

SFDC Marketing 101

How to set up web-to-lead
and auto-responders



Bluebird Marketing LLC
Company confidential



The Steps

- ❑ Create an html email template
- ❑ Enable web-to-lead
- ❑ Select the default template
- ❑ Create web-to-lead form
- ❑ Test the form

Setup – Comm. Template - Email

Unfiled Public Email Templates ~ Salesforce - Group E...

Home Feeds (J) Print Page

Setup • System Log • Help & Training • Logout

AppExchange

Home Leads Contacts Opportunities Reports Dashboards Documents

Unfiled Public Email Templates

Below is a list of all your email templates in the folder selected. Click the new button to create a new email template. You can use these email templates when sending single emails.

Folder: Unfiled Public Email Templates Create New Folder

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 Template

Action	Email Template Name	Template Type	Available For Use	Description	Owner	Last Modified
Edit Del	SALES: Follow Up (SAMPLE)	Text	✓	Follow up on discussion	TReil	4/27/20
Edit Del	SUPPORT: New assignment notification (SAMPLE)	Text	✓	Internal notification to case owner when case is assigned.	TReil	4/27/20
Edit Del	SUPPORT: Case Response with Solution (SAMPLE)	Text	✓	Standard template for responses to customer	TReil	4/27/20

Select Text, HTML, or Custom

- Personal Setup**
 - My Personal Information
 - Email
 - Import
 - Desktop Integration
- App Setup**
 - Customize
 - Build
 - Exchange
 - Integrate
- Administration Setup**
 - Manage Users
 - Company Profile
 - Security Controls
 - Communication Templates
 - Letterheads
 - Email Templates

Email Template New Template [Help](#)

Step 1. Email Template: New Template

Next

Choose the type of email template you would like to create.

- Text
- HTML (using Letterhead)
- Custom (without using Letterhead)

Next

Step 2. HTML Email Template: New Template

Step 2 of 4

Previous

Next

Cancel

Email Template Information

| = Required Information

Folder	<input type="text" value="Unfiled Public Email Templates"/>
Available For Use	<input type="checkbox"/>
Email Template Name	<input type="text" value="Bluebird Auto-responder"/>
Letterhead	<input type="text" value="Bluebird Marketing"/>
Email Layout	<input type="text" value="Free Form Letter"/> View Email Layout Options
Encoding	<input type="text" value="General US & Western Europe (ISO-8859-1, ISO-LATIN-1)"/>
Description	<input type="text"/>

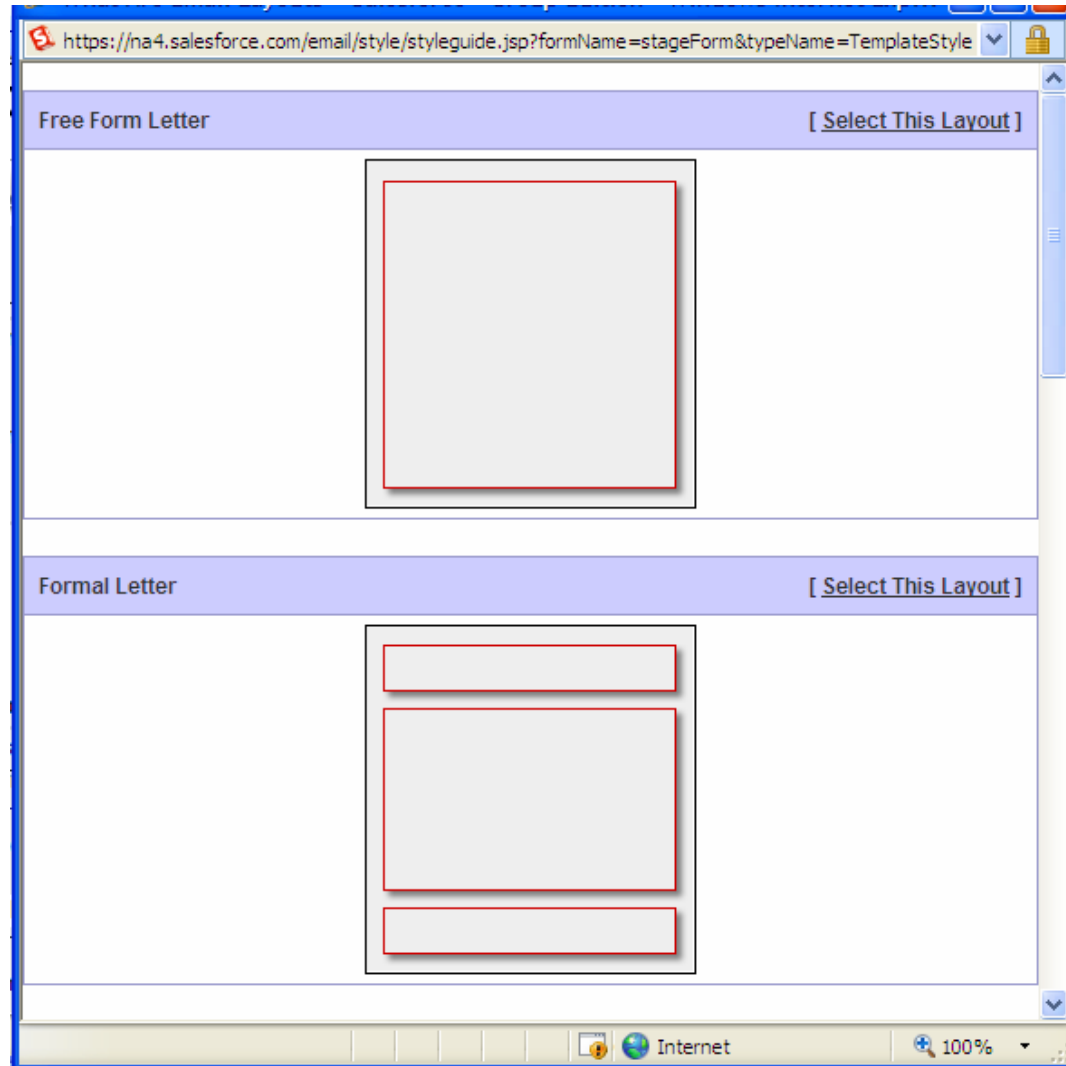
Previous

Next

Cancel

[View Email Layout Options \(New Window\)](#)


































Select the type of letter...



Edit your email...

If the text version of the template is left blank, this version will be stripped of HTML and sent as the text version.

Formatting Controls

Font Size    **B** *I* U                              

Available Merge Fields

Select Field Type Select Field Copy Merge Field Value

Contact Fields


Copy and paste the merge field value into a section below.

Step 3. Create HTML version

Step 3 of 4

[Preview](#) [Previous](#) [Next](#) [Cancel](#)

HTML Email Content

 = Required Information

Subject



Use merge fields to personalize

The screenshot displays a software interface for creating an HTML email. At the top, there is a 'Formatting Controls' toolbar with options for font, size, bold, italic, underline, and alignment. Below this is the 'Available Merge Fields' section, which includes a 'Select Field Type' dropdown set to 'Contact Fields', a 'Select Field' dropdown set to 'First Name', and a 'Copy Merge Field Value' field containing the merge code `{!Contact.FirstName}`. A note below states: 'Copy and paste the merge field value into a section below.'

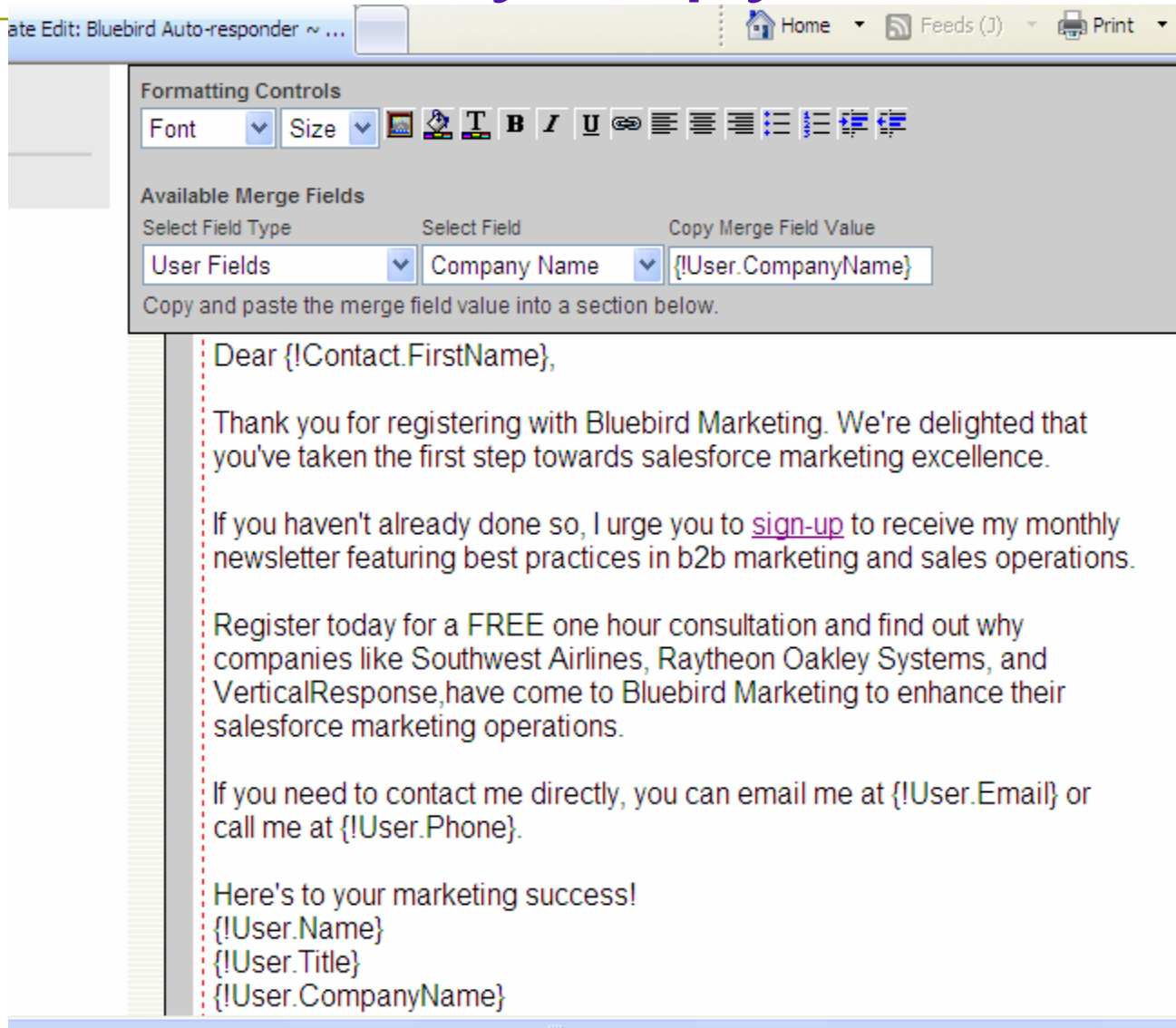
The main content area is titled 'HTML Email Content' and includes a legend: a red vertical bar followed by '= Required Information'. Below this, the 'Subject' field contains the text 'Welcome to Bluebird Blueprint'. The email body content is shown in a preview window with a dark blue header. The header features a white outline of a bluebird in flight on the left and the text 'bluebird blueprint' in a white, lowercase, sans-serif font on the right. The main body text is enclosed in a red dashed border, indicating it is required information. The text reads: 'Dear {!Contact.FirstName},
Thank you for registering with Bluebird Marketing. We're delighted that you've taken the first step towards salesforce marketing excellence.
If you haven't already done so, I urge you to sign-up to receive my monthly newsletter featuring best practices in b2b marketing and sales operations.'

At the bottom of the interface, there is a taskbar showing 'Level', 'English (U.S.)', and 'Internet' with a 100% zoom level.

Insert hyperlinks...

The screenshot displays the Salesforce Marketing Cloud interface. On the left, a navigation menu includes 'Email Templates', 'Email Merge Templates', 'Management', 'Reporting', and 'Profile Administration'. The 'Center' section is active, showing 'Description Summary'. The main area features an 'Available Merge Fields' dialog with three columns: 'Select Field Type' (set to 'Contact Fields'), 'Select Field' (set to 'First Name'), and 'Copy Merge Field Value' (set to '{!Contact.FirstName}'). Below this, a text prompt reads 'Copy and paste the merge field value into a section below.' The background shows a dark blue banner with a white bird logo and the word 'blueprint' in white. An 'Explorer User Prompt' dialog is overlaid, containing the text: 'Script Prompt: Please enter the URL for the link you want to create.' The input field contains the URL 'http://bluebirdblueprint.blogspot.com'. Below the dialog, the text reads: 'We're delighted that you've taken the first step towards salesforce marketing excellence. If you haven't already done so, I urge you to [sign-up](#) to receive my monthly newsletter featuring best practices in b2b marketing and sales operations.'

Type the body copy...



The screenshot shows an email editor window titled "ate Edit: Bluebird Auto-responder ~ ...". The interface includes a top navigation bar with "Home", "Feeds (J)", and "Print" options. Below this is a "Formatting Controls" panel with a toolbar containing icons for font, size, color, background color, bold, italic, underline, link, bulleted list, numbered list, indent, and outdent. The "Available Merge Fields" section has three dropdown menus: "Select Field Type" (set to "User Fields"), "Select Field" (set to "Company Name"), and "Copy Merge Field Value" (set to "{!User.CompanyName}"). Below these is a text area containing the following body copy:

Dear {!Contact.FirstName},

Thank you for registering with Bluebird Marketing. We're delighted that you've taken the first step towards salesforce marketing excellence.

If you haven't already done so, I urge you to [sign-up](#) to receive my monthly newsletter featuring best practices in b2b marketing and sales operations.

Register today for a FREE one hour consultation and find out why companies like Southwest Airlines, Raytheon Oakley Systems, and VerticalResponse, have come to Bluebird Marketing to enhance their salesforce marketing operations.

If you need to contact me directly, you can email me at {!User.Email} or call me at {!User.Phone}.

Here's to your marketing success!
{!User.Name}
{!User.Title}
{!User.CompanyName}

Click Next and Copy text from HTML

Previous Save Ca

Copy text from HTML version

Text-Only Email Content

Subject Welcome to Bluebird Blueprint

Text Body

Dear {!Contact.FirstName},

Thank you for registering with Bluebird Marketing. We're delighted that you've taken the first step towards salesforce marketing excellence.

If you haven't already done so, I urge you to sign-up to receive my monthly newsletter featuring best practices in b2b marketing and sales operations.

Register today for a FREE one hour consultation and find out why companies like Southwest Airlines, Raytheon Oakley Systems, and VerticalResponse, have come to Bluebird Marketing to enhance their salesforce marketing operations.


If you need to contact me directly, you can email me at {!User.Email} or call me at {!User.Phone}.

Here's to your marketing success!
{!User.Name}
{!User.Title}
{!User.CompanyName}

Previous Save Ca

Save your email...

HTML Email Template
Bluebird Auto-responder

[Printable View](#) | [Help for this Page](#) 

Preview your email template below.

Email Template Detail		Edit Properties	Edit HTML Version	Edit Text Version	Delete	Clone
Folder	Unfiled Public Email Templates					
Available For Use	<input type="checkbox"/>	Last Used Date				
Template Name	Bluebird Auto-responder					
Letterhead	Bluebird Marketing					
Email Layout	Free Form Letter					
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)					
Author	Tricia Reilly [Change]					
Description						
Subject	Welcome to Bluebird Blueprint					
Created By	Tricia Reilly , 2/6/2008 6:31 PM		Modified By	Tricia Reilly , 2/6/2008 6:31 PM		
		Edit Properties	Edit HTML Version	Edit Text Version	Delete	Clone



Make it available and send a test...



Use your company's existing Letterhead and select one of Salesforce's pre-defined Email Layout options to create your HTML email template.

Give your template a name and description and place it in the appropriate folder. Note that the Description field is for internal use only.

Once you have finished creating your HTML email template, check the "Available For Use" box to make this template available to your users.

A screenshot of the 'Email Template Edit' form in Salesforce. The form has a title bar with 'Email Template Edit' and buttons for 'Save', 'Save & New', and 'Cancel'. Below the title bar is a section titled 'Email Template Information' with a legend indicating that a red vertical bar next to a field name means it is required information. The form fields are: 'Folder' (dropdown menu set to 'Unfiled Public Email Templates'), 'Available For Use' (checkbox checked), 'Email Template Name' (text input field containing 'Bluebird Auto-responder'), 'Letterhead' (text input field containing 'Bluebird Marketing'), 'Email Layout' (text input field containing 'Free Form Letter'), 'Encoding' (dropdown menu set to 'General US & Western Europe (ISO-8859-1, ISO-LATIN-1)'), and 'Description' (empty text input field). At the bottom of the form are buttons for 'Save', 'Save & New', and 'Cancel'. A red circle highlights the 'Folder' dropdown and the 'Available For Use' checkbox.

Send a test message...

Tricia Reilly [treilly@bluebirdmarcom.com]

Sent:

trishthedish@gmail.com

Welcome to Bluebird Blueprint



bluebird blueprint

Dear Trish,

Thank you for registering with Bluebird Marketing. We're delighted that you've taken the first step towards salesforce marketing excellence.

If you haven't already done so, I urge you to [sign-up](#) to receive my monthly newsletter featuring best practices in b2b marketing and sales operations.

Register today for a FREE one hour consultation and find out why companies like Southwest Airlines, Raytheon Oakley Systems, and VerticalResponse, have come to Bluebird Marketing to enhance their salesforce marketing operations.

If you need to contact me directly, you can email me at treilly@bluebirdmarcom.com or call me at 415-505-4313.

Here's to your marketing success!
Tricia Reilly
Bluebird Marketing LLC

Set-up – Customize – Leads - WTL

The screenshot shows the Salesforce Marketing Cloud interface. At the top, there is a navigation bar with the Salesforce logo and links for Setup, System Log, Help & Training, and Logout. Below this is a secondary navigation bar with tabs for Home, Leads, Contacts, Opportunities, Reports, Dashboards, and Documents. The main content area is titled "Web-to-Lead Setup".

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
 - Home
 - Activities
 - Leads
 - Fields
 - Validation Rules
 - Page Layout
 - Search Layouts
 - Queues
 - Assignment Rules
 - Settings
 - Buttons and Links
 - Web-to-Lead

Web-to-Lead Setup

Using pre-existing pages on your company's website, you can capture contact and pro generate new leads in Salesforce, enabling you to respond in real-time to customer req

My Website

First Name
Last Name
E-mail

Create New Lead

Web-to-Lead Settings

Web-to-Lead Enabled

Default Lead Creator Tricia Reilly

Default Response Template

Get Info Before You Start

What is the maximum number of leads I can capture?

Enable Web-to-lead


Web-to-Lead Settings

Web-to-Lead Settings


Enable your organization to receive online leads.

Web-to-Lead Enabled

The user who will be listed as Creator when a Lead is created online.

Default Lead Creator 

Use Lead Auto-Response Rules to select different email response templates based on attributes of the Leads. Leads not matching any of the rules will be sent the default response template selected below.

Default Response Template 

Select your default template

Phishing Protection on Identity Safe Log-ins

Web-to-Lead Settings Salesforce Group Edition Home Feeds (1) Print Page Tools

force marketing Marketing

ds Contacts

Lookup

Unfiled Public Email Templates Search Go!

You can use "*" as a wildcard next to other characters to improve your search results. For example, "ad*" returns all records with a name that contains "ad".

Name	Description	Template Type
Bluebird Auto-responder		HTML
SALES: Follow Up (SAMPLE)	Follow up on discussion	Text
SUPPORT: New assignment notification (SAMPLE)	Internal notification to case owner when case is ...	Text
SUPPORT: Case Response with Solution (SAMPLE)	Standard template for responses to customer inqui...	Text

Help for this Page

Required Information

Create web-to-lead code

Salesforce 8 marketing Setup • System Log • Help & Training • Logout

Home Leads Contacts Opportunities Reports Dashboards Documents

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
 - Home
 - Activities
 - Leads
 - Fields
 - Validation Rules
 - Page Layout
 - Search Layouts
 - Queues
 - Assignment Rules
 - Settings
 - Buttons and Links
 - Web-to-Lead

Web-to-Lead Setup

Using pre-existing pages on your company's website, you can capture contact and pro generate new leads in Salesforce, enabling you to respond in real-time to customer req

My Website

First Name
Last Name
E-mail

Create New Lead

Account	Name	Last Name	First Name
Account 1	John	Doe	John
Account 2	Jane	Doe	Jane
Account 3	John	Doe	John
Account 4	Jane	Doe	Jane
Account 5	John	Doe	John
Account 6	Jane	Doe	Jane
Account 7	John	Doe	John
Account 8	Jane	Doe	Jane
Account 9	John	Doe	John
Account 10	Jane	Doe	Jane

Web-to-Lead Settings

Web-to-Lead Enabled

Default Lead Creator Tricia Reilly

Default Response Template

Get Info Before You Start

What is the maximum number of leads I can capture?

Select the fields you want...

Create a Web-to-Lead Form

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

Available Fields		Selected Fields	
Salutation	Add ▶	First Name	Up ▲
Website		Last Name	
Mobile	Remove ◀	Title	Down ▼
Fax		Company	
Address		Email	
Country		Phone	
Description		City	
Lead Source		State/Province	
Industry		Zip	

NOTE: Would you like to add custom fields that you do not see listed under Available Fields? You can set up custom lead fields to gather additional information from your website. [Tell me more.](#)

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:

Enter the return URL...

Easily set up a page on your website to capture new leads.

Create a Web-to-Lead Form

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

Available Fields

- Salutation
- Website
- Mobile
- Fax
- Address
- Country
- Description
- Lead Source
- Industry

Add



Remove



Selected Fields

- First Name
- Last Name
- Title
- Company
- Email
- Phone
- City
- State/Province
- Zip

Up



Down



NOTE: Would you like to add custom fields that not see listed under Available Fields? You can add custom lead fields to gather additional information on your website. [Tell me more.](#)

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

<http://www.bluebirdmarcom.com/signup/thankyou.html>

Generate

Cancel

Copy and paste the HTML to your webmaster

Create a Web-to-Lead Form

Copy and paste the sample HTML below and send it to your webmaster.

```
<!-- ----- -->
<!-- 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="00D600000006svR">
<input type="hidden" name="retURL"
```

Finished

Sample web-to-lead form

FREE One Hour Salesforce.com Marketing Consultation



Wondering how to get the most out of your Salesforce deployment? Struggling to generate enough leads to satisfy your sales team?

Bluebird Marketing is offering a FREE one hour consultation to review your entire Lead Generation and Marketing Operations program—including your Salesforce instance.

Register below and when you do, you'll get:

1. Tips and tricks to fine tune your deployment for success
2. Advice on measuring Marketing's true impact on sales
3. Ideas on the best offers and tactics to generate real pipeline

So don't delay – register below and be on your way to an optimized Marketing program.

First name

Last name

Title

Company

E-mail

Phone

Sample form

First name

Last name

Title

Company

E-mail

Phone

Relationship to Salesforce:

Customer
Prospect
Partner

I am most concerned about:

Generating leads
Optimizing for metrics and results
Improving data and list quality

Sign me up to receive news and information from Bluebird Marketing LLC on a monthly basis.

About Bluebird Marketing LLC
Tricia Reilly, Bluebird Marketing's Principal Consultant, is a seasoned Demand Creation and Direct Marketing expert, fo

- Hidden fields
 - Campaign Source
 - Lead Source
 - Lead Action



If you don't have a webmaster...

□ Contact me at
treilly@bluebirdmarcom.com

Creating customized auto-responders

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
 - Home
 - Activities
 - Leads
 - Fields
 - Validation Rules
 - Page Layout
 - Search Layouts
 - Queues
 - Assignment Rules
 - Settings

Lead Assignment Rule User group leads

Create the rule entries to automatically assign leads to users or queues based on the criteria specified in the rule. You can create, edit, or delete rule entries. You can also reorder the entries from this page after creating them.

Edit			
Rule Name	User group leads	Active	<input checked="" type="checkbox"/>
Created By	Tricia Reilly, 2/6/2008 10:22 PM	Modified By	Tricia Reilly, 2/6/2008 10:22 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 entry. You can create an additional rule if you are importing leads and you choose to route them based on another criteria.

Set the auto-responder criteria

Rule Entry Edit
User group leads [Help](#)

Enter the rule entry

Step 1: Set the order in which this rule entry will be processed | = Required In

Sort Order

Step 2: Select the criteria for this rule entry

Run this rule if the following :

Field	Operator	Value	
<input type="text" value="Campaign source"/> <input type="button" value="v"/>	<input type="text" value="equals"/> <input type="button" value="v"/>	<input type="text" value="user group"/>	AND
<input type="text" value="--None--"/> <input type="button" value="v"/>	<input type="text" value="--None--"/> <input type="button" value="v"/>	<input type="text"/>	AND
<input type="text" value="--None--"/> <input type="button" value="v"/>	<input type="text" value="--None--"/> <input type="button" value="v"/>	<input type="text"/>	AND
<input type="text" value="--None--"/> <input type="button" value="v"/>	<input type="text" value="--None--"/> <input type="button" value="v"/>	<input type="text"/>	AND
<input type="text" value="--None--"/> <input type="button" value="v"/>	<input type="text" value="--None--"/> <input type="button" value="v"/>	<input type="text"/>	

[Advanced Options...](#)

Step 3: Select the user or queue to assign the Lead to

User Email Template

Click save and view your rules

Lead Assignment Rule User group leads

[Help for this Page](#) 

Create the rule entries to automatically assign leads to users or queues based on the criteria specified in the rule entries. You can reorder the entries from this page after creating them.

[Edit](#)

Rule Name	User group leads	Active	<input checked="" type="checkbox"/>
Created By	Tricia Reilly , 2/6/2008 10:22 PM	Modified By	Tricia Reilly , 2/6/2008 10:29 PM

[Edit](#)

Rule Entries

[New](#)

[Reorder](#)

Action	Order	Criteria	Assign To	Email
Edit Del	<input type="text" value="1"/>	Lead: Campaign source EQUALS user group	Tricia Reilly	<input checked="" type="checkbox"/>

Questions?

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- Ph: 415-505-4313
- Bluebirdblueprint.blogspot.com