Max's Distinctive, Impressive BizTech Student Blog

How to be a Better Borg

So…even if you don't remember back from my first posting, I'm sure you could tell by now. Love classic movies. Terminator (the original) is a fave. Did you catch the character names in the **Lead** records last time?

Kyle Reese: *"The terminator's an infiltration unit. Part man. Part machine. Underneath it's a hyper-alloy combat chassis. Micro-processor controlled. Fully armored. Very tough. But outside it's living human tissue—flesh, skin, hair, blood, grown for the cyborgs…"*

Yep. Ahhh-nold. Our beloved guv. A T-800 (Model 101) cyborg, sent back in time from the post-apocalyptic future to kill Sarah Conner before she has a son (you guessed it), John, who would grow up to lead the humans against the Cyberdyne cyborg army. Kyle gets sent back to protect her so she can have John & he can save the world, etc.

No spoilers. Watch it for yourself. Thank me.

Ok, so maybe I'm ever so slightly borg-obsessed. But you gotta admit—it's pretty dang sweet having a robot part of me to keep the human part's backside covered. It's smart. It's fast. It never makes a mistake—the cyborg-me is so totally on top of this job now and I keep finding more & more stuff I can do on the robo side, using SF.

Like remember last time? I'd set up the **Leads** object with automatic assignment rules so when I typed in a new lead, SF automatically assigned it to Riley or me, based on our business rules. Cyborg-me can't mess that up anymore. Hah. And all this process automation stuff made life *so* much easier, esp with the leads piling up fast.

But even the T-800 (Model 101) could be upgraded. In Terminator 2 (Judgment Day), Ahhh-nold came back, reprogrammed as a good guy to protect John Conner from the T-1000, a new cyborg made from a "mimetic poly-alloy" so it could liquefy, turn into whatever, & harden again. Cool effect (for its day) but otherwise typical sequel, lacking the originality & dramatic tension of the original. Still, it makes a point—even a cyborg has room for improvement. The cyborg-me did too.

<div align="center">

Kick it up a Notch: Human side
(Oh, the humanity!)

</div>

To start, since my robot/SF side was automatically handling all the lead assignment & alerting, it left me with more time to do the human-side stuff better, eg. better prepping to have good calls with my leads. I even found some SF tools to help. Check this out.

So remember how last episode, Kyle Reese was a new lead. He got assigned to you and you sent him an email to introduce yourself.

So now, Kyle has emailed you back and said yes, he actually would like you to give him a call. Now, if you want to be smart about managing this relationship, maybe you should check the dude out a bit before you connect in real time:

1. Click on your **Leads** tab and open **Kyle Reese** (if you don't see him show up under **Recent Leads**, pull down the **View** menu & select **All Open Leads** to see the full list)
2. Scroll to the top of the **Kyle Reese** details page and click the **YouTube** icon under his name
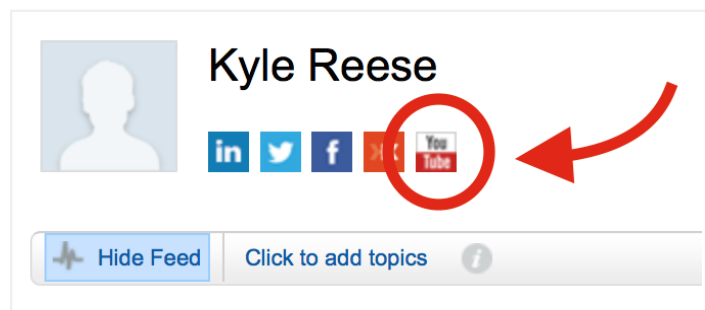

3. In the popup window that appears, you should see a list of YouTube vids you can watch to get you up to speed on this guy before you call. Since Kyle Reese was a Terminator character, there's a bunch to choose from (I recommend **Greatest screen heroes - Kyle Reese in The Terminator** 8:10) "Hi, I see you're handy with a shotgun..."
4. Go ahead & close out your YouTube popup when you're done & if he was real, you could check him out in LinkedIn, Twitter, Facebook and Klout, but you get the idea so on we go
5. Now, pretending you just called him, go back down to the bottom of the page, under **Activity History**, and click the **Log a Call** button to make a record of it
6. Under **Description Information**, in the **Comments** textbox, enter "Sounded like a nut case. Kept ranting about being from the future." and click **Save**
7. Now you can see the call logged under **Activity History** (along with the completed email task from last time)

So SF has social media baked in. Awesome. But turns out they also worked in this "social business" thing called "Chatter." Prof says it's like social media but *inside* your org. It's like Facebook but just between you and your co-workers. Like, you can connect a discussion to any record, like a lead (like Kyle), do Likes, polls, etc. to get quick answers from your peeps:

8. Scroll up to the top of the **Kyle Reese** details page again
9. Just below the row of social media icons like LinkedIn, Twitter, etc. you should see a bar with an option to **Hide Feed** but <u>don't click it</u> (or if it says **Show Feed**, <u>DO</u> click that)
10. Below that you'll see **Post** and below that a textbox with **Write something…** grayed out
11. Click on **Write something…** and enter "This guy's a weirdo. Says he came from the future to warn us about Cyberdine's cyborgs"
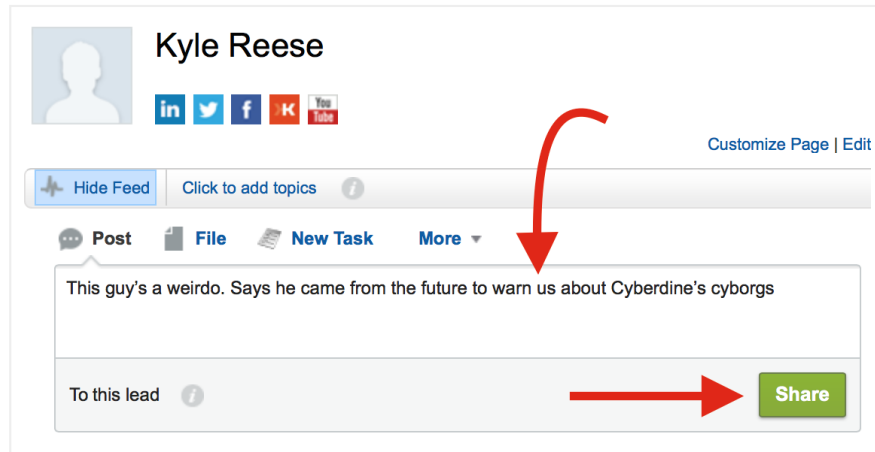

12. Click the green **Share** button to post it to a **Chatter** feed for the **Kyle Reese** lead record
13. Now, to get help from you peeps (just Riley for now), find the **More** drop-down, just above the **Write something…** textbox, to the right, & select **Poll**
14. Type over **What would you like to ask?** with "Should we pursue this guy any further?"
15. Below, in the **Choice 1** textbox, enter "Yeah, he could be crazy but wealthy"
16. In the **Choice 2** textbox enter "Nah, he's creeping me out"
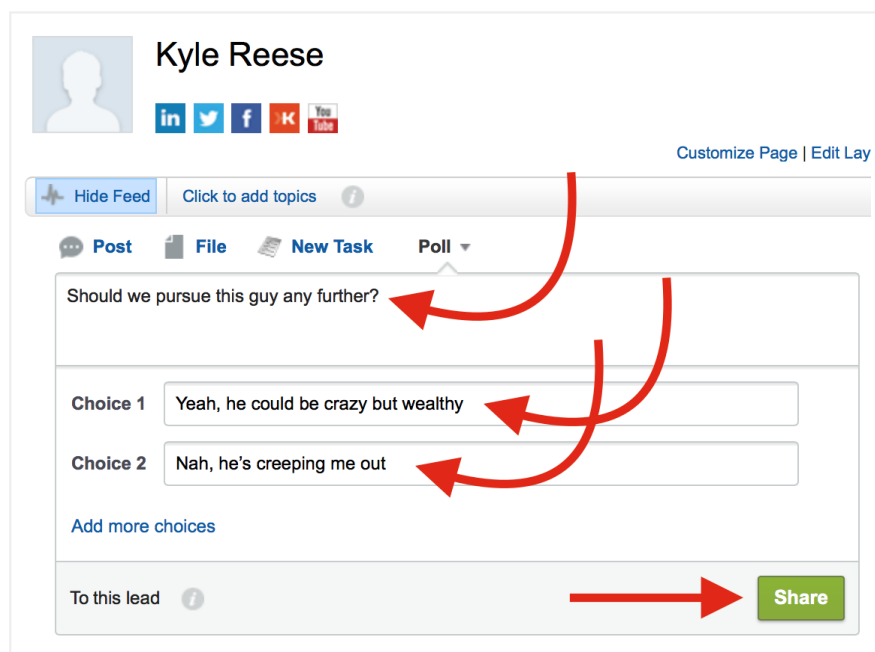
17. Click the green **Share** button

Now vote in the poll yourself:

18. See the poll appearing in the feed? Click the button for **Nah, he's creeping me out**.
19. Then, click the **Vote** button & notice the bar chart showing 100% **Nah...** for now (w 1 vote)
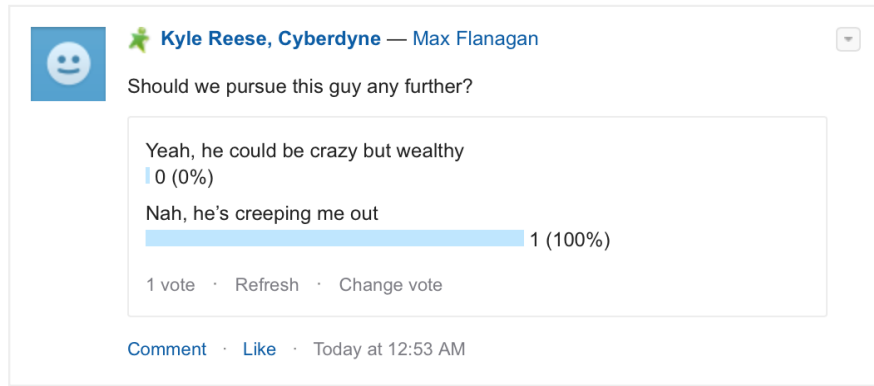

Now, to see what it looks like to Riley, you'll be logging out of your account and logging in as her. Remember, last time you created her as a user with an email address you could check. When you created her account, SF sent an email to that address with a link to activate the account and set the password. But it may have been awhile since you did that, so do it again now to make sure:

20. Go to **Setup** > **Administer** > **Manage Users** > **Users**, find the row for Riley and note the **Username** it shows for her b/c you'll need it in a sec to login is as Riley
21. On the row for Riley, check the checkbox on the left & then click **Reset Password(s)** (above or below) to make SF send another account activation email to "Riley's" email address
22. When you see the popup window asking **Reset passwords for these users?** then click **OK**
23. Log out of SF (popup menu under your name) and close the window/tab it was in
24. Open the new email message (pretending to be Riley) & then click the link they gave you to get back to your browser, set the new password & log in to her account
25. Now click on the sadly-goofy raccoon/mascot icon at the top right to get a popup & then click **Switch to Salesforce Classic**

Now, as Riley, you can engage in "social business" with your co-worker (you) in a FB-like way:

26. Click the **Chatter** tab & close whatever popups appear with **Chatter** intro vids, etc.
27. Click **All Company** under **Feed** on the leftside menu to see how Riley would see your two posts about **Kyle Reese**. (The real Riley sees all my posts b/c she set her account to **Follow** me, using **People**, below **Feeds** on the left. But don't bother with that now.)
28. For your comment about him being a weirdo, click **Like**, just underneath
29. That should trigger an email to you, informing you Riley **Like**d your comment
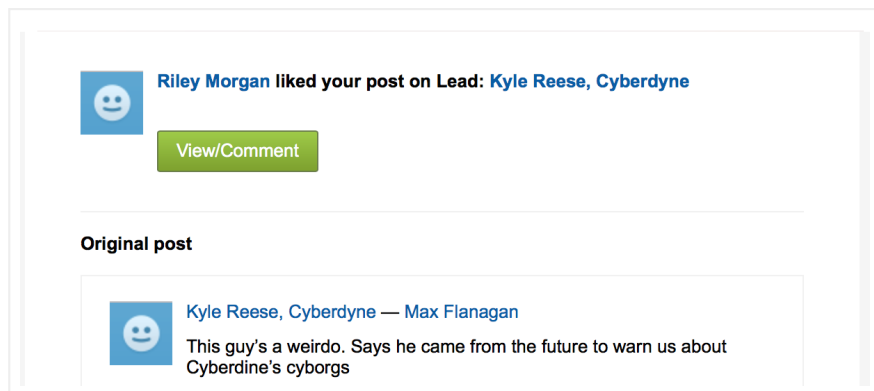
30. For the poll, vote for **Nah...** and notice the bar chart showing **100% Nah...** with two votes now

31. Click the little blue **Comment** link just below the blue bar

32. In the **Write a comment...** textbox that opens up, enter "go ahead & bag him" and click the **Comment** button, just below, on the right
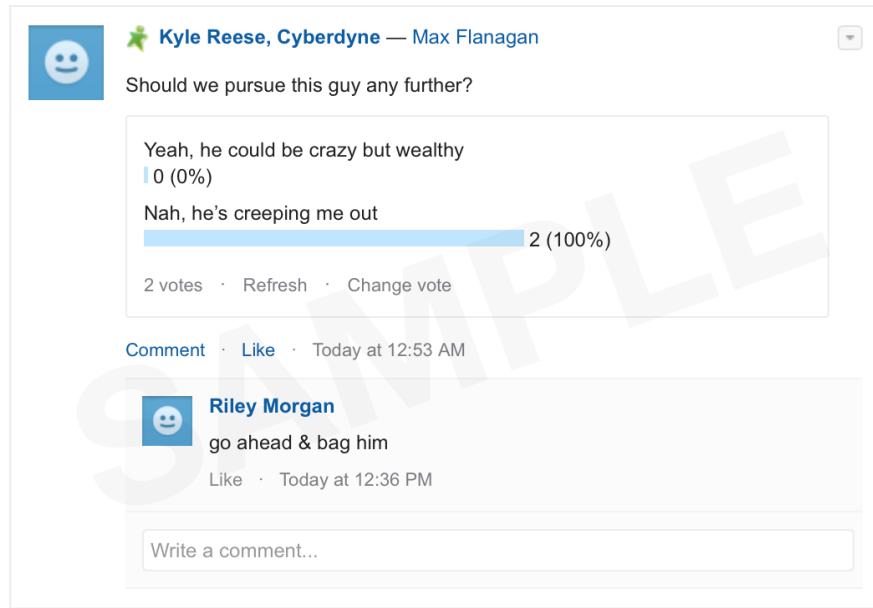
And you got another email telling you Riley commented on your poll. SF keeps you "posted". (;-J)

Basically, it's a quick way to get/give ideas across the whole company. You can follow specific people or groups of people at work, specific leads in the database, post links & files. Pretty much the whole social thing works here. (Probably best to stay away from posting pics from last night's rave, however. Just sayin'.)

33. So play around with the chatter stuff if you want & then when you're done, just go up to Riley's name (by **Setup**), pull down the menu and then <u>logout (as Riley) & log back in as yourself</u>

Kick it up a notch: Robo-side
(everything but a time-machine)

So the YouTube & Chatter stuff helped me do my part better, but when I got those initial emails from our web page, I still had to enter the leads by hand and create the tasks to remind me & Riley to follow up. Keeping track of dates & times. Heck, that's something computers are supposed to be good at. I figured there had to be a way to hand this part of my work off to my robo-half, too & there was—"workflow rules." I could tell SF, *"Whenever I add a new lead, don't just assign it to me and send me an alert (like before), also <u>automatically</u> create a new task for me to email them about calling."* Here's how it works (but make sure you're logged in as you now, not Riley!):

34. Go to **Setup** > **Build** > **Create** > **Workflow & Approvals** > **Workflow Rules**

35. Check out **Understanding Workflow** screen and then click the **Continue** button at the bottom

36. On the **All Workflow Rules** page that comes up, click **New Rule**

37. On the **New Workflow Rule** page, in the **Step 1: Select Object** pane, use the drop-down menu to select **Lead** as the **Object** for triggering this new workflow and click **Next**

38. On the **New Workflow Rule-Lead** page, in the **Step 2: Configure Workflow Rule** pane, in the **Rule Name** textbox, enter "if this lead is for me"

39. Under **Evaluation Criteria**, for **Evaluate the rule when a record is:**, make sure **created, and any time it's edited to subsequently meet criteria** is selected

40. Under the **Rule Criteria** section, make sure **Run this rule if the following** drop-down menu shows **criteria are met**

41. In the first row under **Field**, use the drop-down menu to select **Lead: Bay Area location**

42. Use the **Operator** drop-down menu to the right on that same row to select **equals**

43. Click on the magnifying glass just to the right of the **Value** textbox on that same row to bring up the **Lookup** popup window and use it to select **No** and then click the **Insert Selected** button

44. On the 2nd criteria row, just below the one you just set, use the drop-down menu under **Field** to select **Lead: Investment Potential**

45. Use the **Operator** drop-down menu on that same 2nd row to select **less than**

46. In the **Value** textbox on that same 2nd row, enter "150000" (4 zeros—make sure!)

47. Click **Save & Next** to go to the next screen

Ok, you told it how to spot a lead for you, now tell it what to do when it spots one—create a task for you, attached to that new lead (it'll be added to your "to-do" list in SF, complete with reminders):

48. In the **Step 3: Specify Workflow Actions** pane, under **Immediate Workflow Actions**, click **Add Workflow Action** and select **New Task**

49. On the **New Task** page that opens up, in the **Edit Task** pane, click the magnifying glass next to **Assigned To** to bring up the **Lookup** popup window and click on yourself to fill your name into the textbox (you may have to search for your first name to find you)
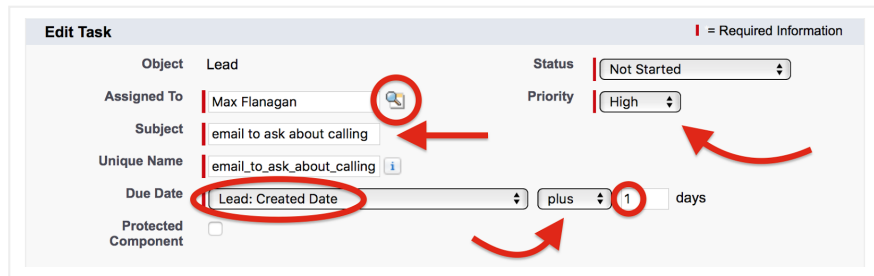
50. In the **Subject** textbox, enter "email to ask about calling"

51. Tab to autofill the **Unique Name** with "email_to_ask_about_calling"

52. Set the **Due Date** drop-down menu to **Lead: Created Date**

53. Make sure the drop-down menu immediately to the right is set to **plus**

54. To give your yourself 24 hours to make that first contact, enter "1" into the **days** textbox to the right

55. For **Priority**, on the upper right of the panel, use the drop-down menu to change **Normal** to **High**

56. Click **Save** to get back to the **Edit Rule if this lead is for me** page and click **Done**

57. On the **Workflow Rule** page for your new rule, click **Activate**
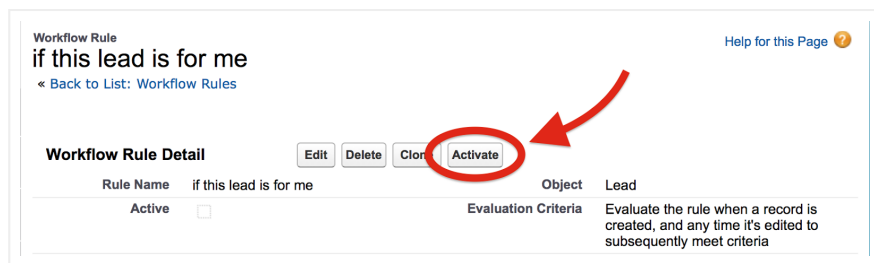
Cool. Then whenever a new lead gets entered for me, SF automatically creates a task for me so I can't forget to call them and I can track if I did or not and what was said. Cyborgs rule! (in a good way). Of course, I set this up for Riley's leads too, just like mine, but skip that for now. I'm dying to show you how to go full-on cyber. I figured out how to create a web form to embed in our fancy web site so leads can submit their info *directly to SF* instead of emailing me. Sweet, eh?

First I went back to create another email template for automatically sending an instant, "personalized" thank-you email to leads as soon as they submit their info:

58. Click on **Setup** > **Administer** > **Communication Templates** > **Email Templates**

59. Click on **New Template**

60. For **Choose the type of email template you would like to create**, the button for **Text** should be selected by default which is fine for this first message so just click **Next**

61. For that personal feel, you want to embed the lead's first name in the email so, under **Available Merge Fields**, use the **Select Field Type** drop-down menu to select **Lead Fields** to make them available for embedding

62. Just beneath that menu, scroll down the **Select Field** drop-down menu to select **First Name**

63. Now, copy what SF has populated into the **Copy Merge Field Value** textbox below, so you'll be able to paste it into the message body in a sec

64. On down, in the pane labeled **Step 2. Text Email Template: New Template**, check the **Available for Use** checkbox

65. For **Email Template Name**, enter "auto-response template for incoming web leads for me"

66. Just click on the **Template Unique Name** textbox and it will auto-populate with the underscore-embedded name

67. For **Description** enter "This is the template for email messages that are triggered by web lead form submits"

68. For **Subject** enter "Thank you for your inquiry"

69. In the **Email Body** textbox, type "Dear " (including the trailing space) and then paste in the mail merge syntax you copied for the lead's first name and then add a comma at the end

70. Leave one blank line and then "We have received your inquiry. Thank you. I will be getting in touch with you soon."

71. Leave another blank line and enter "Cheers,"
72. Write your first name on the line below
73. Click **Save**

Next create the auto-response rule telling SF, if an incoming lead is for you, apply the nifty template you just built & send them that automated thank-you email from you:

74. Go to **Setup** > **Build** > **Customize** > **Leads** > **Lead Auto-Response Rules** & then click **New**
75. For **Rule Name**, enter "This one is mine so..."
76. ***Critical!*** Click the **Active** checkbox and then click the **Save** button
77. Now you'll see the new rule appearing on the **Web-to-Lead Auto-Response Rules** page
78. Click on the name you gave it—**This one is mine so...** to open it up
79. In the **Rule Entries** section at the bottom, click the **New** button
80. Under **Step 1: Set the order in which this rule entry will be processed**, for **Sort Order**, enter the number "1"
81. Under **Step 2: Select the criteria for this rule entry**, make sure **Run this rule if the following** drop-down menu shows **criteria are met**
82. In the first row under **Field**, use the drop-down menu to select **Lead: Bay Area location**
83. Use the **Operator** drop-down menu to the right on that same row to select **equals**
84. Click on the magnifying glass just to the right of the **Value** textbox on that same row to bring up the **Lookup** popup window and use it to select **No** and then click **Insert Selected**
85. On the 2nd criteria row, just below the one you just set, use the drop-down menu under **Field** to select **Lead: Investment Potential**
86. Use the **Operator** drop-down menu on that same 2nd row to select **less than**
87. In the **Value** textbox on that same 2nd row, enter "150000" (4 zeros—make sure!)

88. Under **Step 3: Specify the name and address to include on the auto-response message From line**, enter your name
89. In the **Email Address** textbox, enter the one you entered for yourself when you created your SF login (probably the same as for your login, depending on what you had set up)

90. Under **Step 4: Select the template to use**, click the magnifying glass next to **Email Template** to bring up the **Lookup** popup window and click **auto-response template for incoming web leads for me** to populate it into the textbox
91. Click **Save**

Now for the grand finale! All your automation instructions are in place. Just need to create the form for your website—the one leads will fill out:

92. Under **Setup** > **Build** > **Customize** > **Leads** click **Web-to-Lead**
93. In the **Web-to-Lead Setting**s, click **Create Web-to-Lead Form**
94. On the **Web-to-Lead Setup** page, under **Create a Web-to-Lead Form**, in the **Selected Fields** list, click **City** to highlight it and click the **Remove** button immediately to the left (don't need it)
95. Do the same for **State/Province** (don't need it either)
96. Click **Company** to highlight it and then click the **Up** button immediately to the right to move it above **Email**
97. In the **Available Fields** list, click **Phone** to highlight it and click the **Add** button immediately to the right to move it over to the **Selected Fields** list
98. In the **Available Fields** list, click **Bay Area location** to highlight & **Add** to move it over too
99. In the **Available Fields** list, click **Investment Potential** to highlight it and click the **Add** button immediately to the right
100. Below, in the **Return URL** textbox, after the "http://" that's already there, add "www.signingsavvy.com/sign/THANK%20YOU/426/1" (be exact!) because you don't really have a website with a thank-you page of your own but this one's a clever sign-language thank-you video page you can send leads to after they submit their stuff


101. Uncheck Enable Spam Filtering (not a worry for now) & then click **Generate**
102. On the **Web-to-Lead Setup** page, under **Copy and paste the sample HTML below and send it to your webmaster,** select (highlight) & copy everything in the large textbox (there's more than you see at first—scroll if needed OR use the Select All shortcut: Cntrl/Cmnd-A)

Now, you've got the HTML for a web-based form ready to paste into a file you can open in your browser! You can't paste it into a Word doc though, b/c Word will embed all kinds of other formatting, etc. that messes it up. You need a plain text editor that will let you make a file with just exactly what you just copied. Fortunately, both Windows and the MacOS have plain text editors built in. If you're using Windows, skip on down to **Step 117**.

So if you're using a Mac:

103. Find & open an app called **TextEdit** that resides in your **Applications** folder (use **Finder** or **Launchpad** or **Spotlight**, the magnifying glass at the top right of the screen, to find it)

104. Click **TextEdit** on the menu bar at the top to get the drop-down menu & click **Preferences**

105. Make sure you're on the **New Document** tab and check **Plain Text** under **Format**
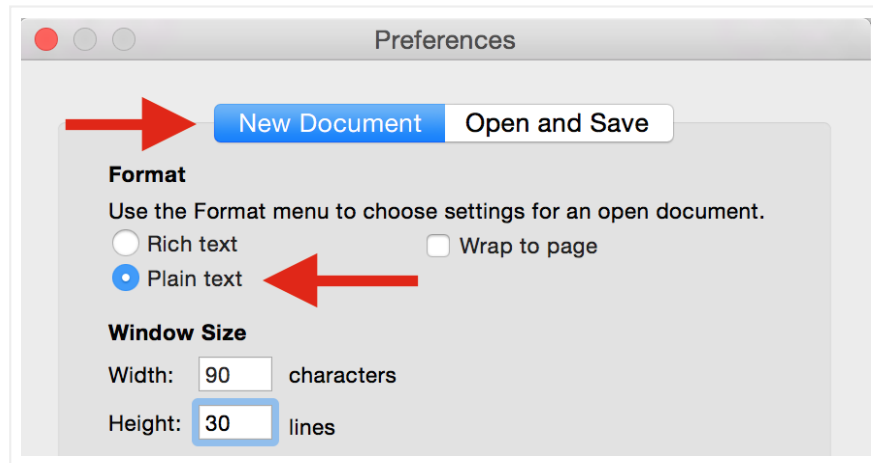
106. Now click**TextEdit** on the menu bar at the top to get the drop-down menu again and this time select **Quit TextEdit** (that'll save the preference change)

107. Now reopen **TextEdit**

108. If you don't have a new blank document to work in, then pull down the **TextEdit** menu, go to **File** and select **New** to open a new document (if your new blank document window opens with formatting tools at the top, then your file isn't in **Plain Text** mode & it won't work—try fixing the preferences again by repeating **Steps104-107**)

109. Paste all that HTML code you copied from SF into the new document

110. In the **TextEdit** menu, go to **File** and select **Save...**

111. In the dialog box that opens, in the **Save As:** textbox, enter "myweb2lead.html"

112. Use the **Where:** drop-down menu to select **Desktop** so you can easily find the file later

113. Click the **Save** button

114. In the dialog box that opens, click the **Use .html** button

115. In the menu, under **TextEdit**, select **Quit TextEdit**

116. Skip down to just after **Step 125**

To open **Notepad** in **Windows 7** or earlier:

117. Click **Start** (bottom left on your screen) > **All Programs** > **Accessories** > **Notepad**

To open **Notepad** in **Windows 8** or later:

118. Open the **Start** screen (the window symbol at the bottom left on your screen) and type "Notepad"

Once you have **Notepad** open:

119. Paste all that HTML code you copied from SF into the new blank document that has opened
120. In the **Notepad** menu, click **File** and select **Save As**
121. Set the destination of the new file to **Desktop** using the drop-down menu
122. For **File name** enter "myweb2lead.html" (the ".html" part is critical!)
123. For **Save as type** select **All Files (*.*)**
124. Click the **Save** button
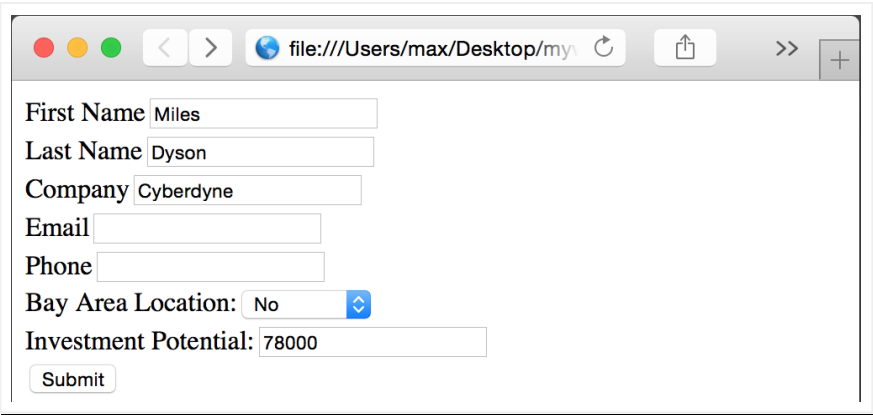125. In the **Notepad** menu, click **Exit**

Do you realize what you've got there, in your little file? It's a fully functional web form page! You could put it on a website where potential leads could fill it out & when they click **Submit**, SF would do all this, *automatically:*

- take them to a thank-you page,
- send them a personalized thank-you email from you,
- create a lead record with the info they entered,
- log the thank-you email in the **Activity History** for that lead record,
- assign the new lead record to you or Riley, according to the business rules about location and investment potential,
- send you or Riley a new lead alert email, providing the lead name & basic info,
- create a high-priority task for you, under the **Open Activities** for that lead, telling you to follow up, within a day, by sending them an email to ask if it's ok for you to call,
- remind you, every time you log in, to send that email (if you haven't by the due date), and
- take out the trash, wash the dishes & give you this *insane* neck rub.

Ok, it's not advanced enough to do that last line (yet), but all the rest? Totally. All thanks to all the automation setup you did in my last posting and this one. You're epic!

Now it's not fancy looking, mind you. (I just gave mine to our geek, Linh. She made it pretty & uploaded it to our site.) But what you have there really works, just like it is. Try it out:

126. Navigate to your **Desktop**, find the file you just created, called **myweb2lead.html** and double-click to open it up in your browser (if it looks like a bunch of HTML instead of the pic below, then it didn't get made as a "plain text" file so go back to **Steps 104-107**)

127. For **First Name** & **Last Name**, enter "Miles" and "Dyson" (from Terminator 2—he was the scientist that created the bad borg technology)

128. For **Company**, enter "Cyberdyne"
129. For **Email**, use your own email address so you can see & open the thank-you message
130. Make up a random number for **Phone**
131. Select **No** for **Bay Area Location** (important—this lead is yours, not Riley's!)
132. For **Investment Potential** enter a number <u>less than</u> 150000, like 78000
133. Click **Submit**

You should see the cool sign-language thank-you video now playing in your browser. (Ours takes you to a thank-you page on our site, of course.)

134. Check your email (as Miles) for the thank-you & (as you) for the alert about your new lead

And finally, go back to SF and see all the stuff that happened there:

135. Click your **Leads** tab
136. If you don't already see Miles, select the **Today's Leads** or **All Open Leads** view
137. Click on Miles to open up his **Lead** record
138. On the upper part of the page, you'll see the field values you entered on the form, like **Name**, **Company**, **Bay Area Location** & **Investment Potential**, etc. (is that crazy or what?)
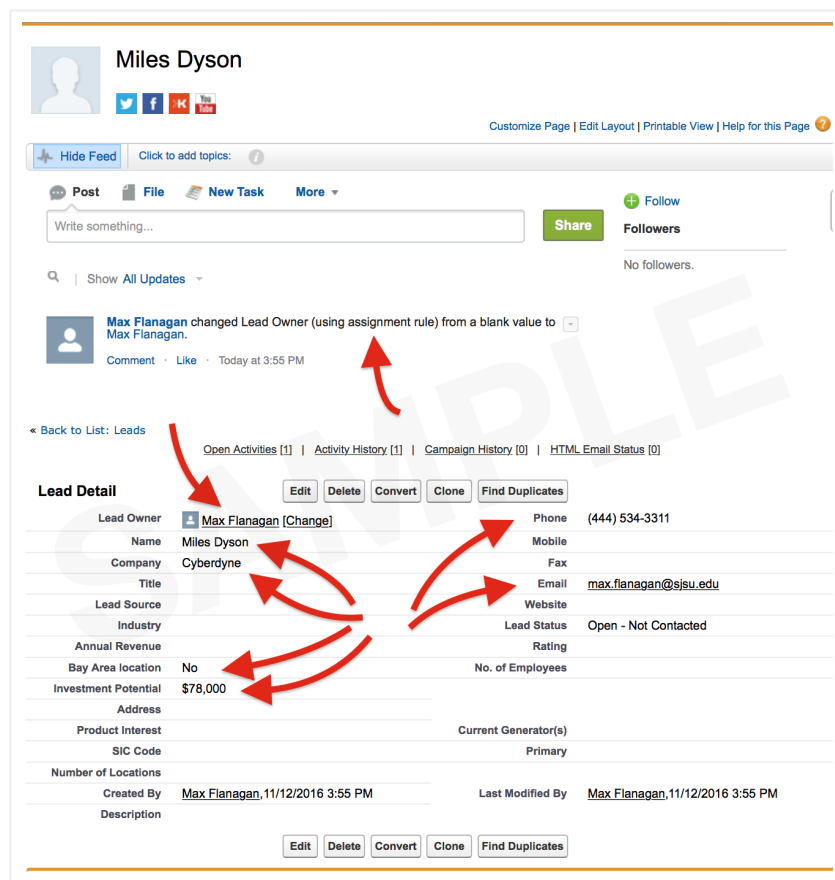
See where it says you changed the **Lead Owner** (using assignment rules) from a blank value to your name? Your assignment rules worked on the lead, *automatically,* when it came in from the form! And the assignment notification was posted, *automatically,* to the Chatter feed so your co-workers (e.g. Riley) are kept posted about new leads that are yours too, not just theirs (hers).

But wait, there's more…

139. On the lower part of the page, under the **Open Activities** section you should see the "to-do" task that your workflow created for you, **"email to ask about calling"** & under **Activity History** you should see the task **"Email: Thank you for your inquiry"** that was done already by the auto auto-response rule you set up (sending the thank-you email to Miles)
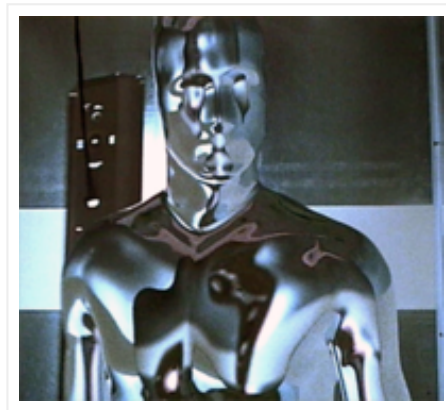

K, like me, you just made yourself into an ultra-advanced, lead-processing cyborg! Like the T-1000 but without blowing things up & impaling people on your pointy 5-foot long finger (hopefully). Now my human time is spent on the important stuff, like dealing with the leads, while my robo-half does all the dirty work.

Smooth, eh?

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