

5 Ways to Push Leads to Salesforce

1

Salesforce API (REST, SOAP) with User Authentication

Salesforce API (REST, SOAP) with User Authentication: This method involves using standard Salesforce API's to integrate. The lead provider needs to format the field mappings of their leads to conform to the client's standard layout. A user on the lead provider side would need to write integration and authentication code for the Salesforce integration to work. Salesforce has documentation to help with this procedure.



2

Salesforce API (REST, SOAP) with Client Side Certificate Authentication

This method is the same as above, but the authentication key will come not from the developer, but from a trusted certificate authority. The benefit here is that less code is needed and a trusted provider will handle the authentication.



3

Custom API (REST, SOAP) without Authentication

This method will involve developers on the client side to write a custom API that can take the leads from many providers and map them correctly into Salesforce. This does require a force.com site to be configured, and there may be some development required on the side of the lead provider. This API will not be protected by an authentication key, so potentially, anyone could upload leads if they knew the API endpoint.



4

Custom API (with authentication). Either User Authentication or Client Side Authentication

This method is the same as option 3, but with the addition of client developers creating code and formatting for authentication. The authentication is the same as listed in either option 1 or 2.



5

Email services (Apex email handler)

If there is no ability or desire to connect to an API, on either the Lead Provider or the Client side, this option will allow leads to be pushed into Salesforce from an email. Developers on the client side will need to configure a Salesforce email address to receive leads, and then create an email handler that parses information from the email text or attachment into Salesforce. This option would require that all formatting remains constant for the mappings to work. There are Salesforce Apps which handle this specific sort of process.

