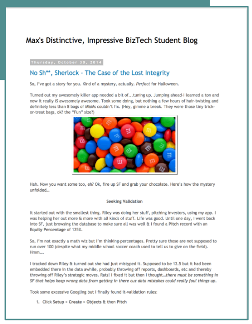
Business Systems Innovation Labs

Lab 2a Troubleshooting Quick-Ref


Max's Distinctive, Impressive BizTech Student Blog

Thursday, October 30, 2014

No Sh**, Sherlock - The Case of the Lost Integrity

So, I've got a story for you. Kind of a mystery, actually. *Perfect* for Halloween.

Turned out my awesomely killer app needed a bit of...tuning up. Jumping ahead-I learned a ton and now it really *IS* awesomely awesome. Took some doing, but nothing a few hours of hair-twisting and definitely less than 8 bags of M&Ms couldn't fix. (Hey, gimme a break. They were those tiny trick-or-treat bags, ok? the "Fun" size?)

Hah. Now you want some too, eh? Ok, fire up SF and grab your chocolate. Here's how the mystery unfolded...

Seeking Validation

It started out with the smallest thing. Riley was doing her stuff, pitching investors, using my app. I was helping her out more & more with all kinds of stuff. Life was good. Until one day, I went back into SF, just browsing the database to make sure all was well & I found a **Pitch** record with an **Equity Percentage** of 125%.

So, I'm not exactly a math wiz but I'm thinking-percentages. Pretty sure those are not supposed to run over 100 (despite what my middle school soccer coach used to tell us to give on the field). Hmm....

I tracked down Riley & turned out she had just mistyped it. Supposed to be 12.5 but it had been embedded there in the data awhile, probably throwing off reports, dashboards, etc and thereby throwing off Riley's strategic moves. Rats! I fixed it but then I thought...*there must be something in SF that helps keep wrong data from getting in there cuz data mistakes could really foul things up.*

Took some excessive Googling but I finally found it-validation rules:

1. Click **Setup** > **Create** > **Objects** & then **Pitch**

Step 18: I don't know what information to type into my new Pitch record.

All the information you need to enter is in the paragraph above **Step 18**; beginning with "Today is 10/7/2016." Once you find that paragraph, enter the information mentioned into your newly created Pitch record.

Step 21: When I hit Clone, nothing happens.

Don't worry. It worked but if you blinked you might have missed it! Remember **Clone** makes an identical copy so it looks the same but what you're seeing really is a new record, alright. See, the **Pitch ID** is no longer "P-010." The **Pitch ID** for this new cloned record is "P-011".

Step 93: I don't see Email in the list so I can't click on it.

If Email isn't appearing on the list then the problem probably happened back on **Step 78** when you created **Contact Name** as a field connecting the **Meeting Attendance** records to their corresponding records in **Contact**. You might have connected **Meeting Attendance** to **ContRact** instead. (SF has a built-in object to track **Contract**ual sales agreements.) Or to **Meeting**. Just go back into **Meeting Attendance** and delete that custom field (**Contact Name**) and then carefully redo **Step 78** to add it back, connected to **Contact** this time.

Step 96: I don't see the Enthusiasm field showing up when I'm trying to add a new Meeting record.

You might have skipped **Step 77**. If so just go back into the **Meeting** object, scroll to **Custom Fields and Relationships**, click **New** and add it, according to **Step 77**.

But if you're sure you did create it already and it's just not showing up, then the visibility for that field probably got turned off, making it "Hidden." (This can happen when you create a field if your WiFi is really slow/spotty or if you clicked **Next, Next, Save** really fast – you're skipping over those pages so fast their coding doesn't fully execute.)

So just go back to **Setup > Build > Create > Objects > Meeting**, scroll down to **Custom Objects & Relationships** and click on **Enthusiasm** (NOT on **Edit**). Then click **Set Field-Level Security** (upper center of the page). Then click the checkbox next to the column-header **Visible**. That will turn on the field's visibility for all user types listed below, including yours (Admin). Then click **Save** and when you go back to **Step 96**, **Enthusiasm** should be showing properly.

When there are quotes around something I'm supposed to type/copy, do I include the quotes when I type/copy it?

No, you only need to type/copy what is written inside of the quotation marks. So if Max tells you to enter "Mobile" into **Field Label** then you would type/copy just those 6 letters into the **Field Label** form slot. No quotes go in there!