Partner Web-to-Lead Process

- Partner warm transfers call to ExactCare Pharmacy representative.
- Partner simultaneously sends Lead data as Anonymous HTTP POST in JSON format.
- Http Response returned to partner.
    - 200 Post Successful
    - 400 Post Successful
        - Phone Number Missing or Incorrect.
        - RecordTypeId is missing.
- ExactCare Pharmacy representative looks up Referral record in Salesforce using Home Phone as reference.
    - If call is transferred but the Lead is not received, the ExactCare Pharmacy representative must create the Lead with the patient on phone to provide info they just gave the Partner.
    - Delayed Lead input may result in duplicate record.

Additional Notes

- If at any time a partner is not sure if a field should be populated, they should not include it; ExactCare will reach out if there are certain fields missing that are needed.
- The responses highlighted in **blue** in the Partner Lead Input section are hard coded and will be the same for every referral. Please hard code these fields with the input provided below. The fields highlighted in **red** are variable and can be updated by partner prior to passing to ExactCare.

Partner Lead Input

- Anonymous connection to Apex REST API Controller.
- HTTPS Request Header:
    - POST https://exactcarepharmacy.my.salesforce-sites.com/lead/services/apexrest/v1/LeadApi/
    - Content-Type: application/json
- Lead data must conform to standard JSON format (Example Below):

```
{
    “Referral_Source_System” : “W2L PROXY”,
    “LeadSource” : “Phone”,
    “RecordTypeId” : “012390000006DX3AAM”,
    “Referral_Source_Details” : “Warm Transfer”,
    “List_Affiliate_Name” : “XYZ”,
    “Web_Referrer_Company“ : “001Pi00005enAmuIAE”,
    "Referrals": [{
            “FirstName“ : “Mary“,
            “LastName“ : “Test“,
            “Gender“ : “Female“,
            “Date_of_Birth“ : “05/23/1957“,
            “Status“ : “Awaiting Scheduling“,
            “Phone“ : “333-444-5555“,
            “MobilePhone“ : “333-444-5556“,
            “Email“ : “mtest@gmail.com“,
            “Street“ : “1938 Howe Road“,
```

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```
        "City" : "Parma",
        "State" : "Ohio",
        "PostalCode" : "44123",
        "Episode_ID" : "YY321",
        "Scheduling_Status" : "Awaiting 1st Patient Contact",
        "Primary_Insurance_Company" : "UnitedHealthcare",
        "Total_Med_Count" : "8",
        "Batch_Status" : "Unreleased"

    }]
}
```


Web-To-Lead Fields

Salesforce Data	Field Name	Data Type	Example values
First Name	firstName	Text(40)	
Last Name	lastName	Text(80)	
Gender	gender	Text(10)	Picklist: Male, Female, Unknown
DOB	date_of_Birth	Text(20)	mm/dd/yyyy (#0/#0/yyyy)
Phone	phone	Text(20)	000-000-0000
Mobile	mobilePhone	Text(20)	000-000-0000
Street	street	Text(100)	
City	city	Text(80)	
State	state	Text(80)	Full state name: Ohio, Texas, etc.
Zip code	postalCode	Text(20)	#####
Email	email	Text(100)	abc.def@mail.com
Prim Insurance	primary_Insurance_company	Text(20)	Alphanumeric
Status	Status	Text(25)	Hard Coded Value: Awaiting Scheduling
Scheduling Status	Scheduling_Status	Text(25)	Hard Coded Value: Awaiting 1st Patient Contact
Referral Source System	Referral_Source_System	Text(150)	Hard Coded Value: W2L PROXY
Referral Source Details	Referral_Source_Details__c	Text(150)	Hard Coded Value: Warm Transfer
Record Type Id	RecordTypeId	Text(150)	Hard Coded Value: 012390000006DX3AAM
Referral Source Details	Referral_Source_Details	Text(150)	Hard Coded Value: Warm Transfer
Episode ID	Episode_ID	Text(100)	Unique ID set by partner
LeadSource	LeadSource	Text(255)	Hard Coded Value: Phone
Web Referrer Company	Web_Referrer_Company	Text(100)	Hard Coded Value: 001Pi00005enAmuIAE
Batch Status	Batch_Status	Text(50)	Hard Coded Value: Unreleased
List Affiliate Name	List_Affiliate_Name	Text(150)	Used to identify specific campaigns. i.e Downsell (DS) vs Standalone (SA)
Total Med Count	Total_Med_Count	Number	

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