Max's Distinctive, Impressive BizTech Student Blog

Saturday, November 5, 2016

Need Superpowers? Go Cyborg w/SF.......8-0

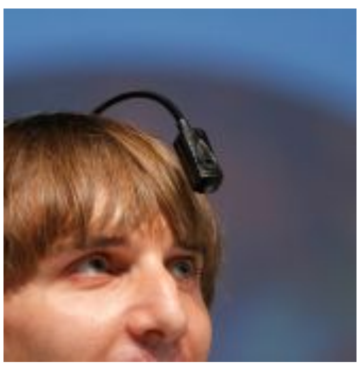
They say the best stuff happens by accident sometimes.

I was stuck in traffic, just scanning the radio & heard the word “cyborg” go by and was like “Ok, Terminator 5? Part-human/part-robot? Seriously?” So I hit the channel & heard this guy saying he was a cyborg for real and he can “hear color.”

Yeah, I know!

Thy said he was born with “achromatopsia” so he could only see in black & white but “*...he wanted to experience color. So he designed a new electronic body part that would help.*”

Yeah, I know!!



Neil Harbisson: Real Cyborg

But I looked it up. It ***is*** for real. Here’s the interview (from NPR’s “To the Best of Our Knowledge”) and a vid of his TED talk. (TED’s a bunch of free, short presentations by amazing people.)

Maybe I’ll do a TED talk too someday cuz I’m a cyborg now (kinda) after my latest SF exploits.

Yeah, I KNOW!!!

I got overloaded and was going crazy til I found a way to make SF *share the job with me*. Here’s the scoop—

First was good news. Riley got funding from an “angel.” Bad news? It was only half and only if she could raise the rest by the end of the year. So the push was on for a bigger pool of potential investors she could pitch ASAP.

Good news—she got her geek co-founder, Linh, to build this awesome teaser webpage that she got posted to these online investment communities, “advertising” to invest in their startup. At the bottom, it says if you’re interested to send your name, contact info & potential $ investment level to *InvestorRelations@RileyzStartup.com*. (Not the real name, of course, but you get the idea.)

Then, bad news again. Guess who got put in charge of dealing with those emails?

Yeah.

At first it was no big. When an email came in I was supposed to write back to say we got it, thanks & someone would get in touch soon. Then:

- if they were talking serious $, like more that $150k, then forward to Riley so she can get in touch and decide if she should pitch to them,
- if it was $150k or less, then I should call and talk to them to determine if they're really worth Riley's time to pitch them (she told me the kinds of things to say/ask) or
- if they were around here (the Bay Area), then even if it was under $150k, still forward to Riley b/c she could maybe schedule a demo/reception here to pitch a bunch of them at once.

Easy, peasy, right? Uh-uh:

- There was a ton more than we expected—an inbox tsunami!
- Some people didn't include their address or their investment level or whatever in their message (didn't read instructions, surprise) & I had to go back & forth with them an extra round (or two!) to get the info.
- I got so far behind I just couldn't get that first email back to people so quick & they would email again (being snarky) which only made more work and wasn't so good for "investor relations" (ouch).
- Sometimes the emails I forwarded to Riley got lost in her stuffed inbox so I had to send her reminders but I wasn't sure which ones she had already followed up on or not so she got annoyed with me making her inbox even worse. :(
- Sometimes I just forgot to send her a reminder. (yikes!)

As Prof would say, our business process didn't scale.

Me? I said *bleep* (expletive deleted).

He would say we needed some biz process re-engineering & automation.

I said, "I need *bleep*ing superpowers to keep up with this *bleep*. If only I could morph into a cyborg —part biz student girl, part high-tech, intelligent robot—in order to keep up."

Turns out I could. And I did!

Taking the Lead: Part 1

(Making some nifty SF email templates for alerts to Riley & to me too)

One day we were talking. Riley called one of these potential investors a "lead." Something clicked. I remembered seeing **Lead** was built-in (standard) object in SF. *Was there stuff in SF I could use to help deal with all these "Investor Leads?"*

A bit o' Googlin', some hits & misses, and I figured it out.

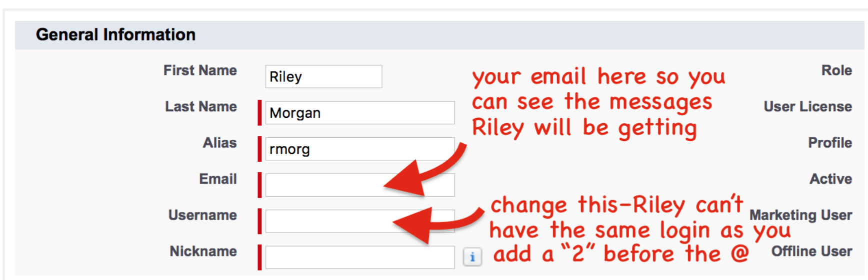
If we kept this potential investor data as **Lead** records, instead of having all that info buried in our emails, we could stay organized. We could both see all the leads and which of us was assigned to which, and what their status was, like did we contact them yet?, reports, etc. AND...

SF could be my robot-self and do a bunch of the work (eg. assigning leads & reminding, etc) for me —*automatically*!

To see how this works, you're first going to to create a new user account for "Riley," inside your SF "instance," just like I did. (Remember SF is "enterprise" software so, like Prof says, the setup that you configure—your SF "instance"—would maybe have users across the whole company. And as the "administrator," you would set up their accounts so they could log in and see their stuff.)

1. Go to **Setup** > **Administer** > **Manage Users** > **Users**

2. You should see a listing of users with a few rows including one for yourself as **System Administrator** and a few others SF puts in automatically but you can ignore those
3. Click the **New User** button above the rows
4. Enter "Riley" for the **First Name** and "Morgan" for **Last Name**. (Not really hers but...)
5. Tab to autofill **Alias**
6. *******CRITICAL:** For Riley's **Email**, just enter the same email address you used when you created your account. SF will send her email to that account & you can check it (pretending to be Riley) when we get to that point later on ***********



7. When you tab, **Username** auto-populates with that same email address you just entered <u>but you need to CHANGE IT</u> b/c she can't have the same **Username** as you, right? Just insert a "2" into it, just in front of the @ sign (eg "xxx2@yyy.zzz") and *that* will be <u>her</u> **Username** for logging in. (In SF, **Usernames** *look* like email addresses...but are just for logins.)
8. **Nickname** will have already auto-populated too but just change it to "Riles"
9. On the upper right find the pulldown menu labelled **User License** & select **Salesforce**
10. Use the **Role** pulldown menu just above to select **CEO**
11. Use the **Profile** pulldown menu to select **Contract Manager**
12. Click the **Save** button

Now remember, **Lead** is a standard object (already built in to SF) and it has built-in fields for a lead's contact info, their **Status** (eg. have they been contacted yet?, etc) and **Lead Owner** (who's responsible for following up?). So now, whenever someone emailed me their info I could easily add a new **Lead** record—I just had to pick me or to Riley as the owner, based on those "business rules" above, & then send an alert email to her (or me) to say "Here's a new lead to follow up on."

But the coolest part was to make SF (the robot part of the cyborg me) do the assignment and send the email *automatically* whenever I entered a lead, so I couldn't forget.

But first, I had to add two new custom **Lead** fields for doing assigning—those business rules were based on whether the lead was from around here and how much they were looking to invest. So first, I added a custom field called **Bay Area Location**:

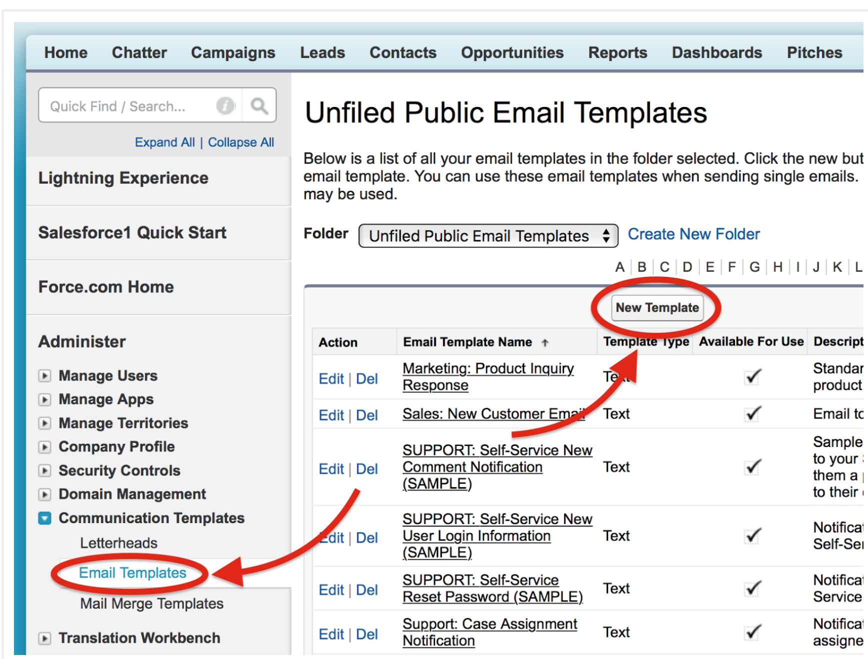
13. Go to **Setup** > **Build** > **Customize** > **Leads** (on the 5th row under **Customize**) > **Fields**
14. Scroll down to **Lead Custom Fields & Relationships**
15. Click the **New** button
16. Select the **Picklist** option & click **Next**
17. For **Field Label** enter “Bay Area location” (Don’t enter the quotes, remember?)
18. Just below, next to **Values**, click **Enter values, with each value separated by a new line.** to open a textbox where you can enter the list of values to pick from
19. In that textbox enter “Yes” on the first line and enter “No” below it, on the 2nd line
20. **Field Name** should have automatically populated with “Bay_Area_location”
21. Click **Next, Next** and click **Save & New**

Then I created one called **Investment Potential**:

22. Select the **Currency** option & click **Next**
23. For **Field Label** enter “Investment Potential”
24. In the **Length** textbox enter **7** and for **Decimal Places** enter **0**
25. **Field Name** should have automatically populated with "Investment_Potential”
26. Click **Next, Next** and click **Save**

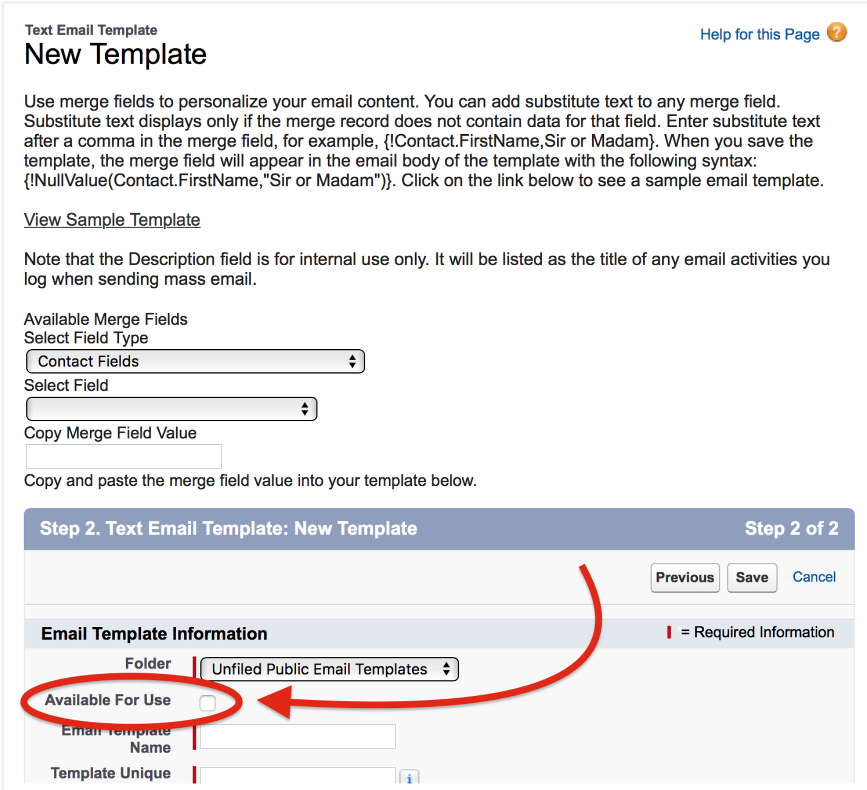
Next, I created an email template so I could make SF send an email to Riley *automatically* whenever a lead got assigned to her:

27. Click on **Setup** > **Administer** > **Communication Templates** > **Email Templates** and you’ll see a list of built-in templates that are already in there (you can ignore those)

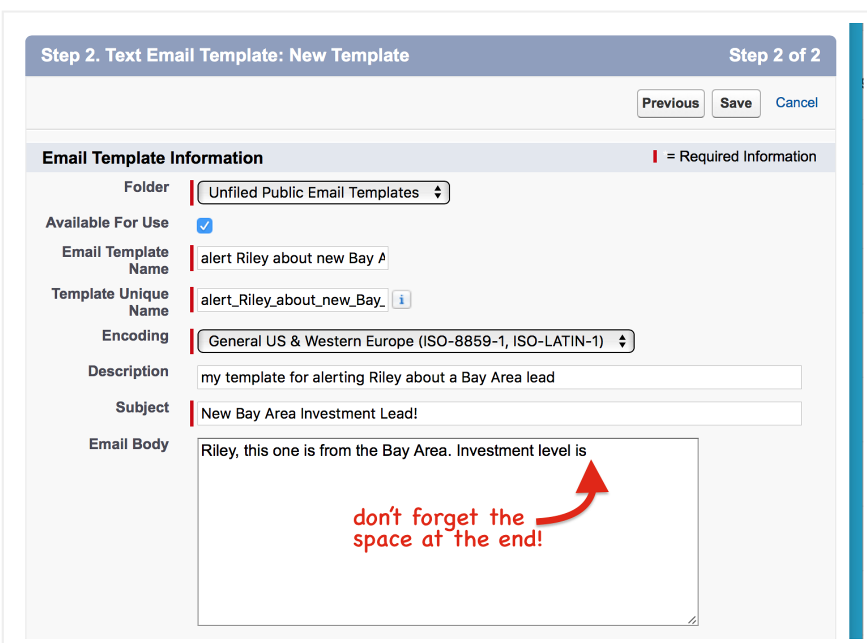


28. Click the **New Template** button
29. The **Text** button should already be checked
30. Click **Next**

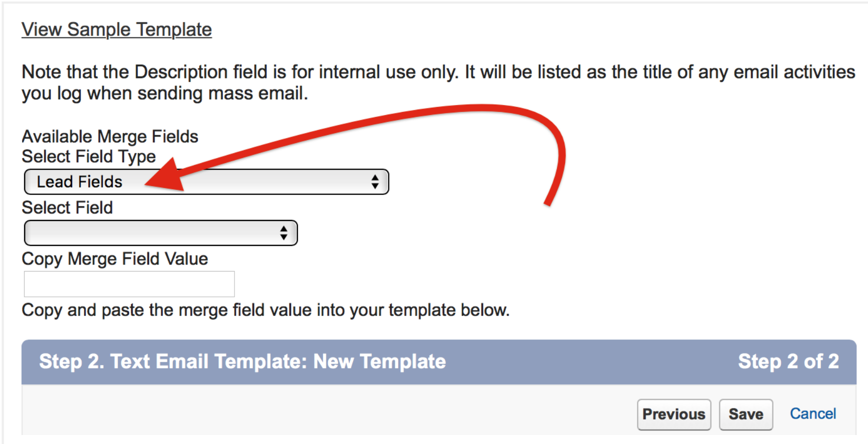
31. Now on the **New Template** page that appears, scroll down to the **Email Template Information** area and check the **Available for Use** checkbox



32. For **Email Template Name**, enter "alert Riley about new Bay Area lead"
33. Tab to the next field, **Template Unique Name**, and it should auto-populate with "alert_Riley_about_new_Bay_Area_Lead"
34. For **Description**, enter "my template for alerting Riley about a Bay Area lead"
35. Skip down to **Subject** and enter "New Bay Area Investment Lead!"
36. In the **Email Body** textbox, enter "Riley, this one is from the Bay Area. Investment level is " (be sure to include that extra space that's there after the "is")



37. Now above, on that same page, find the **Select Field Type** that is currently set to **Contact Fields** and use the pulldown menu to select **Lead Fields** instead

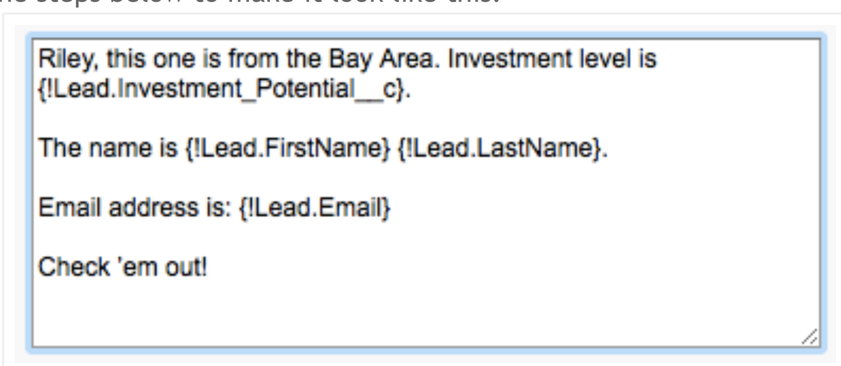


38. Just below that, find the **Select Field** drop-down menu, scroll the menu down to the **Custom Fields** at the bottom and select **Investment Potential**
39. The **Copy Merge Field Value** textbox will auto-populate and highlight. Copy it just like you would in any copy/paste operation on your computer and then paste it into the **Email Body** textbox at the end of what you typed already (after the "is" and the extra space) and then add a period at the end. It should look like this (but maybe wrapped to 2 lines):

   Riley, this one is from the Bay Area. Investment level is {!Lead.Investment_Potential__c}.

40. Then, in the **Email Body**, type a couple of returns to add a blank line & type "The name is " (with the space at the end)

Keep following the steps below to make it look like this:



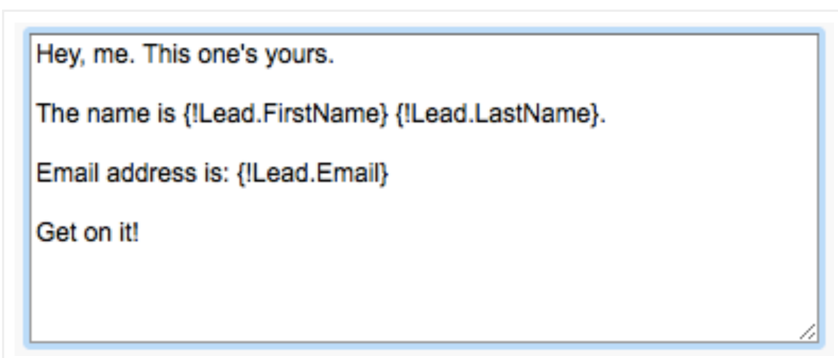
41. Back up above, at **Select Field**, use the pulldown menu to change **Investment Potential** to **First Name**
42. Like before, copy what's now in the **Copy Merge Field Value** & paste it after "The name is " in the **Email Body** and add a space after what you pasted (" ")
43. Now go back up again to **Select Field** and change **First Name** to **Last Name**, copy and paste it after the **First Name** in the **Email Body** (make sure you paste it after the space you added behind **First Name**) and then add a period (at the end)
44. Type two returns to add a blank line and type "Email address is: " with the space at the end
45. Again, go back up to **Select Field** and change **Last Name** to **Email**, and then copy/paste in
46. Type two returns to add a blank line and type "Check 'em out!"
47. Click **Save** just below the **Email Body** textbox

Good. That template's done. Now make another one like it but this one will be for alerting Riley to a new lead from *outside* the Bay Area:

48. You should be on the **alert Riley about new Bay Area lead** page so just click **Clone** to make a duplicate
49. In the **Email Template Name** textbox, change "Bay Area" to "distant"
50. In **Template Unique Name**, do the same so it says "alert_Riley_about_new_distant_lead"
51. In **Description**, make it "my template for alerting Riley about a distant lead"
52. Click **Save**
53. On the new page that appears, click the **Edit** button near the top
54. In **Subject**, change "Bay Area" to "Distant"
55. Now in the **Email Body** textbox, change "from" to "outside" so it reads "Riley, this one is outside the Bay Area."
56. Click **Save**

Now clone another template for email alerts to yourself:

57. Click **Clone** again
58. In the **Email Template Name** textbox, change it to "alert myself about a new lead"
59. In **Template Unique Name**, do the same so it says "alert_myself_about_a_new_lead"
60. In **Description**, enter "my template for alerting myself about a new lead"
61. Click **Save**
62. On the new page that appears, click the **Edit** button near the top
63. Change the **Subject**, to "New (minor) Investment Lead for YOU (me) -- Go!"
64. Now in the **Email Body** textbox, make it like this:



65. Click **Save**

Now you've got templates for each of the three assignment possibilities any they'll pull the actual names, $ figures and email addresses of the leads into the messages when they're sent. You'll see.

Next? Create the rules your robot half will use to assign **Lead** records whenever they're entered.

Taking the Lead: Part 2
(Program your 'bot to make the assignments for you!)

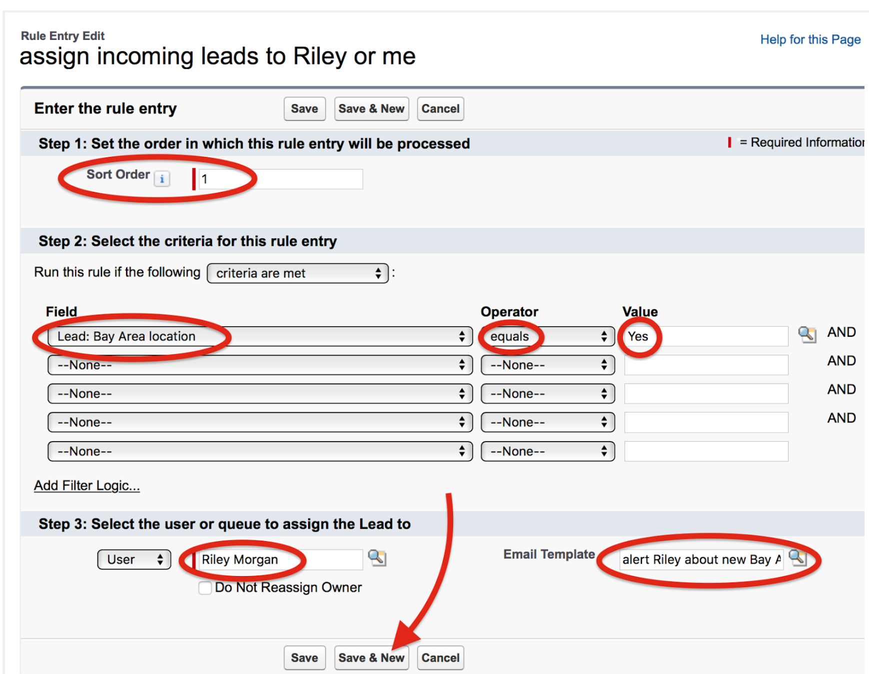
Then I set up the rule so every time a new lead gets added, SF automatically assigns it to the right one of us and sends us an email alert:

66. Click **Setup** > **Build** > **Customize** > **Leads** > **Lead Assignment Rules**
67. Ignore the built-in one named **Standard**
68. Click the **New** button
69. For **Rule Name** enter "assign incoming leads to Riley or me"
70. <u>Be sure to click the **Active** checkbox</u> or your rule won't appear (or work)
71. Then click **Save**
72. Now you should see that rule appear in the list of **Lead Assignment Rules**
73. Click on the rule name ("**assign incoming leads to Riley or me**")
74. Under **Rule Entries** click the **New** button

Now SF works through the rules in the order you set them up—when you enter a new lead record, it starts with the first rule and if it comes out true, then it assigns the lead to the user specified in that rule. If not, it goes to the next rule and so on. I just needed to take the three rules Riley had made and put them in here for SF but I needed to get them in logical order.

So, I knew if the new lead was from the Bay Area, that trumped everything, it was Riley's lead, so I started with that:

75. Enter the number 1 for **Sort Order** to make sure this rule entry is looked at first
76. On down, find the first drop-down menu under **Field** and select **Lead: Bay Area location**
77. To the right, under **Operator**, select **equals**
78. By the textbox under **Value**, click the magnifying glass and in the popup window that appears, check the checkbox labeled **Yes** and click the **Insert Selected** button
79. Below, under **Step 3: Select the user or queue to assign the Lead to**, select **User** from the pulldown menu and click the magnifying glass by the textbox
80. In the popup window that appears, search for "Riley" and then click her name to select her
81. Then click the magnifying glass by the textbox labelled **Email Template**
82. In the popup window that appears, click on **alert Riley about new Bay Area lead**



83. Click **Save & New**

Now the next rule entry to be considered. It's only checked if the new lead didn't pass the first rule and get assigned to Riley already. At this point, we know it's not a lead from the Bay Area so for this rule we'll check **Investment Potential**:

84. Enter the number 2 for **Sort Order** to make sure this rule entry is looked at next
85. On down, find the first pulldown menu under **Field** and select **Lead: Investment Potential**
86. To the right, under **Operator**, select **less or equal**
87. To the right, under **Value**, enter 150000 (four zeros—no commas!)
88. Below, under **Step 3: Select the user or queue to assign the Lead to**, select **User** from the drop-down menu and click the magnifying glass by the textbox
89. In the popup window that appears, search for your own name and click it to select yourself
90. Then click the magnifying glass by the textbox labelled **Email Template**
91. In the popup window that appears, click on **alert myself about a new lead**
92. Click **Save & New**

The last rule entry is for all leads that that didn't get assigned by the the first two entries. To make it all the way down to this entry, they'd have to be outside the Bay Area (1st entry didn't snag it) AND they must have higher than $150,000 potential (2nd entry didn't snag it either). So at this point, they <u>definitely</u> go to Riley (no need to match anything this time—just assign to Riley):

93. Enter the number 3 for **Sort Order** to make sure this rule entry is looked at third, only after the other two failed to assign the lead
94. Below, under **Step 3: Select the user or queue to assign the Lead to**, select **User** from the drop-down menu and click the magnifying glass by the textbox
95. In the popup window that appears, search for "Riley" and then click her name to select her
96. Then click the magnifying glass by the textbox labelled **Email Template**
97. In the popup window that appears, click on **alert Riley about new distant lead**
98. Click **Save**

Rule Entries New Reorder

Action	Order	Criteria	Assign To	Email
Edit | Del	1	Lead: Bay Area location EQUALS Yes	Riley Morgan	✓
Edit | Del	2	Lead: Investment Potential LESS OR EQUAL 150000	Max Flanagan	✓
Edit | Del	3		Riley Morgan	✓

Now you should see all three entries for this rule (3rd one didn't need any criteria, remember?) and it should be good to go!

Taking the Lead: Part 3

(Try out your new Cyber-superpowers)

Now to try out your work, pretend you just got an email from a potential investor named "Sarah Conner." You replied to say thanks & someone would be in touch soon. Now you need to enter her info as a new **Lead** record.

Now you should already have a **Leads** tab (SF comes set up with one automatically but if you don't see it then add one like you did awhile back by clicking the **+** sign by the tab on the farthest right & then click the **Customize My Tabs** button and then move **Leads** from **Available** to **Selected Tabs**).

99. Click your **Leads** tab and then click the blue **Create New**... pulldown menu on the upper left

100. Click on **Lead**
101. The **New Lead** form will appear and will show you as the **Lead Owner** but that might be reassigned, depending on the rules, when you **Save**—you'll see...
102. For **First Name**, enter "Sarah"
103. For **Last Name**, enter "Conner"
104. **Company** is required so just put in "Cyberdyne"
105. Skip down to **Bay Area location** and select **No**
106. For **Investment Potential** enter "450,000"
107. On the righthand side, in the **Email** textbox, enter "sconner@cyberdyne.com"
108. Leave **Lead Status** set to **Open - Not Contacted** (just saying thanks & we'll be in touch doesn't count)
109. Scroll down to the **Optional** section at the very bottom and check the checkbox labelled **Assign using active assignment rule**
110. Click **Save & New**

Now enter another lead:

111. For **First Name**, enter "Kyle"
112. For **Last Name**, enter "Reese"
113. Just use "Cyberdyne" for **Company** again
114. Skip down to **Bay Area location** and select **No**
115. For **Investment Potential** enter "125,000"
116. On the righthand side, in the **Email** textbox, enter your own email address (so below, when you pretend to be Kyle, you can log into your email account and see messages sent here)
117. Leave **Lead Status** set to **Open - Not Contacted**
118. Scroll down to the **Optional** section and check **Assign using active assignment rule**
119. Click **Save & New**

One more:

120. For **First Name**, enter "John"
121. For **Last Name**, enter "Conner"
122. Just use "Cyberdyne" for **Company** again
123. Skip down to **Bay Area location** and select **Yes**
124. For **Investment Potential** enter "110,000"
125. On the righthand side, in the **Email** text box, enter "jconner@cyberdyne.com"
126. Leave **Lead Status** set to **Open - Not Contacted**

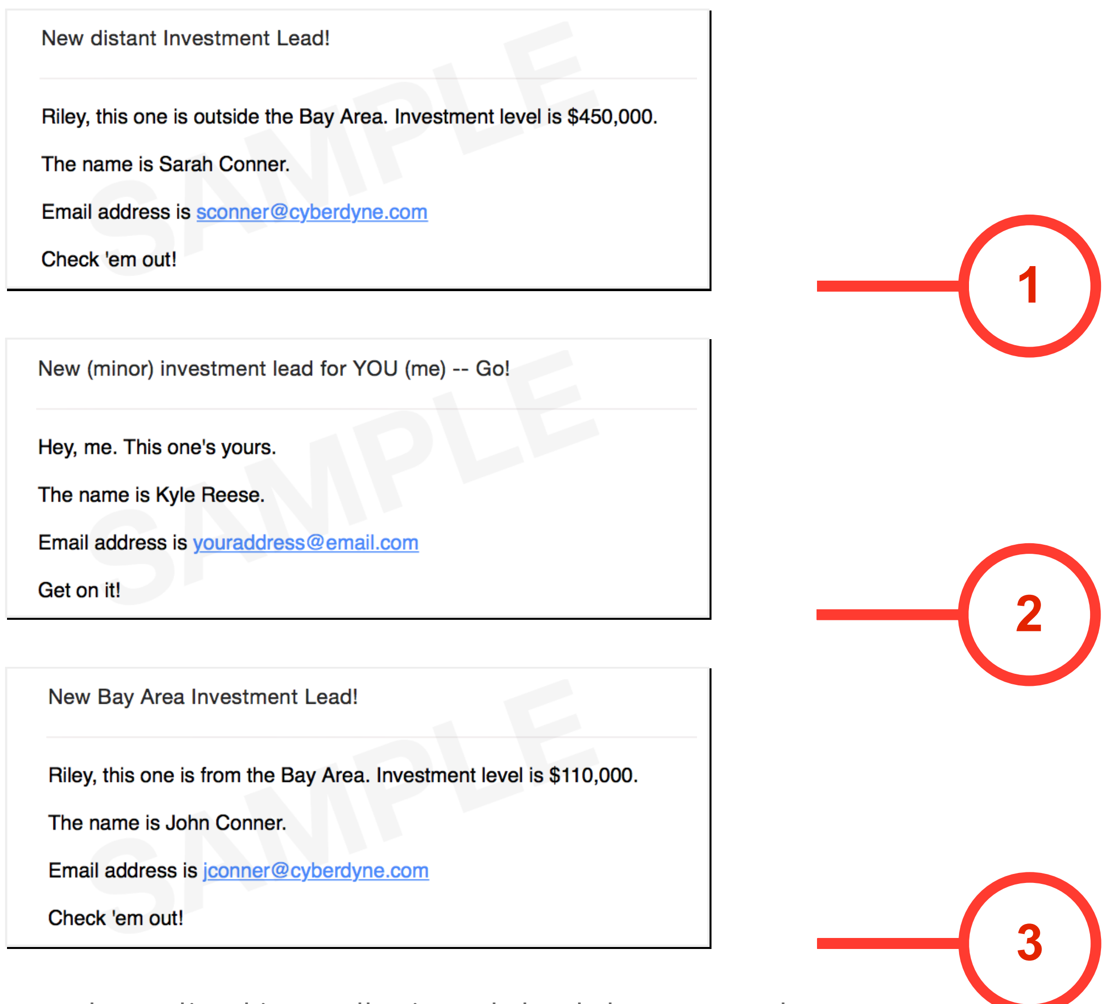
127. Scroll down to the **Optional** section and check **Assign using active assignment rule**
128. Click **Save**

Ok so now to check out the leads you entered.

129. Click your **Leads** tab
130. Use the **View** pulldown menu to select **Today's Leads** and behold...

If all went well, you should see your three leads, all properly assigned. (You may need to scroll sideways.) The **Owner Alias** column should list "rmorg" (short for Riley Morgan) for John Conner (Bay Area) and Sarah Conner (over $150k investment potential). And it should show your alias (like "rmorg" but with your name) for Kyle Reese (under $150k investment potential). And there's a column to track **Status** (eg. **Open - Not Contacted**) & one called **Unread by Owner** to show whether the lead's been looked at yet whoever's reponsible for it—accountability. (scary)

Leave SF for now & go check your email. You should see 3 new alert messages—2 meant for Riley (about John & Sarah), and 1 meant for you (about Kyle)—each with the field values filled in. Open them up to confirm your borg half did it's job. (Note: These go to the addresses in your and Riley's user profiles. If the messages don't appear & you have to edit those addresses, then delete and re-enter and **Save** the leads again to trigger re-sending the messages to the corrected addresses.)


New distant Investment Lead!

Riley, this one is outside the Bay Area. Investment level is $450,000.

The name is Sarah Conner.

Email address is sconner@cyberdyne.com

Check 'em out!

New (minor) investment lead for YOU (me) -- Go!

Hey, me. This one's yours.

The name is Kyle Reese.

Email address is youraddress@email.com

Get on it!

New Bay Area Investment Lead!

Riley, this one is from the Bay Area. Investment level is $110,000.

The name is John Conner.

Email address is jconner@cyberdyne.com

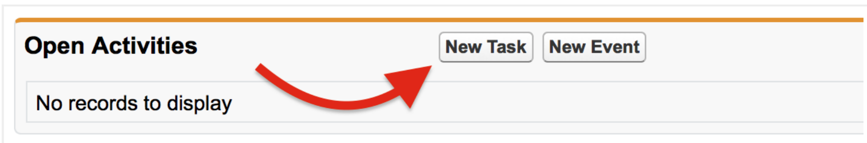
Check 'em out!

Is that cool or what? I started to realize this was all going to help...help us manage better...manage our relationships...our relationships with the people we're asking for money...like as if they were customers...this is...the Customer Relationship Management (CRM) stuff Prof told us about (!) & Salesforce was built for that (oh yeah). I started finding tons of other stuff to help even more.

More Cyborg-CRM Adventures
(Remind me to seem like the type to remember)

Check this out—when you add a new lead, you can create a task for yourself in the system and tell your robo-half to remind you to deal with it so you *can't* forget:

131. Back in SF, you should see the view list of the three leads you created (if not, then click on your **Leads** tab and use the **View** pulldown to select **Today's Leads** and click **Go!**)
132. Click the **Kyle Reese** lead to open it up and scroll down to find the **Open Activities** section just below the **Lead** fields for Kyle



133. Click on **New Task**
134. On the **New Task** page, the **Assigned To** field should already be set to you which is good so leave that alone—it's going to be your task, after all
135. Click the popup window icon just to the right of the **Subject** textbox and select **Email**
136. For **Due Date**, click on the textbox to bring up a calendar and click on tomorrow's date to fill that in if you want to get back to them in 24 hours, like I'm supposed to
137. Leave **Priority** set to **Normal** and leave **Status** set to **Not Started** and leave **Lead** set to **Kyle Reese** (all automatic)
138. In the **Comments** textbox below, enter "sounded enthusiastic in his initial email" (b/c this history could be helpful to you later on)
139. **Reminder** (at the bottom) is automatically set to 8:00 am on the **Due Date** (tomorrow) but to see how it works, set the reminder date to yesterday (and make sure your browser isn't blocking popup windows for SF—you may have to change your browser security prefs)
140. Click **Save**

Wait a minute or two and you should hear a sound (if your volume isn't muted) and should see a popup window at the upper left of your screen, showing your "overdue" task. You'll see this overdue task popup window every time you log into SF, if you have anything to list there. If you have a bunch, you can hover any one to see its details at the top. And you can click any one to go straight to that task's details page. No more forgetting. No more relationship damage. Ultra-nifty.

Just close that reminders popup window and take a look at the **Kyle Reese** details screen again. Notice anything different? If you scroll down you can see your new task under **Open Activities** for him, below his field details. Awesome. Time to follow up!

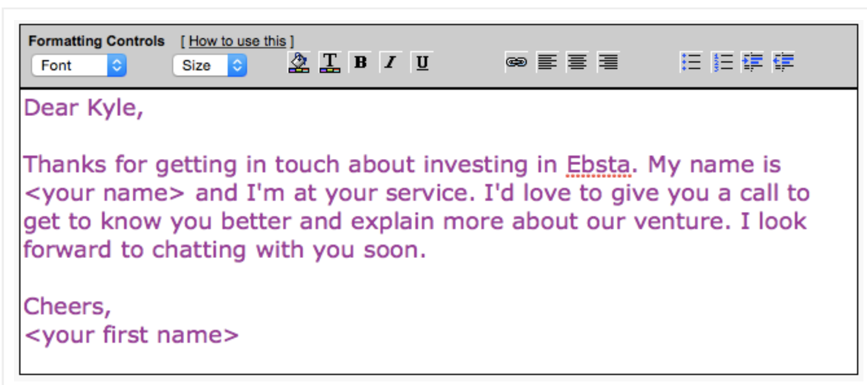
Now, turns out, if you email him using SF, it will track & organize all your interactions with him so your stuff won't get lost, forgotten, etc and you won't get in trouble. Cool, you can try it now, but first, you have to make sure your settings for sending email through SF are all good to go:

141. Click on your name toward the upper right, next to **Setup**
142. In the drop-down bubble menu that appears, click on **My Settings**
143. In the menu list on the left, click **Email**
144. In the sub-menu that appears, click **My Email Settings**

145. Under **Would you like to automatically BCC emails to your return address?**, click **No** (you could get a copy of everything you send so you know what it looks like to your recipients but don't bother for now)
146. In the **Email Signature** textbox, enter your name on the top line and then on the next line enter "Investment Team"
147. Click **Save** at the bottom of the **My Email Settings** page

Now let's create that email to Kyle:

148. Use your **Leads** tab and click his name to get back to the **Kyle Reese** details page
149. Scroll on down to **HTML Email Status** and click **Send an Email** (an HTML email looks prettier than a plain old text one and better in other ways you'll soon see too)
150. If **Email Format** says **Text Only [Switch to HTML]** then click the switch link to make it say **HTML [Switch to Text Only]**
151. Notice that **To** is already set to "Kyle Reese"
152. For **Subject**, enter "In response to your inquiry about investing in Ebsta..." (not actually Riley's startup but good to know about—they make SF apps that add specialized features)
153. Type in the message textbox to make it look like the pic below but of course, substitute your name for "<your name>" and your first name for "<your first name>"



154. Highlight (select) all the text you entered and then use the **Formatting Controls** menu bar to set the **Font** to **Verdana** (friendlier) the **Size** to **11px** (nice & big, in case he's old) and the **T** button to set the text color to a dark purple (warm & fuzzy)
155. Now double-click on the word "Ebsta" in the first sentence so it's selected (highlighted) and click the little chain icon in the **Formatting Controls** menu bar
156. In the popup window that appears, type into the textbox so it says "http://www.ebsta.com/about-ebsta/" and click **OK**
157. Now click **Send**

K, now pretend you're Kyle for a minute:

158. Open up a new browser window or your email app so you can check your inbox for the email address you entered earlier as Kyle's (**Make sure your email settings allow images!**)
159. Find the message you just sent, open it up and click on the Ebsta link to open up their "About Ebsta" web page
160. Log out of your email (or close your email app) and then log back in (or reopen your email app) and open up "Kyle's" email message a 2nd time
161. Log out of your email (or close your email app)

Now, you're you again:

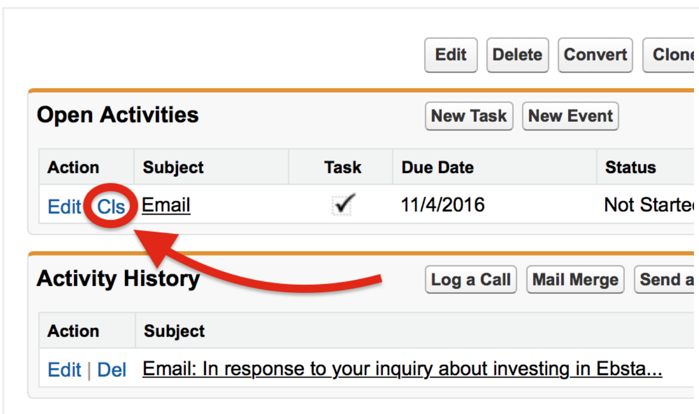
162. Go back to SF and refresh (reload) the Kyle Reese page again (or log out of SF and log back into it and go back to **Leads** & then the Kyle Reese page again)
163. Look at the bottom of the page, under **HTML Email Status** for info about the message you just sent. It lists **Date Sent**, **Date Opened**, **Last Opened** and the **# Times Opened.** <u>*If your* email settings were set to allow images</u>, this should be "2" b/c, as Kyle, you opened it twice. (Some security settings block this so don't worry if you can't get it to work.)

Super helpful when you're trying to gauge Kyle's 'tude for a chat, eh? A little scary, privacy-wise, but *this is what's possible when you send email as HTML and have a CRM to help you track stuff*.

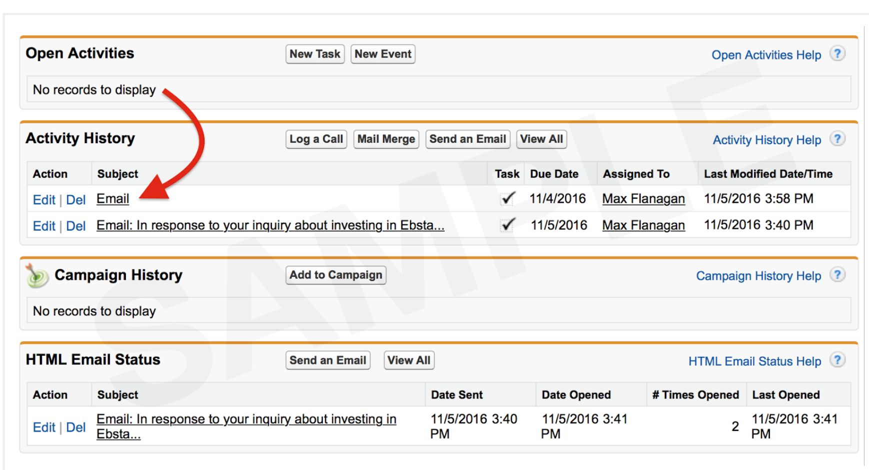
Now notice that the message you sent is also listed under the **Activity History** section. That's how you track all your interactions with Kyle (email, calls, etc.) so you don't forget what you did when.

Above that, under **Open Activities**, there's the old task you had set earlier telling you to email Kyle in the first place. That's done now so:

164. Click **Cls** (next to **Edit** on that task row) to close out that task record



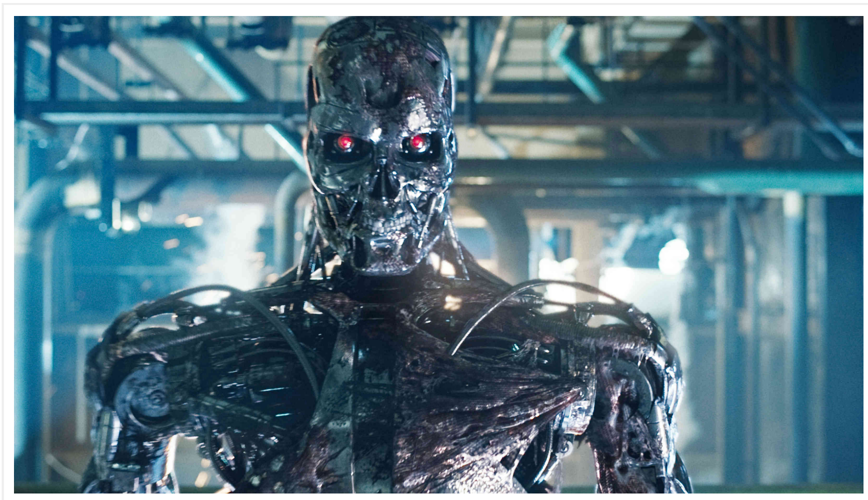
165. That opens the details page for that task but it automatically changes the **Status** to **Completed** for you so you can just click **Save**
166. Now, back on the details page for Kyle, you can see that task has left the **Open Activities** section and moved down under **Activity History** & you won't get those reminders for it anymore b/c it's closed now (done)



So SF really helps you track what you did & what you're supposed to do. You can schedule events like calls & meetings using a calendar that's built in too. You can even sync your SF email & calendar with Outlook or your Google Apps account using an SF app from—you guessed it—Ebsta. They sell it on the Salesforce AppExchange, a kind of App Store for SF where 3rd party companies sell apps that add to its features and extend its capabilities.

So SF rocks as a CRM and now you and SF are integrated, intermingled, working as one—you're a cyborg! (kinda)

CONGRATULATIONS!
(Now...don't be evil.)



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