



## Phase 7: Integration & External Access

### Step 1: Set Up Web-to-Lead

The first task is to create a Web-to-Lead Form. This tool generates HTML code for a form that you can place on your company website. When a visitor fills it out, a Lead record is automatically created in Salesforce.

1. Go to Setup → search for Web-to-Lead and click on it.
2. Click the Create Web-to-Lead Form button.
3. From the "Available Fields" list, add the fields you want on your form (e.g., First Name, Last Name, Email, Company) to the "Selected Fields" list.
4. For the Return URL, enter a website address where users will be sent after submitting the form. For this project, you can just enter <http://www.salesforce.com>.
5. Click the Generate button.

Salesforce will now show you a block of HTML code. In a real project, you would give this to your web developer. For now, simply generating it completes this step.

The screenshot shows the Salesforce Setup interface. The left sidebar has 'Web-to-Lead' selected under 'Marketing'. The main page title is 'Web-to-Lead' with a 'SETUP' button. The section 'Web-to-Lead Setup' is displayed, with the sub-section 'Create a Web-to-Lead Form'. It shows two lists: 'Available Fields' (Salutation, Title, Website, Phone, Mobile, Fax, Street, Zip, Country (text only)) and 'Selected Fields' (First Name, Last Name, Email, Company, City, Country, State/Province). There are 'Add' and 'Remove' buttons between the lists, and 'Up' and 'Down' buttons for reordering. A note says: 'NOTE: Would you like to add custom fields that you do not see listed under Available Fields? You can set up custom fields to gather additional information from your website. [Tell me more](#).'. Below the lists, it says: '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.' A 'Return URL' field contains 'http://'. The top navigation bar includes 'Search Setup', 'Home', 'Object Manager', and various icons for sharing and help.

### Step 2: Set Up Email-to-Case

1. Enable the Feature
  - Go to Setup → search for Email-to-Case and click on it.
  - Click Edit, check the Enable Email-to-Case box, and click Save.
2. Configure a Routing Address
  - In the "Routing Addresses" section, click New.
  - Fill in the details:
    - Routing Name: Support Inquiries
    - Email Address: Enter a real email address you have access to (but one that is different from your Salesforce login email). This will act as your company's support email address.
    - Click Save. Salesforce will now send a verification email to that address.
3. Verify Your Email

- Go to the inbox of the email address you just entered.
  - Find the email from Salesforce and click the verification link inside it.
4. Final Step (Conceptual)
- After verification, Salesforce provides a long, system-generated "Email Services Address". In a real project, you would set up a rule in your email service (like Gmail) to automatically forward all emails from your support address to this Salesforce address.

The screenshot shows the Salesforce Setup interface with the following details:

- Setup Home:** The main navigation bar includes Home, Object Manager, and a search bar labeled "Search Setup".
- Email-to-Case Configuration:**
  - Feature Settings:** Under Service, the "Email-to-Case" feature is selected.
  - On-Demand Service:** A checkbox "Place user signatures before email threads" is checked.
  - Processing Errors:** A checkbox "Enable on-demand service" is checked.
  - Overload Handling:** Options for "Over email rate limit action" (Bounce message or Discard message) and "Unauthorized sender action" (Bounce message or Discard message) are shown.
  - Notify Errors:** A checkbox "Notify senders about Email-to-Case processing errors" is checked.
- Routing Addresses:** A table titled "Routing Addresses" lists one entry:
 

Action	Source	Routing Name	Case Owner	Email Address	Verification	Controlled by Permission Set	Email Services Address
Edit   Del	Email2Case	Support_Inquiries		239x5a33e2@gmail.com	Pending [Resend]	No	