



# Lead Capture for Sales Cloud User's Guide

Version 1.0, Winter '17



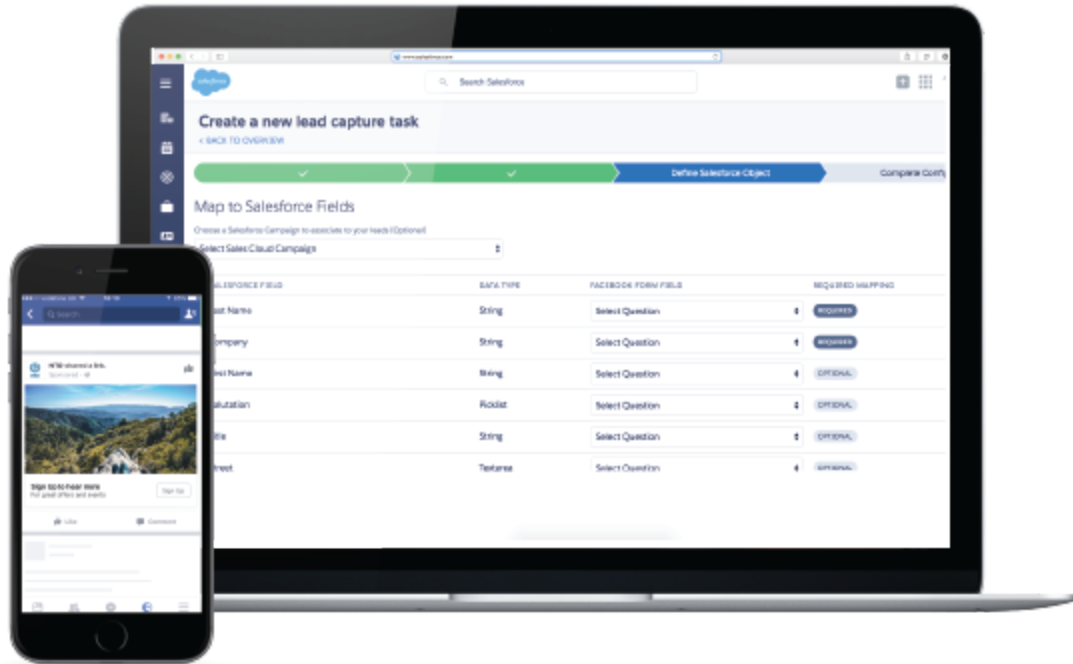
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# CONTENTS

Welcome to Lead Capture for Sales Cloud .....	4
Go to the Lead Capture App .....	5
Create a Lead Capture Task .....	6
Import Existing Facebook Leads .....	7
View Captured Leads .....	8
Test a Lead Capture Task .....	9

# Welcome to Lead Capture for Sales Cloud



Lead Capture for Sales Cloud makes it easy to import leads from Facebook Lead Ad campaigns into Salesforce. After Lead Capture is set up, leads generated from Lead Ad campaigns are imported into Salesforce in real time, ready for you to qualify and convert.

Before you start using Lead Capture, make sure:

- Your Salesforce admin has installed and configured the Lead Capture app in your org.
- You've created a Facebook Lead Ad form whose fields map to required fields on the Salesforce Lead object.
- You've been assigned the Admin role for the Facebook page associated with the Lead Ad form.
- You're logged out of your Facebook account.


Lead Capture is available in both Salesforce Classic and Lightning Experience in: Enterprise and Unlimited editions.

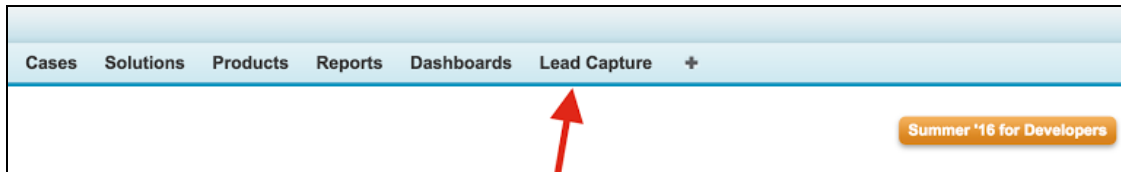
# Go to the Lead Capture App

You can access the Lead Capture app in Salesforce Classic or Lightning Experience. Before accessing the app, make sure you're logged out of your Facebook account.

## USER PERMISSIONS

To view the Lead Capture app:

- “Salesforce Lead Capture” permission set
  1. Log in to the Salesforce org where the app is installed.
  2. Go to the app in Lightning Experience:
    - a. Click the App Launcher icon (  ) and then click **Other Items**.
    - b. Click **Lead Capture**.
  3. Go to the app in Salesforce Classic:
    - a. Click **Lead Capture** from your org's list of tabs.



- b. If the Lead Capture tab isn't visible, click the (+) icon next to the main tabs and then click **Lead Capture**.

If you can't access the app, or the app appears blank, ask your Salesforce admin to verify that you have the Salesforce Lead Capture permission set.

# Create a Lead Capture Task

To import leads from a Facebook Lead Ad campaign to Salesforce, first create a lead capture task. A lead capture task establishes a connection between Facebook and Salesforce and creates a new lead record in your org whenever a prospect fills out a Lead Ad form.

Before you create a lead capture task, make sure you have the Admin role for the Facebook page associated with the Lead Ad form. You can learn more about Lead Ad campaigns and forms on [Facebook](#).

## USER PERMISSIONS

To create a lead capture task:

- “Salesforce Lead Capture” permission set
  1. Go to the Lead Capture app in your Salesforce org.
  2. Click **Create Lead Capture Task**.
  3. Click **Login To Facebook** and then enter your Facebook login credentials.
  4. Select a Facebook page.
  5. Click **View Lead Forms**.
  6. Select a form to sync the associated Facebook leads, and then click **Confirm Selection & Continue**.
  7. Optionally, map the leads to a Salesforce campaign.
    - a. Select a Salesforce campaign.
    - b. Map Facebook lead fields to fields on the Lead object.
  8. Click **OK, Continue**.
  9. Click **Submit**.

New Facebook leads are now automatically imported to your org. To add existing leads to your org, you must import them manually.


# Importing Existing Facebook Leads

A lead capture task imports new Facebook leads—that is, leads generated after the capture task was created. To add exist Facebook leads, you must import them manually. Before importing leads, make sure you're logged out of your Facebook account.

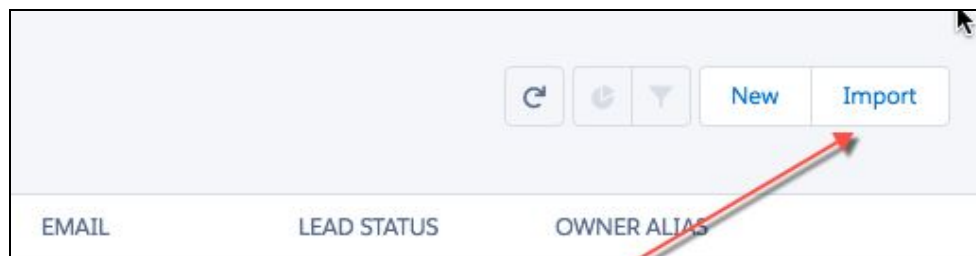
## USER PERMISSIONS

To import leads:

- “Salesforce Lead Capture” permission set
1. Go to the Lead Capture app in your Salesforce org.
  2. Export the leads from Facebook.
    - a. Click **Create Lead Capture Task**.
    - b. Click **Login To Facebook** and then enter your Facebook login credentials.
    - c. Select a Facebook page.
    - d. Click **View Lead Forms** and then select a form.
    - e. From Actions, click **Download**. Your Facebook leads are exported as a comma-delimited text (.csv) file.

 **Important:** The .csv file includes all Facebook leads from the last 90 days that are associated with the form you select. Before importing the Facebook leads, check for duplicates in your org that may have been imported using another method. If you find duplicate leads, remove them.

3. Import the leads into your org.
  - a. Go to the Leads tab in your Salesforce org.
  - b. Click **Import** and then follow the instructions in the wizard.



# View Captured Leads

To view leads captured from a Facebook Lead Ad campaign, go to the Leads tab in your Salesforce org. Then, look for lead records with the Facebook Lead ID field.

## USER PERMISSIONS

To view Leads tab:

- “Read” on leads

# Test a Lead Capture Task

Before you run a new Facebook Lead Ad campaign, create a test lead to verify your lead capture test is working correctly. You can use the Facebook Lead Ads Testing Tool to create test leads.

## USER PERMISSIONS

To view Leads tab:

- “Read” on leads

1. Go to <https://developers.facebook.com/tools/lead-ads-testing>.



**Note:** To access the Lead Ads Testing Tool, you must have admin-level permissions on the Facebook page associated to the lead form.

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### Lead Ads Testing Tool

Use this tool to test your API or CRM integration. You can create a test lead to confirm that your integration is set u

Page: Northern Trail Outfitters ▼

Form: NTO Event Sponsorship form ▼ Preview form

You can create one lead per form. You'll need to delete an existing lead in order to create a new one.

Create lead Delete lead

2. Select a Facebook page and a Lead Ad form.
3. Click **Preview Form** to add sample data. If you don't add data to the form, Facebook generates a sample inputs for you.
4. Click **Create Lead**.
5. Log in to your Salesforce org and go to the Leads tab. Within a few minutes, the test lead appears as a new record.