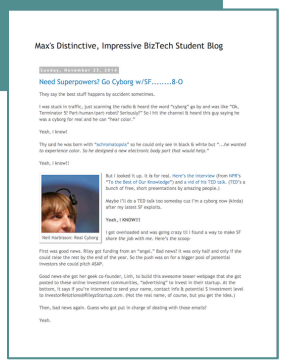
Business Systems Innovation Labs

Lab 3a Troubleshooting QuickRef


Max's Distinctive, Impressive BizTech Student Blog

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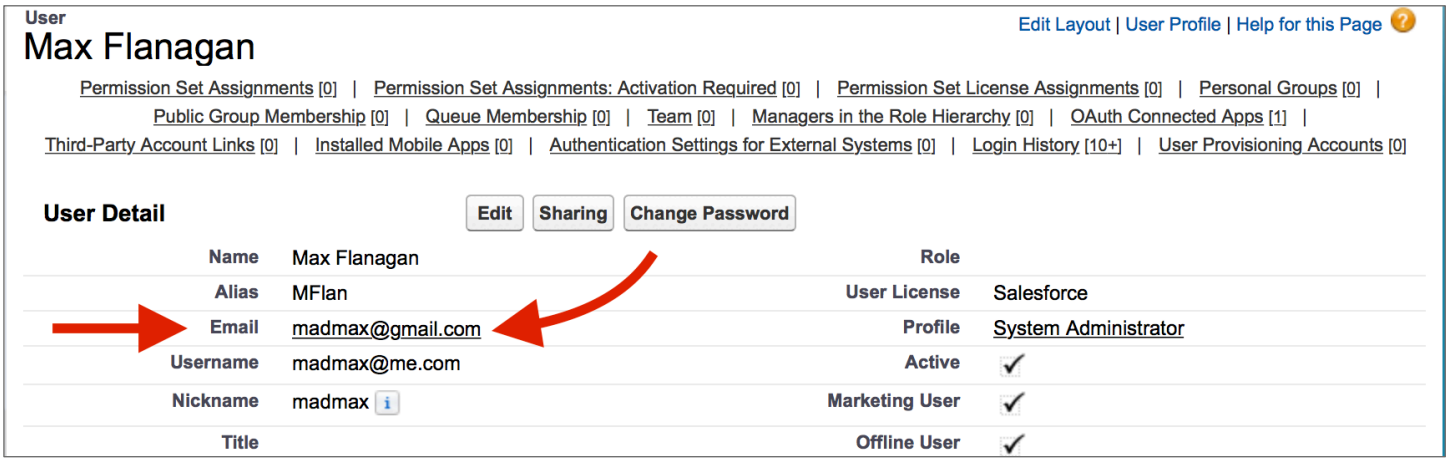
Steps 9-11 : Can't find the CEO Role or Contract Manager Profile or Salesforce license!

When you created your account, you got the 30-day free trial account, not the **Developer Edition** account as specified in Lab 1a. No worries. You need to go to this link and get a brand new account (and you'll need to specify a different email address) and then start over at the top of 3a: **https://developer.salesforce.com/signup**

Step 130: I'm not getting some or all of the emails!

Most likely you're not looking in the right email account inboxes or the account you set up for Riley isn't valid. Here's how to check to be sure. First for you (then for Riley, below):

1. Go to **Setup > Administer > Manage Users > Users**
2. Click on your name in the user list and you should something that looks like this:



Whatever you have showing there–THAT is the email account where the Kyle Reese email is being sent. Check **THAT** account including spam, etc. If you're still not seeing the Kyle Reese email then go on to the next page.

If you're not finding the Sarah Connor and John Connor emails then repeat Steps 1 and 2 above but for the Riley account you created. Just like in the pic above, check the email address (**NOT** the Username–that's for logging in).

If Riley's email is invalid or you need to change it for whatever reason, just click **Edit** and then

1. In the **Email** slot, change the email address to a valid, non-Yahoo (preferably Gmail) address that you can check for Riley's messages about John Conner and Sarah Conner and click **Save** (but the change won't show up yet)
2. Now log into the email account for the new address that you just replaced for Riley because Salesforce just sent "her" a message to confirm the change
3. In the Salesforce email that was just sent to Riley, click the link to confirm the new email address is valid. The change in Salesforce will not be updated until you do this!

Now you should be able to get all three email messages but you need to get Salesforce to send them again:

4. Repeat Lab 3a Steps 129 and 130 to see the three leads you already added
5. Delete each of them by clicking **Del** and then clicking **OK** to popup asking "Are you sure?"
6. Repeat Lab 3a Steps 100-128 (be sure you don't skip 109, 118 or 127)

Now all three messages should be waiting for you in the inboxe(s) for your account & Riley's!

Lab 3a Troubleshooting Quick-Ref

(page 2)

Step 130: I didn't get any of the 3 emails! I'm using Yahoo or AOL. (If not, skip farther down.)

Yahoo and AOL accounts don't work well with Salesforce, but don't despair. You can still make this work but you'll need another non-Yahoo/AOL email account, preferably Gmail. If you don't already have one, then create one now with Gmail and then update your address in SF:

1. Go to **Setup > Administer > Manage Users > Users**
2. Click on your name in the user list
3. Click **Edit** at near the top
4. In the **Email** slot, change the email address to a valid, non-Yahoo (preferably Gmail) address that you can check for your Kyle Reese message later on and then click **Save**

Now do the same for the Riley account you created (assuming you got that far) but note–there's an extra step for her:

5. Go to **Setup > Administer > Manage Users > Users**
6. Click on Riley's name in the user list
7. Click **Edit** at near the top
8. In the **Email** slot, change the email address to a valid, non-Yahoo (preferably Gmail) address that you can check later on for Riley's messages about John Conner and Sarah Conner and click **Save**
9. Now to log into the Yahoo address that you just replaced for Riley (her previous address) because Salesforce just sent "her" a message to confirm the change
10. In the Salesforce email that was just sent to Riley, click the link to confirm the change from the old Yahoo email address to the new one you entered above in Step 9 above. The change will not be made if you don't do this!

Now you should be able to get all three email messages but you need to get Salesforce to send them again:

11. Repeat Lab 3a Steps 129 and 130 to see the three leads you already added
12. Delete each of them by clicking **Del** and then clicking **OK** to popup asking "Are you sure?"
13. Repeat Lab 3a Steps 100-128 (be sure you don't skip 109, 118 or 127)

Now all three messages should be waiting in the inbox for the email address you entered in Steps 4 and 9 above!

Step 130: I didn't get any of the 3 emails! I do NOT have the "using Yahoo/AOL" problem.

It's possible you missed Step 70 which activates the **Lead Assignment Rule** you created. To check and correct if needed:

1. Go to **Setup** > **Build** > **Customize** > **Leads** > **Lead Assignment Rules**
2. You should see the rule you created called "assign incoming leads to Riley or me" and the checkbox under **Active** should be checked for that rule. If it's already checked, then that's not your problem so skip on down to the next possibility below. But if it's not checked then it IS your problem so continue with these steps
3. Click on the rule name ("assign incoming leads to Riley or me")
4. Click **Edit**
5. Check the **Active** checkbox
6. Click **Save**
7. Now your rule will work and you should be able to get all three email messages but you need to get Salesforce to send them again so Repeat Lab 3a Steps 129 and 130 to see the three leads you already added
8. Delete each of them by clicking **Del** and then clicking **OK** to popup asking "Are you sure?"
9. Repeat Lab 3a Steps 100-128 (be sure you don't skip 109, 118 or 127)
10. Now all three messages should be waiting your inbox

Lab 3a Troubleshooting Quick-Ref

(page 3)

Step 130: I didn't get all three emails–I got some other combination of zero, one or two but none of the issues above applies to me.

Ok, if you're sure it's not one of the issues above, then the problem is probably with your **Lead Assignment Rule** or your **Email Templates**.

First check the **Email Templates** you created:

1. Go to **Setup** > **Administer** > **Communication Templates** > **Email Templates**
2. Find the three templates you created, "alert Riley about new Bay Area lead," "alert Riley about new distant lead" and "alert myself about a new lead"
3. Make sure that the checkbox under the **Available for Use** column is checked for all three–if not, that's your problem (You probably skipped Step 31 the first time.)
4. For each of those templates that don't have the **Available for Use** checkbox checked, click **Edit**, check the checkbox for **Available for Use** and click **Save**
5. Now your rule should work and you should be able to get all three email messages but you need to get Salesforce to send them again so Repeat Lab 3a Steps 129 and 130 to see the three leads you already added
6. Delete each of them by clicking Del and then clicking OK to popup asking "Are you sure?"
7. Repeat Lab 3a Steps 100-128 (be sure you don't skip 109, 118 or 127)
8. Now all three messages should be waiting your inbox

If the **Email Templates** weren't your problem, then check your **Lead Assignment Rule**. It's probably something wrong with the **Criteria** of your **Rule Entries**:

1. Go to **Setup** > **Build** > **Customize** > **Leads** > **Lead Assignment Rules**
2. Click on the rule you created "assign incoming leads to Riley or me"
3. Again make sure **Active** is checked and then carefully examine the **Rule Entries** and compare this to the screen capture in after Step 98 of Lab 3a. If there are any discrepancies, then click **Edit** for that entry and fix and **Save**
4. Now your rule will work and you should be able to get all three email messages but you need to get Salesforce to send them again so Repeat Lab 3a Steps 129 and 130 to see the three leads you already added
5. Delete each of them by clicking **Del** and then clicking **OK** to popup asking "Are you sure?"
6. Repeat Lab 3a Steps 100-128 (be sure you don't skip 109, 118 or 127)
7. Now all three messages should be waiting your inbox