

Business Systems Innovation Labs

Lab 3b Troubleshooting QuickRef



Step 36: On the All Workflow Rules page, there's no New Rule button to click on!

Easy one. Remember when you logged in as Riley, to vote in the Chatter poll and post about Kyle Reese? Well, you're still logged in as Riley and she doesn't have permission to create new workflow rules, so the **New Rule** button doesn't appear for her. **Solution:** Click on Riley's name on the upper right to pull down a menu and click **Logout** and then log back in as yourself and start back at Step 34 again. You'll be fine.

Step 103: I can't find the TextEdit app on my Mac.

Don't worry. It's there somewhere. **Solution:** Try clicking on the tiny magnifying glass in your menu bar at the far right. That opens Spotlight, a Mac tool for finding stuff. Then you can type in "TextEdit" and it will find it for you. You can then double click on it in the Spotlight results to open it directly. Or, you could use Launchpad to find & open TextEdit.

Step 126: When I opened the myweb2lead.html file in my browser it showed random junk instead of the web form.

Your browser isn't recognizing the contents of the file as HTML code. This could be due to not getting the file extension right—it has to be .html (or .htm). But more likely, you're on a Mac, using TextEdit and you didn't get the file to be formatted as Plain Text. Note Steps 104 and 105 about changing the TextEdit preferences to make sure **Plain Text** is specified as the format AND then close and reopen TextEdit. Note: if your new blank document opens with a ruler and a bunch of formatting options showing at the top of the window, then your file is going to be **Rich Text** and that doesn't work. And you can't convert it once it's created in the wrong format. **Solution:** You need to get the preferences right and then create a new document that opens in a window with no formatting stuff at the top. Then copy & paste the code again from Salesforce and save. That file should work for you.

Step 139: I'm not seeing anything under Open Activities or under Activity History or both!

So there are a couple of things that could be causing this:

1. First, & most likely if both are missing—when you entered Miles Dyson's info on the web form, you didn't specify "No" for Bay Area Location. The default is "Yes," just because that was the first one you entered way back when you created the field. So when the form opened up, Yes was already selected. If you didn't change it to "No," then Miles would become Riley's lead so your workflow rules wouldn't trigger & create the task. Same for the auto-response rule. This could also happen if you entered an **Investment Potential** of 150,000 or more. (The rule says it has to be less than 150,000 to be your lead.) **Solution:** Fill out the form again, being sure to use "No" and a number less than 150,000. **But remember**, you'll need to find the new Miles Dyson in your leads to see the activity entries.
2. Alternatively, you may have missed the steps that make your rules active. Both the workflow rule and the auto-response rule need to be specified as **Active** or they will lie there dormant and never be triggered. If you're missing one of the two activities entries for Miles Dyson, then that's probably why. **Solution:** If you're missing the "email to ask about calling" task, then go to **Setup > Build > Create > Workflow & Approvals > Workflow Rules** and click **Activate** under **Action** next to the rule name. If you're missing the "Email: Thank you for your inquiry" entry, then go to **Setup > Build > Customize > Leads > Auto-Response Rules**. Then click on the rule name, then the **Edit** button, then check **Active** and then click **Save**. In either case, you'll need to fill out the form again. **But remember**, you'll need to find the new Miles Dyson in your leads to see the activity entries.