

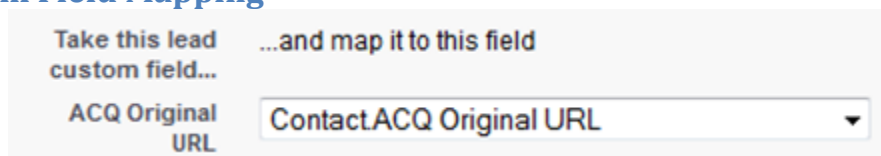
Salesforce Implementation Guide

This document is meant to be shared with a Salesforce Admin to provide the required information and context to set up a Salesforce account to trap and pass the trkid parameter in Salesforce.

In order to trap and pass the Tracking Id, you will need to add one custom field for the Object LEAD, and one field for the Object CONTACT. These 2 fields will be named the same and the Contact field will be the result of a converted Lead.

OBJECT	FIELD LABEL	API NAME	DATA TYPE
Lead	ACQ Original URL	ACQ_Original_URL__c	Long Text Area(32768)
Contact	ACQ Original URL	ACQ_Original_URL__c	Long Text Area(32768)

Lead Custom Field Mapping



Opportunities and Contacts

Opportunities do not have a tracking Id; Contacts and Leads do. Because of this, we have to make sure that Opportunities are always linked to Contacts using the Contact Role. You may achieve this with a few lines of code on before update/insert Opportunity and using a Validation Rule before an Opportunity becomes Closed Won.

Tracking the URL from your Landing Page

When accessing from a search click, your landing page's URL contains encoded parameters relevant to the search click. In order to transfer this information to your Web-to-Lead form, we need to track this original URL or the Tracking Id parameter (trkid=) that it contains when the page loads. This can be done using a session variable (Server Side) or a cookie (Client Side). Your webmaster will be able to suggest the solution that best suits your environment and business needs.

Once the first page's URL (or its Tracking Id) is captured in a session variable or a cookie, it needs to be passed, along with other information relevant to the lead, in the Web-to-Lead Form on form completion. The Web-to-Lead form is a form imbedded in your website which the client will submit, and which will create a Lead in your Salesforce instance. The URL should be a hidden field (next section).

Either the complete URL or its Tracking Id can be captured; the API will work with both.

Example of Tracking Id: <http://www.example.com?trkid=V1ADW1234-9855428954-K-trip-5678424-b-s>

Note: If your landing page is accessing a third party site, like Marketo, you may need to retrieve the URL or its Tracking Id using other tools to ensure it is retained in the user session

Web-to-Lead Configuration

Please refer to this Salesforce link to create a simple Web-to-lead Form:

https://help.salesforce.com/HTViewHelpDoc?id=setting_up_web_to_lead.htm&language=en_US

Once the Web-to-Lead Form is created, you will need to edit it in Notepad or any other HTML editor and add a few lines of code (as discussed in previous section, this part will be customized by your webmaster):

Before the <Submit> tag, insert the URL variable:

```
<input id="ACQ_Original_URL__c" name="ACQ_Original_URL__c" type="hidden" value="(YOUR SESSION VARIABLE OR COOKIE)">
```

The end result should look like this:

```
!- ----- -->
!- NOTE: Please add the following <META> element to your page <HEAD>.    -->
!- If necessary, please modify the charset parameter to specify the      -->
!- character set of your HTML page.                                     -->
!- ----- -->

META HTTP-EQUIV="Content-type" CONTENT="text/html; charset=UTF-8">
<!- ----- -->
!- NOTE: Please add the following <FORM> element to your page.          -->
!- ----- -->

form action="https://www.salesforce.com/servlet/servlet.WebToLead?encoding=UTF-8" method="POST">

input type=hidden name="oid" value="(Your Organisation ID)">
input type=hidden name="retURL" value="(Your Return URL)">

!- ----- -->
!- NOTE: These fields are optional debugging elements. Please uncomment   -->
!- these lines if you wish to test in debug mode.                         -->
!- <input type="hidden" name="debug" value=1>                             -->
!- <input type="hidden" name="debugEmail" value="youremail@yourdomain.com"> -->
!- ----- -->

label for="first_name">First Name</label><input id="first_name" maxlength="40" name="first_name" size="20" type="text" /><br>
<label for="last_name">Last Name</label><input id="last_name" maxlength="80" name="last_name" size="20" type="text" /><br>
<label for="email">Email</label><input id="email" maxlength="80" name="email" size="20" type="text" /><br>
<label for="company">Company</label><input id="company" maxlength="40" name="company" size="20" type="text" /><br>
<label for="city">City</label><input id="city" maxlength="40" name="city" size="20" type="text" /><br>
<label for="state">State/Province</label><input id="state" maxlength="20" name="state" size="20" type="text" /><br>

input id="ACQ_Original_URL__c" name="ACQ_Original_URL__c" type="hidden" value="(YOUR SESSION VARIABLE OR COOKIE)"><br>

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

/form>
```