

Record-to-Web (RtW)

Salesforce Connector to Website



SmartStart Guide for Users

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Introduction to RtW (Record-to-Web)

Many companies struggle with accurately showing data on their website that are kept and maintained in Salesforce. Ideally, certain named users should be able from within Salesforce to select, on the spot, which data should be shown. Use cases are job postings, customer quotes, customer references, product information, newsfeeds, ...

Record-to-Web is an Integration App in the 'IT & Administration' category of the AppExchange that enables users to easily publish data directly from salesforce on to their company website. In other words, a Salesforce connector for Websites.

Publish Salesforce information via RtW

This documentation outlines how RtW users are authorized to publish Salesforce data with a click. Once RtW has been set up by your administrator and you have received the permission to use RtW, the steps are incredibly easy:

1. **Go to the record that you want to publish**
2. **Check the RtW checkbox**

The screenshot shows a Salesforce interface for a Case record titled "Maintenance guidelines for generator unclear". The case number is 00001004, with a status of "Closed" and a priority of "Medium". The "Related" section on the left includes "Open Activities (0)", "Activity History (0)", "Case Comments (0)", "Attachments (0)", and "Case History (0)". On the right, the "Record-to-Web Preview" panel is highlighted with a red box. It features a toggle switch labeled "Active" which is turned on. Below the toggle, the following information is displayed: Account Name (Express Logistics and Transport), Asset ID, Case Number (00001004), Type (Other), and Web Company. The "Details" section at the bottom right shows the Case Owner (Tuur Dutolt), Status (Closed), Case Number (00001004), Priority (Medium), Contact Name (Babara Levy), and Contact Phone ((503) 421-7800).

You're done!! Now the information that you have in the RtW preview is published. That's how easy it is!

Unpublish Salesforce information via RtW

If you want to stop showing the selected record information, same principle

1. **Go to the record that you want to publish**
2. **Uncheck the RtW checkbox**

The screenshot shows the Salesforce interface for a Case record titled "Maintenance guidelines for generator unclear". The record details include Priority: Medium, Status: Closed, and Case Number: 00001004. The left sidebar contains sections for "Related" (Open Activities, Activity History, Case Comments, Attachments, Case History) and "Details" (Case Owner, Case Number, Contact Name, Account Name, Status, Priority, Contact Phone, Contact Email). The "Record-to-Web Preview" panel on the right is highlighted with a red box, showing a toggle switch labeled "Inactive" which is currently turned off. A red arrow points to the toggle switch.

Again, done!! Now the information that was published is not shown anymore on the website.
Pretty straightforward, no?

If something is still unclear, do not hesitate to contact us via our listing on the Appexchange.
If everything is clear and you are satisfied with the result, please consider giving us a 5-star rating via the comments on the AppExchange!