
Gravity Forms – Salesforce CRM Integration

Installation

WordPress Dashboard

- Go to 'Admin' -> 'Plugins' -> 'Add New'.
- Click on 'Upload Plugin'.
- Upload plugin zip.
- Activate plugin.

WordPress Multisite Network Dashboard

- Go to 'Network Admin' -> 'Plugins' -> 'Add New'.
- Click on 'Upload Plugin'.
- Upload plugin zip.
- Only install plugin zip in 'Network Admin' and do not activate it.
- Activate plugin site wise ('Site' -> 'Admin' -> 'Plugins').

Configuration

Integration Method: API

- Create Connected App in Salesforce CRM to get Consumer Key and Consumer Secret. The guide is [here](#).
- Go to 'Admin' -> 'GF – Salesforce' -> 'Configuration'.
- Salesforce CRM Environment: Select Production or Sandbox environment.
- OAuth Flow: Select Username-Password Flow or Token Flow. We Recommend: Token Flow.

Token Flow

- Consumer Key: Add your Salesforce Connected App Consumer Key.
- Consumer Secret: Add your Salesforce Connected App Consumer Secret.

- Click on 'Authorize' button.

Username-Password Flow

- Consumer Key: Add your Salesforce Connected App Consumer Key.
- Consumer Secret: Add your Salesforce Connected App Consumer Secret.
- Username: Add your Salesforce System Administrator account Username.
- Password: Add your Salesforce System Administrator account Password.
- Click on 'Save Changes' button.

Integration Method: Web-to-Lead or Web-to-Case

- Salesforce CRM Environment: Select Production or Sandbox environment.
- Organization ID: Add your Salesforce Organization ID. The guide is [here](#).
- Click on 'Save Changes' button. Also, you can add custom fields for Web-to-Lead or Web-to-Case.
 - Object: Select an object.
 - Field Label: Add field label.
 - Field Name: Add field name.
 - Field Type: Add field type.
 - Click on 'Add Custom Field' button.

Integration

- Go to 'Admin' -> 'GF - Salesforce' -> 'Integration'.
- You can see list of Gravity Forms forms.
- Click on edit form icon which you want to integrate form.
- Select a Salesforce CRM object you want to integrate with current form.
- Click on 'Filter' button to filter object fields.
- Check 'Salesforce CRM Integration?' checkbox if you want to integrate Salesforce CRM.
- Select 'Create Object Record' or 'Create/Update Object Record' action event.
 - Create Object Record: On form submitted, it will add record.
 - Create/Update Object Record: If form submitted email address match with existing record, it will update record. If form submitted email address not

match with existing record, it will add record.

- Select a campaign if you want to add Contact or Lead to your Salesforce CRM Campaign.
- Map Gravity Forms form fields to Salesforce CRM object fields.
Below object wise fields are required in the Salesforce CRM and it must be mapped with Gravity Forms form fields.

- Case: Case Origin
- Contact: Last Name
- Lead: Last Name and Company Name

For 'Lookup Relationship' type fields (Lead Owner, Contact Owner, Record Type, Account, Contact, etc...), create hidden field in the form and map it with 'Lookup Relationship' type field.

- For Lead Owner, create hidden field in the form with value Lead Owner ID.
 - For Contact Owner, create hidden field in the form with value Contact Owner ID.
 - For Record Type, create hidden field in the form with value Record Type ID.
 - For Account, create hidden field in the form with value Account ID.
 - For Contact, create hidden field in the form with value Contact ID.
- Click on 'Save Changes' button.

API Error Logs

- Go to 'Admin' -> 'GF - Salesforce' -> 'API Error Logs'.
- You can see Salesforce CRM API error logs.

Settings

- Go to 'Admin' -> 'GF - Salesforce' -> 'Settings'.
- API Error Notification: Add 'Subject' and 'Send To'. Will be sent Salesforce CRM API error to the specified email.
- Ignore spam entry?: Check 'Ignore spam entry?' checkbox if you want to ignore spam status entry when send to Salesforce CRM.
- Delete data on uninstall?: Check 'Delete data on uninstall?' checkbox if you want to delete this plugin data on uninstall.

Can't find what you're looking for?

We also provide custom developed plugins, add-ons, extensions and themes. Collaborate with us today to get the best-fit solution for your business and we will ensure that our team is available at your service to answer all your queries.

[CONTACT US](#)

[BLOG](#) [CONTACT US](#) [PRIVACY POLICY](#) [TERMS & CONDITIONS](#)

Copyright 2023 © Obtain Code