Proposal for PLG

At

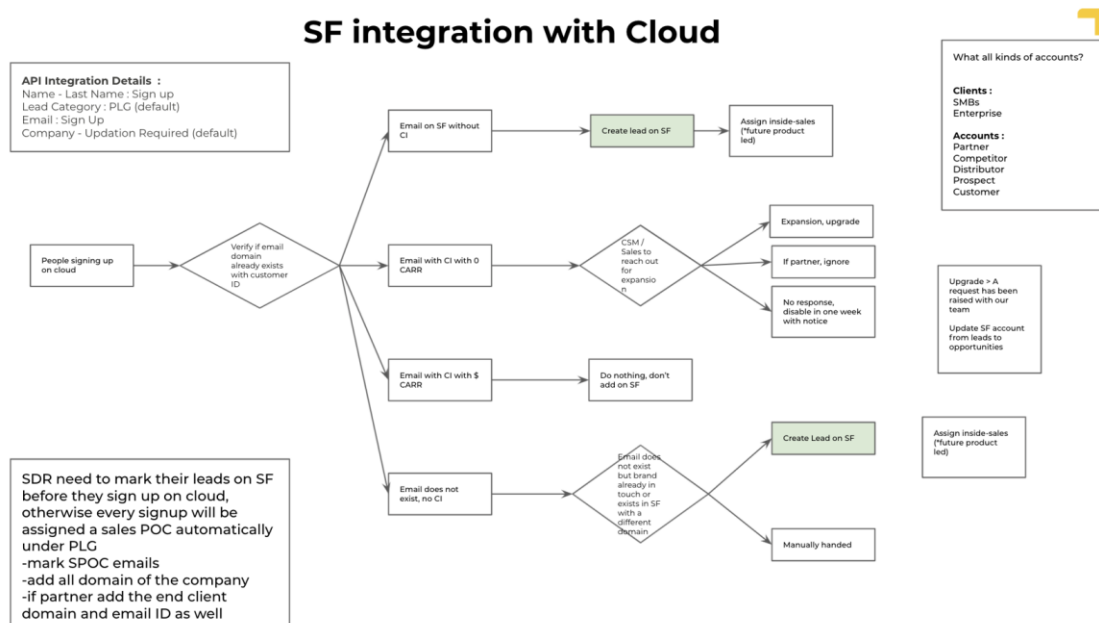**Objective:**

- When customer signs up with email on cloud website, make a call to salesforce and send   the email Id of user
- Salesforce will host an API which will check.
  - Email Id sent matches any existing lead in salesforce. If a match is found, return the lead category and message stating email id present in Salesforce as Lead
  - If no lead is found, check in contact to find a match based on email. Return message stating email matched in contact. **Here there is no category field in contact hence might need to create one.**
  - If no Lead and Contact found, Check All accounts which have a customer Id and match with Customer SPOC Email field on account. If a match is found, return the Account Name, Custom Id, Categorisation as 'Email present on Account as Customer SPOC'.

- In case no Lead or Contact or Account is found, Salesforce will send a response of no Match. Cloud website will have to make another API call to salesforce to create a new lead by sending the first Name, Last Name, and email. Salesforce will create a new lead with lead categorization as "PLG"

FLOW

SF integration with Cloud

API Integration Details :
Name - Last Name : Sign up
Lead Category : PLG (default)
Email : Sign Up
Company - Updation Required (default)

People signing up on cloud

Verify if email domain already exists with customer ID

Email on SF without CI → Create lead on SF → Assign inside-sales (*future product led)

Email with CI with 0 CARR → CSM / Sales to reach out for expansion →
- Expansion, upgrade
- If partner, ignore
- No response, disable in one week with notice

Email with CI with $ CARR → Do nothing, don't add on SF

Email does not exist, no CI → Email does not exist but brand already in touch or exists in SF with a different domain →
- Create Lead on SF → Assign inside-sales (*future product led)
- Manually handed

SDR need to mark their leads on SF before they sign up on cloud, otherwise every signup will be assigned a sales POC automatically under PLG
-mark SPOC emails
-add all domain of the company
-if partner add the end client domain and email ID as well

What all kinds of accounts?

Clients :
SMBs
Enterprise

Accounts :
Partner
Competitor
Distributor
Prospect
Customer

Upgrade > A request has been raised with our team

Update SF account from leads to opportunities

Proposed Solution:

- RoMtek will build 3 API's
  - Access token
  - Email search
  - Insert Lead

1. Obtaining access token

Endpoint: XXXXXXXXXXXXXXXX

HTTP method: POST

Parameters:

KEY	VALUE
grant_type	xxxxxx
client_id	xxxxxxxxxxxxx
client_secret	xxxxxxxxxxxxxxxxx
username	xxxxxxxxxxxxxx
password	xxxxxxxxxxxxxxxxxxxxx

Response received:

```
{
    "access_token": "<xxxxx>",
    "instance_url": "xxxxx",
    "id": "<xxx>",
    "token_type": "xxxxxx",
    "issued_at": "<xxxxx>",
    "signature": "<xxxxxx>"
}
```

2. Email Search API

Endpoint:
```
https://www.sampleurl.com/services/apexrest/plgService?email=abc@xyz.com
```

HTTP method: GET

KEY	VALUE
Content-Type	application/json
Authorization	Bearer <access_token>

Response for successful transaction:
a) *Email found as lead*

```
{
        "status": "SUCCESS",
        "message": "matching Lead found",
        "leadCategory": "xyz",
        "contactCategory":"",
        "accountCategory":"",
        "AccountName": "",
        "customerId": ""
}
```

b) *Email Found as contact*

```
{
        "status": "SUCCESS",
        "message": "matching contact found",
        "leadCategory": "",
        "contactCategory": "pqr",
        "accountCategory": "",
        "AccountName": "",
        "customerId": ""

}
```

c) *Email found in Account SPOC*

```
{
        "status": "SUCCESS",
        "message": "matching account SPOC found",
        "leadCategory": "",
        "contactCategory": "",
        "accountCategory": "Email present on Account as Customer SPOC",
        "AccountName": "ABC Limited",
        "customerId": "CUST-XXXX"
}
```

d) No Lead Contact or Account SPOC found

```
{
    "status": "SUCCESS",
    "message": "no match found",
    "leadCategory": "",
    "contactCategory": "",
    "accountCategory": "",
    "AccountName": "",
    "customerId": ""
}
```

e) Response for unsuccessful transaction:

```
{
    "status": "ERROR",
     "message": "<error_message>"
}
```

3. **Creating lead API**

   Endpoint: https://sampleurl.com /services/apexrest/plgService

   HTTP method: POST

   Headers:

KEY	VALUE
Content-Type	application/json
Authorization	Bearer <access_token>

   Request body:
   ```
   {
           "email": "abc@xyz.com",
           "firstname" : "xyz",
           "lastname": "xyz",
           "salutation": "xyz",
           "leadcategory": "PLG",
           "companyname": "Abc ltd",
           "phone" : 1234567890
   }
   ```

   Response for successful transaction:
   ```
   {

    "status": "SUCCESS",

    "message": "Lead created successfully."
   }
   ```

Response for unsuccessful transaction:

```
{
    "status": "ERROR",
    "message": "<error_message>"
}
```

Acceptance

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