ADMINISTRATION ESSENTIALS FOR EXPERIENCED ADMINS (AUTOMATION)

Exercise Guide

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8-1: Create an Email Footer

Goal:

Create an email footer that will be displayed, regardless of the template used, for both individual and mass emails, using the disclaimer language that John has provided.

Tasks:

1. Create a new email footer.
2. Complete the Organization-Wide Email Footer information and activate the new footer for both single and mass emails.

Time:

5 minutes

Instructions:

1. Create a new email footer called Disclaimer.
   A. Click **Setup | Email Administration | Email Footers**.
   B. Click **New**.
2. Complete the Organization-Wide Email Footer information and activate the new footer for both single and mass emails.
   A. Name: `Legal Disclaimer`
   B. Active for single email: **Select**
   C. Active for mass email: **Select**
   D. Email encoding: **General US & Western Europe (ISO-8859, ISO-LATIN-1)**
   E. Text of footer:

   ```
   This transmission is intended by the sender and proper
   recipient(s) to be confidential, intended only for the proper
   recipient(s). If you are not the intended recipient(s), please
   notify the sender at either the email address or telephone number
   above and delete this email from your computer.
   ```

   Note: You can find the text of this footer on Chatter. Search for John Wiseman's profile, and copy the disclaimer text from the conversation between John, the Admin User, and Noah.

   F. Click **Save**.

8-2: Create a Folder and Letterhead

Goal:

Create an email folder to store all marketing templates and create Letterhead that uses the current AW Computing logo, as supplied to you by Conner in a Chatter post.

Tasks:

1. Create a read-only Marketing folder for email templates that is accessible to all users.
2. Save the logo file that Conner posted to your desktop. (This has been done for you.)
3. Upload the logo file to the Documents tab. (This has been done for you.)
4. Create a letterhead.
5. Customize the letterhead.

Time:

10 minutes

Instructions:

1. Create a read-only Marketing folder for email templates that is accessible to all users.
   A. Click **Setup | Communication Templates | Email Templates**.
   B. Click **Create New Folder**.
   C. Fill out the folder information as follows:
      i. Email Template Folder Label: `Marketing`
      ii. Press **TAB** to move to the next field.
      iii. Folder Unique Name: (This field auto-populates.)
      iv. Public Folder access: **Read Only**
   D. Click **Save**.
2. Save the logo file to your desktop. (This has been done for you.)
3. Upload the logo file to the Documents tab. (This has been done for you.)
4. Create a letterhead.
   A. Click **Setup | Communication Templates | Letterheads**.
   B. Click **Next**.
   C. Click **New Letterhead**.
   D. Complete the details about the new letterhead.
      i. Available For Use: **Select**
      ii. Letterhead Label: `General Marketing`
      iii. Press **TAB** to move to the next field.
      iv. Letterhead Unique Name: (This field auto-populates.)

v. Description: `Use this letterhead for all public facing communications if no specific Marketing letterhead exists.`

E. Click **Save**.

5. Customize the letterhead.

A. Click **Select Logo**.

i. From the File Location picklist, select **Shared Documents**.
ii. Click the **AW Computing logo** file.

B. Click **Edit Top Line**.

i. Line Color: `#0072BC (steel blue)`
ii. Height (pixels): `5`
iii. Click **OK**.

C. Click **Edit Middle Line**.

i. Line Color: `#0072BC (steel blue)`
ii. Height (pixels): `5`
iii. Click **OK**.

D. Click **Edit Bottom Line**.

i. Line Color: `#0072BC (steel blue)`
ii. Height (pixels): `5`
iii. Click **OK**.

E. Click **Preview**.
F. Close the preview window or tab.
G. Click **Save**.

8-3: Create an Email Template

Goal:

Create an email template with the General Marketing letterhead and make it available to end users in both plain text and HTML formats.

Tasks:

1. Create an email template with the General Marketing letterhead.
2. Make it available to all users.
3. Add merge fields.
4. Test the template.

Time:

10 minutes

Instructions:

1. Create an email template with the General Marketing letterhead.
   A. Click **Setup | Communication Templates | Email Templates**.
   B. Verify that the current folder is the Marketing folder.
   C. Click **New Template**.
   D. Complete the new template details.
      i. Select the **HTML (using Letterhead)** radio button.
      ii. Click **Next**.
2. Make it available to all users.
   A. Folder: **Marketing**
   B. Available For Use: **Select**
   C. Email Template name: `Public Facing General`
   D. Template Unique Name: (This field auto-populates.)
   E. Letterhead: **General Marketing**
   F. Email Layout: **Free From Letter**
   G. Encoding: **General US & Western Europe (ISO-8859, ISO-LATIN-1)**
   H. Description: `To be used for all public facing emails, if there is no more specific template available.`
   I. Click **Next**.
3. Add merge fields.
   A. Select Field Type: **Contact Fields**
   B. Select Field: **First Name**

C. Select and copy the text in the Copy Merge Field Value field.
D. Complete the HTML Email Content.
   i. Subject: <<REPLACE WITH SUBJECT>>
   ii. In the main text area, type `Dear`
   iii. Press **SPACEBAR**.
   iv. Paste the merge field text and add a `comma`
   v. Click **Next**.
   vi. Leave the Text-Only Email Content field empty so it will auto populate with the stripped contents of the HTML version.
   vii. Click **Save**.

4. Test the template.
   A. In the Global Search box, type `Arnold`
   B. Click **Search**.
   C. In the Contacts section of the search results, click **Arnold Adams**' record.
   D. Hover over the **Activity History** link, and click **Send an Email**.
   E. Click **Select Template**.
   F. From the Marketing folder, select the **Public Facing General** template.
   G. Review the template for accuracy.
   H. Click **Cancel**.

8-4: Create a New Workflow Rule with Immediate and Time Dependent Actions

Goal:

Ensure that the VP of Services is notified whenever cases are opened for large accounts, and that the Account Owner is assigned a task to follow up with the customer after the case is closed.

Tasks:

1. Create a workflow rule on the Case Object.
2. Establish evaluation criteria.
3. Establish trigger criteria.
4. Add an immediate workflow action.
5. Add a time trigger.
6. Add a time dependent action.
7. Test the workflow actions.

Time:

15 minutes

Instructions:

1. Create a workflow rule on the Case Object.
   A. Click **Setup | Create | Workflow & Approvals | Workflow Rules**.
   B. Click **Continue**.
   C. Click **New Rule**.
   D. From the Select object picklist, select **Case**.
   E. Click **Next**.
2. Establish evaluation criteria.
   A. Rule Name: `New Case at Large Account Notification`
   B. Description: `Notify Services VP regarding new cases for large accounts and assign follow up to Account Owner.`
   C. Evaluate the rule when a record is: **created**
3. Establish trigger criteria.
   A. Run this rule if the following: criteria are met:
      i. Field: **Account: Annual Revenue**
      ii. Operator: **greater than**
      iii. Value: `20000000`
      iv. Field: **Account: Employees**

   v. Operator: **greater than**
   vi. Value: `5000`

B. Click **Add Filter Logic**.

   i. Change the filter logic to `1 OR 2`.
   ii. Click **Save & Next**.

4. Add a workflow action.

   A. Click **Add Workflow Action | New Email Alert**.

      i. Description: `Email Alert - Notify VP about cases for large accounts`.
      ii. Unique Name: (This field auto-populates.)
      iii. Select the **Unfiled Public templates** folder.
      iv. Email Template: **SUPPORT: New case for large account**
      v. Add the VP of Services as a recipient.

         a. Recipient Type Search: **Role**
         b. From the Available Recipients list, select **Role: VP Services**.
         c. Click **Add**.

      vi. In the additional Emails section, enter your own email. (This step is necessary in order to test the workflow rule.)

   B. Click **Save**.

5. Add a time trigger.

   A. Click **Add Time Trigger**.
   B. Add Time Trigger: **1 Day(s) After Rule Trigger Date**
   C. Click **Save**.

6. Add a time-dependent workflow action.

   A. Below the Time-Dependent Workflow Actions section, click **Add Workflow Action | New Task.**

      i. Assigned To: (click the lookup icon, select Owner from the Type list. Choose **Account Owner**).
      ii. Subject: Follow up with customer on case resolution.
      iii. Unique Name: (This field auto-populates.)
      iv. Due Date: Select **Case: Date/Time Closed Plus 2 Day(s).**
      v. Priority: **High**.

   B. Click **Save**.

C. Click **Done**.
D. Click **Activate**.
E. At the Default Workflow User box, click **OK**.
F. Set the Default Workflow User to: (your name)
G. Click **Save**.

7. Test the workflow rule.

A. Click the **Accounts** tab.
B. In the View box, select **All Accounts**.
C. Click **Go!**
D. Make sure the Account Name column is sorted A – Z.
E. Click **American Bank**.
F. Hover over the **related list** hover link for Cases.
G. Click **New Case**.
H. Enter the new case information.

i. Contact Name: `Kelly`
ii. Case Origin: **Phone**
iii. Type: **Problem**
iv. Case Reason: **New problem**
v. Subject: `Spider Laptops not compatible with AW printers`
vi. Description: `The latest Spider laptops don't seem to work with the old AW printers.`

I. Click **Save**.
J. Check your email to make sure you received the alert.

Note: You would now delete your email address from the rule so as not to continue receiving alerts for all cases that meet the workflow rule criteria.

K. In the Monitor area of Setup, click **Time-Based Workflow**.
L. Set the workflow criteria.

i. Object equals `Case`
ii. Click **Search**.
(Note that the task has been scheduled for the following day.)

8-5: Create a Process

Goal:

Automatically post to Allison Wheeler when a sales rep wins an opportunity.

Tasks:

1. Create a process.
2. Specify the object.
3. Add process criteria.
4. Add an immediate action.
5. Activate and test the process.

Time:

10 minutes

Instructions:

1. Create a process.
   A. Click **Setup | Create | Workflow & Approvals | Process Builder**.
   B. Click **New**.
      i. Process Name: `Post for Won Opportunities`
      ii. Description: `Post to Allison Wheeler for won opportunities.`
   C. Click **Save**.
2. Specify the object.
   A. Click **Add object**.
      i. Object: **Opportunity**
      ii. Start the process when a record is: **created or edited**
   B. Click **Save**.
3. Add process criteria.
   A. Click **Add criteria**.
      i. Criteria Name: **Won Opportunity**
      ii. Criteria for Executing Actions**: Conditions are met**
      iii. Field: **Stage** (Scroll down to Stage and Click **Choose**)
      iv. Operator: **Equals**
      v. Type: **Picklist**
      vi. Value: **Closed Won**

vii. Conditions: **All of the conditions are met (AND)**
viii. Click **Advanced**.
ix. Click **Yes**.

B. Click **Save**.

4. Add an immediate action.

A. Under IMMEDIATE ACTIONS, click **Add Action**.

i. Action Type: **Post to Chatter**
ii. Action Name: **Post to VP Sales**
iii. Post to: **User**
iv. User: **Search for a user**
v. Find a user: **Allison Wheeler**

B. In the text box, enter `I just won this opportunity:`
C. Click **Merge Field**.
D. Select **Name** and click **Choose**.
E. Click **Save**.

5. Activate and test the process.

A. Click **Activate**.
B. Click **OK** to the version warning.
C. Click **Back to Setup | Manage Users | Users**.
D. In the Action column, click **Login** next to Anna Bressan.
E. In the Global Search box, enter `ziffcorp` and click **Search**.
F. Under Opportunities, click **Edit** next to ZiffCorp- Printers.
G. Change the Stage field to **Closed Won**.
H. Click **Save**.
I. In the Global Search box, enter `Allison` and click **Search**.
J. Click **Search Feeds**.
K. Verify that the Post appears in the feed.
L. Click **Anna Bressan | Logout**.

8-6: Prepare the Lead Fields and Create Queues

Goal:

Set the default lead status to “unqualified.” Map a custom lead field for region to the custom account field, Region, which you created earlier. Set up queues so that leads can be routed to the correct sales teams. Since the website is currently only in English, restrict the queues to the US and EMEA teams.

Tasks:

1. Set the default lead status to “unqualified.”
2. Map a custom lead field for Region to the custom account field, Region, which you created earlier.
3. Set up a queue for the US Sales team.
4. Set up a queue for the EMEA Sales team

Time:

10 minutes

Instructions:

1. Set the default lead status to “unqualified.”
   A. Click **Setup | Customize | Leads | Fields**.
   B. Click **Lead Status**.
      i. In the Lead Status Picklist Values area, click **Reorder**.
      ii. From the Default Value picklist, select **Unqualified**.
   C. Click **Save**.
2. Map a custom lead field for Region to the custom account field, Region, which you created earlier.
   A. Click **Customize | Leads | Fields**.
      i. In the Lead Custom Fields & Relationships area, click **Map Lead Fields**.
      ii. Map the Region field to **Account.Region**.
   B. Click **Save**.
3. Set up a queue for the US Sales team.
   A. In the Setup area, click **Manage Users | Queues**.
   B. Click **New**.
   C. Complete the details about the new queue.

i. Queue Label: `US Sales Team Queue`
ii. Queue Email: (Leave empty.)
iii. Send Email to Members: **Deselect**
iv. From the Available Objects list, select **Lead**.
v. Click **Add** to move Lead to the Selected Objects list.
vi. Add Queue Members.

a. Search: **Roles and Subordinates**
b. For: `US Sales Director`
c. Click **Find**.
d. From the Available Members list, select **Roles and Subordinates: US Sales Director**.
e. Click **Add** to add Roles and Subordinates: US Sales Director to the Selected Members list.

vii. Do you want to execute the actions only when specified changes are made to the record?: **Yes**

D. Click **Save**.

4. Set up a queue for the EMEA Sales team.

A. Repeat steps 3.B. and 3.C.

i. Queue Label: `EMEA Sales Team Queue`
ii. Queue Email: (Leave empty.)

B. Send Email to Members: **Deselect**
C. Click **Add** to move Lead to Selected Objects.
D. Add Queue Members.

i. Search: **Roles and Subordinates**
ii. For: `EMEA Sales Director`
iii. Click **Find**.
iv. From the Available Members list, select **Roles and Subordinates: EMEA Sales Director**.
v. Click **Add** to add Roles and Subordinates: EMEA Sales Director to the Selected Members list.

E. Click **Save**.

8-7: Create Assignment Rules

Goal:

Ensure that the salesperson who follows up with the lead is in the same region as the person submitting the lead.

Tasks:

1. Create a new assignment rule and set it as active.
2. Add a new rule entry.
3. Create a new lead to test.

Time:

10 minutes

Instructions:

1. Create a new assignment rule and set it as active.
   A. Click **Setup | Customize | Leads | Lead Assignment Rules**.
   B. Click **New**.
   C. Complete the new lead assignment rule information.
      i. Rule Name: `Leads by Region`
      ii. Set this as the active lead assignment rule: **Select**
   D. Click **Save**.
   E. Click **Leads by Region**.
2. Add a new rule entry.
   A. In the Rule Entries area, click **New**.
   B. Set the sort order.
      i. Sort Order: `1`
         a. Field: **Lead: Region**
         b. Operator: **equals**
         c. Value: **US**
         d. Queue: **US Sales Team Queue**
         e. Click **Save & New**.
      ii. Sort Order: `2`
         a. Field: **Lead: Region**
         b. Operator: **equals**
         c. Value: **EMEA**

d. Queue: **EMEA Sales Team Queue**
e. Click **Save & New**.

iii. Sort Order: `3`

a. Field: **Lead: Region**
b. Operator: **equals**
c. Value: (Leave blank.)
d. User: **Allison Wheeler**

C. Click **Save**.

3. Create a new lead to test.

A. Click **All Tabs (+)**.
B. Click **Leads**.
C. Click **New**.
D. Click **Continue** (keeping the default Telemarketing Lead record type).
E. Fill out the new lead information.

i. First Name: `Kendall`
ii. Last Name: `Carson`
iii. Company: `Projection Management`
iv. Title: `Chief Executive Officer`
v. Phone: `415-123-1234`
vi. Email: `kcarson@projmgmt.com`
vii. Region: `US`
viii. Assign using active assignment rule: **Select**

F. Click **Save**.
G. Check the Chatter feed and confirm that the lead you just created has been routed to the correct queue.

8-8: Create an Auto-Response Rule and Enable Web-to-Lead

Goal:

Create an auto-response rule that will send appropriate email templates to web generated leads. Enable the web-to-lead feature and generate HTML code that will be placed on AW Computing's website by the Marketing webmaster. Before sending the code to Marketing, test the code to make sure the code, the auto-assignment and auto-response rules all work.

Tasks:

1. Create an auto-response rule.
2. Enable Web-to-Lead.
3. Create a new Web-to-Lead HTML form.
4. Save and test the form.

Time:

15 minutes

Instructions:

1. Create an auto-response rule.
   A. Click **Setup | Customize | Leads | Lead Auto-Response Rules**.
   B. Click **New**.
      i. Rule Name: `Technology Industry Promotion`
      ii. Set this as the active Web-to-Lead Auto-Response rule: **Select**
   C. Click **Save**.
   D. Click **Technology Industry Promotion**.
   E. In the Rule Entries area, click **New**.
   F. Fill out the new rule entry information.
      i. Sort Order: `1`
      ii. Run this rule if the following: **criteria are met:**
         a. Field: **Lead: Industry**
         b. Operator: **equals**
         c. Value: `Technology`
      iii. Name: `Allison Wheeler`
      iv. Email Address: (enter your own email address for testing purposes)
      v. Email Template: From the Unfiled Public Email Templates folder, choose the **Leads: Tech Industry Promotion** template.
   G. Click **Save**.

2. Enable Web-to-Lead.

   A. Click **Setup | Customize | Leads | Web-to-Lead**.
   B. Click **Edit**.
   C. Edit the Web-to-Lead settings.

      i. Web-to-Lead Enabled: **Select**
      ii. Default Lead Creator: (your name)

         Note: The default lead creator must be a user that has both the Modify All data and Send Email permissions.

      iii. Default Response Template: From the Unfiled Public Email Templates folder, choose the **Leads: Web-to-Lead email response** template**.**

   D. Click **Save**.

3. Create the new Web-to-Lead HTML form.

   A. Click **Create Web-to-Lead Form**.
   B. Ensure the necessary fields are in the Selected Fields list. If not, move them from the Available Fields list to the Selected Fields list.

      First Name
      Last Name
      Email
      Company
      Industry
      City
      State/Province
      Region

   C. In the Return URL field, enter `http://www.salesforce.com` to specify the page that will be displayed after submitting the form.
   D. Click **Generate**.
   E. Copy to the generated HTML onto your clipboard.
   F. Navigate to your desktop.
   G. Right-click and choose **New | Text document**.
   H. Double-click on the **new text file** to open it.
   I. Paste the generated HTML into the file.
   J. Click **File | Save As**.
   K. Change the file name to `Web to lead.html`
   L. Click **Save**, and close the file.
   M. Double-click on the **Web to lead.html** file to open it.
   N. Confirm that the generated HTML contains the necessary fields.

4. Save and test the form.
    A. In the already open web-to-lead form, enter the following information:
        i. First Name: `John`
        ii. Last Name: `Goldie`
        iii. Email: (enter your own email here)
        iv. Company: `Hyper International`
        v. Industry: `Technology`
        vi. City: `San Francisco`
        vii. State: `CA`
        viii. Region: `US`
    B. Click **Submit**.
    C. In Salesforce, click the **Leads** tab.
    D. In the View box, select **US Sales Team Queue**.
    E. Click **Go!**
    F. Confirm that the lead you just entered is now in Salesforce.

    Optional: Check your email to see that the correct email response template has been delivered.

