the Max Labs project

Business Systems Innovation Labs

Lab 3b Pre-flight Checklist

"How to be a Better Borg"

The last of Max's lab postings takes you farther than you ever imagined a non-nerd could go!

Prep: What do you need to start?

To make this one work, you need to have gotten most of Lab 3a running successfully. At least, **you need to have received the automatic lead alert email message about Kyle Reese.** If not, go back and do Steps 1-101 of Lab 3a before starting this one. (Start with a new Salesforce account if you need to, being sure NOT to use Yahoo for email.)

Learning Objectives: What to "get"

- ☑ Discover more of how CRM systems can help businesses do a better job of dealing with customers (& sell more).
- ☑ *See for yourself* how social media tools are used *within* organizations today to do things better/faster/smarter.
- ☑ Get the basic idea of HTML and apps "talking among themselves" via APIs (Application Programming Interfaces)
- ☑ *Surprise yourself* with the awesome power (and unbelievable ease!) of integrating the Web with data systems.
- ☑ *Get how amazingly much you can make tools do for you automatically* (process automation), but with no coding!

Deliverables: Get your points

There are four points marked to stop & take a screencap (or pic) to submit for credit:

1 After Step 31, your screen should match the one in the lab, showing the Chatter (social media) exchange between you and Riley.

2 After Step 106, you should be viewing the **Today's Leads** list view, showing the lead you added by API with the weird name you made from your own.

3 After Step 142, you should be viewing the Details tab of the Miles Dyson lead page, showing the fields with data entered from your web form.

4 After Step 144, you should be viewing the Upcoming & Overdue activities list, showing the new task to send an email, and the activity history timeline, showing a thank-you email has been sent.

Just make sure your name appears on every screencap! Just hit the little character icon at the top right corner for a popup that shows your name. If it covers some of your work, np—just zoom out your browser until the popup doesn't cover anything important. (Command-minus for Macs; Control-minus for Windows)

Tips: Get more

This lab is the culmination of all the work you've put in so far. When you get to the end, you'll be amazed at what you've created and proud of what you've accomplished, but only **IF** you read and *experience* it—don't just run through the steps!

Resources: Get some help

Stuck? You can probably fix it quick yourself at the Help FAQ at MaxzPlace. If not, post to the Help Forum.

Max's Distinctive, Impressive BizTech Student Blog

Saturday, November 23, 2019

How to be a Better Borg

So, in case you've never seen the original Terminator—trust me. It's the best. You can say the FX are old-school, but it beats the pants off the others for dramatic tension:

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..."*

So, the borg he was taking about? Our illustrious former CA governor guv, Ahhh-nold. He was 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 cyborg army from Cyberdyne. Kyle gets sent back to try to protect her so John can be born & save the world—yay. Stream it soon, but not right now. This posting's the coolest yet—promise!

Ok, I'm ever-so-slightly borg-obsessed. But you can't deny—it's pretty cool having a cyber mini-me to keep the human part's backside covered. Smart. Fast. Never makes a mistake. The cyborg-me is so totally on top of this job now & I keep finding more parts of my job that my robo side can do for me (ok, more processes I can "automate") using SF, so the human side of me can live to see yet another Terminator sequel someday.

Like remember last time? How I (we) set up the **Leads** object with automatic assignment rules so when a new lead record gets created, SF automatically assigns it to Riley or me & sends the alert to the right one? But even the T-800 (Model 101) had room for an upgrade. In Terminator 2, Ahhh-nold came back, re-programmed now as a good guy to protect John Conner from the T-1000, a new cyborg made from a "mimetic poly-alloy" that let it liquefy, turn into whatever, & harden again. Cool effect (for its day) but an otherwise unremarkable sequel, IMHO. Still, it makes a point—cyborgs can be improved. Even mine.

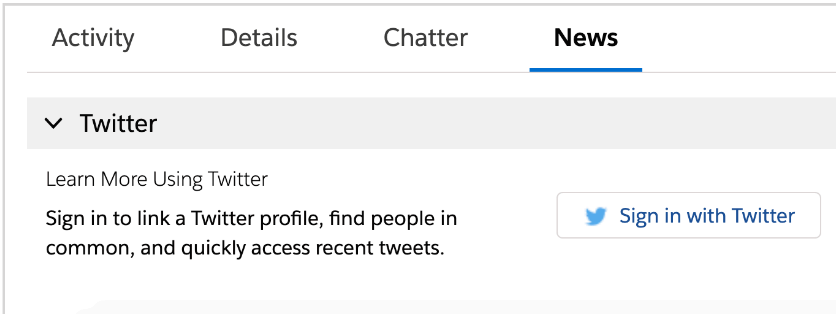
Kick it up a Notch: Human side

(Oh, the humanity!)

So remember how last episode, Kyle Reese was a new lead. He got assigned to you, you got an alert email about him & then you had to send him an email to introduce yourself (*ideally* within 24hrs).

So now, let's say 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:

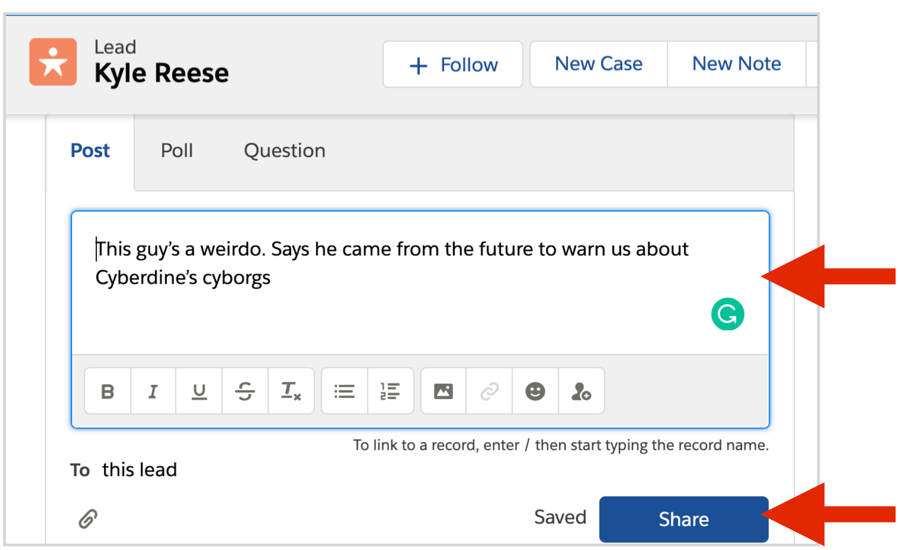
1. Log back into SF, hit the **App Launcher** and get into the **Marketing** app
2. Click on your **Leads** tab and open **Kyle Reese** (if you don't see him show up under **Recent Leads**, pull down the **List View** menu & select **All Open Leads** and find him in the full list)
3. Before you call him, you might want to get prepared by doing some background intel—click the **News** tab, under the blue progress symbol labelled **Working - Contacted** in the **Sales Path**
4. If you have a Twitter account, you can click **Link Twitter Account** and connect to…or just use Keanu Reeves, let's say, and SF will stick his pic on the **Kyle Reese** lead



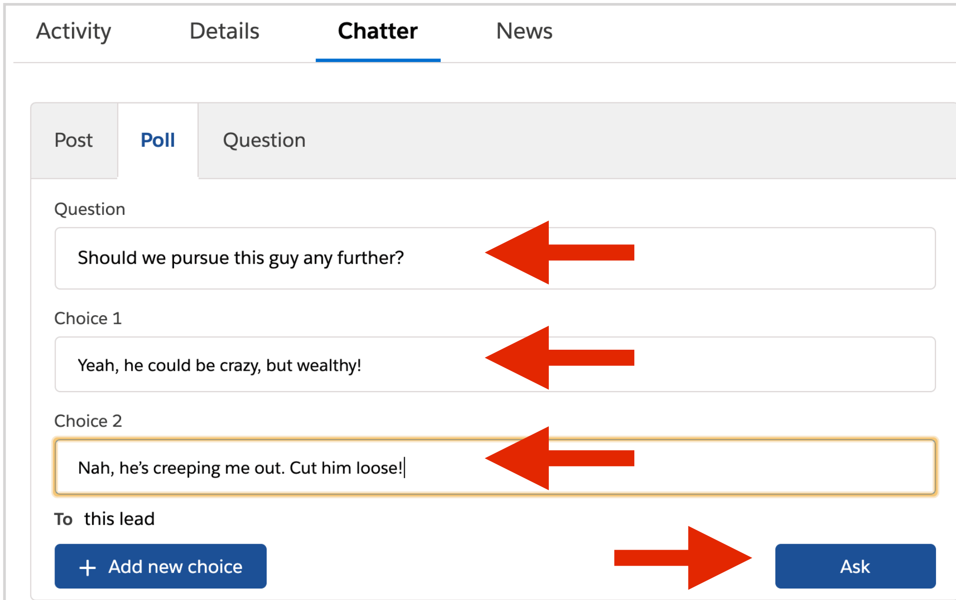
5. Now, pretending you just called him, click back on the **Activity** tab & then click the **Log a Call** tab below that
6. In the **Comments** textbox, enter "Sounded like a nut case. Kept ranting about being from the future." and click **Save**
7. Now you can see the call appearing in the activity history timeline, below the email you had sent before

So besides pulling in Twitter & other outside news for intel to help you deal w leads, SF also worked in their own FB-like tool, "Chatter." Prof says it's an example of "social business"—like social media but *inside* your org—just you & your co-workers. It lets you connect a discussion to any record, like a lead (like Kyle) & do likes, polls, etc to get quick answers from your peeps in the office:

8. Still on the **Kyle Reese** lead page, find & click the **Chatter** tab (next to the **News** tab)
9. There's a newsfeed on the guy—with a place at the top to post and update & all the activities you've done already will be auto-posted below
10. So just click on **Share an update...** and enter "This guy's a weirdo. Says he came from the future to warn us about Cyberdine's cyborgs" and hit the blue **Share** button to post it



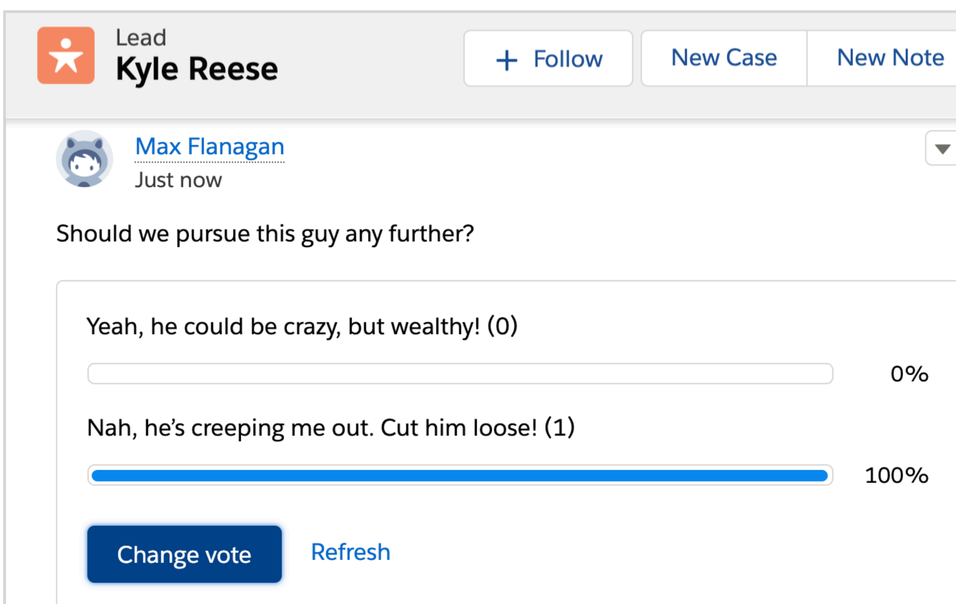
11. Now, to get help from your peeps (eg Riley), click the **Poll** tab (next to **Post**)
12. Click on **What would you like to ask?** and enter "Should we pursue this guy any further?"
13. Below, in the **Choice 1** textbox, enter "Yeah, he could be crazy, but wealthy!"
14. In the **Choice 2** textbox enter "Nah, he's creeping me out. Cut him loose!"



15. Click the blue **Ask** button

Now vote in the poll yourself:

16. Find the poll down below in the feed & click **Nah, he's creeping me out. Cut him loose!**
17. Then, click the **Vote** button & notice the bar chart showing 100% **Nah**... for now (w/ 1 vote)



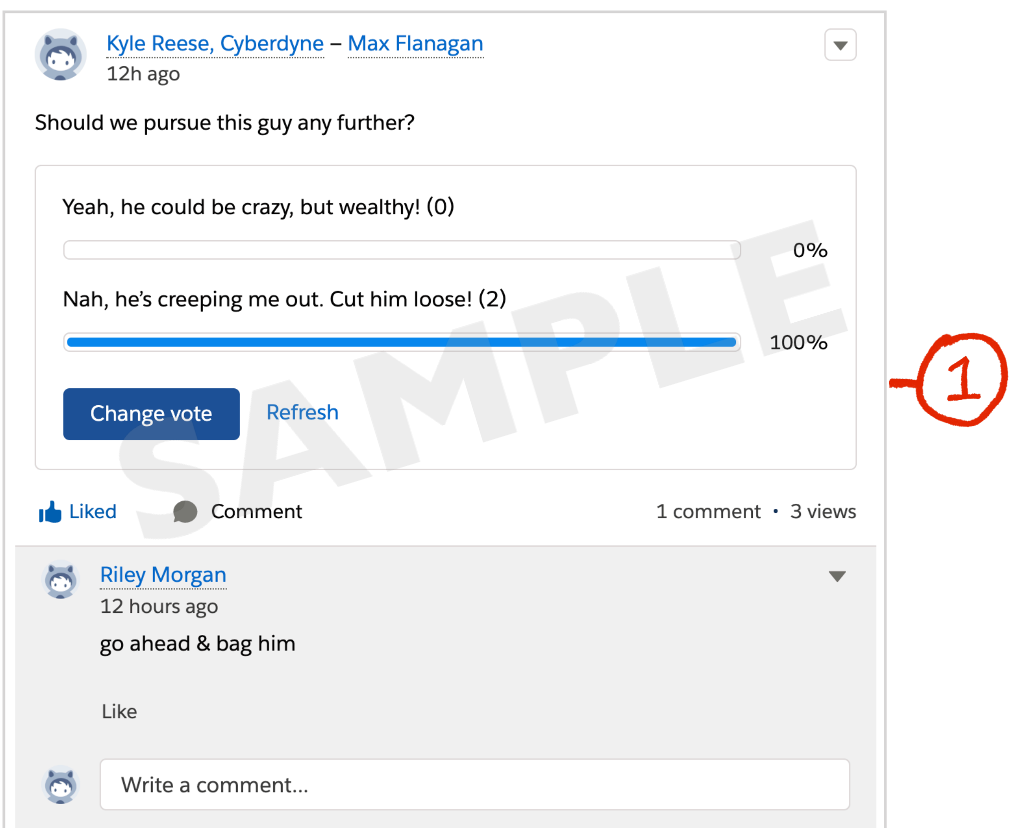
Now, to see what it looks like to Riley, you can log out of your account and log in as her (remember, last time you created her as a user in your SF "org") but to make it easy, reset her password first:

18. Go to the **Setup** gear icon (top right by the bell) and click **Setup**
19. On the lefthand side, under **ADMINISTRATION**, click **Users** and then find & click **Users** under that (just below **User Management Settings**)
20. On the row for Riley, check the checkbox on the left & then click **Reset Password(s)** to make SF send another account activation email to "Riley's" email address (should be your address, really)
21. When you see the popup window asking **Reset passwords for these users?** click **OK**
22. Next, click the character in the upper right corner to get the drop-down & click **Log Out**
23. Now, pretending to be Riley, find & open the new email message & click the link they gave you to get back to your browser, do the verification (another email), set the new password & log in to her account

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

24. Click the **X** to kill the **Welcome to Lightning Experience** popup
25. Click the **Chatter** tab & close whatever popups appear with **Chatter** intro vids, etc
26. Now you (as Riley) can see the poll and the post you (as you) shared is below that
27. For your comment about him being a weirdo, at the bottom, click **Like**
28. That should trigger an alert email to you, informing you that Riley **Liked** your post
29. For the poll, vote for **Nah**... and notice the bar chart showing **100% Nah**... with two votes now
30. Click the little blue **Comment** icon (just below the blue **Change Vote** button)
31. In the **Write a comment**... textbox that opens up, enter "go ahead & bag him" and then click the blue **Comment** button, just below, on the right, to post it

And now you got another email telling you Riley commented on your poll. SF keeps you "posted". (;-J)



Basically, it's a quick way we get/give ideas across the whole company. We can follow certain people or groups at work, or specific leads, etc in the database. Pretty much the whole social media thing works here—you just make sure you don't post your personal stuff by accident. That happens, apparently. Yikes!

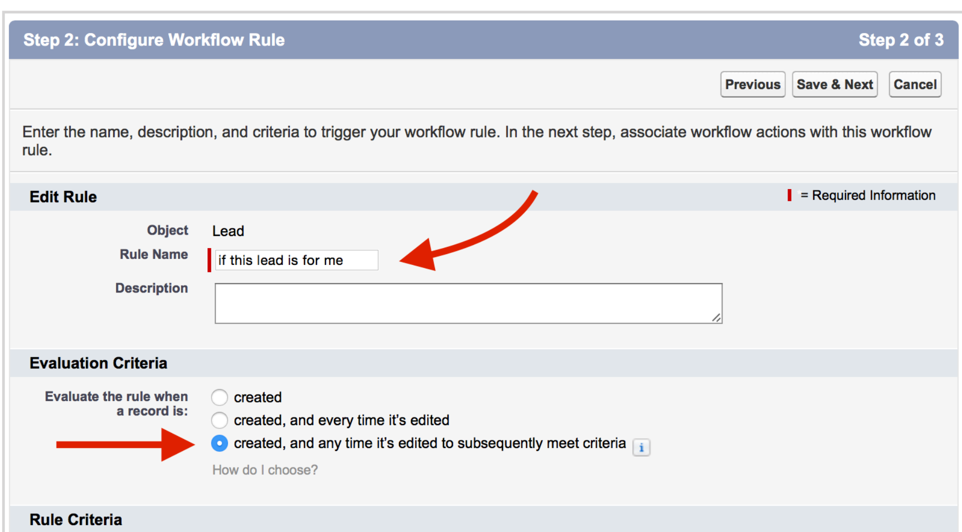
32. So now log out as Riley—hit the character icon at the top right and on the popup, click **Log Out** under Riley's name and then & log back in as yourself

Kick it up a notch: Robo-side

(everything but a time-machine)

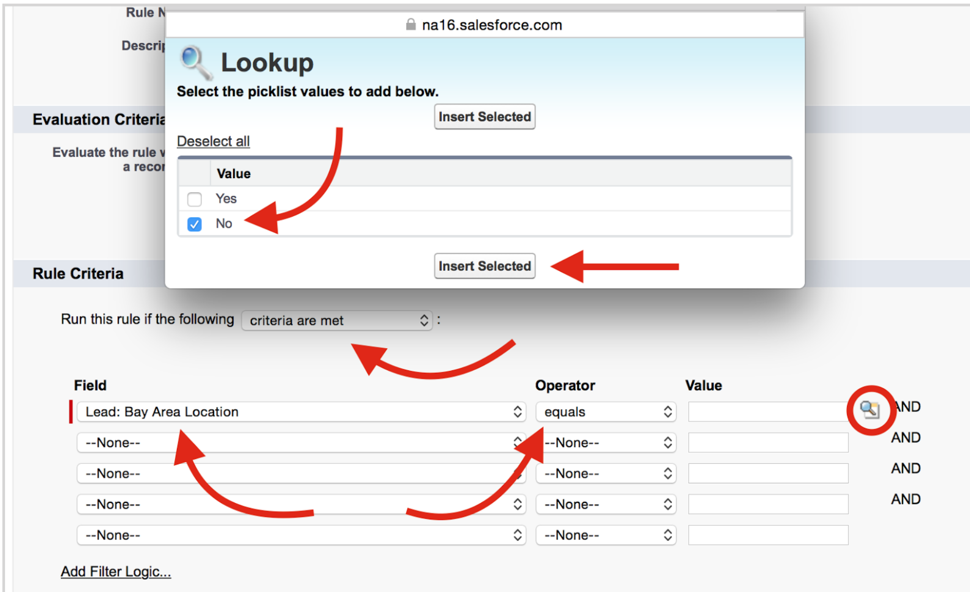
So things were better, but when I got those lead emails from our web page, I still had to enter their info by hand and create the tasks to remind me & Riley to follow up. Keeping track of dates, etc—stuff computers are supposed to be good at—there had to be a way to hand this off to my robo-half, too. Finally found it—"workflow rules." You can 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.*"

33. Make sure you're logged in as you now, not Riley! and you'll see a notification indicator on your bell on the upper right—click the bell and it will tell you Riley commented on your post, just **X** it out
34. On the lefthand menu, way under **PLATFORM TOOLS**, find & click **Process Automation** and under that, click **Workflow Rules**
35. Check out the **Understanding Workflow** page that explains what workflows are, what they can do and what they consist of & 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** for triggering this new workflow and click **Next**
38. On next page for **Step 2: Configure Workflow Rule**, 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 the **Run this rule if the following** drop-down menu shows **criteria are met**

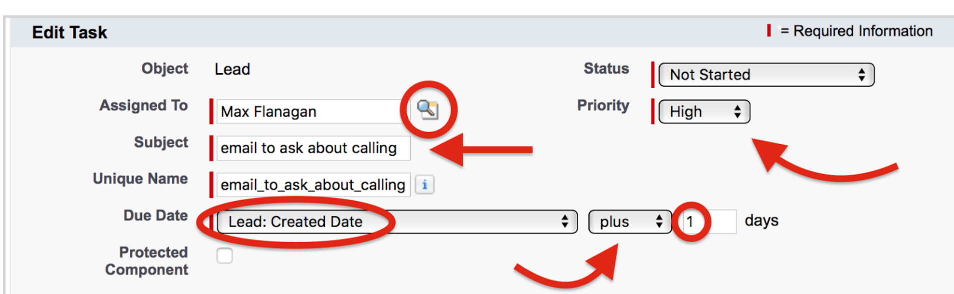
41. In the first row under **Field**, use the drop-down menu to select **Lead: Bay Area location**
42. Use the **Operator** drop-down menu to the right on that same row to select **equals**
43. Click on the magnifying glass just to the right of the **Value** textbox on that same row to bring up the **Lookup** popup window and use it to select **No** and click on **Insert Selected**



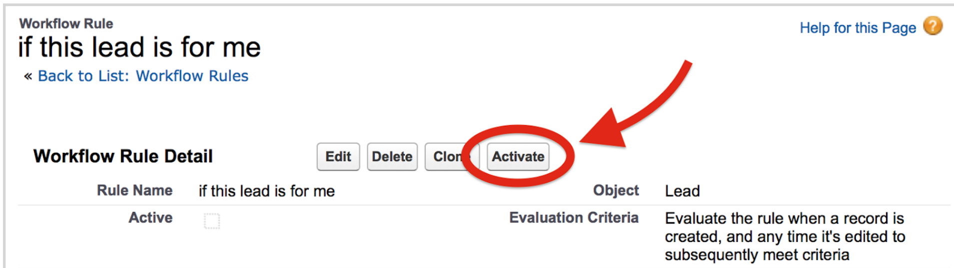
44. Then, on the 2nd criteria row, right below the one you just set, use the drop-down menu under **Field** to select **Lead: Investment Potential**
45. Use the **Operator** drop-down menu on that same 2nd row to select **less than**
46. In the **Value** textbox on that same 2nd row, enter "150000" (4 zeros—make sure!)
47. Click **Save & Next** to go to the next screen & ignore the yellow warning line at the bottom

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):

48. In the **Step 3: Specify Workflow Actions** pane, under **Immediate Workflow Actions**, click the **Add Workflow Action** drop-down & 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
50. In the **Subject** textbox, enter "send email to ask about calling"
51. Tab to auto-fill 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**



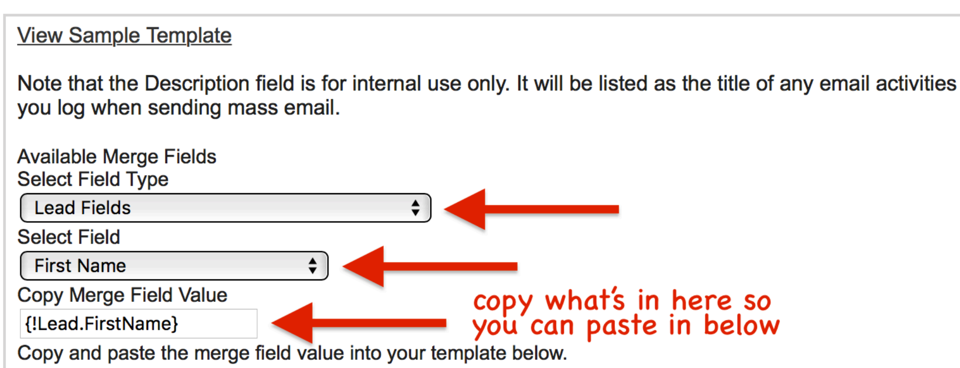
54. To give your yourself 24 hours to make that first contact, enter "1" into the **days** textbox to the right
55. For **Priority**, on the upper right of the panel, use the drop-down menu to change **Normal** to **High**
56. Click **Save** to get back to the **Step 3: Specify Workflow Actions** page and click **Done**
57. On the **Workflow Rule** page for your new rule, click the **Activate** button (upper center) & ignore the new yellow warning line at the bottom



Cool. Now whenever a new lead gets entered for me, SF automatically creates the task for me. 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-send-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 our SF database* instead of emailing me. Hah!

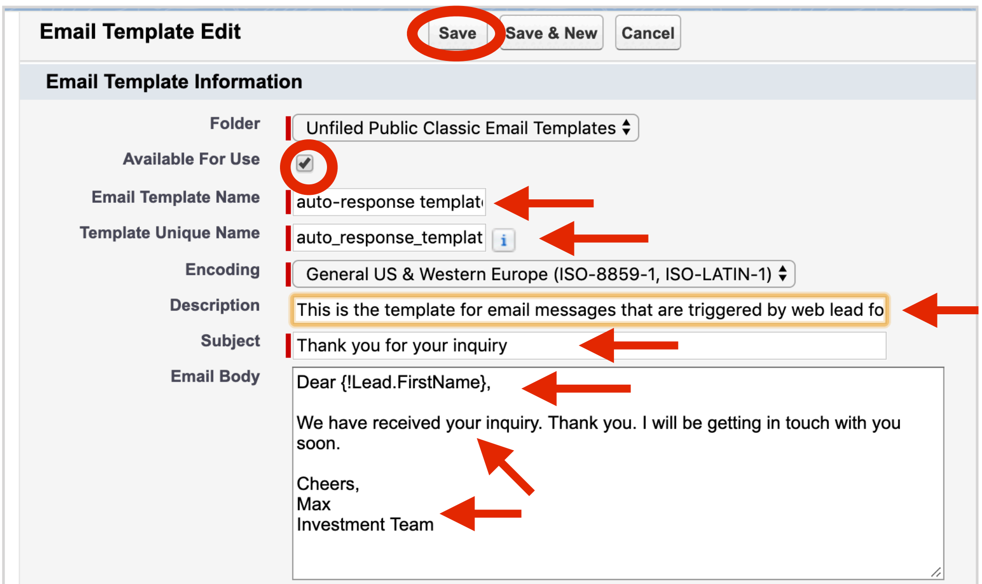
First, before making the form, I created another email template—this one for sending an instant, "personalized" thank-you message to leads automatically, as soon as they submit their info to the new form:

58. On the lefthand menu, toward the top, under **ADMINISTRATION**, click **Email** and under that, click **Classic Email Templates**
59. Click the **New Template** button and then, for **Choose the type of email template you would like to create**, the **Text** option is fine & should already be selected so just click **Next**
60. On the next page, scroll down to the pane labeled **Step 2. Text Email Template: New Template**, check the **Available for Use** checkbox
61. For **Email Template Name**, enter "auto-response template for incoming web leads for me"
62. Just tab or click on the **Template Unique Name** textbox and it will auto-populate with the underscore-embedded name
63. For **Description** enter "This is the template for email messages that are triggered by web lead form submits"
64. For **Subject** enter "Thank you for your inquiry"
65. Back up above, find the menu that says **Contact Fields** and change it to **Lead Fields**
66. Then, below that, under **Select Field**, use the blank drop-down to select **First Name**



Now, SF has populated the **Copy Merge Field Value** textbox below—highlight it and copy it so you can paste it in the next step:

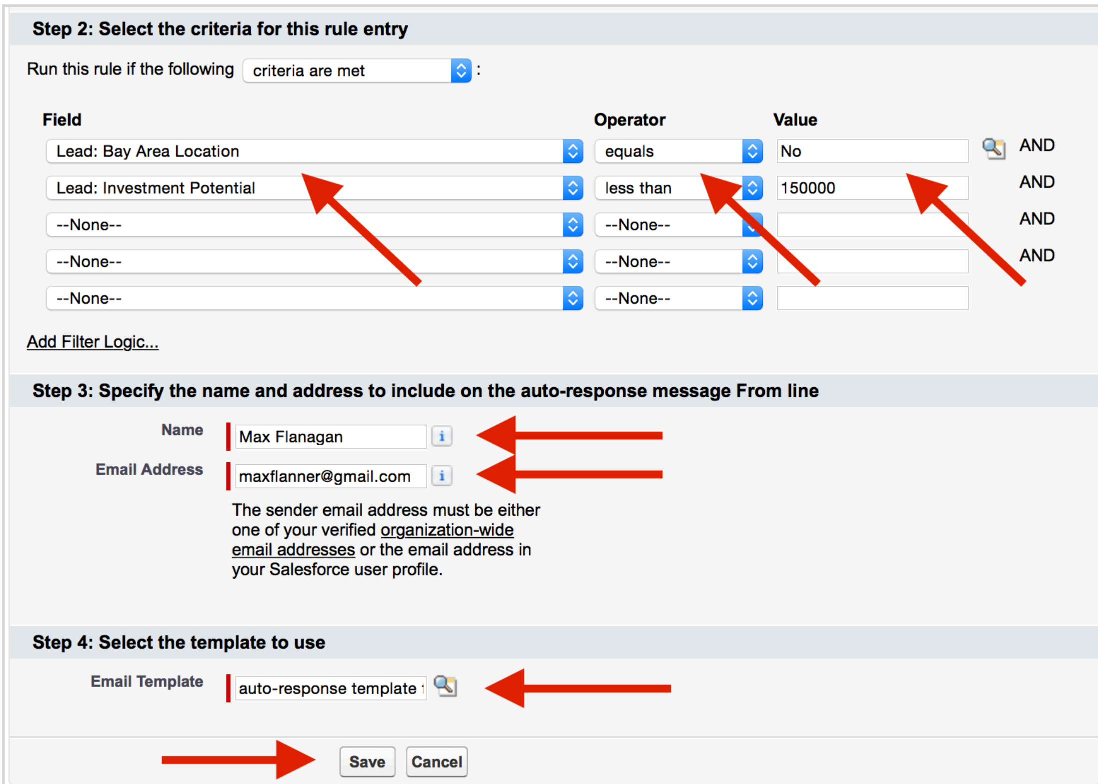
67. In the **Email Body** textbox, type "Dear " (including the trailing space) and then paste in what you copied for the lead's first name & add a comma after it, at the end
68. Leave one blank line and then "We have received your inquiry. Thank you. I will be getting in touch with you soon."
69. Leave another blank line and enter "Cheers," and then type your first name on the line below and then type "Investment Team" on the line below that
70. Click **Save**



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

71. On the lefthand menu, under **PLATFORM TOOLS**, click **Feature Settings** and under that, **Marketing** and under that, **Lead Auto-Response Rules** & click the **New** button
72. For **Rule Name**, enter "This one is mine so..."
73. ***Critical!*** Click the **Active** checkbox and then click the **Save** button
74. Now you'll see the new rule appearing on the **Web-to-Lead Auto-Response Rules** page
75. Click on the name you gave it—**This one is mine so**... to open it up
76. In the **Rule Entries** section at the bottom, click the **New** button
77. Under **Step 1: Set the order in which this rule entry will be processed,** for **Sort Order,** enter the number "1"
78. 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**
79. In the first row under **Field**, use the drop-down menu to select **Lead: Bay Area location**
80. Use the **Operator** drop-down menu to the right on that same row to select **equals**
81. 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**
82. On the 2nd criteria row, right below the one you just set, use the drop-down menu under **Field** to select **Lead: Investment Potential**

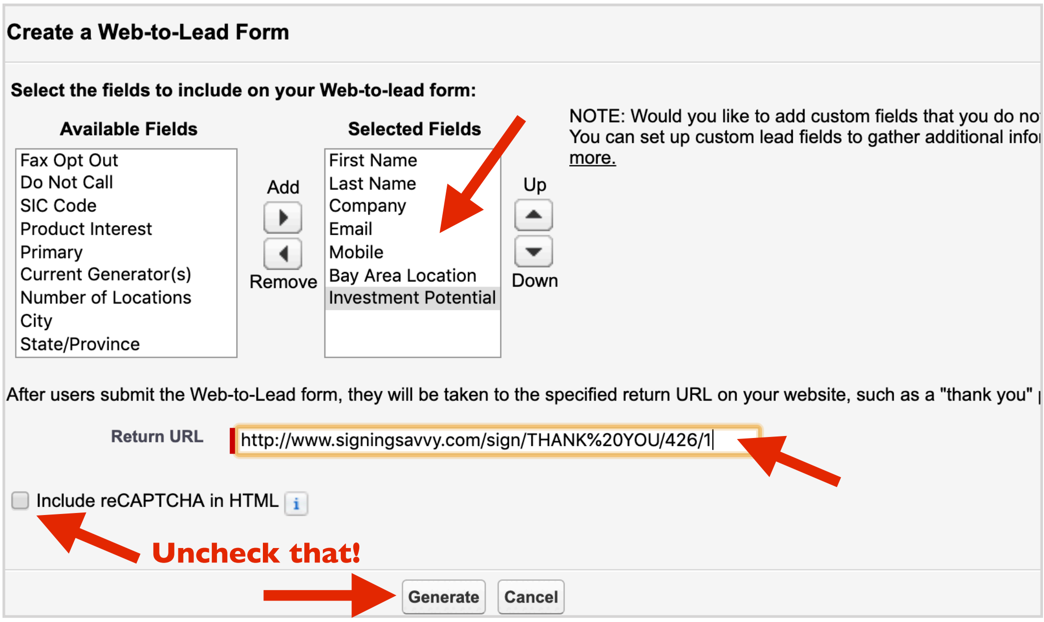
83. Use the **Operator** drop-down menu on that same 2nd row to select **less than**
84. In the **Value** textbox on that same 2nd row, enter "150000" (4 zeros—make sure!)
85. Under **Step 3: Specify the name and address to include on the auto-response message From line,** enter your first and last name
86. In the **Email Address** textbox, enter the one you entered for yourself when you created your SF login (probably the same as for your username, depending on what you had set up)–has to be your real email!
87. 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
88. Click **Save**



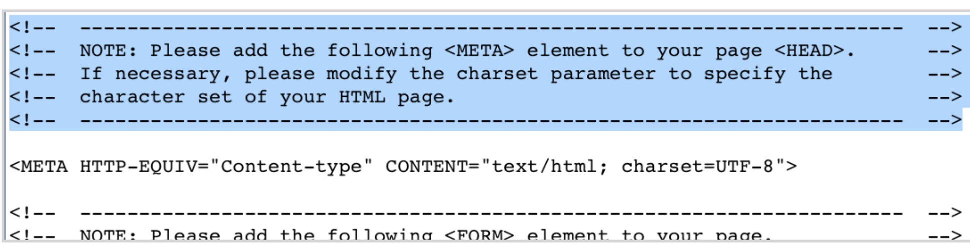
Now for the grand finale! All your robo-instructions are in place. Just need to create the website form that the potential investor leads will fill out:

89. Back on the lefthand menu, down below **Lead Auto Response Rules**, click **Web-to-Lead** (**Setup** > **PLATFORM TOOLS** > **Feature Settings** > **Marketing** > **Web-to-Lead**)
90. Under the **Web-to-Lead Settings,** click the **Create Web-to-Lead Form** button
91. On the **Web-to-Lead Setup** page, under **Create a Web-to-Lead Form**, in the **Selected Fields** list, click **City** to highlight it & click the **Remove** button immediately to the left (don't need it)
92. Do the same for **State/Province** (don't need it either)
93. Click **Company** to highlight it and then click the **Up** button immediately to the right to move it above **Email**
94. In the **Available Fields** list, click **Mobile** to highlight it and click the **Add** button immediately to the right to move it over to the **Selected Fields** list
95. In the **Available Fields** list, click **Bay Area location** to highlight & **Add** to move it over too

96. In the **Available Fields** list, click **Investment Potential** to highlight it and click the **Add** button immediately to the right
97. Below, in the **Return URL** textbox, leave the "http://" right where it is but, after it, copy/paste or type in "www.signingsavvy.com/sign/THANK%20YOU/426" (be exact!) bc you don't really have your own thank-you web page you can send leads to after they submit but you can use this cool sign-language thank-you video page instead
98. Uncheck **Include reCAPTCHA in HTML** (not a worry for now) & then click **Generate**



I know. I was like what IS all that <bleeeep>? I mean I knew it was "HTML" which theoretically tells your browser what goes on a web page & where, etc but…sheesh! But then staring at it, I could kinda figure it out:



```
<!--  ----------------------------------------------------------------------  -->
<!--  NOTE: Please add the following <META> element to your page <HEAD>.      -->
<!--  If necessary, please modify the charset parameter to specify the        -->
<!--  character set of your HTML page.                                        -->
<!--  ----------------------------------------------------------------------  -->

<META HTTP-EQUIV="Content-type" CONTENT="text/html; charset=UTF-8">

<!--  ----------------------------------------------------------------------  -->
```

See the instructions for humans? In the upper part? Those **<!--** symbols had to be telling the browser to just ignore those lines. Cool. I did too.

Now look lower down—each line seems to be for one of the form slots, in the order they'll appear, each telling the name of the field in SF (eg "first_name") where the user's answer should go, along with the label to show on the form (eg "First Name") & how long to make the form slot (eg 20), etc. For my custom fields like "Investment Potential," there was some kind of SF-assigned ID instead of the field name. Ok, got that, np. So far, so good.

Back up higher, see the two lines with "input type=hidden"?


```
<input type=hidden name="oid" value="00D4P000000gX01">
<input type=hidden name="retURL" value="www.signingsavvy.com/sign/THANK%20YOU/426/1http://">

<!--  ----------------------------------------------------------------------  -->
```

Had to mean these were like the other input fields except they don't get displayed on the form for the user to fill in—their values are set, right there in the HTML. In that first one, "oid" means "Org ID"—set to the ID for the account I share w/Riley, etc. (SF calls them "orgs".) When a user fills out the form & clicks **Submit**, our "oid" gets sent, along with all the entered data, so SF knows which org to put the record into (ours). The other line was apparently using "retURL" to set that "thank-you" page as what to go to next after **Submit** gets clicked.

But this one was a mystery I had to Google—the great and powerful "form action."

```
<!--  ----------------------------------------------------------------------  -->

<form action="https://webto.salesforce.com/servlet/servlet.WebToLead?encoding=UTF-8" method="POST">
```

Turns out some apps are built with ways to talk to other apps, not just people. Their coders put in APIs (Application Program Interfaces) that are like apps' ears and mouths for hearing and talking back & forth w/other apps. And they can talk over the Web using HTTP format, the same way browsers talk to Web servers. (I found this awesome <u>free API tutorial</u>.)

So the **form action** line tells the browser:

> *whenever **Submit** gets clicked, send a POST request (with an Org ID + the fieldnames & their values) by HTTP to a teeny app (a "servlet") named "webtolead" running on a server in SF's cloud at that address (https://webto…)*

That little servlet dude is always running there, day-in/day-out, always listening for those POST requests to come in & when one does, he builds a new **Lead** record out of it & sticks it into the org account with that Org ID.

And check this out—you can bypass your browser's form handler & just send your own HTTP-based API request straight to SF by putting that servlet address & whatever(field, value) pairs you want into the address bar. Here's that HTML line minus the form action part (we're skipping the form handler & going straight to the API, baby):

https://webto.salesforce.com/servlet/servlet.WebToLead?encoding=UTF-8"method="POST"

99. Copy & paste it into a new tab in your browser but **DON'T** send it yet (<u>don't</u> click **Enter**, just paste)
100. Go back to SF & look in that textbox of HTML to find the line that starts with "<input type=hidden" and has your Org ID (oid) and copy <u>just your ID number</u> (NOT the quotes)
101. Back on the tab where you pasted that link above, at the end, add "&oid=" (no quotes) and then paste on your Org ID after it (no spaces) so it looks like this <u>**but with your Org ID** (be exact)</u>**:**

Remember that "oid" value I mentioned earlier, include that in the URL below. It's unique to your account, so it won't work if you don't change it!

https://webto.salesforce.com/servlet/servlet.WebToLead?encoding=UTF-8"method="POST"&oid=**00D4P000000yb1T**

102. Now, at the very end, add "&first_name=" and then add the first two letters of your first name plus the last three letters of your last name, eg for me, Max Flanagan, it would be "Magan" but <u>don't type quotes</u>!

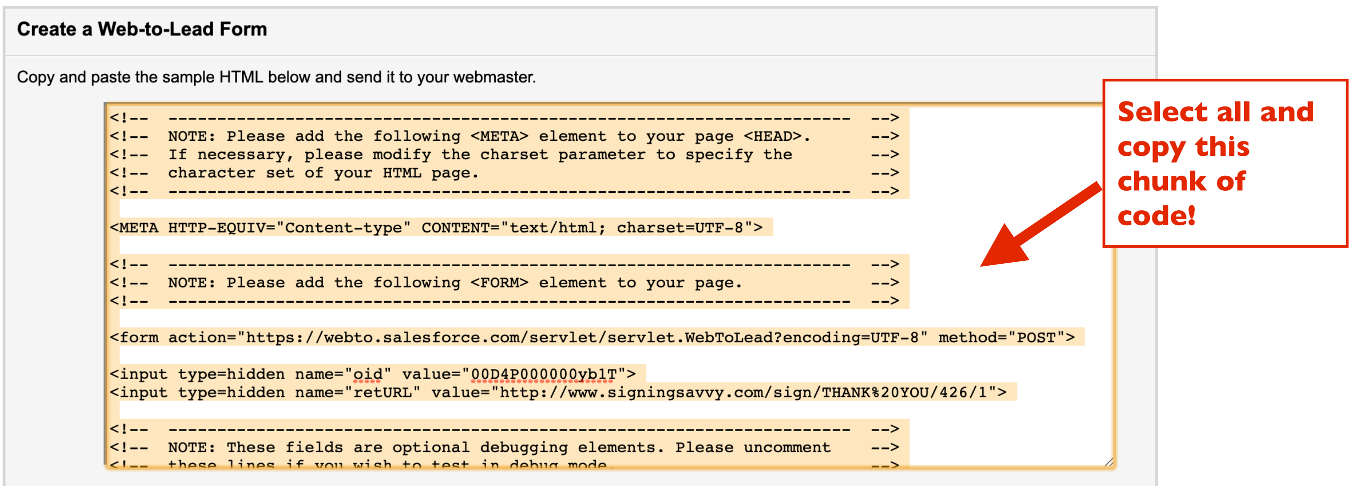
…servlet.WebToLead?encoding=UTF-8"method="POST"&oid=00D4P000000yb1T&first_name=Magan

103. You could add more (field, value) pairs but you get the point, just go ahead and hit **Enter** to launch it

The page will just go blank but you just added a **Lead** record to your SF org by issuing your own API request directly to SF's little "webtolead" servlet, somewhere in their massive Web cloud. It only has your crazy new first name in it—the rest of the fields are empty. But still, you did it & now you know what "the man behind the curtain" is really up to, Dorothy. Hah!

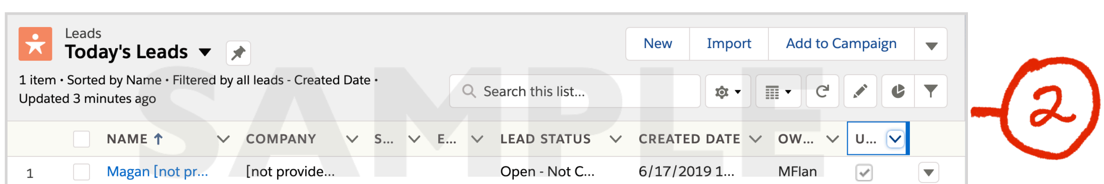
Go check it out but **FIRST DO THIS (super-important!)**:

104. Go back to SF & copy that whole chunk of HTML text in that textbox bc you'll need it in a minute (make sure you get it all—maybe use the shortcut for "copy all" if you want: **Ctrl/Cmnd-A**)



Now to confirm your API request worked, look for the lead you just added:

105. Hit the **App Launcher** > **Marketing** and click your **Leads** tab
106. Click the drop-down next to **Recently Viewed** (upper left) and select **Today's Leads**



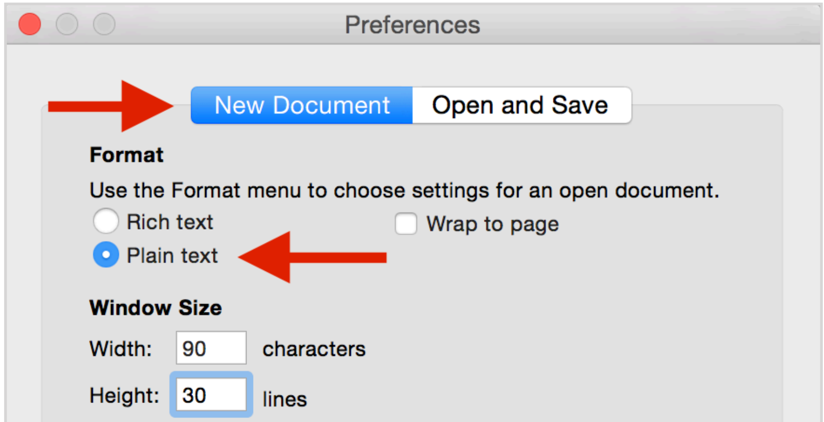
There you are with your weird first name & last name "not provided". (Hah, like Luke Wilson's character in Idiocracy—"Not Sure"). Anyway, you did it—you talked to a servlet thru its API. Not a deep conversation, but…

Now, back to setting up that web form. You've still got that chunk of HTML code copied, now you just need to paste it into a file you can open in your browser. One problem—you can't paste it into a Word doc b/c Word will embed all kinds of extra formatting, etc & that'll mess it up. You have to use 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 121**.

So if you're using a Mac:

107. 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)

108. Click **TextEdit** on the menu bar at the top to get the drop-down menu & click **Preferences**
109. Make sure you're on the **New Document** tab and check **Plain Text** under **Format**



110. 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)
111. Now reopen **TextEdit**
112. 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 **Steps109-112)**
113. Paste all that HTML code you copied from SF into the new document
114. In the **TextEdit** menu, go to **File** and select **Save**...
115. In the dialog box that opens, in the **Save As**: textbox, enter "myweb2lead.html"
116. Use the **Where**: drop-down menu to select **Desktop** so you can easily find the file later
117. Click the **Save** button
118. In the dialog box that opens, click the **Use .html** button
119. In the menu, under **TextEdit**, select **Quit TextEdit**
120. Skip down to just after **Step 130**

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

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

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

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

Once you have **Notepad** open:

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

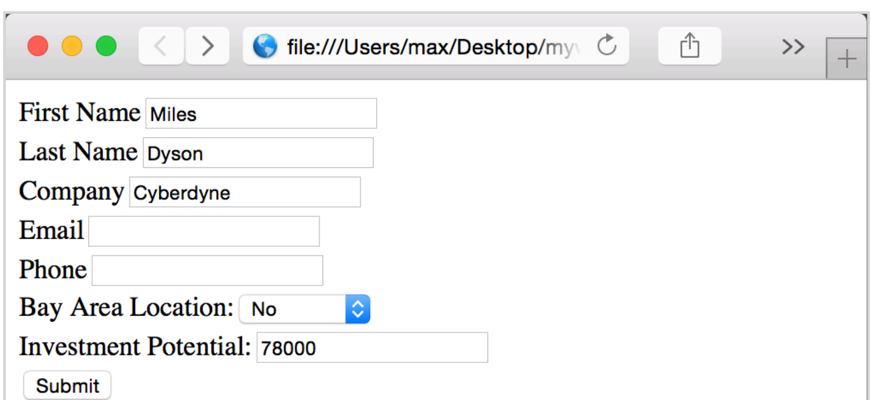
Now, do you realize what you've got there, in your little file? It's a fully functional web form page! You could put it on a website where potential leads could fill it out & when they click **Submit**, SF would do all this, *automatically*:

- take the lead straight 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 timeline for that lead record,
- assign the new lead record to you/Riley, going by the rules & their 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 **Upcoming & Overdue** activity list for that lead, telling you to follow up, within 24, 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, walk the dog & give you this insane neck rub.

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

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:

130. On your desktop, find the file you just created, **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 109-112**)
131. For **First Name & Last Name,** enter "Miles" and "Dyson" (from Terminator 2—he was the scientist that created the bad borg technology)
132. For **Company**, enter "Cyberdyne"
133. For **Email**, use your own email address so you can see & open the thank-you message
134. Make up a random number for **Phone**
135. Select **No** for **Bay Area Location** (important—this lead is yours, not Riley's!)
136. For **Investment Potential** enter a number less than 150000, like 78000
137. Click **Submit**

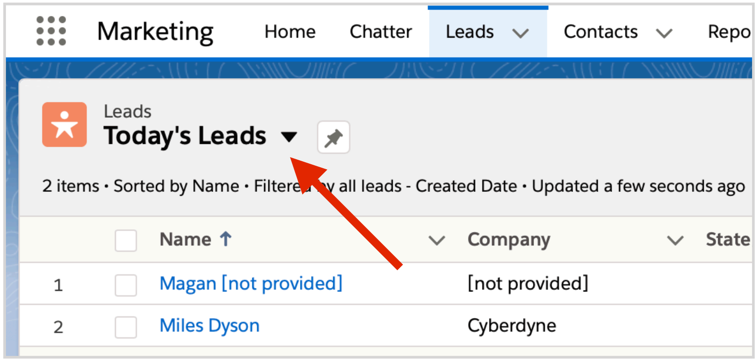


You should see the cool sign-language thank-you video now playing in your browser. (Ours takes you to a real thank-you page on our site, of course.)

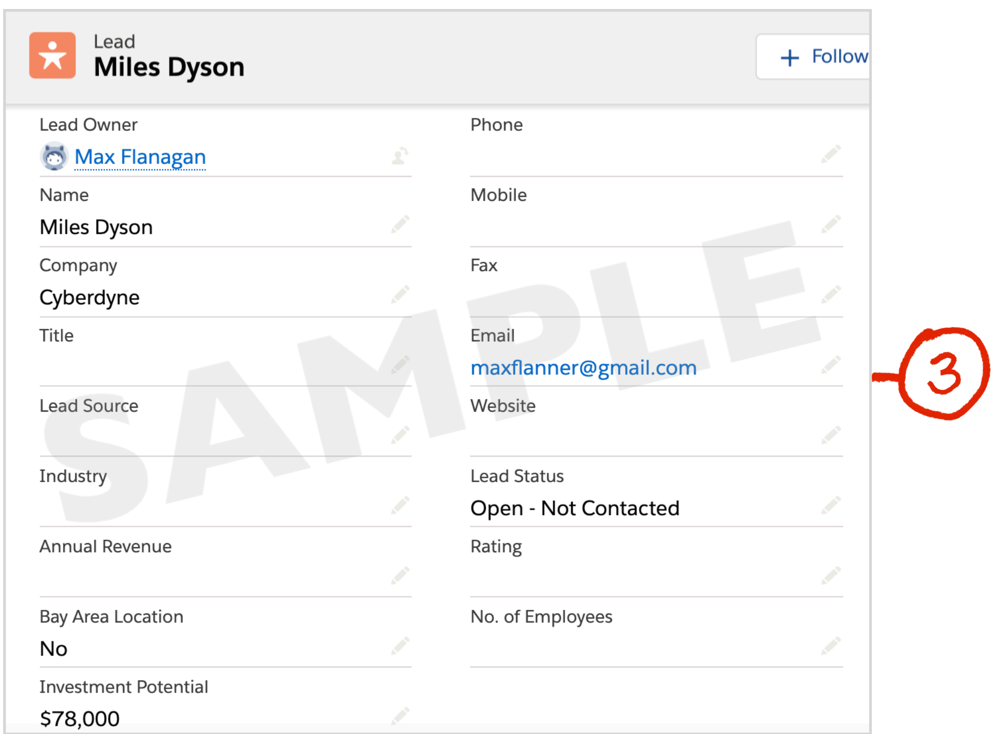
138. Check your email (as Miles) for the thank-you message
139. Check your email (as you) for the alert message about your new lead, Miles

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

140. Back in SF again, on the **Leads** tab page, use the list view drop-down to re-select **Today's Leads** now, even if it's already showing, because that'll refresh the data & you'll see your new lead Miles appear, along with the weird one you added earlier via API. (If you added Miles yesterday/earlier, he won't show up under **Today's Leads**, right?–just select **All Open Leads** & find him in the list w/SF's sample leads.)



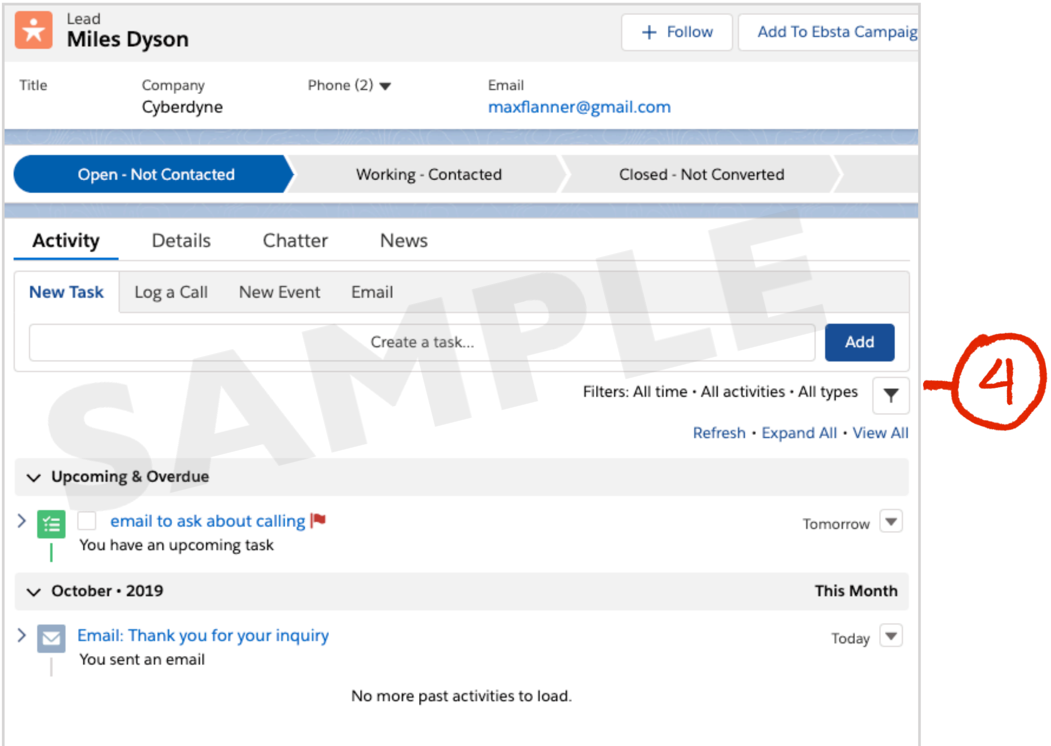
141. Click on Miles to open up his **Lead** record
142. Click on the **Details** tab (under the blue **Open - Not Contacted** button) and you'll see the field values you entered on the form, like **Name, Company, Bay Area Location & Investment Potential,** etc (it worked, eh? hah!)
143. Click on the **Chatter** tab and you can see the **Lead Owner** was changed from a blank value to you by an assignment rule a few minutes ago (when you clicked **Submit** on the form)



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 (eg Riley) are kept posted about new leads that are yours too, not just theirs (hers).

But wait, there's more...

144. Click on the **Activity** tab and scroll down to see the "to-do" task that your workflow created for you, "**send email to ask about calling"** listed under **Upcoming & Overdue** & also, in the activity history timeline (under **October • 2019** for me), there's the task **"Email: Thank you for your inquiry"** that was done already by the auto-response rule you set up to send the thank-you 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?

All done? Good work!

Now take a few to give us your feedback & enter to win AirPods!

Go to http://tiny.cc/MaxLabsFeedback

One entry/lab/student

Enter with every lab for the most chances to win

3 winners every term!