

## Phase 4: Process Automation (Admin).

In this phase, we will make the system work for us. Our first goal is to automatically capture leads from a website form using a standard feature called Web-to-Lead. This will generate an HTML form you can use to create leads directly in Salesforce from any website.

The screenshot shows the Salesforce Web-to-Lead Setup page in a browser. The browser's address bar displays the URL: `orgfarm-4c931c0dfd-dev-ed.develop.lightning.force.com/lightning/setup/LeadWebtoleads/page?address=%2F_ui%2Fcommon%2Fconfig%2Fentity%2FWebToLeadUi%2F%3FretURL%3D...`. The Salesforce interface includes a top navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. A left sidebar lists various setup options under 'Feature Settings', 'Marketing', 'Service', and 'Custom Code'. The main content area is titled 'Web-to-Lead Setup' and contains a section 'Create a Web-to-Lead Form' with instructions to copy and paste sample HTML. The HTML code includes meta tags for content type and charset, and form elements for 'oid' and 'retURL'. A 'Finished' button is located at the bottom of the code block. The Windows taskbar at the bottom shows the date and time as 11:07 PM on 9/25/2025.

Recent | Dashboards | Salesforce | Web-to-Lead | Salesforce | Google Gemini

orgfarm-4c931c0dfd-dev-ed.develop.lightning.force.com/lightning/setup/LeadWebtoleads/page?address=%2F\_ui%2Fcommon%2Fconfig%2Fentity%2FWebToLeadUi%2F%3FretURL%3D...

Search Setup

Setup Home Object Manager

we

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

Custom Code

Canvas App Previewer

DataWeave Resources

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Web-to-Lead Setup

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

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://webto.salesforce.com/servlet/servlet.WebToLead?encoding=UTF-8&orgId=00DgR000007c49p" method="POST">

<input type="hidden" name="oid" value="00DgR000007c49p">
<input type="hidden" name="retURL" value="http://www.salesforce.com">

<!-- ----- -->
<!-- NOTE: These fields are optional debugging elements. Please uncomment. -->
```

Finished

Rainy days ahead 25°C

Search

ENG IN

11:07 PM 9/25/2025

Creating a **Lead Assignment Rule**. This rule will automatically change the owner of a new lead if it meets certain criteria. For our test, we'll assign any lead from a company named "Test Corp" to our Sales Rep user.

The screenshot shows the Salesforce Setup interface for Lead Assignment Rules. The browser tabs include 'Recent | Dashboards | Salesforce', 'App Manager | Salesforce', 'Lead Assignment Rules | Salesforce', 'Google Gemini', and 'anujpande1/Sales-Lead-Manag'. The address bar shows a Salesforce URL. The left sidebar has a search bar with 'lead' and a navigation menu with 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Lead Assignment Rules' and contains a 'Lead Territory Assignment' rule. The rule is active and was created by Anuj Pande on 9/25/2025 at 10:43 AM. The rule entry table shows a single entry with the criteria 'Lead: Company EQUALS Test Corp' and is assigned to 'Sales Rep'.

Setup | Home | Object Manager

Search Setup

Lead

Feature Settings

Marketing

Lead Assignment Rules

Lead Auto-Response Rules

Lead Processes

Lead Settings

LinkedIn Lead Gen

Lead Gen Fields

LinkedIn Accounts

Web-to-Lead

Sales

Lead Intelligence View Setup

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### Lead Assignment Rules

Lead Assignment Rule

#### Lead Territory Assignment

Add rule entries that specify the criteria used to route leads. You can reorder rule entries on this page after you create them.

**Rule Detail**

Rule Name	Lead Territory Assignment	Active	✓
Created By	Anuj Pande, 9/25/2025, 10:43 AM	Modified By	Anuj Pande, 9/25/2025, 11:15 AM

**Rule Entries**

Action	Order	Criteria	Assign To	Email
<a href="#">Edit</a>   <a href="#">Del</a>	1	Lead: Company EQUALS Test Corp	Sales Rep	

## Create an Assignment Flow

We will create a flow that triggers when a web lead is created, checks the company name, and assigns it to the Sales Rep.

The screenshot displays the Salesforce Flow Builder interface for a flow named "Lead Assignment on Creation - V1". The flow is a "Record-Triggered Flow" that starts when a "Lead" record is created. The trigger is configured with the object "Lead", the trigger type "A record is created", and the optimization "Fast Field Updates". The flow consists of three steps: "Record-Triggered Flow" (Start), "Assign to Sales Rep" (Assignment), and "End". The flow is currently active and was last saved on 9/25/2025 at 11:40 PM. The interface includes a top navigation bar with tabs for "Recent | Dashboards", "App Manager | Sales", "Flows | Salesforce", and "Lead Assignment on". The bottom of the screen shows a Windows taskbar with various application icons and the system clock indicating 12:47 AM on 9/26/2025.

```
graph TD; Start([Record-Triggered Flow Start]) --> Assign[Assign to Sales Rep Assignment]; Assign --> End([End]);
```