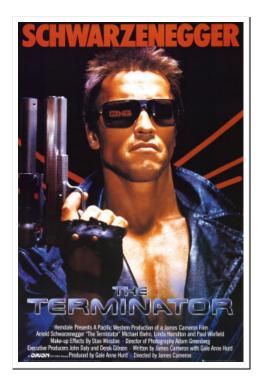
Max's Distinctive, Impressive BizTech Student Blog

Saturday, November 12, 2016

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 postapocalyptic 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.

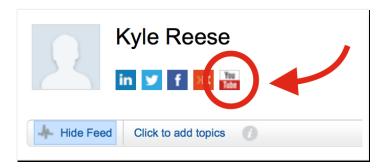
Kick it up a Notch: Human side (Oh, the humanity!)

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
- 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"

5.2	Kyle R					
Hide Feed	in y f			\int	Cust	omize Page Edit
Post This guy's		Solution New Task New Task ys he came from t	More •	varn us about 0	Cyberdine's cybe	orgs
To this lead	d 🕜					Share

- 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"

	Kyle Reese in 🔽 f 📧 🎬	
		Customize Page Edit Lay
👆 Hide Feed	Click to add topics	
😰 Post	👕 File 🥒 New Task Poll 🔻	
Should we	pursue this guy any further?	
Choice 1	Yeah, he could be crazy but wealthy	
Choice 2	Nah, he's creeping me out	
Add more of	choices	
To this lead	0	Share

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)

•	Kyle Reese, Cyberdyne — Max Flanagan Should we pursue this guy any further?	w
	Yeah, he could be crazy but wealthy 0 (0%) Nah, he's creeping me out 1 (100%)	
	1 vote · Refresh · Change vote	
	Comment · Like · Today at 12:53 AM	

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 Liked your comment

9	ley Morgan liked your post on Lead: Kyle Reese, Cyberdyne View/Comment
Original po	st
•	Kyle Reese, Cyberdyne — Max Flanagan This guy's a weirdo. Says he came from the future to warn us about Cyberdine's cyborgs

Т

- 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

	🜟 Kyle Reese, Cyberdyne — Max Flanagan	-
9	Should we pursue this guy any further?	
	Yeah, he could be crazy but wealthy 0 (0%)	
	Nah, he's creeping me out	
	2 (100%)	
	2 votes · Refresh · Change vote	
	Comment · Like · Today at 12:53 AM	
	Riley Morgan	
	go ahead & bag him	
	Like · Today at 12:36 PM	
	Lino Today at 12.00 FW	
	Write a comment	

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"

	rkflow Rule		Ste	p 2 of 3
		Previous	Save & Next	Cancel
inter the name, descripti ule.	on, and criteria to trigger your workflow rule. In the next step, associate	workflow actio	ons with this w	orkflow
Edit Rule			= Required Inf	ormation
Object Rule Name Description	Lead if this lead is for me			
Evaluation Criteria				
Evaluate the rule when a record is:	 created created, and every time it's edited created, and any time it's edited to subsequently meet criteria How do I choose? 			
Rule Criteria				

- 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

	🔍 Lookup					
	Select the picklist values to					
aluation Criteria		Insert Selecte	d			
Evaluate the rule v a recor	Deselect all					
arecor	Value					
	Yes ✓ No					
	🗹 No					
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ule Criteria		Insert Selecte	ed 🔶	_	_	
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	e following criteria are met		Operator	Value		
Run this rule if the			Operator	Value \$		ND
Run this rule if the		0:	Operator			
Run this rule if the Field Lead: Bay Are		0:	Operator equals	\$		
Run this rule if the Field Lead: Bay Are None		0:	Operator equals None None	 <td></td><td>AND</td>		AND

- 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)

Edit Task			= Required Information
Object	Lead	Status	Not Started
Assigned To	Max Flanagan	Priority	(High 🛟
Subject	email to ask about calling		
Unique Name	email_to_ask_about_calling		
Due Date	Lead: Created Date	¢ plus	¢ 1 days
Protected			-
Component			

- 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

View Sample Template	
Note that the Description field is for international you log when sending mass email.	al use only. It will be listed as the title of any email activities
Available Merge Fields Select Field Type	
Lead Fields	€
Select Field	
First Name 🗘	
Copy Merge Field Value	copy what's in here so
{!Lead.FirstName}	copy what's in here so you can paste in below
Copy and paste the merge field value into yo	

- 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."

Email Templa	te Information	Required Information
Folder	Unfiled Public Email Templates ᅌ	
Available For Use		
Email Template Name	auto-response template	
Template Unique Name	auto_response_template	—)
Encoding	General US & Western Europe (ISO-8859-1, IS	SO-LATIN-1) ᅌ
Description	This is the template for email messages that an	re triggered by web lead form subr
Subject	Thank you for your inquiry	
Email Body	Dear {!Lead.FirstName},	_
	We have received your inquiry. Thank you. I w with you soon.	ill be getting in touch
	Cheers, Max	
	Next step	os
		Previous Save Cance

- 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!)

	ng criteria are met ᅌ :			
Field		Operator	Value	
Lead: Bay Area Loca	ion	equals	ᅌ No	🕙 AND
Lead: Investment Pot	ential	less than	150000	AND
None		None		ANE
None		Interview of the second sec		ANE
None	•	 None 		
Email Address	maxflanner@gmail.com i			
Email Address	The sender email address must be eithe one of your verified <u>organization-wide</u> <u>email addresses</u> or the email address in your Salesforce user profile.			
Email Address tep 4: Select the ter	The sender email address must be eithe one of your verified <u>organization-wide</u> <u>email addresses</u> or the email address in your Salesforce user profile.			

- 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 Settings, 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

SIC Code Product Interest Primary Current Generator(s) Number of Locations City Remove Remove Print Name Last Name Email Company Phone Bay Area location Down	elect the fields to include	on your Web-to-lead form:	
Product Interest Primary Current Generator(s) Number of Locations City State/Province Hermove Remove Remove Remove Remove Honon Investment Potential Multiple Last Name Email Company Phone Bay Area location Investment Potential Down Down Return URL http://www.signingsavvy.com/sign/THANK%20YOU/426/1 Enable spam filtering (recommended) Company Phone Bay Area location Investment Potential Multiple Last Name Return URL Multiple Last Name Multiple Company Phone Bay Area location Investment Potential Multiple Company Down Down City Company Down Company Down Company Down Company Company Down Company Down Company Down Company Company Down Company Company Down Company Company Company Company Down Company	Available Fields	Selected Fields	NOTE: Would you like to a can set up custom lead fiel
Return URL http://www.signingsavvy.com/sign/THANK%20YOU/426/1 Enable spam filtering (recommended)	SIC Code Product Interest Primary Current Generator(s) Number of Locations City State/Province	Add Last Name Email Company Phone Bay Area location	

- 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

	Prefer		
Format Use the Forma Rich text Plain text Window Size	-	Open and Save settings for an open d Wrap to page	ocument.
Width: 90 Height: 30	characters lines		

- 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 (<u>if your new blank document window opens</u> 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 <u>name</u> 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**)

● ● ● < > ● file:///Users/max/Desktop/my\ Ĉ
First Name Miles
Last Name Dyson
Company Cyberdyne
Email
Phone
Bay Area Location: No
Investment Potential: 78000
Submit

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 less than 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?)

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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)

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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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