the Max Labs project

Business Systems Innovation Labs
Lab 1a Pre-flight Checklist

"I did it! Check this OUT!"

Pick up where you left off with the story of Max, the SJSU student blogging her new gig at a Silicon Valley startup. Follow along, step-by-step as she figures out how to build an actual app on her laptop AND her phone!

Prep: Get ready

- ☑ Be sure you read the Pre-lab backstory (**Lab 0**) first, so you know Max & what's going on with her.
- ☑ **Careful!** When the instructions tell you to create your Salesforce account, be sure that you:
  - follow the link given to get the free **Developer Edition** (DE) account **(DO NOT GO TO THE SALESFORCE WEBSITE AND GET THE 30-DAY FREE TRIAL!!!)**, and
  - do **NOT sign up w/AOL or Yahoo**—better to get a free **Gmail** account just for the labs instead.
- ☑ **SALESFORCE MAY NOT WORK RIGHT UNLESS YOU** turn off ad/popup blockers AND allow cookies:
  - In **Safari,** select **Settings**, click the **Privacy** tab & make **Prevent cross-site tracking** UNchecked
  - In **Chrome,** select **Settings**, then choose **Privacy & Security** from the left-hand menu, then click on **Third-party Cookies** & set it to **Allow third-party cookies**
  - In **Firefox,** select **Settings**, then choose **Privacy & Security** from the left-hand menu, choose **Custom** and then make sure **Cookies** is UNchecked

Learning Objectives: What to "get"

- ☑ What is data, really? What are databases, at their core? What good are they, in real life & in business?
- ☑ What's the big idea of "the cloud?" Why use it for apps & data we work with?
- ☑ Get how startup culture works & drives the world's innovation.
- ☑ See for yourself how tools, like Salesforce, let you do a lot, without a lot of effort/skill/knowledge.
- ☑ This stuff's not nerdy. It's cool, it's tech-boosted business and women belong.

Checkpoints: Get points

When you reach these checkpoints in the lab, make sure your screen matches the screencap shown there. If not, fix whatever's wrong before going on. It's a good idea to run the grader app at every checkpoint, so you can see any mistakes so far & how to fix them. (Just ignore errors about steps you haven't done yet.) **But be sure to run the grader app at the end of the lab, at least, before going on to the next one so you don't lose your work!** (See https://www.maxzplace.com/grader-info for grader app installation/info.)

1 After **Step 82** you should be viewing the fake data values you entered for your first **Pitch** record. If not, click your **Pitches** tab and then click on the **Pitch ID** to open that record's details. (80 pts)

2 After **Step 98** you should be seeing a table w/4 columns (**Pitch ID**, **Business Name**, **Investment Amount** & **Equity Percentage)** & at least 4 rows of fake data you added (2 VCs+2 Angels). (20 pts)

Tips: Get more

The big idea here is digital business enablement/transformation. **If you zoom thru the steps just to get to the end, you'll miss out!** The steps are just the "what." The story parts give you the "how" & "why." Read to experience. Experience to learn.

Resources: Get help

Stuck? **NEVER TRY TO UNDO/REDO THE WHOLE LAB**—that can make things worse! Instead, look for a fast fix, 24/7, at the Help FAQ at MaxzPlace. No luck? Then post to the Help Forum there to get answers ASAP!

Max's Distinctive, Impressive BizTech Student Blog

Monday, September 16, 2019

I did it! Check this OUT

Ok, so I really, *really* wanted to impress my new "suit"-friend/boss Riley and make this the best app-for-tracking-pitches-to-VCs/Angel-investors on the face of the planet and……I did! (I think). My own totally killer mobile app. Built by me. You HAVE to try it for yourself. Seriously. It's fun. Promise. I'll list out what I did, step-by-step. Just follow along. It's super-easy.

But first, before you fire up Salesforce, let me give you the gist so you know where this is going. To start out, I created what SF calls an "object". (Prof says most databases call them "tables," but SF likes to be different that way—ok, whatever—we accept and move on.) Tables/objects– they're just a way to organize the data into lists, really. Rows and columns of data are like the list of players on the scoreboard at a Giant's game.

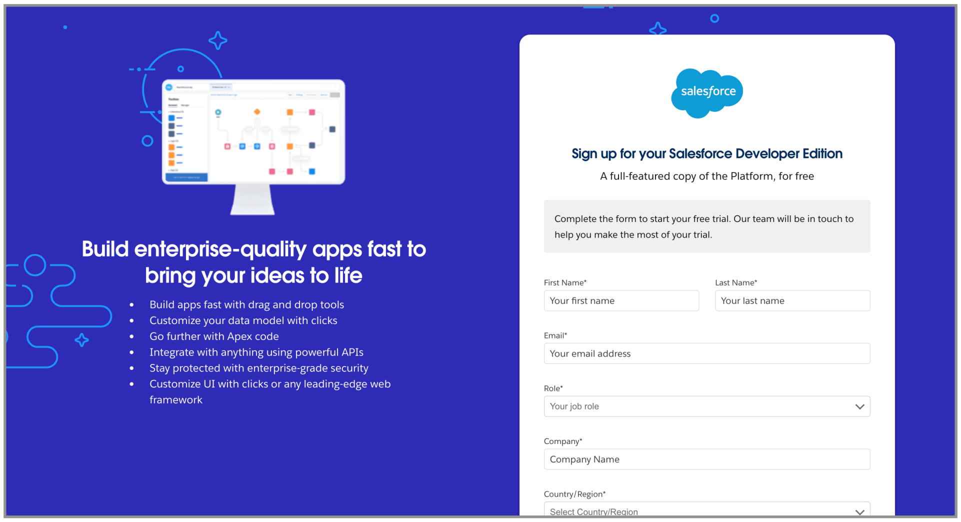
We're used to thinking of lists as bunches of the same kinds of things (players), where each row is one individual of that type of thing (eg Buster Posey) and the columns tell different kinds of things *about* the things in the rows, (eg Buster wears the number 28, plays the catcher position — "C", batting average=.292).

So then in SF, **objects** are like lists of things you want to keep track of and when you create an object, you name it that way (like "Players"). And the columns are called **fields** and you name the fields too (like "Player Name", "Position" & "Batting Average", unlike the scoreboard). The field names are like the column headers for the list. You can have as many fields as you want (almost) and you can name them whatever makes sense for your app.

Now, back to my app for Riley. She wanted to keep track of these sales "pitches" that she's going to be making to the VCs & Angels to get them to invest. And I realized, that's just like the baseball players—just keeping a list of the investors she's pitching with the columns of stuff about them so she can save it and pull it up on her phone whenever she needs it.

Then I knew I just needed SF for setting up the object & the fields and the layout of how it should look, like in the tutorial I did. Seemed easy enough. Turned out it was, mostly, but computers are picky—I had to get each step just right. But once you get the details set, it does actually work. Ok, so now you HAVE to try this out for yourself. I'll show you every step. You'll be amazed. Promise!

First, go get an SF account but **DO NOT GET THE 30-DAY FREE TRIAL ACCOUNT!** Huge mistake! Instead, go to https://developer.salesforce.com/signup and get the free, lifetime Salesforce "Developer Edition" (DE) account. The web page with the form should look like this:

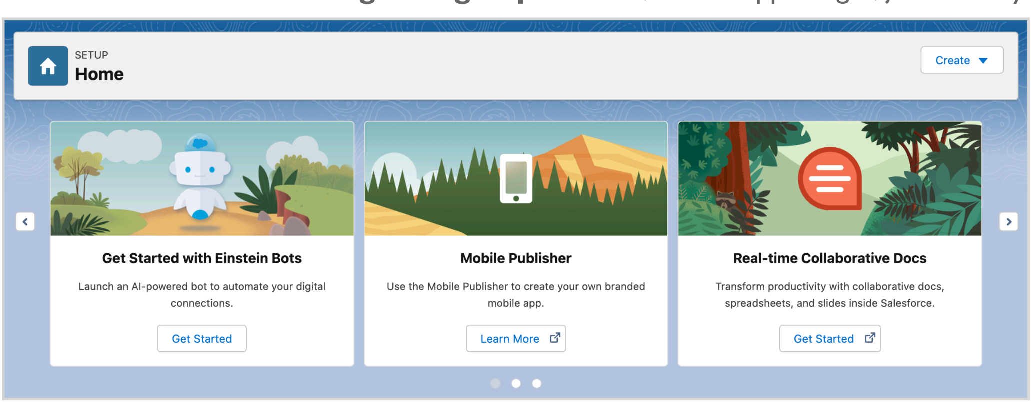


On the signup page, enter your real name and use a real email address—one you can log into—bc they send you an email with the link to set your password & get started. (**Do <u>NOT</u> use a Yahoo, Hotmail or AOL account**—they don't play nice with SF! **To be safe, just create a new Gmail account to use just for this.**) For **Role** and **Company**, anything's ok, but for **Country**, be sure to pick **United States**, <u>even if you're someplace else</u>, just to make sure everything will work later on. Then for **Postal Code** you can just use your own or you can use mine (**95192**) if you're outside the US. For **Username**, you can enter anything that LOOKS like an email address, even if it's not real, eg "hippo@suitcase.sauce" will work as long as nobody else already got it! Whatever—just make sure you remember it and your pw, especially. Then, click **Submit** and just wait, **<u>even if nothing happens for a long time</u>**. **Do <u>NOT</u> get impatient and redo it!!** (Trust me.)

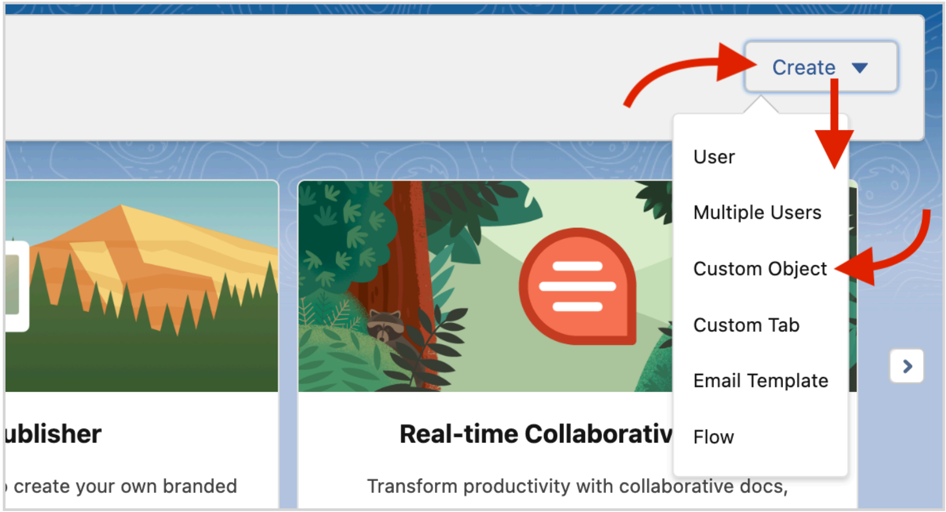
In a few minutes you'll get a "Welcome to Salesforce: Verify your account" email from them at the address you entered. See where it says "To easily log in later, save this URL:"? That's your personal SF login link! After this, always use that for logging in to avoid problems. But for now, click **Verify Account** & follow the instructions to set your password, etc & voila—you're logged in! Now, don't panic—just follow along with what I did.

So first, like I said, I knew I needed an object to hold a record for each pitch Riley made (the "please invest in my company" kind of pitch, NOT the baseball kind). SF has some built-in ("standard") objects for accounts & leads & other common business stuff, but not one for investor pitches, so I had to create my own (a "custom" object) which I creatively named "Pitch":

1. So first, I clicked on the gear icon near the upper right corner, by the bell, & then, on the drop-down that appeared, I clicked **Setup** (do <u>NOT</u> click **Service Setup**–never use that one) to make sure I was on the **Setup Home** page that looks like this (different pics in those panels is ok but if there's no gear icon at all then click **Switch to Lightning Experience**, on the upper right, just left of your name)

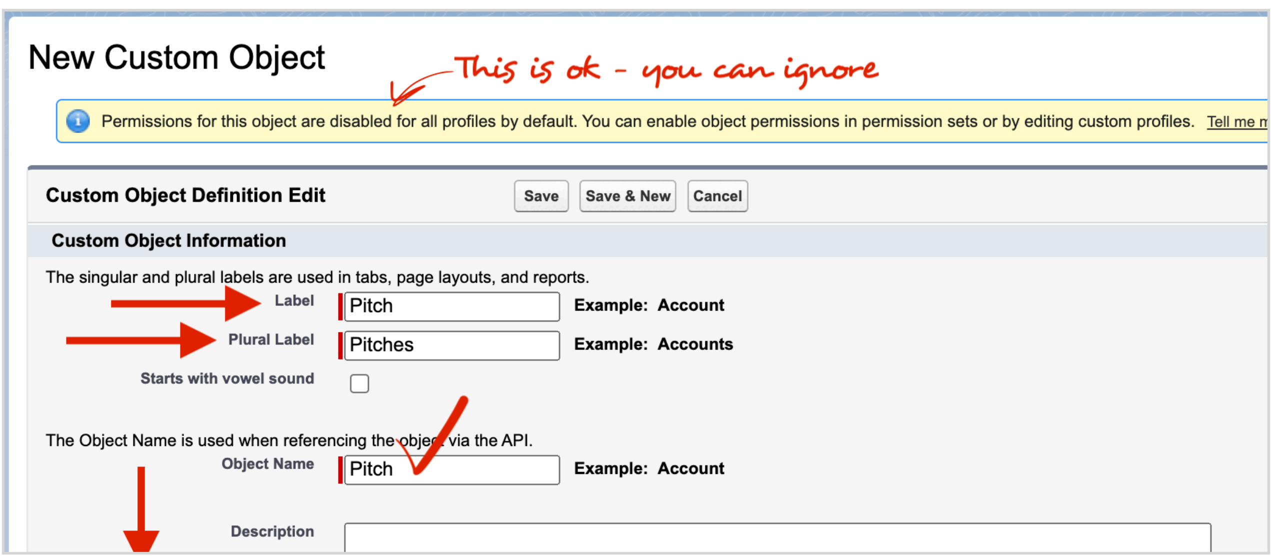


2. Then I clicked on the **Create** button and selected **Custom Object** from the drop-down



That brought up a new webpage labelled **New Custom Object** at the top. So far, so good. There was a form to fill in and from the tutorial, I knew the slots with red bars on the edge are mandatory so…

3. Under **Custom Object Information**, I filled in the **Label** slot with "Pitch" (don't type the quote marks—they just show you exactly what to type—the stuff between them)
4. And for **Plural Label**, I used "Pitches"
5. I noticed SF had auto-filled **Object Name** with "Pitch" so I assumed that was ok and I skipped down to **Record Name** under the **Enter Record Name Label and Format** section



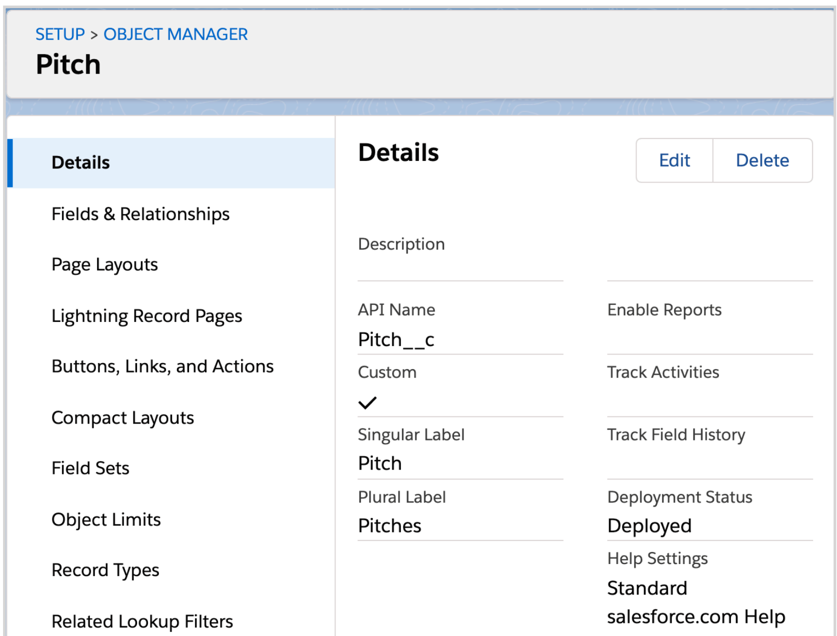
So what about **Record Name**? I remembered in class we learned that **records** are just the individual rows of data that go together for the kind of thing you're tracking (eg "Buster Posey," "C", ".292" all would go together as a baseball player record). And Prof says you want some kind of ID—some field that'll have a different value for every record, just to help keep them all straight. Like for people records, they use Social Security numbers a lot, but Riley wouldn't be messing with that stuff, so I Googled around & figured it out.

Turns out SF's got that covered—you can make it automatically assign a unique ID to every record as it's being created. You just use the settings to say how you want them numbered and how you want them to look:

6. For **Record Name**, it already said "Pitch Name" but I changed it to "Pitch ID"

7. Then, I used the **Data Type** drop-down menu to select **Auto Number**
8. In the **Display Format** textbox that opens up underneath, I entered "P-{000}" (tells SF to make the IDs look like "P-027" and such; good enough to handle a thousand investors—plenty, but be sure to include the curly braces!)
9. For **Starting Number** enter zero (the number 0, <u>NOT</u> the letter "O")
10. Then I skipped down to the bottom and clicked **Save**

That brought up a page of details about **Pitch**, my first very own custom SF object in the cloud! (Ok, not exactly a viral sensation but a veritable…"micro-achievement"?)



11. Next, I knew I needed to add those fields that Riley would want to track for each of her pitches so I clicked on **Fields and Relationships**, on the left-side vertical menu, just below **Details** with the blue background behind it

Then I could see there were already three built-in ("standard") fields created by SF and the **Pitch ID** one I had set for the **Record Name** when I created **Pitch**. To add some for Riley:

12. I clicked on **New**, to the right, above the list of fields

That brought up a **New Custom Field** panel with a section labeled **Step 1: Choose the field type**. Ok, what's up? So, here's where SF wants to know if the field is going to hold numbers, letters, dates, whatever it is so it can store & then display the field's data properly.

So here I took a deep breath and thought for a sec, "What would Riley want to know about each pitch AND what *kind* of data would that be?" Ok, Max, just start with the obvious—the name of the business, ie the VC firm she made that pitch to.

And biz names are just text so:

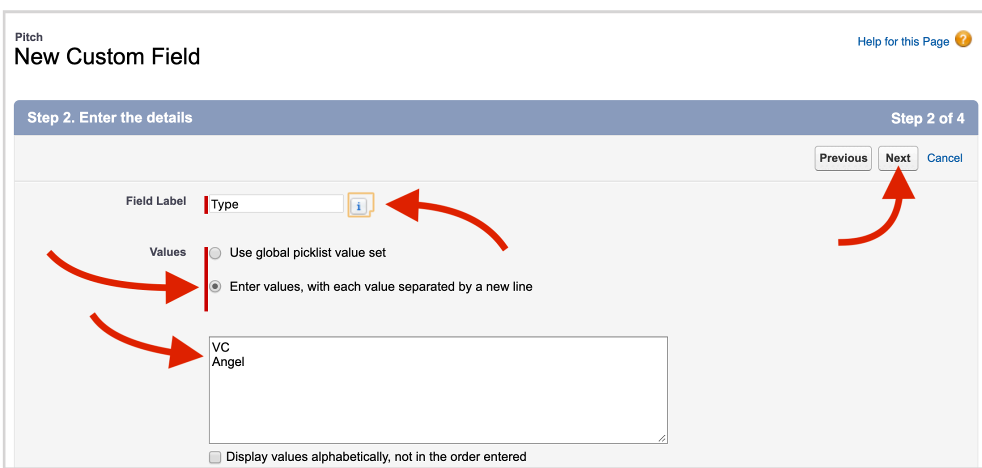
13. For **Data Type**, I scrolled down to find **Text** & clicked the little circle (aka a "radio button")
14. Then I scrolled down to the bottom and clicked **Next** (lower right) to continue

15. **Step 2** wanted me to enter the details. For **Field Label**, I entered "Business Name" & when I hit my tab key to go to the next slot, SF auto-filled the **Field Name** slot with "Business_Name" (w/ an underscore)
16. For **Length**, I put in the number 40 (figured that should be enough for any business name)
17. Then I checked the checkbox for **Required** so SF would **Always require a value in this field in order to save a record** (seemed to make sense–every pitch kinda needs the name of the business)
18. Then, I scrolled on down and clicked **Next**
19. That took me to **Step 3** which was stuff about **Field Level Security**, which I totally ignored & I clicked **Next** again, but only after waiting for the page to fully load (impt!!—learned the hard way)
20. Then I got to **Step 4**, a page about layouts (which I waited to let fully load again) & then bypassed like the last one by clicking **Save & New** to start back at the beginning, so I could add another field

(BTW, as I was adding these fields, I messed up a couple of times and got lost & I kind of panicked. But it turns out, it's ok bc if that happens, all the stuff you saved is still there and you can just use **New** again to get back into adding fields, just like before, to finish off. No worries.)

So now…more fields, right? Hmm…ok, she would want more than just a list of the names of the places she pitched, right? Like stuff *about* them. But what exactly…? Ok, so they could be a VC or an "Angel"-type investor, right? Probably good to know which is which—so how about a field for "type?" And there's only two possible options (data values) for that so she'd want to be able to just pick one instead of having to type it out each time…and…behold—in the **Data Type** list, I found the perfect thing:

21. I chose **Picklist** (NOT the Multi-Select one) & then clicked **Next** like before
22. For **Field Label**, I entered "Type" (to tell which type of biz, VC or Angel, for each **Pitch** record)
23. Then, just below **Field Label,** next to **Values**, I clicked the **Enter values, with each value separated by a new line** option & that opened a textbox where I typed "VC" on the 1st line & then hit **Enter/Return** & typed "Angel" on the 2nd line



24. Then, like before, I clicked **Next** & then waited for the page to fully load (remember? always let it load) and then I clicked **Next** again (and waited again, yes) and then **Save & New**, to add another field

Ok, so what other info would she want to keep for a pitch? If I were trying to hit someone up for big bucks, seems like I would probably want to keep track of their name, to prevent yet another entry in "Max's Big Book of Awkward Moments." So, I went ahead and repeated the process to create another new field as follows:

25. For **Data Type**, I selected **Text** & clicked **Next**
26. For **Field Label**, I entered "Contact Name"
27. **Length**: 30
28. Then (you guessed it)—**Next** (pause) & then **Next** (pause) & then **Save & New**, to add another field

Next—pretty safe assumption—you would want to keep their contact info too, right? Fortunately, I saw the clever geeks at SF had included a data type just for handling phone number formats, so:

29. **Data Type**: Phone
30. **Next**
31. **Field Label**: "Mobile"
32. **Next** (pause) & then **Next** (pause) & then **Save & New** (remember—<u>don't click thru too fast</u>!)

Then, unsurprisingly by now, I saw there was also a special data type for email address fields, so:

33. **Data Type**: Email
34. **Next**
35. **Field Label**: "Email" (less typing than "Email Address" & the "Address" part is obvious)
36. **Next**, **Next**, **Save & New** (with pauses in between, always!)

Now I was on a mini-roll…at least!

Ok, so at each company she pitched, she would want to keep track of the dollar amount they talked about investing (kinda the whole point). I thought about using text but then I remembered—Prof said if you type numbers into a text field, they're just like letters, etc—you can't do math on them. What if she wanted to…say…add up the total amount for all pitches, or list all the pitches for over $200k, or whatever? So I looked for a number-based field type and found **Currency** (perfect) & set it big enough for multi-million deals (hah), just in case:

37. **Data Type**: Currency
38. **Next**
39. **Field Label:** "Investment Amount"
40. **Length**: 12
41. **Decimal places**: 2
42. **Next**, **Next, Save & New** (w/pauses)

And we learned if they invest money, then they get a piece of the action (aka "equity percentage") ie how much of the company (what %) they own for their investment:

43. **Data Type**: Percent
44. **Next**
45. **Field Label**: "Equity Percentage"
46. **Length**: 3
47. **Decimal places**: 1
48. **Next, Next, Save & New** (w/pauses)

Then it occurred to me that the date she made the pitch might be important to know & I found a data type for that too:

49. **Data Type**: Date
50. **Next**
51. **Field Label**: "Pitch Date"
52. **Next, Next, Save & New** (w/pauses)

Then, envisioning how she would actually use this stuff, I guessed she would want to keep track of when she would plan to follow up with them after the initial meeting so I added that too:

53. **Data Type**: Date (just like the last one)
54. **Next**
55. **Field Label**: "Follow Up"
56. **Next**, **Next**, **Save & New** (w/pauses)

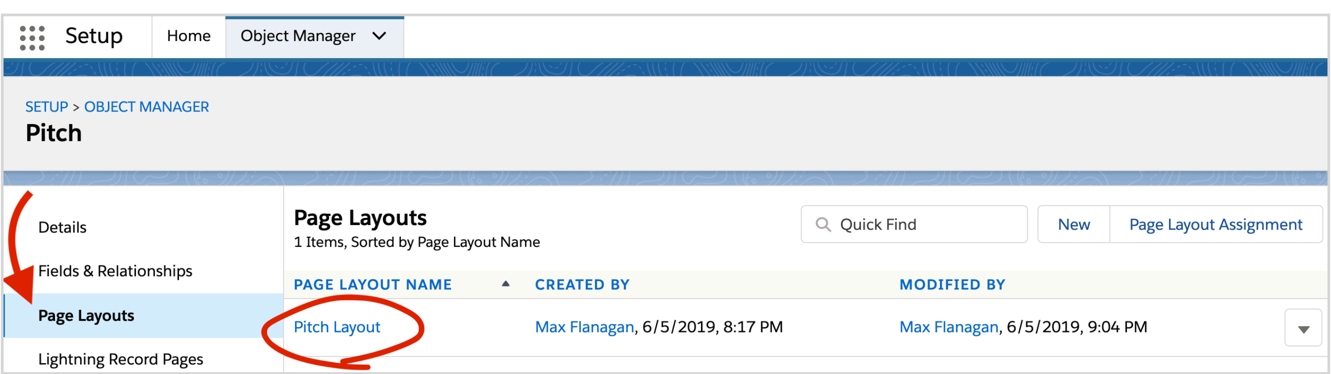
Finally, she said she needed to type in written comments about each business, to remind her how things went. Looking at the text options, **Text Area (Long)** and **Text Area (Rich)** seemed like overkill. But 255 characters seemed ok enough for comments so:

57. **Data Type**: Text Area
58. **Next**
59. **Field Label**: "Comments"
60. **Next**, **Next** and then...WAIT!!!—**NOT Save & New** this time (bc I was done with adding fields)—so just plain **Save** this time

Ok, so I had a custom object (table) with a bunch of custom fields (columns) of all different types and it took...only a few. Not so bad. Then it was like, ok what else do I need to make it an app—something she can actually use to do stuff?

Well, one would imagine she'd need some kind of form page for entering the data. And there it was, the first thing I saw, right under **Fields & Relationships** sounded promising:

61. I clicked on **Page Layouts** and there was one SF already made called **Pitch Layout**
62. So I clicked on it (on the words **Pitch Layout**) and…

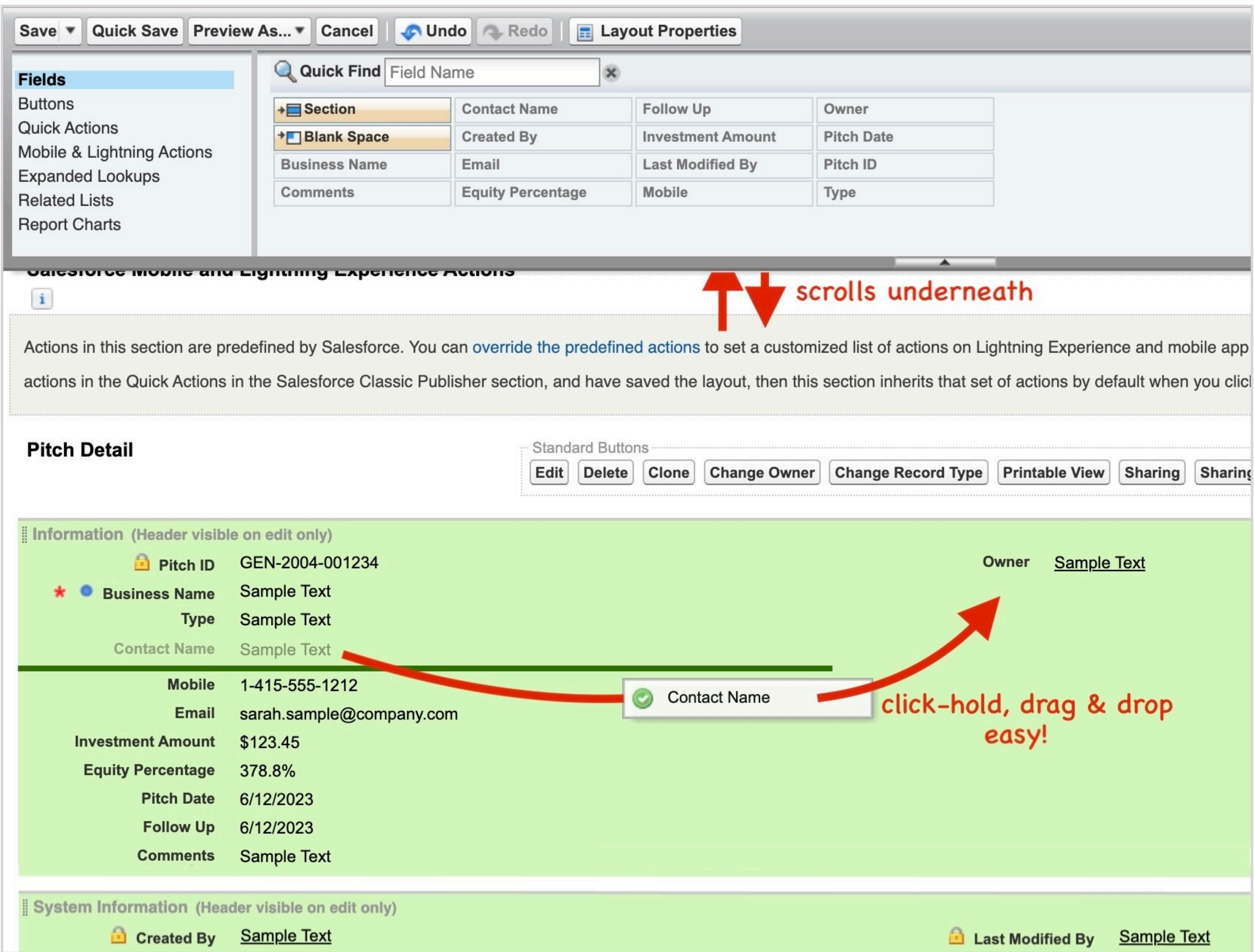


There was this list of **Pitch** fields in light text in a panel at the top of a long page. The panel kind of floated there, always at the top, even when I scrolled around the stuff below it.

When I scrolled down I found a section labeled **Pitch Detail** and I realized it was showing a mock-up, like a sample, of how the fields & values would look on the screen when you were entering a new **Pitch** record, like on your laptop. They were just listed there in the order I'd created them, all lined up in one column on the left. The right-hand column just had the one SF-created field, **Owner**, at the top, with **Created By** and **Last Modified By** at the bottom. Hmm…

Looked ok, but kinda super-lopsided. Not the best for impressing my user/boss (Riley). Here's the thing, tho—when I put the cursor over a field, it changed to a four-directional arrow thingy…drag & drop? Yesss! When I clicked down onto a field, I could drag it around & drop it wherever the background had turned green, so:

63. I pressed down & held on the **Contact Name** field in the left-hand column to drag it over to the right-hand column and I dropped it there under **Owner** and it stuck!

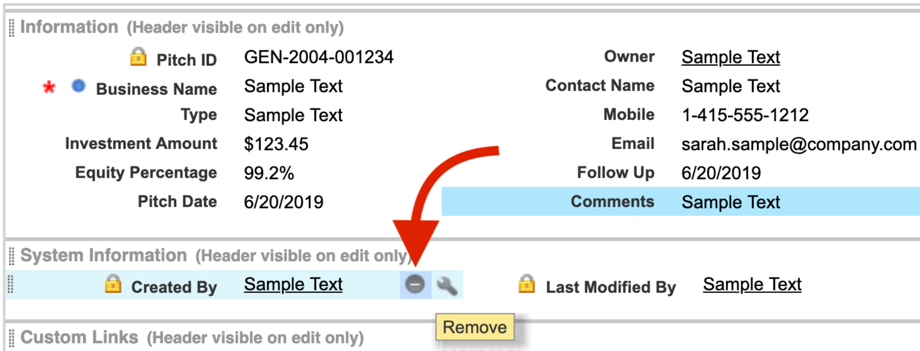


64. Then I did the same to drag **Mobile** under **Contact Name** (goes with contact info)
65. Then I dragged **Email** under **Mobile** (also goes with contact info)
66. Next, I dragged **Follow Up** under **Email** (needed for setting up next meeting)
67. And finally, I dragged **Comments** under **Follow Up** (good to review for next meeting)

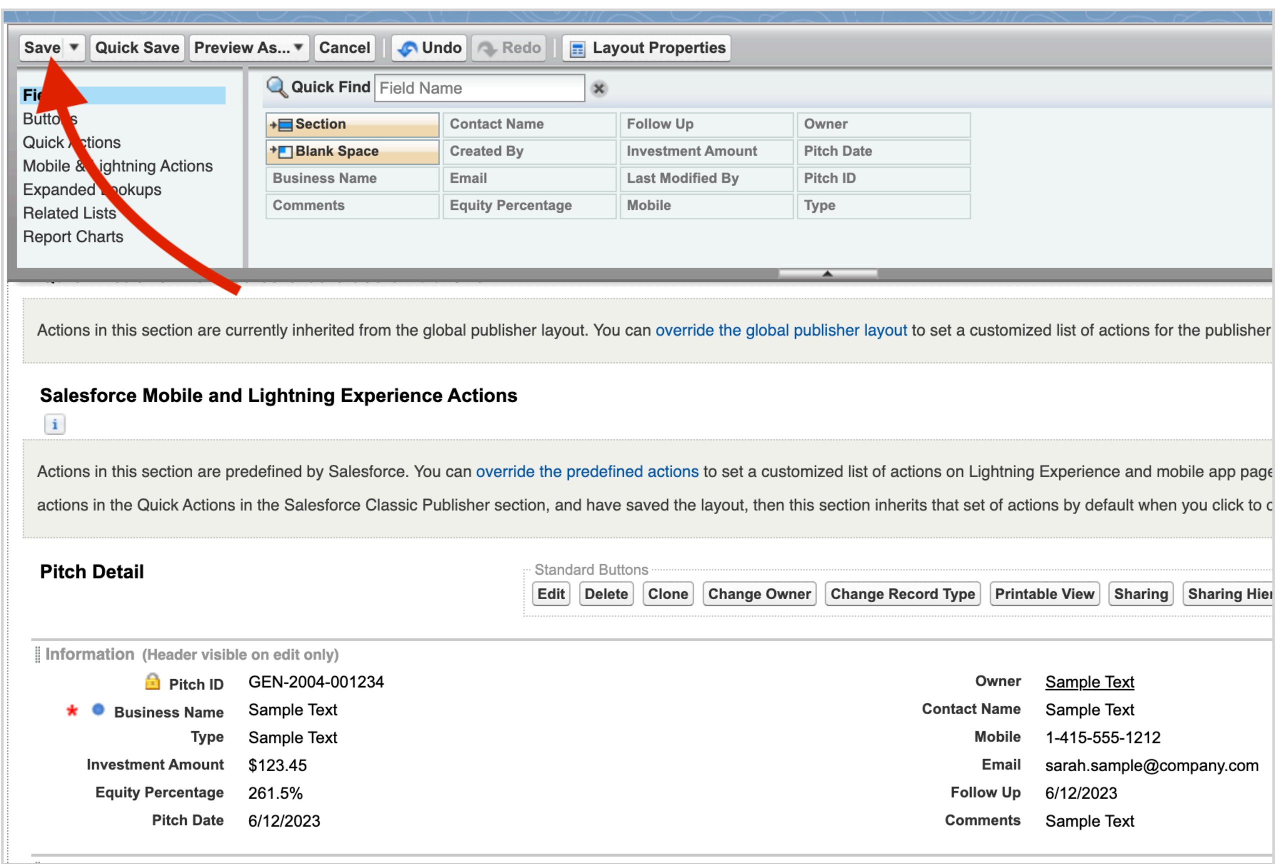
Now, whenever Riley viewed a record or entered a new one (on her laptop), the screen layout would have this nice 2-column look with the stuff she needed for the next meeting grouped together on the right. Way better.

I also wanted to hide the system stuff that Riley wouldn't need—**Created By** & **Last Modified By**—so it would look cleaner to her. Totally doable:

68. I rolled the cursor arrow over the **Created By** field, just below **Pitch Date**, and a little circle with a minus sign (-) appeared next to this tiny little wrench icon
69. When I touched the little circle with the minus sign inside, a **Remove** label popped up to show what it does, so I clicked & poof—it was good & gone



70. I did the same thing (**Steps 68 & 69**) for **Last Modified By** (under **Comments**) & then I noticed both the fields I'd "deleted" from the layout had "undimmed" in the panel, like…ready to be dragged back down into the layout later on (not that I would but…just in case)
71. Ok, so now this was looking like a decent, respectable layout & I wanted to try it out, like put in a record, so first I clicked the **Save** button up on the top left of that top panel:



But now how to get the layout to like…work?

So, from the tutorial I did before—if you want to be working with the data, like actual records, you have to be working inside an app, *inside Salesforce*. Yeah, weird. But apparently you can have multiple apps inside your company's Salesforce account because different people in the company have different jobs so they each might want different apps to use on different parts of the data in the same database. Apparently, that's why they call it "enterprise software"—cuts across the whole company (not the Star Trek spaceship, sadly).

So far, all this was just in **Setup** mode—setting up the objects, fields, layouts, etc. Turns out there's this thing called the **App Launcher** with already built-in apps to let you enter, display, search, etc, on the actual data.

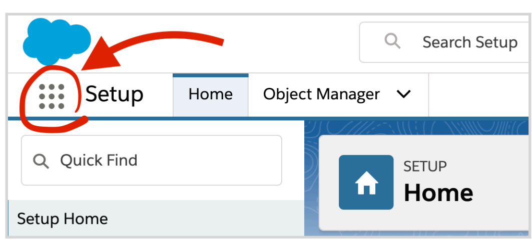
And to give everybody in the "enterprise" what they need to do their job, you can customize the built-in apps (and/or make your own) by adding a tab that lets you access the data.

So before leaving **Setup** mode, I created a tab so I'd be able to add/view data *inside* the **Pitches** object:

72. I clicked **Home**, next to **Setup** in the upper left corner
73. Then, I scrolled down the left-hand vertical menu down to find **User Interface** and clicked it to drop down its sub-menu underneath
74. Then I scrolled down the **User Interface** sub-menu to find **Tabs** and clicked that
75. That brought up a **Custom Tabs** panel with a **Custom Object Tabs** section containing a promising-looking **New** button that I boldly clicked on
76. Then a **New Custom Object Tab** panel appeared with a drop-down menu by **Object** that let me select **Pitch**
77. For **Tab Style,** I clicked on the magnifying glass to bring up a panel of choices and I chose the treasure chest to signify my (potentially) future fortune :)
78. Then the old **Next**, **Next**, **Save** routine

Ok, **Pitches** tab done. No rocket science involved (so far). But now how to get out of **Setup** mode, find the tab I just created & use it to DO something, eg adding in data, viewing it & using it for stuff?

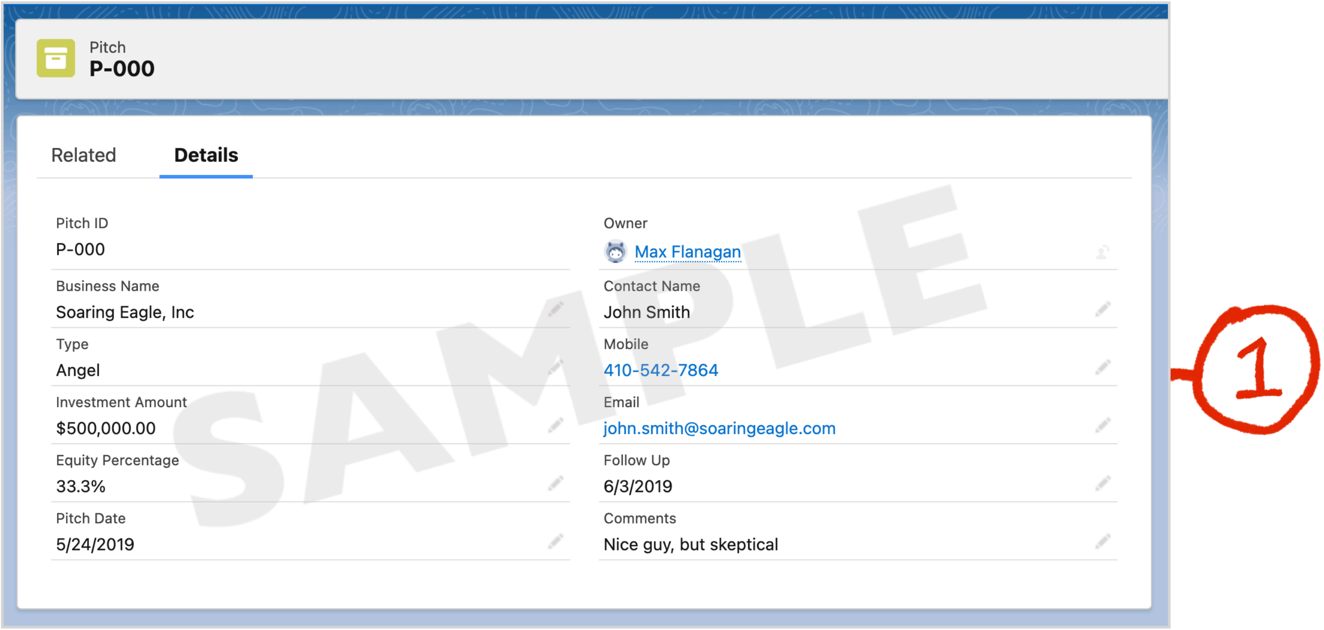
Ok, so there's this little "waffle" thingy on the upper left, just under the blue cloud, like rain falling down? Right. Anyway, if you run the cursor onto the dots, they kind of pulse and turn colors. (This is what passes for cool FX in Salesforce-world, apparently.)



Then, a little label appears to tell you that's the **App Launcher**:

79. When I clicked on the **App Launcher** grid, it gave me a window of apps & I just chose **Marketing CRM Classic** (aka **Marketing**, for short) because…hey, I'm a Marketing major (remember?) and anyway it worked out bc there was a graph of fake sales data & some other random stuff but there above it was row of tabs for accessing the data, including my very own **Pitches** tab sitting on the right
80. So I clicked on the **Pitches** tab label (NOT the little down-arrow) & I got a page that seemed like it would list **Pitch** records if there were any, but obviously not yet, so then…
81. I clicked the **New** button on the upper right & behold—a form, just like my gorgeous layout

82. And it actually worked—I entered some fake data for each field & clicked **Save** and…there it was, my first **Pitch** record, automatically assigned **Pitch ID=P-000**, as planned—haha!



Now to get the full effect of this next part, you need at least a few records into your database, so…

83. Use the **Pitches tab** and **New** button again (just like before) to add three (3) more **Pitch** records with different random data (just make up stuff). Remember, **Business Name** was the only field we made required (hence the tiny red star by that slot label) but you should fill in every slot anyway just so they'll all look like real actual records. (To save clicks, instead of **Save** you can click **Save & New** to get a new empty form to fill in each time.)

BTW—I noticed, when you're entering data, SF catches certain typos, but not others. It lets you enter letters in into a phone number field (lame). But it does catch/stop you from entering an email address in the wrong format. As long as the format's right though, it takes it, even if it's not a real, working address. So I had to be careful—messed up data would NOT look good in my demo for Riley.

Ok, so the data was in there. Cool. Next, I wanted to try out the mobile app on my iPhone to see if I could view the records I'd entered & even add a new pitch record that way, like Riley would want to. If you have a mobile, install the free **Salesforce** app (Google Play/iTunes), open it up, click **I Accept** and log in (same username and password) and just follow the verification instructions, click **Allow** & **Allow** again & you're in!

84. So then I had to click **Get Started** to clear the "Welcome to the new.." panel & I saw this long **Menu** (If yours looks different, tap the little 3-bar "hamburger" menu icon on the bottom right to get here.)
85. Then I tapped **All Items** (near the top) & I scrolled way down to find my **Pitches** tab
86. I clicked on that and...voila—I saw **Recent Pitches** showing a list of **Pitch IDs** for the pitch records that I'd just added on my laptop, so—kinda yay, but were those really *my* records? Where was the data?
87. I figured hey, it's an app, right?—so I tried clicking on one and, true to app-world norms, it opened up and I could click on **Details** to see all its fields &…it was mine, alright (so far/so pretty dang good)

The mobile version looked a bit different than my laptop, though. Instead of my clever-looking two-column layout, the fields were just in a long single column—I had to scroll down to see everything. Not super-ideal but hey, it's a phone. Not a ton of "real estate" there. On a tablet, maybe. For now…oh, well.

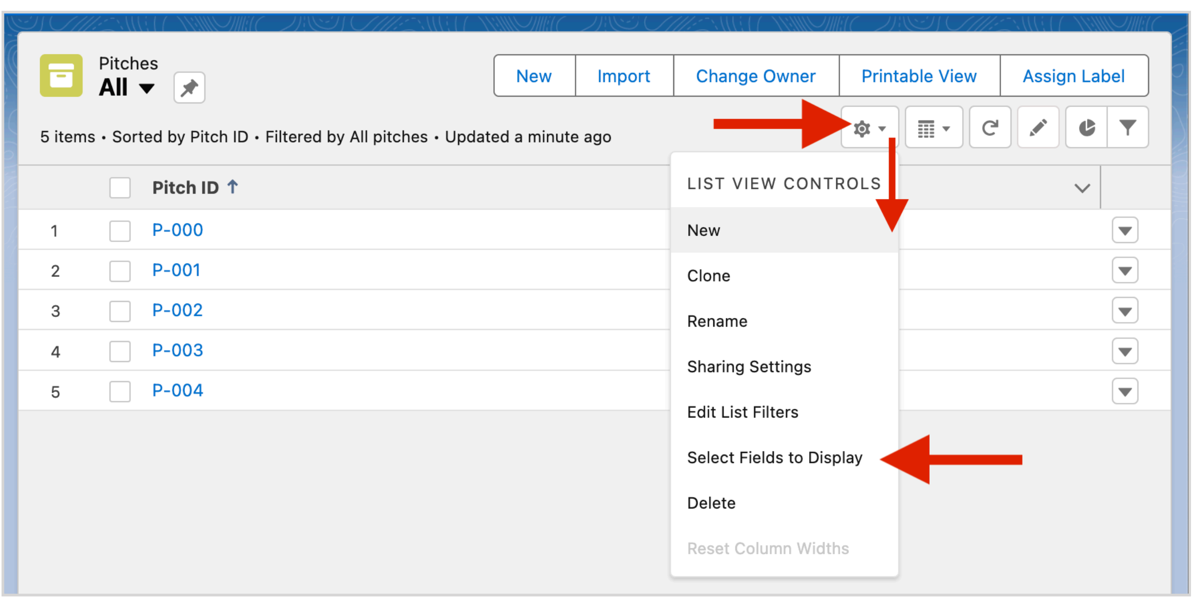
The big question I was dying to know now—would it actually work as a mobile app?

88. At the upper right corner, I tapped on the gray circle icon with **... More** to find the **Edit** button (turquoise pencil icon) and when I tapped that, it let me touch the field values and change them however I wanted
89. Then after I tapped **Save**, I went back to my laptop, used the **Pitches tab** and clicked on the **Pitch ID** number of the record I had just edited and…behold(!), the changes I'd just made were there, good to go, already—the magic of the cloud thing at work behind the scenes, apparently. (You might have to use your browser's refresh function to make that work.)
90. Back on my phone, I tapped the left-arrow at the top left (Androids, use your back buttons) to get back to the screen listing the **Pitch IDs** and I tried out the **New** button at the upper right corner (like Riley would do to record a new pitch)
91. I filled in the fields & clicked **Save** (top right) and the new **Pitch** record showed up on my laptop, as expected, making me feel kinda…victorious (?) & only slightly geeky (slightly yikes!)

So anyway, it was working. I was…semi-thrilled. But it didn't feel like blow-away-Riley level yet. Seemed like it should show more than just the IDs when you click on **Pitches**—at least you'd want to see the names of the businesses so you'd know what details you're going to get when you click on one.

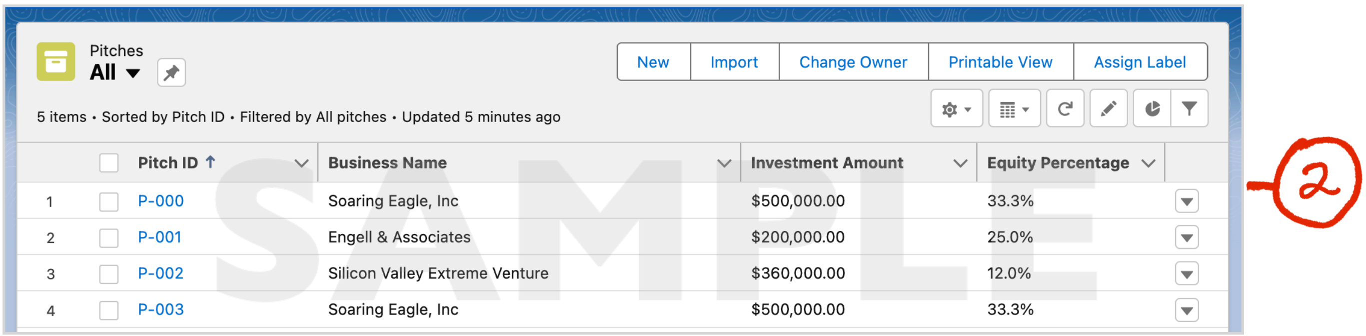
And maybe you wouldn't even need to click if some of the main detail fields were also showing up in the list, along with the IDs. Seemed like there had to be a way:

92. On my laptop, I hit the **App Launcher** again like before & selected the **Marketing** app again
93. Then I clicked the **Pitches** tab (the label, NOT the down-arrow) and then, on the upper left, next to **Recently Viewed**, I clicked the down-arrow and selected **All**, hoping to see more of my data but still there was just that (nearly) useless list of IDs with nothing else so...
94. Looking for **Pitch** tab settings, I tried the little gear icon toward the right, below **Change Owner** (NOT the **Setup** one at the very top right by the bell) to see what was in the drop-down
95. Near the bottom of the drop-down, hah, I found **Select Fields to Display** & clicked it



96. A listbox magically appeared, listing the **Available Fields** on the left and **Visible Fields** (with **Pitch ID** only) on the right & suddenly I "got it"—I clicked **Business Name** to highlight it and then I just clicked the little right-arrow to move it over to the **Visible Fields** side

97. Then, I thought "There's probably room for a couple more—what would be the most important ones Riley would want to know at a glance?" and I clicked on **Investment Amount** to highlight it and used the right arrow to move it over to the **Visible Fields** list on the right the same way…& same for **Equity Percentage**, so it sat at the bottom of the list
98. Then I clicked **Save** and…there was my list of records, all columns & rows, like a good little database & set up just the way Riley would need for getting stuff done better/faster/smarter

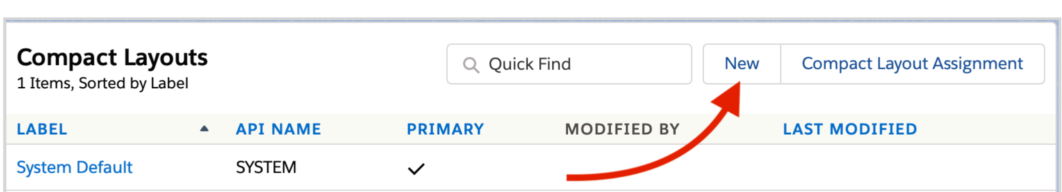


99. Then, I clicked the tiny little pin icon on the upper left by **All**, to be sure this listing would be the one that showed up whenever the **Pitches** tab got clicked
100. Then I thought "Uh-oh, wait—this enterprise deal means Riley will have her own login to this same database—but will the **Pitches** tab look the same for her?" so I clicked the little gear again (NOT the **Setup** one), found **Sharing Settings** on the drop-down & clicked it
101. I was right, sort of—it lets you make the list viewable by just you, or everybody (all users) in the "enterprise" (eg me & Riley & her partner, etc) or by just a certain group, but it was already set to **All users can see this list view,** so I just left it that way and hit **Cancel**
102. Then, just to be sure, I tried clicking on one of the **Pitch ID**s and indeed, that was how she could "drill down" to see all the details, instead of just the key ones I had picked (and later on, if she thought some other fields should be the ones to show up first, I knew that would be an easy fix, now that I had the hang of this)

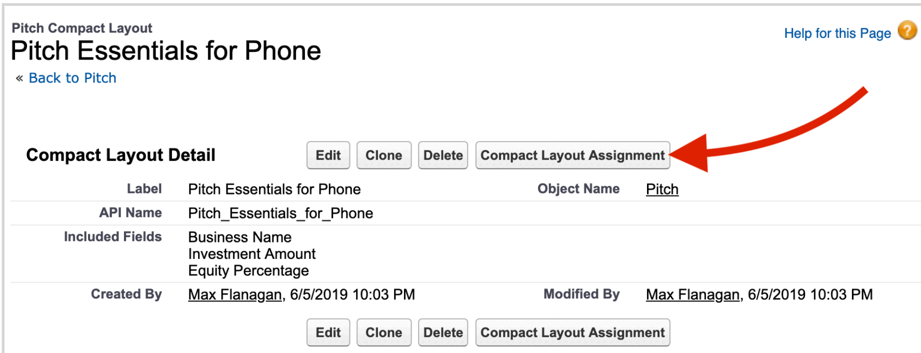
So now I felt like I had my MVP (you remember, right? — "Minimum Viable Product") so I *could* have stopped there but…

I just wanted to add a little more polish before the big unveiling so I tried this **Compact Layouts** feature (see below) that I'd noticed on the **Pitch** object settings page before. I had a hunch it was for setting up layouts for small displays, eg, phones, etc. Turns out I was right:

103. I clicked on that **Setup** gear icon at the upper right corner, by the bell, and then, on the drop-down that appeared, I clicked **Setup** (do <u>NOT</u> click **Service Setup**–never use that one)
104. Then, I clicked on the little down-arrow on the **Object Manager** tab next to **Home** on the upper left and selected **Pitch** to go to the **Pitch** object settings
105. Next, on the left-hand vertical menu, I clicked **Compact Layouts**
106. Then, on the **Compact Layouts** panel, I clicked **New**

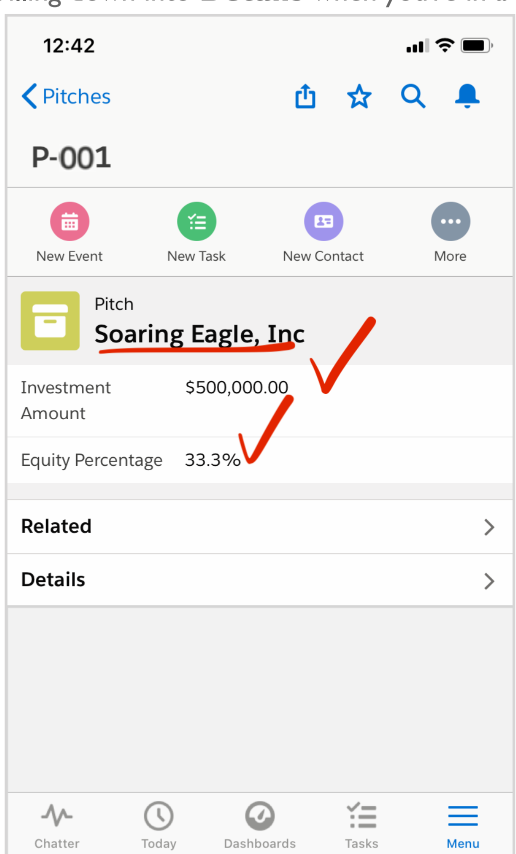


107. On the **Compact Layout Edit** panel that appeared, I entered "Pitch Essentials for Phone" in the **Label** slot
108. When I tabbed, the **Name** field auto-filled with "Pitch_Essentials_for_Phone"
109. Under the **Available Fields** listbox, I highlighted **Business Name** and clicked the **Add** arrow button to move it over to the **Selected Fields** listbox
110. I did the same for **Investment Amount** and **Equity Percentage** since those are the key things to know for each pitch
111. Then I clicked **Save**
112. On the next page that came up, I clicked **Compact Layout Assignment**



113. Then on the next page, I clicked **Edit Assignment**
114. For the **Primary Compact Layout** pull-down menu, I selected the layout I'd named **Pitch Essentials for Phone**
115. Next, I clicked **Save** to lock it in

When I went to my iPhone and clicked on a specific pitch—there was a nice header at the top of that pitch's screen, showing the **Business Name**, **Investment Amount** and **Equity Percentage**–all the essentials so you might not have to bother drilling down into **Details** when you're in a hurry (like Riley always is).



That's when I knew I had it. It worked, looked good & was useful for actually doing stuff. Real stuff. Big-deal stuff.

I could picture Riley, sitting in her car with her phone outside some slick hot-shot VC company, adding her comments about how the big pitch meeting just went, and she's using Max's mobile app!

And I'm not even a geek (as we've established), but I have to admit SF makes it easy to put this stuff together and when it's done, it's very…gratifying? Ok, fun. It's honestly fun. There. I said it. But only in a totally, seriously non-geeky kind of way.

Next step is to show Riley. Hopefully she's going to be so blown away (*has* to be). If so, maybe this blog gig will turn out to be kind of "distinctive & impressive" after all? If anybody's out there—my "followers"—stay tuned…

Older Posts • • • • • • • • Home • • • • • • • • Newer Posts

All done? Good work! Now…

Be sure to run the Grader App right now so you don't lose your work!!!

(Always run the grader app to score your work before going on the next lab!)

Then take a few to give us your feedback & be entered to win AirPods!

Go to http://tiny.cc/MaxLabsFeedback

Enter with every lab for the most chances to win
(one entry/lab/student)

3 winners every term!