



# **Administrator Guide**

Version 2.0



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## **1.Overview:**

WTA is an application that allows you to capture any objects information from the users and helps you to automatically generate new records in Salesforce.com  
You can redirect users to other Web pages as per the requirement.

## **2.Features:**

- Capture any object's information from users and automatically generate new records in Salesforce.com
- No limit of record generation on per day basis from your company's website visitors
- Users can specify default values for records created using web form.
- Exceptions can be easily tracked
- In case of error, users are redirected to a failure return URL with error as a query parameter.
- Send automatic email responses to any object submissions based on the record's attributes.



### 3.Data Flow:

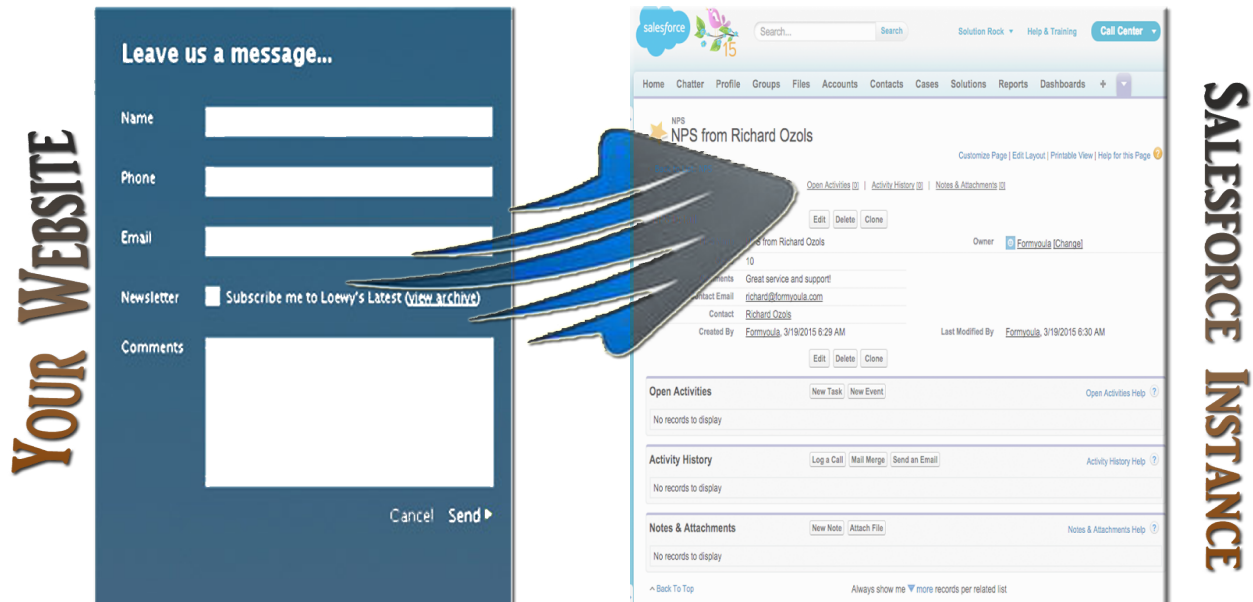


Fig: 3.1

### 4.Pre-Requisites:

- Set up a Force.com site:
  1. From Setup, enter Sites in the Quick Find box, then select Sites.
  2. Register a custom Force.com domain for your organization.
  3. Create your site.
  4. When you are ready to make your site public, click Activate on the Site Details page. You can also activate your site from the Site Edit and Sites pages.
  5. Once you configure Force.com Site, please click on Done.



- Supported Editions of Salesforce:
  1. Professional
  2. Enterprise
  3. Performance
  4. Unlimited
  5. Developer

## **5.Installation Guide:**

This document will provide information about installing WTA application on your own Salesforce Instance.

- Visit [AppExchange](#) and search for Web To Any or simply hit the below link:  
Link:  
<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000DIGucUAF>
- Enter your username and password for the Salesforce organization in which you want to install the package, and then click the login button.
- If the package is password-protected, enter the password you received from the publisher
- Click Install. You'll see a message that describes the progress and a confirmation message after the installation is complete.



## 6.Configuration Guide:

This document provides information about configuring WTA application on your own Salesforce Instance.

This document is basically used by:

1. Salesforce System Administrator
2. Users evaluating WTA Application

It is assumed that user has configured Force.com Site on the respective Salesforce instance where WTA Application is to be used.

Steps for configuration are as below:

The configuration is divided into 2 simple steps:

1. Configure Web To Any Setting
2. Configuring a new Record
3. Creating/Generating a HTML form and downloading it.

### 1. Configure Web To Any Setting

- Login to the Salesforce instance
- From Setup, enter "Custom Setting" in Quick Find box and select it.
- Click on "**Web To Any Setting**" Manage
- Put your Site (Secure) URL in Site URI Field for Default Organization Level Value.
- Please refer following screen-shot



Custom Setting

## Web To Any Setting

Help for this Page

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

Edit Delete

### ▼ Default Organization Level Value

Location [Web To Any Enterprise](#)

Site URL <https://webtoanventerprise.secure.force.com/reg...>

View: All ▼ Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

| New                    |          |
|------------------------|----------|
| Setup Owner +          | Location |
| No records to display. |          |

## 2. Configuring a new Record

- Login to the Salesforce Instance (Skip if you are already logged in)
- From Setup, enter Installed Packages in the Quick Find box and select it.
- Click on **Configure** of WTA package
- Select respective site from the **Select Site** drop down list
- Click on **Next** followed by **New** button
- Enter the **Name** (unique name), **Target Object** and **Default Record Creator (User)** detail respectively; Enable/Disable **Track Exception** field as per your requirement
- Click on Save

Please refer the below screenshots for further reference.

Fig: 6.1.1



WebToAny - Setup

Using pre-existing pages of your company's website, you can capture any object's information from users and automatically generate new records in salesforce.com, which enables you to respond real-time requests to customer requests.

Configuration

Search + New

| ACTION | NAME | TARGET OBJECT | DEFAULT RECORD OWNER | ACTIVE | TRACK EXCEPTION |
|--------|------|---------------|----------------------|--------|-----------------|
|--------|------|---------------|----------------------|--------|-----------------|

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Fig: 6.1.2

### Account Configuration

Name (Unique) 1

Account Configuration

Target Object 2

Account

Default Record Creator (User) 3

Integration User

☒ Active ☒ Track Exception 4

Cancel Save 5

Fig: 6.1.3

## 2. Creating/Generating a HTML form and downloading it.

1. Click on Create form on the respective record
2. Select fields to include on your Web-to-Any form and Click on Next
3. Specify default values for records created using Web-to-Any and Click on Next
4. Enter the Success Return URL and Failure Return URL respectively
5. Click on Generate HTML
6. Click on Download File or Copy the generated HTML code and provide it to your company's webmaster to incorporate into your website.





Please refer the below screenshots for further reference.

WebToAny - Setup

Using pre-existing pages of your company's website, you can capture any object's information from users and automatically generate new records in salesforce.com, which enables you to respond real-time requests to customer requests.

Configuration

Search + New

| ACTION                                                                     | NAME               | TARGET OBJECT | DEFAULT RECORD OWNER | ACTIVE                              | TRACK EXCEPTION                     |
|----------------------------------------------------------------------------|--------------------|---------------|----------------------|-------------------------------------|-------------------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Create Form</a> 1 | Case Configuration | Case          | Integration User     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

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Fig: 6.2.1

## HTML Form Creator

You can specify default values for records created using current web form.

+ Add 1

<< Previous Next >> 2

Fig: 6.2.2



## HTML Form Creator

After users submit the Web-to-Account form, they will be taken to the specified return URL on your website, such as a "Thank you" page and in case of error, we redirect to a failure return URL with error as a query parameter.

Success Return URL 1

Failure Return URL 2

3

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Generate HTML

Fig: 6.2.3



## 7.User Guide:

After successful configuration i.e.

1. Configuring a new Record and
2. Creating/Generating a HTML form.
3. Click on Download File or Copy the generated HTML code and provide it to your company's webmaster to incorporate into your website

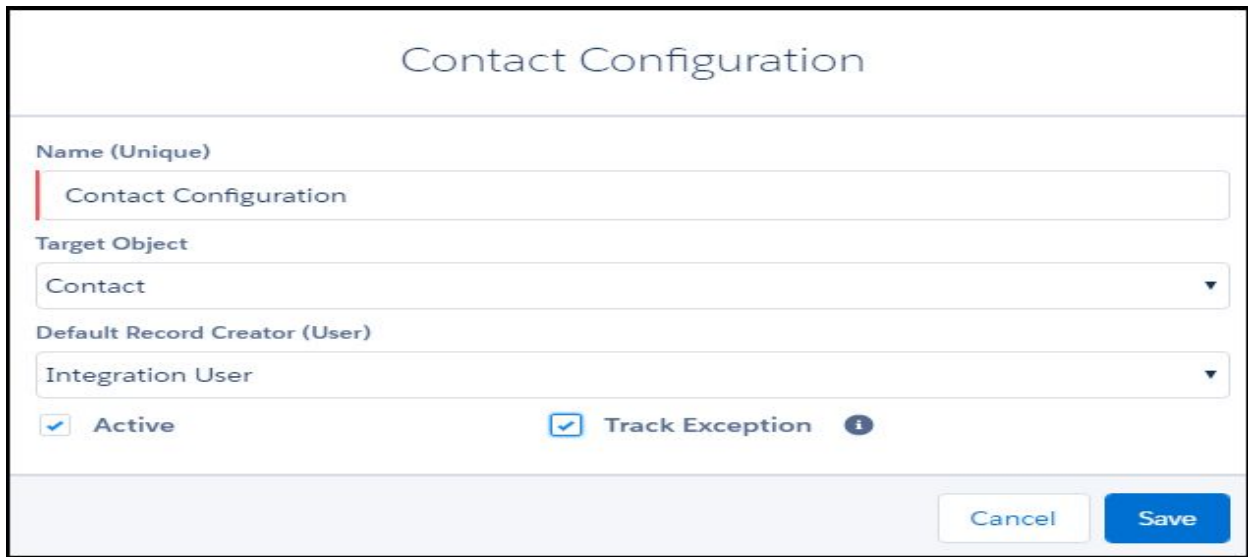
Follow the below Steps:

- Enter the respective values in the form and Click on Submit.
- All the information that you have entered is stored in the respective object as a salesforce record.
- Please refer the below example for precise understanding of using WTA Application.

Sample Example:

In the below example, we will see in detail how the Contacts are created with the prospecting data from your company's website visitors.

**Step 1:** Configure a record with respect to target object using New button on WTA landing Page

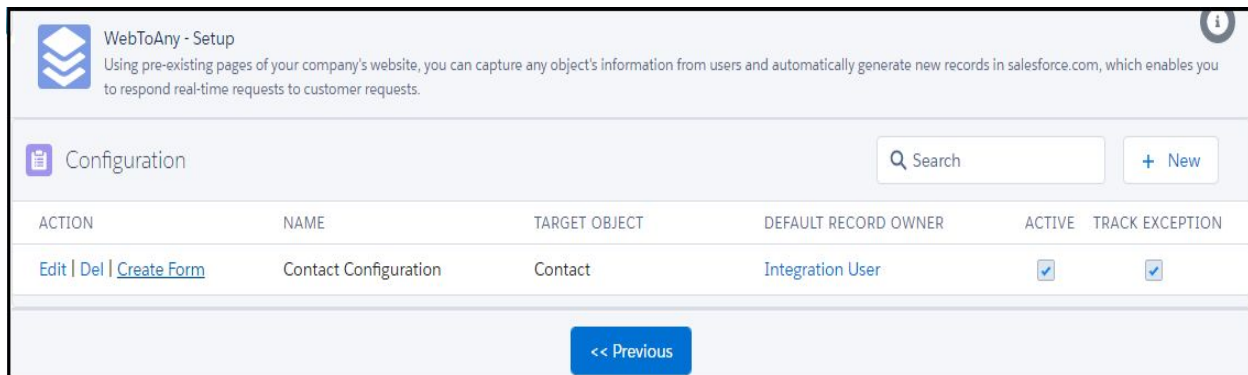


The 'Contact Configuration' form contains the following fields and controls:

- Name (Unique):** A text input field containing 'Contact Configuration'.
- Target Object:** A dropdown menu with 'Contact' selected.
- Default Record Creator (User):** A dropdown menu with 'Integration User' selected.
- Active:** A checkbox that is checked.
- Track Exception:** A checkbox that is checked, followed by an information icon.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.

Fig: 7.1

## Step 2: Create a form for the Contact Object



**WebToAny - Setup**  
Using pre-existing pages of your company's website, you can capture any object's information from users and automatically generate new records in salesforce.com, which enables you to respond real-time requests to customer requests.

**Configuration** Search + New

| ACTION                                                                   | NAME                  | TARGET OBJECT | DEFAULT RECORD OWNER | ACTIVE                              | TRACK EXCEPTION                     |
|--------------------------------------------------------------------------|-----------------------|---------------|----------------------|-------------------------------------|-------------------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Create Form</a> | Contact Configuration | Contact       | Integration User     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

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Fig: 7.2



**Step 3:** Select the fields as per your requirement from the available fields on Contact object

The screenshot displays the 'HTML Form Creator' interface. It features two main panels: 'Available Fields' on the left and 'Selected Fields' on the right. The 'Available Fields' panel lists: Last Name, Lead Source, Level, Mailing City, Mailing Geocode Accuracy, and Mailing Latitude. The 'Selected Fields' panel lists: First Name, Email, Business Phone, and Mailing Country. A blue button with a right-pointing arrow is positioned between the two panels. At the bottom right, there is a blue button labeled 'Next >>'. The title 'HTML Form Creator' is centered at the top of the interface.

Fig: 7.3



**Step 4:** Specify the default values for the required fields on Contact

| Field | Value     |
|-------|-----------|
| 1     | Last Name |

Fig:7.4

**Step 5:** Enter the Success Return URL and Failure Return URL and Generate HTML

Success Return URL

Failure Return URL

Fig 7.5



**Step 6:** Download the Generated HTML and run the file



Fig: 7.6

**Step 7:** Enter all the details in the form and click on Submit

|                                       |               |
|---------------------------------------|---------------|
| First Name                            | Linda         |
| Email                                 | linda@xyz.com |
| Business Phone                        | 9879879879    |
| Mailing Country                       | USA           |
| <input type="button" value="Submit"/> |               |

Fig: 7.7

**Step 8:** Automatically a new record of Contact has been created in Salesforce as seen in the below screenshot



New This Week

Edit | Delete | Create New View

List

Feed

New Contact

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

Action

Name ↑

Account Name

Title

Phone

Email

Contact Owner Alias

Edit | Del |

Bliss, Linda

9879879879

linda@xyz.com

Inteq

Fig 7.8

**Step 9:** Click on the new record created for viewing its detailed information

|                       |                                                    |                      |                        |                       |                                                                     |
|-----------------------|----------------------------------------------------|----------------------|------------------------|-----------------------|---------------------------------------------------------------------|
| <b>Contact Detail</b> |                                                    | <a href="#">Edit</a> | <a href="#">Delete</a> | <a href="#">Clone</a> | <a href="#">Request Update</a>                                      |
| Contact Owner         | <a href="#">Integration User (Change)</a>          |                      |                        |                       | Phone 9879879879                                                    |
| Name                  | Linda Bliss                                        |                      |                        |                       | Home Phone                                                          |
| Account Name          |                                                    |                      |                        |                       | Mobile                                                              |
| Title                 |                                                    |                      |                        |                       | Other Phone                                                         |
| Department            |                                                    |                      |                        |                       | Fax                                                                 |
| Birthdate             |                                                    |                      |                        |                       | Email linda@xyz.com                                                 |
| Reports To            | <a href="#">[View Org Chart]</a>                   |                      |                        |                       | Assistant                                                           |
| Lead Source           |                                                    |                      |                        |                       | Asst. Phone                                                         |
| Currency Field        |                                                    |                      |                        |                       |                                                                     |
| Number Field          |                                                    |                      |                        |                       |                                                                     |
| Percentage            |                                                    |                      |                        |                       |                                                                     |
| Mailing Address       | USA                                                |                      |                        |                       | Other Address                                                       |
| Languages             |                                                    |                      |                        |                       | Level                                                               |
| Created By            | Account Creator Site Guest User, 4/4/2016 11:18 PM |                      |                        |                       | Last Modified By Account Creator Site Guest User, 4/4/2016 11:18 PM |
| Description           |                                                    |                      |                        |                       |                                                                     |

Fig: 7.9



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