

## PHASE 7: INTEGRATION & EXTERNAL ACCESS

**Goal:** Demonstrate how the Institute Management system can connect Salesforce with external applications and services for real-time data exchange, notifications, and API communication.

### 1. Web -to- lead

- Captures student admission inquiries from a website.
- Automatically creates Lead records in Salesforce.
- Reduces manual data entry and errors.
- Supports auto-response emails and assignment rules.
- Helps streamline admissions follow-up process.

The screenshot shows the Salesforce Setup interface for the 'Web-to-Lead' feature. The left sidebar contains a search bar and a navigation menu with categories like 'Feature Settings', 'Marketing', 'Service', and 'Embedded Service'. The 'Web-to-Lead' option is highlighted under 'Marketing'. The main content area is titled 'Web-to-Lead' and includes a 'Create a Web-to-Lead Form' section. This section has two columns: 'Available Fields' and 'Selected Fields'. The 'Available Fields' column lists various fields such as 'Fax Opt Out', 'Do Not Call', 'SIC Code', 'Product Interest', 'Primary', 'Current Generator(s)', 'Number of Locations', 'Company', and 'State/Province'. The 'Selected Fields' column lists 'First Name', 'Last Name', 'Email', 'Phone', and 'City'. There are 'Add', 'Remove', 'Up', and 'Down' buttons between the columns. A note at the top right of the 'Selected Fields' section asks if the user wants to add custom fields. Below the columns, there is a 'Return URL' field with the value 'http://'. There is also a checkbox for 'Include reCAPTCHA in HTML' and a field for 'reCAPTCHA API Key Pair'. At the bottom, there are 'Generate' and 'Cancel' buttons.

Setup

Search Setup

Home Object Manager

Q web

Feature Settings

Marketing

Web-to-Lead

Service

Embedded Service

Legacy Web Chat Migration (Beta)

Messaging for In-App and Web User Verification

Web-to-Case

Web-to-Case HTML Generator

Didn't find what you're looking for? Try using Global Search.

SETUP Web-to-Lead

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

Selected Fields

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.](#)

First Name

Last Name

Email

Phone

City

Up

Down

Add

Remove

State/Province

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://

☒ Include reCAPTCHA in HTML

reCAPTCHA API Key Pair

Enable server fallback

Generate Cancel

```
File Edit View

<!-- ----- -->
<!-- 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://webto.salesforce.com/servlet/servlet.WebToLead?encoding=UTF-8&orgId=00Dak00000YlBcL" method="POST">

<input type="hidden" name="oid" value="00Dak00000YlBcL">
<input type="hidden" name="retURL" value="http://">

<!-- ----- -->
<!-- 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="rasikabharsakle2004@gmail.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="phone">Phone</label><input id="phone" maxlength="40" name="phone" size="20" type="text" /><br>
<label for="city">City</label><input id="city" maxlength="40" name="city" size="20" type="text" /><br>
<input type="submit" name="submit">

</form>
```

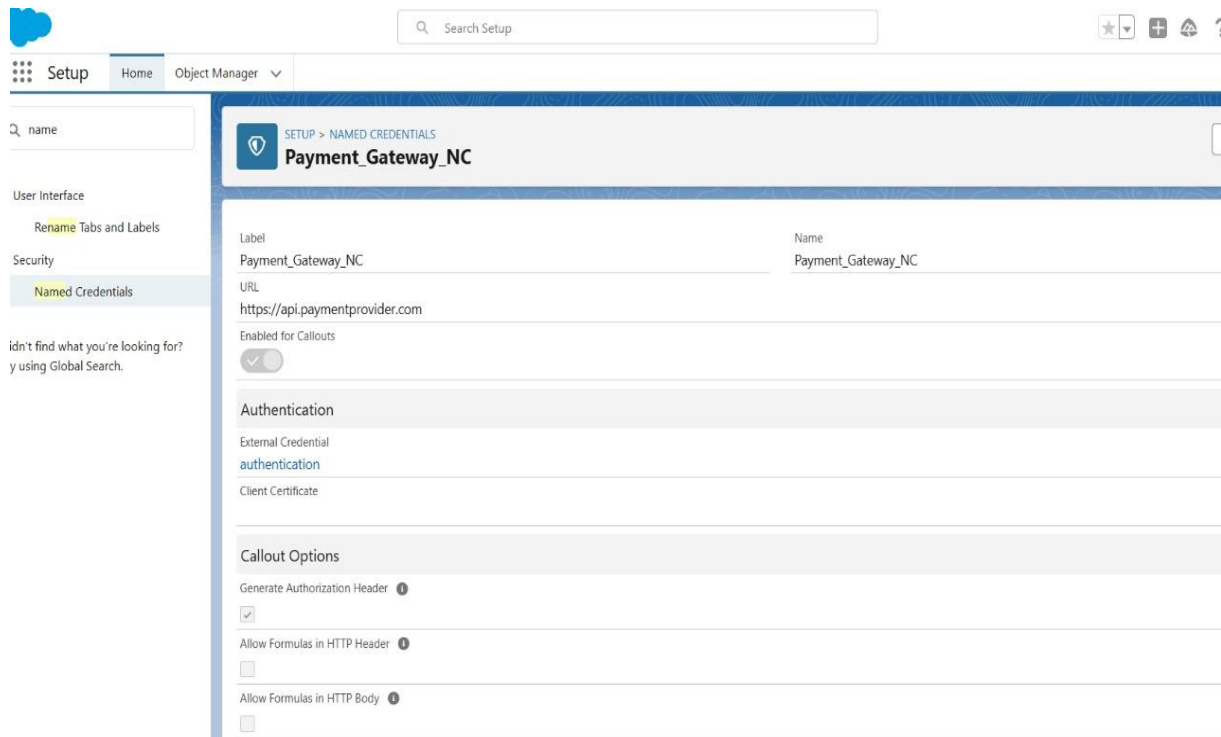


## 2. Name Credential

- Stores authentication securely for external systems.

- Enables Apex to make API callouts without hardcoding credentials.
- Supports payment gateways, SMS services, and exam board APIs.
- Simplifies maintenance by centralizing credentials.
- Improves security and integration reliability.

### ➤ Payment\_Gateway\_NC



The screenshot shows the Salesforce Setup interface for a Named Credential. The left sidebar contains navigation links for User Interface, Security, and Named Credentials. The main content area displays the configuration for 'Payment\_Gateway\_NC'.

Field	Value
Label	Payment_Gateway_NC
Name	Payment_Gateway_NC
URL	https://api.paymentprovider.com
Enabled for Callouts	<input checked="" type="checkbox"/>

**Authentication**

External Credential	authentication
Client Certificate	

**Callout Options**

Generate Authorization Header	<input checked="" type="checkbox"/>
Allow Formulas in HTTP Header	<input type="checkbox"/>
Allow Formulas in HTTP Body	<input type="checkbox"/>

### ➤ Exam\_Board\_NC



Setup

Home

Object Manager

Search Setup

name

User Interface

Rename Tabs and Labels

Security

Named Credentials

Didn't find what you're looking for?  
Try using Global Search.



SETUP > NAMED CREDENTIALS

## Exam\_Board\_NC

Label

Exam\_Board\_NC

Name

Exam\_Board\_NC

URL

https://api.examboard.com

Enabled for Callouts



### Authentication

External Credential

authentication

Client Certificate

### Callout Options

Generate Authorization Header ⓘ



Allow Formulas in HTTP Header ⓘ



Allow Formulas in HTTP Body ⓘ



