

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 

12. Click Save.

Email Notifications

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

There are multiple solutions on salesforce to achieve this but we are going to go with Flows.

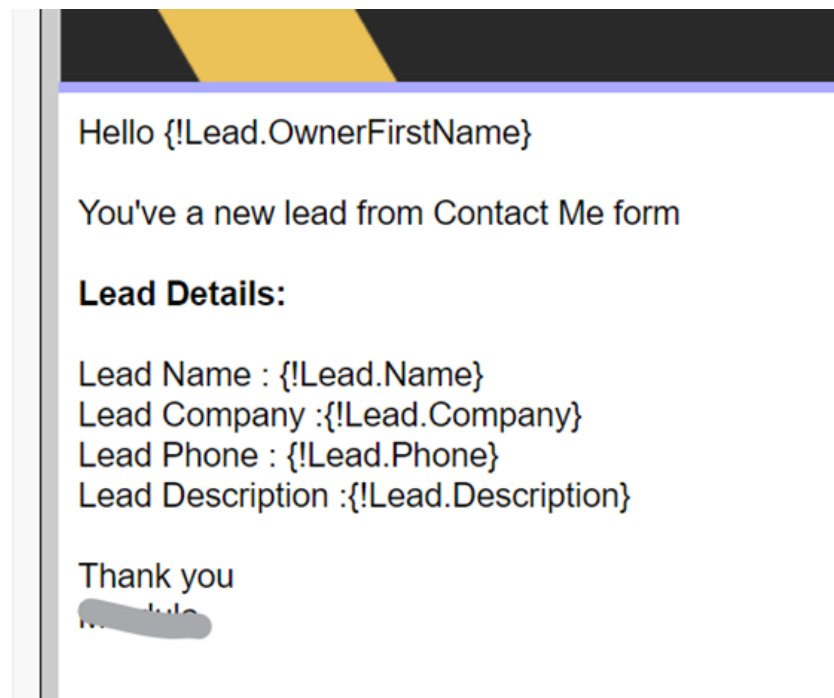
Pre-requisites

- 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 Auto Launched Flow option and click on Next and configure the flow as follows:
5. Object: User
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.
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

New Action

Filter By

Type

Core Action

Apex Action

Apex Action (Legacy)

Email Alert

Action

You've a New Lead from Contact Us form

Use values from earlier in the flow to set the inputs for the "You've a New Lead from Contact Us form" email alert. To use its outputs later in the flow, store them in variables.

* Label

Sending an Email to Lead Owner'

* API Name

Sending_an_Email_to_Lead_Owner

Description

Set Input Values

A_a

* Record ID

{!\$Record.Id}

Cancel

Done

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.

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 mrudulavaleforce@gmail.com

