the Max Labs project

Business Systems Innovation Labs
Lab 3a Pre-flight Checklist

"Need Superpowers? Go Cyborg w/SF........8-O"

Now there are too many potential investors & Max can't keep up! But then she discovers she can make SF do most of the busywork ("process automation") and make her job scalable. Plus, she figures out how to use SF's CRM features to give her leads 1-to-1 attention! (they think)

Prep: Get ready

- ☑ Do NOT use Yahoo or AOL email with this assignment. They won't work! If you normally use one of those, consider creating a free Gmail account to use for this assignment. **If you already set up your account with Yahoo or AOL,** see **Step 8** below to learn how you can change the email address for an account, even though the login name for that account still looks like the old email address. It's easy!

Learning Objectives: What to "get"

- ☑ See for yourself how data can be totally unmanageable when it's not in a system where it can be well...managed (like when it's buried in emails, for example).
- ☑ Realize how you can make business processes manageable, and scalable, through automation (when your data's managed in a system).
- ☑ Discover the power of Customer Relationship Management (CRM) systems to track & ensure effective communication so customers are happier (& buy more).

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 129**, Max tells you to leave SF, open your own email inbox and find three messages sent by SF. First, open the message with subject "New Distant Investment Lead." (70 pts)
2. Next, open the message with subject "New (minor) Investment Lead for YOU (me) – Go!". (6 pts)
3. Then, open the message with subject "New Bay Area Investment Lead". (6 pts)
4. After **Step 158**, you should be on the lead page for Kyle Reese, viewing the activity history timeline at the bottom of the **Activity** panel. (18 pts)

Tips: Get more

Take the time, as you work, to think about what you're actually doing and how it's impacting Max's job. That'll be you someday!

Resources: Get help

Stuck? **DON'T 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

Saturday, November 9, 2019

Need Superpowers? Go Cyborg w/SF.......8-0

The best stuff happens by accident sometimes.

I was stuck in traffic, just scanning the radio & heard the word "cyborg" go by and was like "Ok, Terminator #17. Part-human/part-robot. We get it—enough already." But then I heard the guy saying he was a cyborg for real and he can "hear color."

Yeah, I know!

They said he was born with "achromatopsia," so he could only see in black & white, but...he wanted to experience color. So he designed a new electronic body part that would help.

Yeah, I know!!

Neil Harbisson: World's 1st Real Cyborg!!!

But I looked it up. It IS for real. Here's the interview (from NPR's "To the Best of Our Knowledge") and a vid of his TED talk. (TED's a bunch of free, short presentations by amazing people.)

Maybe I'll do a TED talk too someday cuz I'm a cyborg now (kinda) after my latest SF exploits.

Yeah, I KNOW!!!

I got overloaded and was going crazy 'til I found a way to make SF share the job with me. Here's the scoop—

First was good news. Riley got funding from an "angel." Bad news? It was only half and only if she could raise the rest by the end of the year. So the push was on for a bigger pool of potential investors she could pitch ASAP.

Good news—she got her geek co-founder, Linh, to build this awesome teaser webpage that she got posted to these online investment communities, "advertising" to invest in their startup. At the bottom, it says if you're interested to send your name, contact info & potential $ investment potential to *InvestorRelations@RileyzStartup.com.* (Not the real name, of course, but you get the idea.)

Then, bad news again. Guess who got put in charge of dealing with those emails?

Yeah.

At first it was no big deal. When an email came in, I was supposed to write back to say we got it, thanks & someone would get in touch soon. Then:

- if they were talking serious $, like more than $150k, then forward to Riley, so she can get in touch and decide if she should pitch to them
- if it was $150k or less, then I should call & talk to them to see if it's really worth Riley's time to pitch them (she told me the kinds of things to say/ask) or
- if they were around here (the Bay Area), then even if it was under $150k, still forward to Riley bc she could maybe schedule a demo/reception here to pitch a bunch of them at once.

Easy, right? Hah, wrong:

- There was a ton more than we expected—an inbox tsunami!
- Some people didn't include their address or their investment potential or whatever in their message (didn't read instructions, surprise, surprise…) & I had to go back & forth with them an extra round (or two!) to get their info.
- I got so far behind I just couldn't get that first email back to people fast enough & they would email again (being snarky) which only made more work & wasn't so good for "investor relations" (ouch).
- Sometimes the emails I forwarded to Riley got lost in her super-full inbox, so I had to send her reminders, but I wasn't sure which ones she had already followed up on or not so she got annoyed with me making her inbox even worse… :(
- Sometimes I just forgot to send her a reminder. (yikes!)

As Prof would say, our business process didn't scale.

Me? I said <*bleep*> (expletive deleted).

He would say we needed some biz process re-engineering & automation.

I said, "I need *bleeping* superpowers to keep up with this *bleep*. If only I could morph into a cyborg—part biz student-girl, part high-tech, intelligent robot—in order to keep up."

Turns out I could. And I did!

Taking the Lead: Part I

(Making some slick SF email templates for alerts to Riley & to me too)

One day we were talking. Riley called one of these potential investors a "lead." Something clicked. I remembered seeing **Lead** was a built-in (standard) object in SF. *So, was there stuff in SF I could use to help me deal with all these "Investor Leads?"*

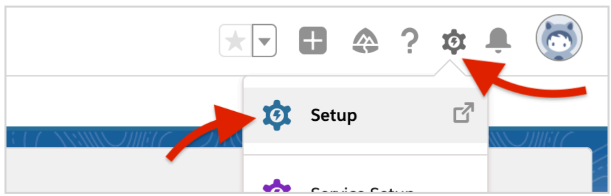
A bit o' Googlin', some hits & misses, and I struck gold.

If we kept this potential investor data as **Lead** records, instead of having all that info buried in our emails, we could stay organized. We could see all the leads and which of us was assigned to which, AND what their status was, like did we contact them yet? and make reports, etc AND...

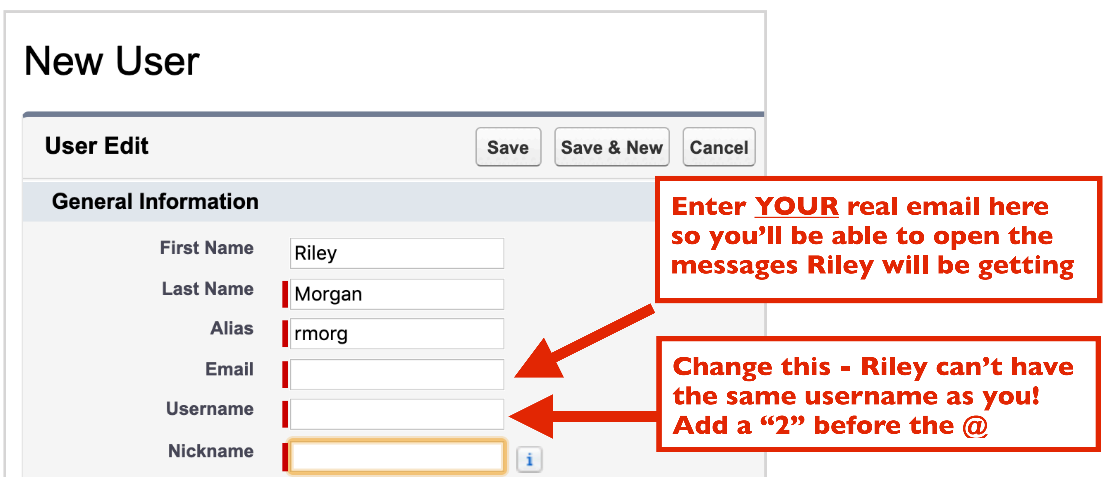
SF could be my robot-self & do a bunch of the work (eg assigning leads & reminding, etc) for me—*automatically*!

To see how this works, create a new user account for "Riley," inside your SF, just like I did. (Remember SF is "enterprise" software, so like Prof says, the setup that you configure—your SF "org"—would maybe have users across the whole company, and as the System Administrator (aka "SysAdmin") you would set up their accounts so they could log in & see their stuff.)

1. Make sure you're on the **Setup** page by clicking the gear icon, next to the bell on the top right, and clicking **Setup**

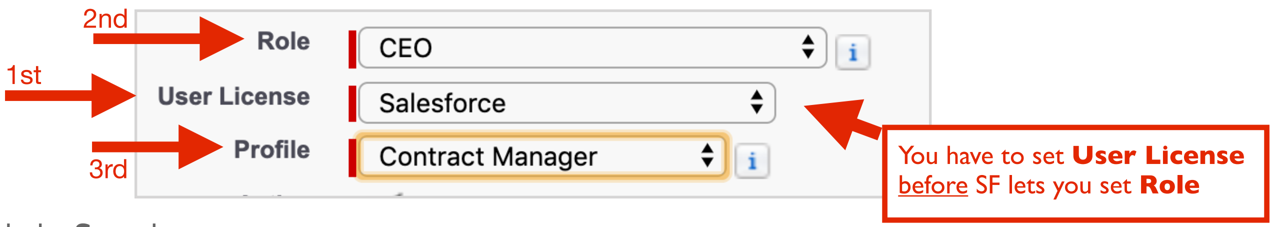


2. On the lefthand side, under **ADMINISTRATION**, drop down the **Users** menu
3. At the bottom of the **Users** menu you just dropped, find **Users** again and click it
4. You should see a listing of users with a few rows including one for yourself as **System Administrator** & a few others SF puts in automatically, but you can ignore those
5. Click the **New User** button above the rows & you'll get a form to fill out
6. Enter "Riley" for the **First Name** and "Morgan" for **Last Name** (not really hers but...)
7. Tab to autofill **Alias** as "rmorg"
8. *****CRITICAL:** For Riley's **Email**, just enter the same email address you used when you created your account. SF will send her email to that account & you can check it (pretending to be Riley) when we get to that point later on *****



9. When you tab, **Username** auto-populates with that same email address you just entered but you need to CHANGE IT bc she can't have the same **Username** as you, right? Just insert a "2" into it, just in front of the @ sign (eg "xxx2@yyy.zzz") and *that* will be her **Username** for logging in. (In SF, **Usernames** just have to *look* like email addresses...but they're just for logging in.)

10. **Nickname** will have already auto-populated too, but just change it to "Riles"
11. On the upper right find the pulldown menu labelled **User License** & select just plain **Salesforce** (this will set the **Profile** menu options for you to set below)
12. Now use the **Role** pulldown menu just above to select **CEO**
13. Then use the **Profile** pulldown menu to select **Contract Manager**



14. Click the **Save** button

Now remember, **Lead**'s a standard object (already built in to SF) & it has built-in fields for a lead's contact info, their **Status** (eg have they been contacted yet?, etc) and **Lead Owner** (who's responsible for following up?).

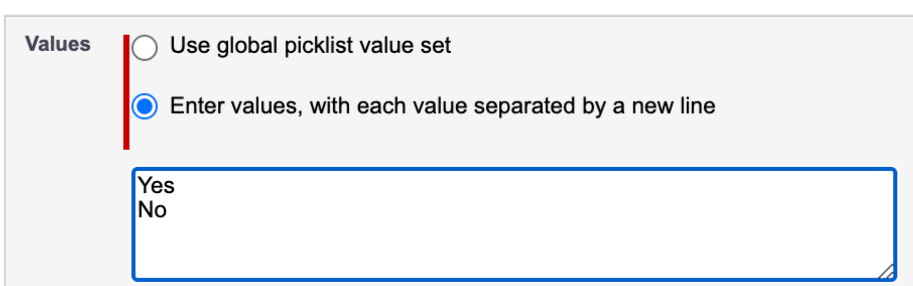
So now, whenever someone emailed me their info, I could quickly add a new **Lead** record—I just had to pick me or Riley as the owner, based on those "business rules" above & then send an alert email to her (or me) to say "Here's a new lead to follow up on."

But the coolest part was to make SF (the robot part of the cyborg me) do the assignment and send the email *automatically* whenever I entered a lead, so I couldn't forget or mess up.

But first, I had to add two new custom **Lead** fields for the assigning—those business rules were based on whether the lead was from around here or not & how much they were looking to invest.

So first, I added a custom field called **Bay Area Location:**

15. Up on the top left, by the **Home** tab, click the **Object Manager** tab (NOT the down-arrow)
16. Scroll down to find & click **Lead**
17. On the left, under **Details**, click **Fields & Relationships**
18. Click the **New** button (just above the list of fields)
19. Select the **Picklist** option & click **Next**
20. For **Field Label** enter "Bay Area location" (don't enter the quotes, remember?)
21. Just below, next to **Values**, click **Enter values, with each value separated by a new line** to open a textbox where you can enter the list of values to pick from
22. In that textbox, enter "Yes" on the first line and enter "No" right below it, on the 2nd line



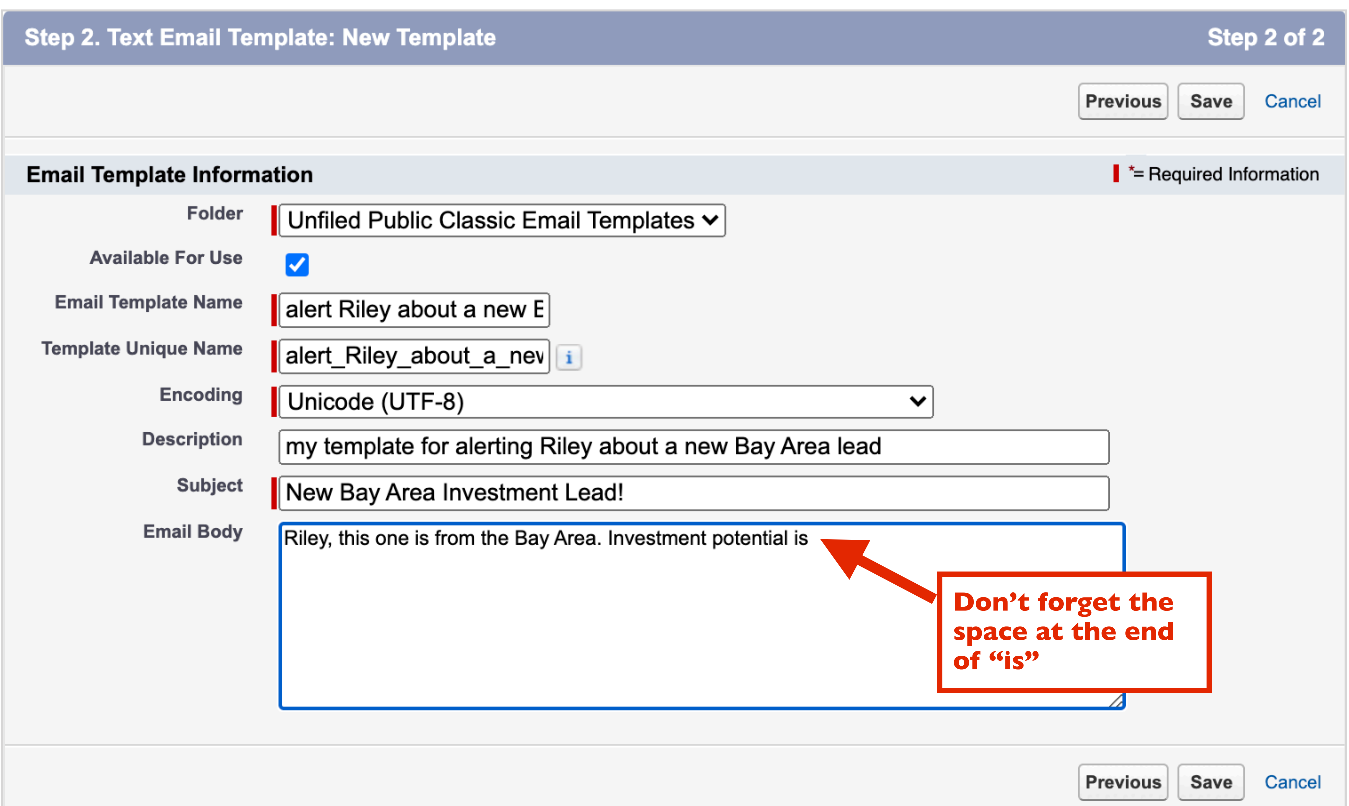
23. **Field Name** should have automatically populated with "Bay_Area_location"
24. Click **Next** (pause to let the page fully load), **Next** (pause) and click **Save & New**

Then I created one called **Investment Potential:**

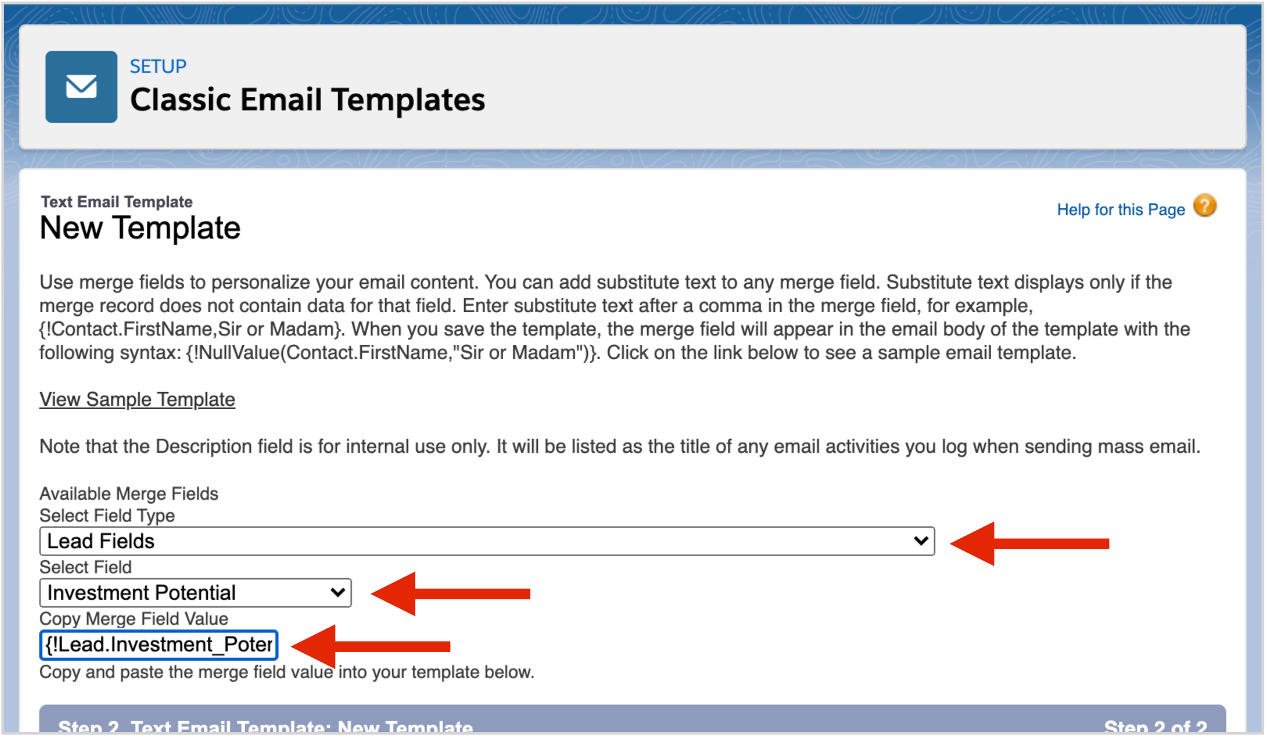
25. Select the **Currency** option & **click** Next
26. For **Field Label** enter "Investment Potential"
27. In the **Length** textbox enter 7 and for **Decimal Places** enter **0**
28. **Field Name** should have automatically populated with "Investment_Potential"
29. Click **Next** (pause to let the page fully load), **Next** (pause) and click **Save**

Next, I created an email template so I could make SF send a nice-looking email to Riley *automatically* whenever a lead got assigned to her:

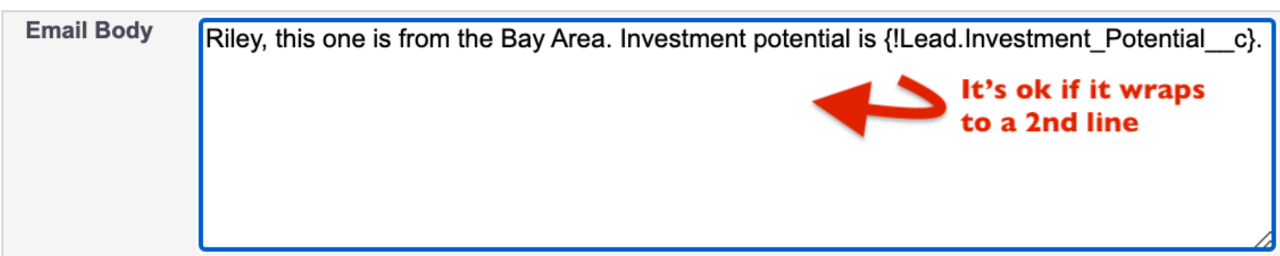
30. Click the **Home** tab on the upper left (next to **Setup**)
31. On the lefthand menu, under **ADMINISTRATION**, find & click **Email** to drop down its menu
32. Under **Email**, click **Classic Email Templates** and you'll see a list of built-in templates that are already in there (you can ignore those)
33. Click the **New Template** button
34. The **Text** button should already be checked so just click **Next**
35. Now on the **New Template** page that appears, scroll down to the **Email Template Information** area and check the **Available for Use** checkbox
36. For **Email Template Name**, enter "alert Riley about a new Bay Area lead"
37. Tab to the next field, **Template Unique Name**, and it should auto-populate with "alert_Riley_about_a_new_Bay_Area_lead"
38. For **Description**, enter "my template for alerting Riley about a new Bay Area lead"
39. For **Subject**, enter "New Bay Area Investment Lead!"
40. In the **Email Body** textbox, enter "Riley, this one is from the Bay Area. Investment potential is " (be sure to include that extra space that's there after the "is")



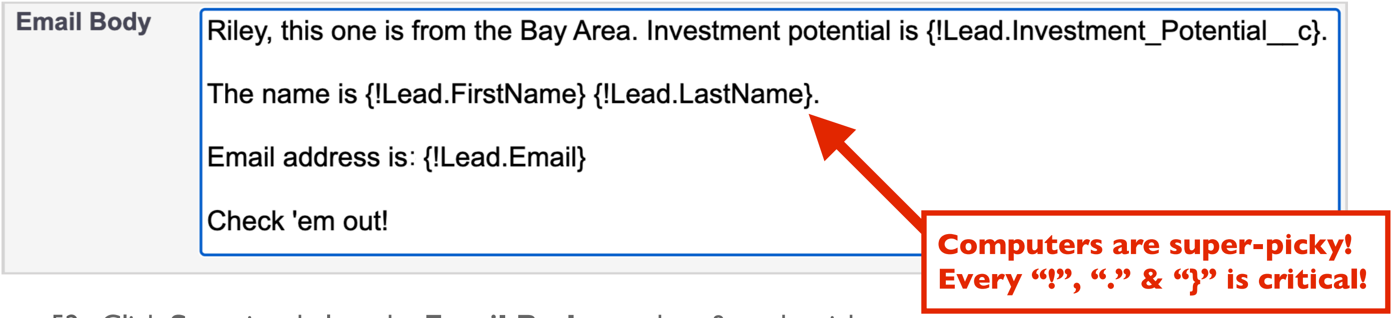
41. Now above, on that same page, find the **Select Field Type** menu that is currently set to **Contact Fields** and change it to **Lead Fields** instead
42. Just below that, find the **Select Field** drop-down menu, scroll the menu all the way down to the **Custom Fields** at the very bottom and select **Investment Potential**



43. The **Copy Merge Field Value** textbox will auto-populate and highlight. Copy it just like you would in any copy/paste operation on your computer and then paste it into the **Email Body** textbox at the end of what you typed already (after the "is" & the extra space)
44. Then add a period at the end of that so it looks like this (but maybe wrapped to 2 lines–that's fine):



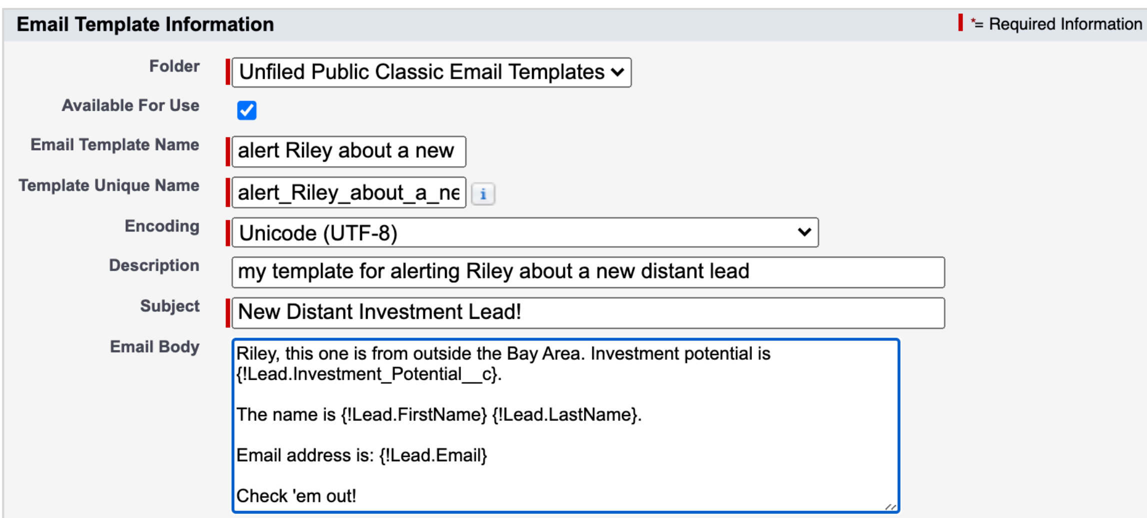
45. Then, in the **Email Body** still, type a couple of returns to add a blank line & type "The name is " (with the space at the end again!)
46. Back up above, at **Select Field**, use the pulldown menu to change **Investment Potential** to **First Name**
47. Like before, copy what's now in the **Copy Merge Field Value** & paste it after "The name is " in the **Email Body** and add a space after what you pasted (" ")
48. Now go back up again to **Select Field** and change **First Name** to **Last Name**, copy and paste it after the **First Name** in the **Email Body** (make sure you paste it after the space you added after **First Name**) and then add a period at the end again
49. Type two returns to add a blank line and type "Email address is: " with a space at the end
50. Again, go back up to **Select Field** and change **Last Name** to **Email**, and then copy/paste it in
51. Type two returns to add a blank line and type "Check 'em out!" so it looks like the image below



52. Click **Save** just below the **Email Body** text box & to the right

Ok, that one's done but we need another one like it for alerting Riley about a new lead from *outside* the Bay Area:

53. You should still be on the **alert Riley about a new Bay Area lead** page so just click **Clone** to make a duplicate
54. Now edit **Email Template Name** so it says "alert Riley about a new distant lead"
55. Then edit **Template Unique Name** so it says "alert_Riley_about_a_new_distant_lead"
56. In **Description**, make it "my template for alerting Riley about a new distant lead"
57. Click **Save**
58. On the new page that appears, click the **Edit** button near the top
59. Edit **Subject** to make it say "New Distant Investment Lead!"
60. Now in the **Email Body** textbox, change "from" to "from outside" so it reads "Riley, this one is from outside the Bay Area."



61. Click **Save**

Now clone another template for email alerts to yourself about leads for you:

62. Click **Clone** again
63. In the **Email Template Name** textbox, change it to "alert myself about a new lead" (w/spaces, NO underscores!)
64. In **Template Unique Name**, do the same so it says "alert_myself_about_a_new_lead" (w/ underscores, NO spaces!)
65. In **Description**, enter "my template for alerting myself about a new lead"
66. Click **Save**
67. On the new page that appears, click the **Edit** button near the top
68. Change the **Subject** to "New (minor) Investment Lead for YOU (me) -- Go!"

69. Now in the **Email Body** textbox, make it like this (be exact):

> Hey, me. This one's yours.
>
> The name is {!Lead.FirstName} {!Lead.LastName}.
>
> Email address is: {!Lead.Email}
>
> Get on it!

70. Click **Save**

Now you've got templates for each of the three assignment possibilities and they'll pull the leads' actual names, $ figures & email addresses from the database right into the messages when they're sent. You'll see.

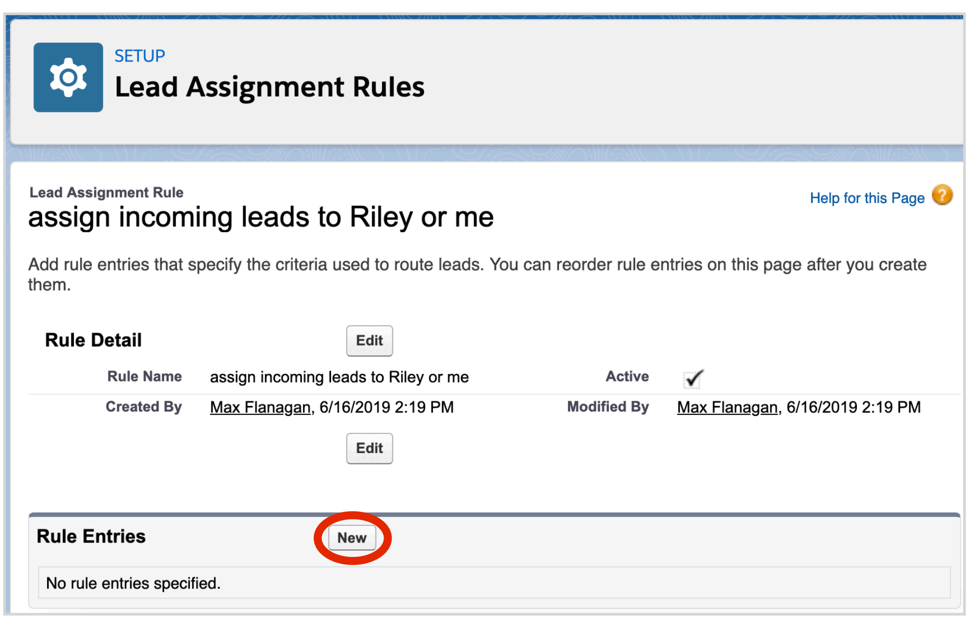
Next—the rules your robot half will use to assign **Lead** records to you or Riley *automatically* (& send the alert automatically) every time you enter one.

Taking the Lead: Part 2

(Program your "bot" to make the assignments for you!)

So now, you have to tell SF the rules so when a lead is added, it can automatically assign it to me or Riley (based on the $ and location) & send us the alert notification:

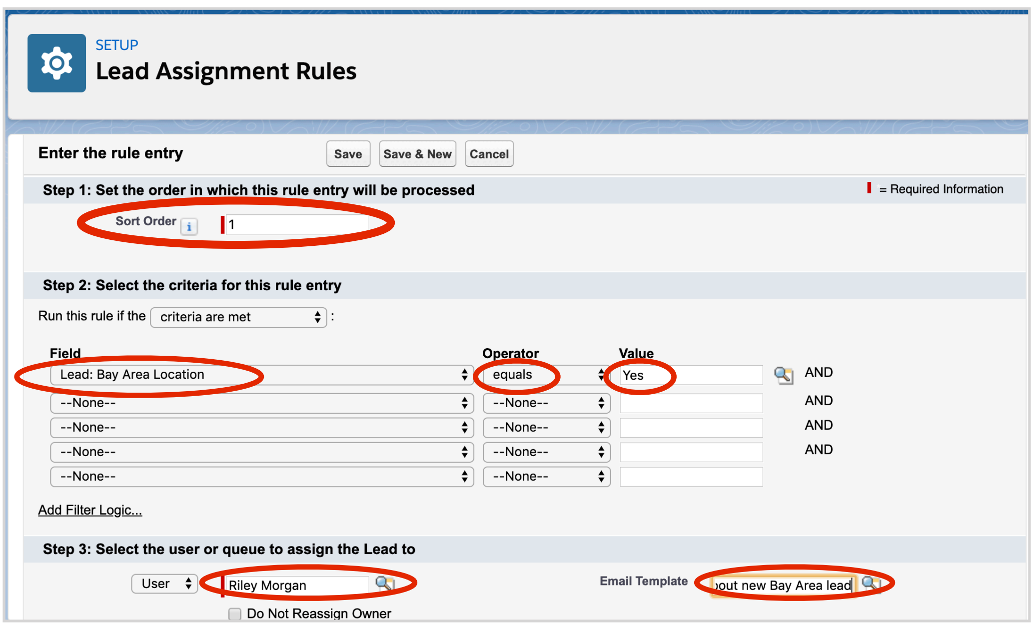
71. So now, on the lefthand side, look under **PLATFORM TOOLS** and click **Feature Settings** to open that up & under that, click **Marketing** and under that click **Lead Assignment Rules**
72. Click the **New** button
73. For **Rule Name** enter "assign incoming leads to Riley or me"
74. <u>Be sure to click the **Active** checkbox</u> or your rule won't appear (or work)
75. Then click **Save**
76. Now, in the list of **Lead Assignment Rules**, click on your new rule name: **assign incoming leads to Riley or me**
77. Then, under **Rule Entries** click the **New** button



Important: SF works thru the rules in the order you put them, from "top" to "bottom," and as soon as it hits one that's TRUE, it stops there & assigns the record to whoever goes with that rule. Cool—so I just needed to put in Riley's three rules, but I had to get them in the exact right order so the logic worked.

So, I knew if the new lead was from the Bay Area, that trumped all else—it was Riley's lead, so I started with that:

78. Under **Step 1: Set the order in which this rule entry will be processed,** for **Sort Order,** enter the number "1" to make sure this rule entry is looked at first
79. Go on down under **Step 2: Select the criteria for this rule entry**, and find the top drop-down menu under **Field** and select **Lead: Bay Area location**
80. To the right, under **Operator**, 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 **Yes** and click **Insert Selected** (or just type in "Yes")
82. Below, under **Step 3: Select the user or queue to assign the Lead to**, make sure the pulldown menu is set to **User** and then click the magnifying glass by the textbox
83. In the popup window that appears, search for "Riley" and then click her name to select her
84. Then click the magnifying glass by the textbox labelled **Email Template**
85. In the popup window that appears, click on **alert Riley about a new Bay Area lead**



86. Click **Save**

So if that first rule didn't turn out true, then SF moves on down and continues looking. So if it gets to this next rule, then it's not a Bay Area lead so next thing to check is **Investment Potential:**

87. Click the **New** button (near the middle) & then on the rule entry page that comes up, enter the number 2 for **Sort Order** to make sure this rule entry is looked at next
88. On down, find the first drop-down menu under **Field** and select **Lead: Investment Potential**
89. To the right, under **Operator**, select **less or equal**
90. To the right, under **Value**, enter 150000 (four zeros—no commas!)
91. Below, under **Step 3: Select the user or queue to assign the Lead to**, make sure the pulldown menu is set to **User** and then click the magnifying glass by the textbox
92. In the popup window that appears, search for your own name and click it to select yourself

93. Then click the magnifying glass by the textbox labelled **Email Template**
94. In the popup window that appears, click on **alert myself about a new lead**
95. Click **Save**

Then, if neither of those rules worked, SF drops down to this one—they'd have to be outside the Bay Area (1st entry didn't snag it) AND they must have higher than $150,000 potential (2nd entry didn't snag it either). So at this point, they <u>definitely</u> go to Riley (no need to match anything this time—just assign to Riley):

96. Click the **New** button (near the middle) again & then on the rule entry page that comes up, enter the number 3 for **Sort Order** to make sure this rule entry is looked at third, only after the other two failed to assign the lead
97. Below, under **Step 3: Select the user or queue to assign the Lead to,** make sure the pulldown menu is set to **User** and then click the magnifying glass by the textbox
98. In the popup window that appears, search for "Riley" and then click her name to select her
99. Then click the magnifying glass by the textbox labelled **Email Template**
100. In the popup window that appears, click on **alert Riley about a new distant lead**
101. Click **Save**

Now you should see all three entries for this rule (3rd one didn't need any criteria, remember?) and it should be good to go!

Rule Entries New Reorder

Action	Order	Criteria	Assign To	Email
Edit | Del	1	Lead: Bay Area Location EQUALS Yes	Riley Morgan	✓
Edit | Del	2	Lead: Investment Potential LESS OR EQUAL 150000	Max Flanagan	✓
Edit | Del	3		Riley Morgan	✓

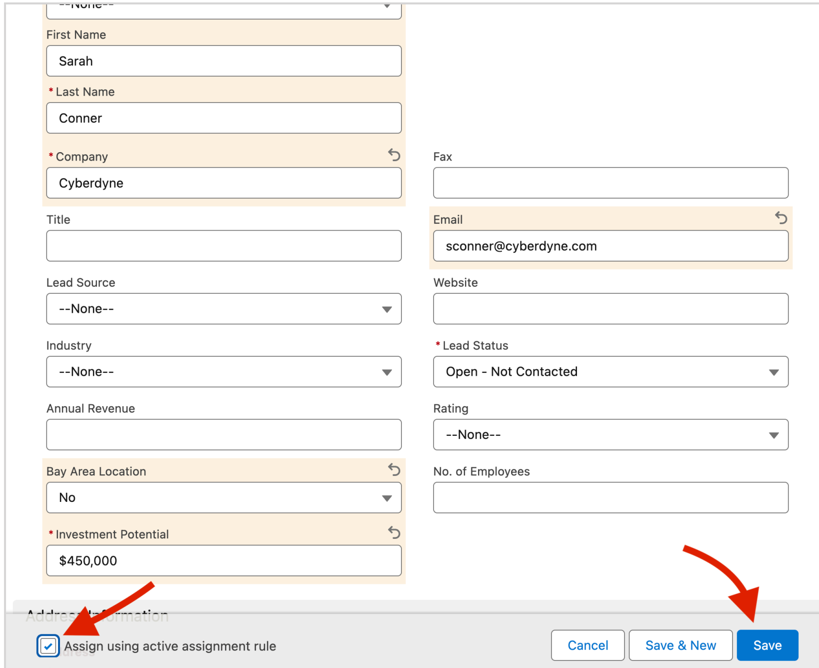
Taking the Lead: Part 3

(Try out your new Cyber-superpowers)

Now to try out your rules, pretend you just got an email from a potential investor named "Sarah Conner." You replied to say thanks & someone would be in touch soon. Now you need to enter her info as a new **Lead** record & you can use the shortcut for adding leads:

102. Hit the **App Launcher** (grid icon—upper left) and select the **Marketing** app
103. Click the down-arrow on the **Leads** tab (already in there, in the middle) & select **+ New Lead** to get a lead form—it'll show you as **Lead Owner** for now but that may get changed by the rules, when you click **Save**, right?
104. For **First Name**, enter "Sarah"
105. For **Last Name**, enter "Conner"
106. **Company** is required so just put in "Cyberdyne"
107. Scroll down to **Bay Area location** and select **No**
108. For **Investment Potential** enter "450,000"
109. On the righthand side, in the **Email** textbox, enter "sconner@cyberdyne.com"

110. At the very bottom of the popup, check the **Assign using active assignment rule** checkbox
111. Click **Save & New**



Now add two more leads the same way–Kyle Reese and John Conner (Sarah's son):

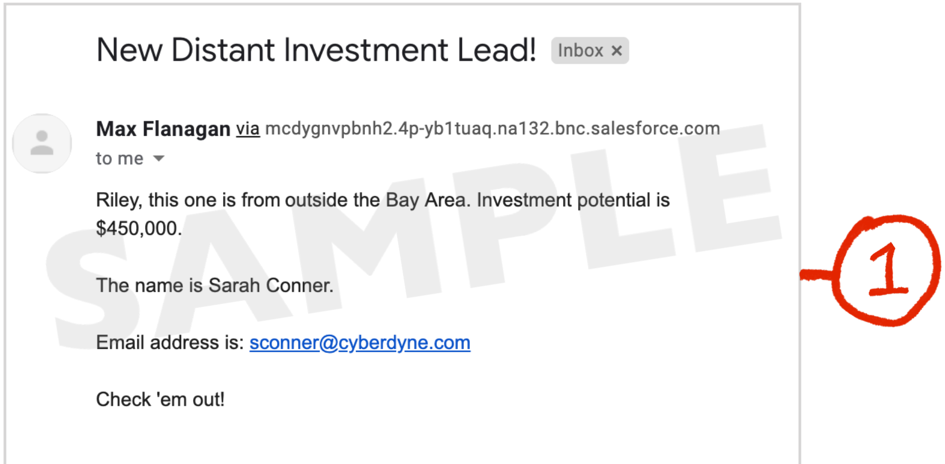
112. For **First Name**, enter "Kyle"
113. For **Last Name**, enter "Reese"
114. Just use "Cyberdyne" for **Company** again
115. Scroll down to **Bay Area location** and select **No**
116. For **Investment Potential** enter "125,000"
117. On the righthand side, in the **Email** textbox, enter your own email address (so below, when you pretend to be Kyle, you can log into your email account and see messages sent here)
118. At the very bottom of the popup, check the **Assign using active assignment rule** checkbox
119. Click **Save & New**
120. For **First Name**, enter "John"
121. For **Last Name**, enter "Conner"
122. Just use "Cyberdyne" for **Company** again
123. Scroll down to **Bay Area location** and select **Yes**
124. For **Investment Potential** enter "110,000"
125. On the righthand side, in the **Email** text box, enter "jconner@cyberdyne.com"
126. At the very bottom of the popup, check the **Assign using active assignment rule** checkbox
127. Click **Save**

Ok so now to check out the leads you entered:

128. Click your **Leads** tab & then, IF you see a **List View** button List View (upper right) click it–if not, you're already there, good to go
129. Use the drop-down arrow by **Recently Viewed** (upper left) to select **Today's Leads** & behold...

Now you should see your three leads, all properly assigned. (You may need to scroll sideways.) The **Owner Alias** column should list "rmorg" (short for Riley Morgan) as owner for John Conner (Bay Area) and Sarah Conner (over $150k investment potential). And it should show your alias (like "rmorg" but with your name) for Kyle Reese (under $150k investment potential) bc you're the owner on that one.

Now go check your email to see the 3 new alert messages—2 meant for Riley (about John & Sarah), and one meant for you (about Kyle)—each with the field data values filled in. Open them up to confirm your *borg* half did its job. (Note: These are sent to the addresses in your and Riley's user profiles. If the messages don't show up, even in your spam folder, you might need to edit/fix those addresses—then just re-enter & **Save** the leads again to trigger re-sending the messages to the updated addresses.)


New Distant Investment Lead! Inbox ×

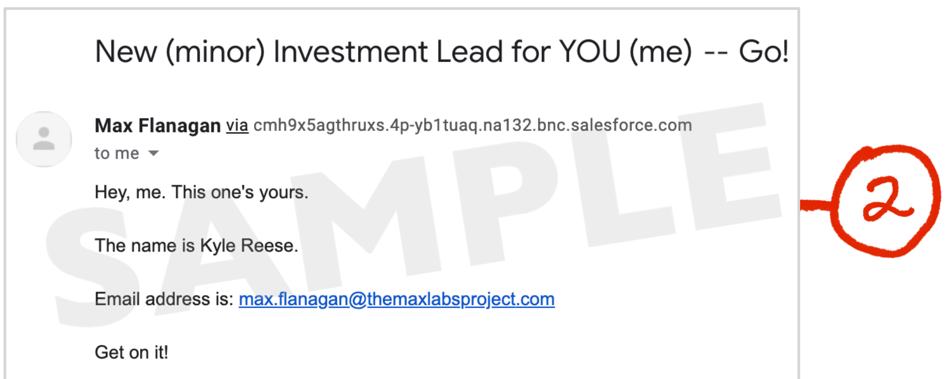
Max Flanagan via mcdygnvpbnh2.4p-yb1tuaq.na132.bnc.salesforce.com
to me

Riley, this one is from outside the Bay Area. Investment potential is $450,000.

The name is Sarah Conner.

Email address is: sconner@cyberdyne.com

Check 'em out!


New (minor) Investment Lead for YOU (me) -- Go!

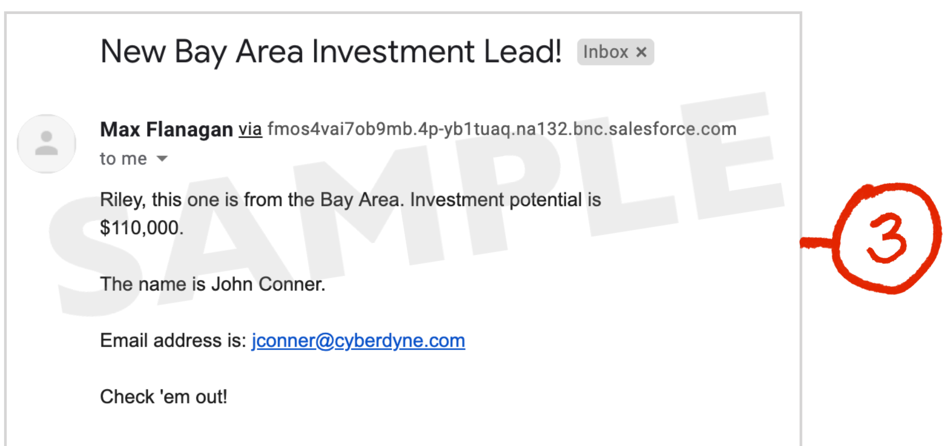
Max Flanagan via cmh9x5agthruxs.4p-yb1tuaq.na132.bnc.salesforce.com
to me

Hey, me. This one's yours.

The name is Kyle Reese.

Email address is: max.flanagan@themaxlabsproject.com

Get on it!


New Bay Area Investment Lead! Inbox ×

Max Flanagan via fmos4vai7ob9mb.4p-yb1tuaq.na132.bnc.salesforce.com
to me

Riley, this one is from the Bay Area. Investment potential is $110,000.

The name is John Conner.

Email address is: jconner@cyberdyne.com

Check 'em out!

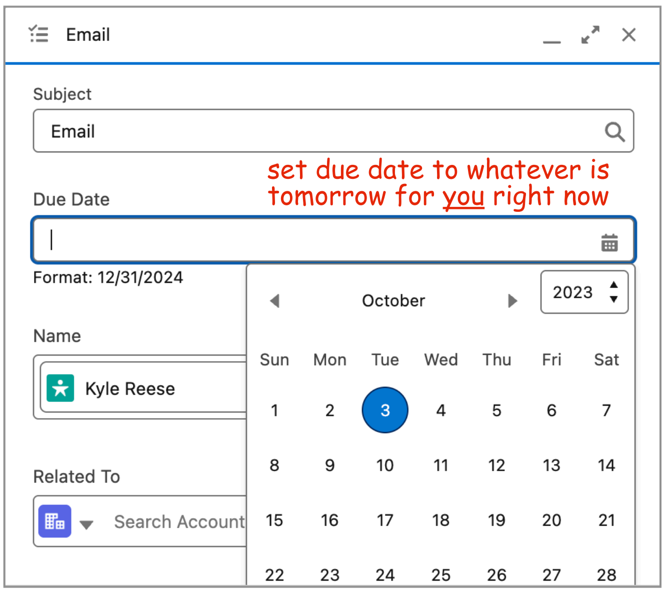
Hah! My very own "mini-Max". Never tired. Never sleepy. (Never assigns the wrong lead to Riley due to a bagel-related distraction, etc like certain unnamed humans.) Now we're better at **M**anaging our **R**elationships (calling, emailing, etc) with our **C**ustomers (leads)—which sounded suspiciously like the **CRM** thing we learned in class. Apparently it's SF's big thing, their "secret sauce," so I kept digging around SF for more & I found some!

More Cyborg-CRM Adventures

(Remind me to seem like the type to remember)

So what I'm getting about this job—when you're trying to develop your relationship with leads (potential investors in our case), you want to track all your communications with them so you can say the right thing at the right time & keep nudging them along until they pony up. SF gets that too, of course, so the **Lead** pages are all over that & they make it easy to plan/track your next move:

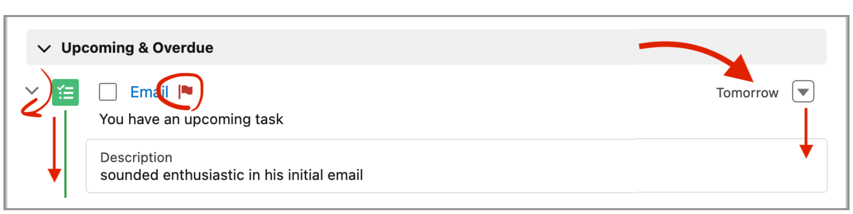
130. Back in SF, you should see the list view of the three leads you created (if not, then go to **App Launcher** > **Marketing CRM Classic** & click the **Leads** tab)
131. Click the **Kyle Reese** lead to open it up
132. Look at the panel under the blue **Open - Not Contacted** arrow-bar where the **Activity** tab is selected and, under that, click **New Task** to open a popup on the lower right for filling in details
133. Click the empty **Subject** slot with a magnifying glass on the right & select **Email** from the drop-down
134. Click the **Due Date** slot to bring up a calendar and click tomorrow's date—the date for YOUR tomorrow, not mine (I'm supposed to email them within 24 hours after I add them as a lead)



135. Click the blue **Save** on the lower right

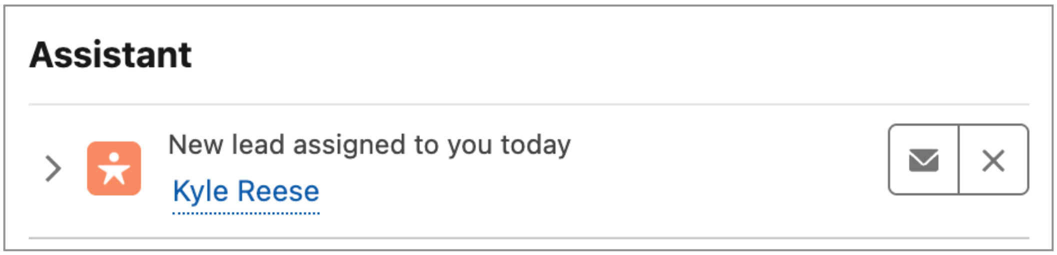
Now if you scroll down you can see the new task—to email Kyle—under **Upcoming & Overdue** and it shows it's supposed to be done by tomorrow. And you can customize it too:

136. Click the downarrow next to **Tomorrow** for the **Email** task and select **Change Priority**
137. In the popup, click on **Normal** in the slot to bring up the choices & select **High** and click **Save** and you'll see a little red flag is there now
138. Now click the downarrow next to **Tomorrow** again but select **Edit Comments** this time
139. In the popup, enter "sounded enthusiastic in his initial email" into the textbox & click **Save**
140. Now, click the right-arrow on the left, by the green task icon for the **Email** task



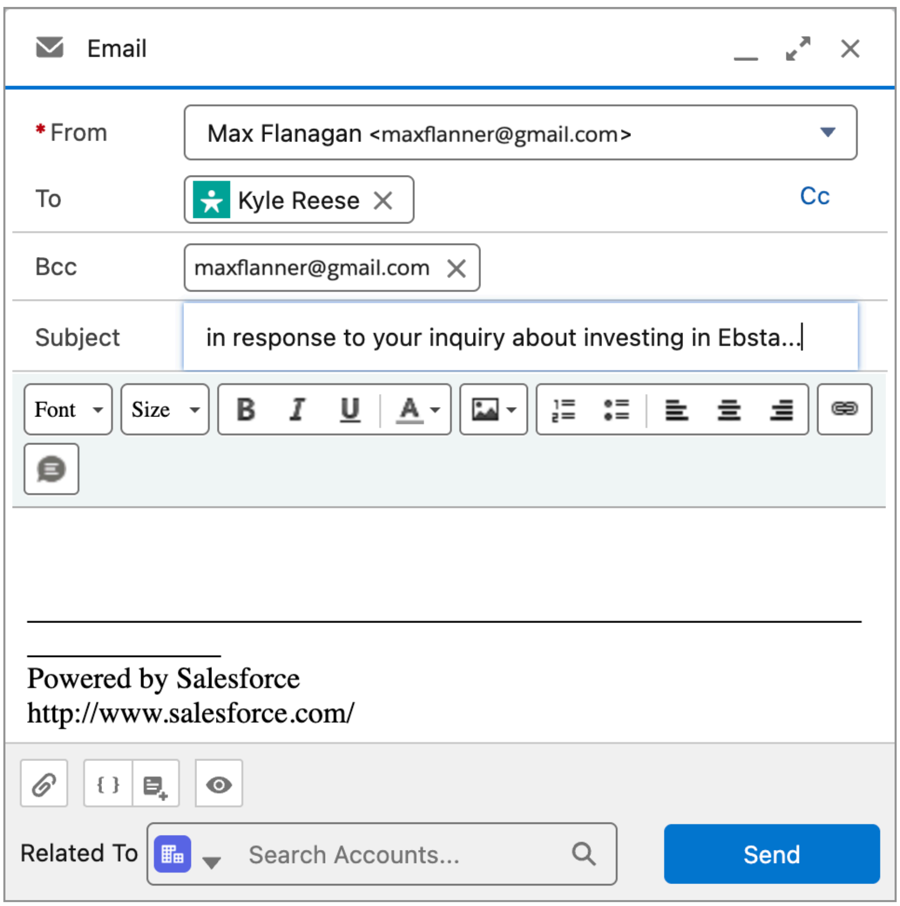
So now, instead of digging around in my email chaos, trying to remember who to send follow-ups or replies and to, etc, there's a page for every lead, listing all the communication activity we've had with them and what's the next task & when to do it. And SF will track all those tasks on your calendar and remind you to do them on time, so you keep your leads engaged & happy.

141. Click the **Home** tab and you'll see an **Assistant** panel on the upper right telling you there was a new lead, Kyle Reese, assigned to you today & the little envelope icon is inviting you to email him. (Not there? Np. Maybe you added Kyle yesterday? Just click your **Leads** tab, click on Kyle & click his email address to get the empty message, same as doing the next step.)

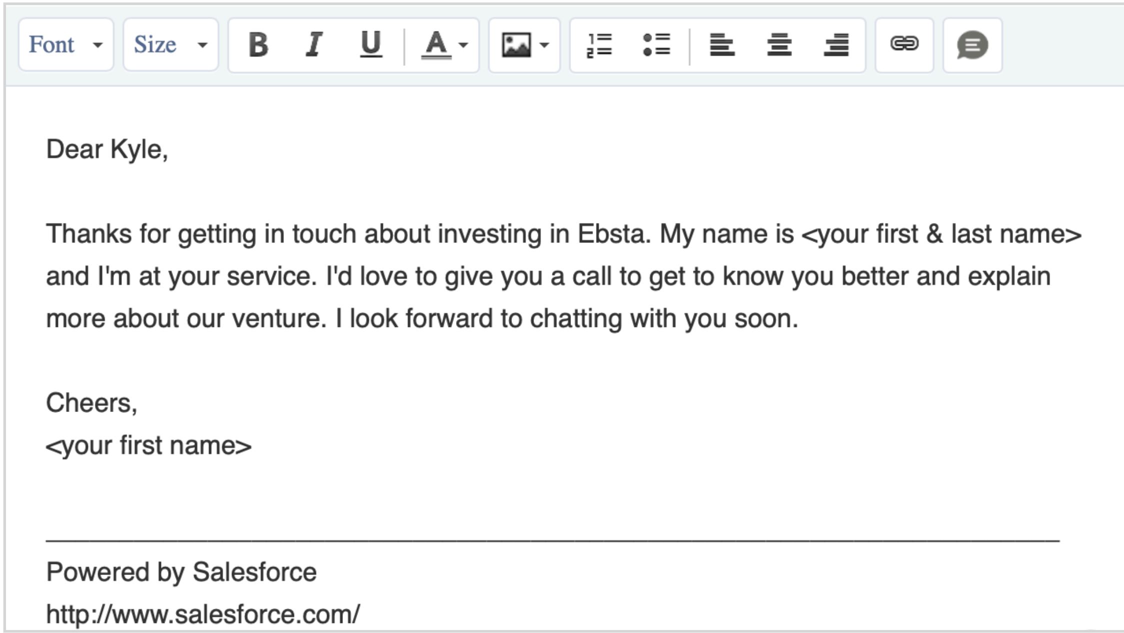


No time like the present—send that email to Kyle:

142. Click the tiny email icon to open a popup for composing an email, pre-addressed to Kyle:



143. For **Subject**, enter "In response to your inquiry about investing in Ebsta..." (not actually Riley's startup but good to know about—they make SF apps that add extra features)
144. Type in the message textbox to make it look like the pic below but of course, substitute your name for "<your first & last name>" and your first name for "<your first name>"



145. Highlight (select) all the text you entered and then use the **Formatting Controls** menu bar to set the **Font** to **Verdana** (friendlier) the **Size** to **18** (nice & big, in case he's an old boomer) and the **A** button to set the text color to a dark violet (warm & fuzzy)
146. Now double-click on the word "Ebsta" in the first sentence so it's selected (highlighted) and click the little chain icon in the **Formatting Controls** menu bar
147. In the popup window that appears, type into the **Link URL** textbox (the one below the other) so that it says "https://www.ebsta.com/about/" and click **Save**
148. Now click **Send**

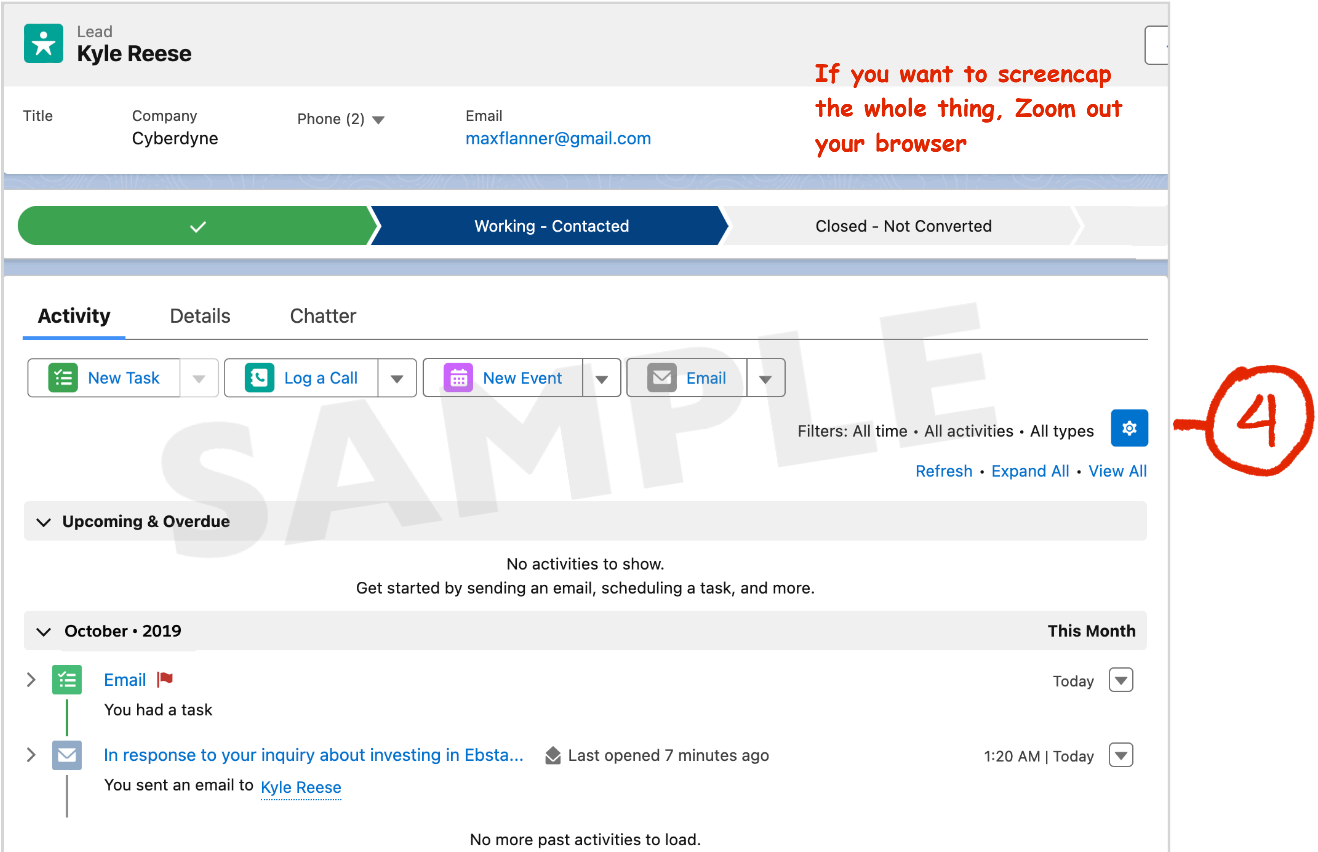
Ok, now the **Assistant** panel says nothing needs your attention right now. Congrats! It's practically telling you to put your feet up on the desk & take a break but first, pretend to be Kyle for a minute:

149. Open up a new browser window or your email app so you can check your inbox for the email address you entered earlier as Kyle's (make sure your email settings allow images!)
150. Find & open the message you sent & click on the Ebsta link to open up their **About** page
151. Close the email message

Now, you're you again:

152. Go back to SF and if you're not on the Kyle Reese lead page already, then hit **App Launcher** > **Marketing CRM Classic** > **Leads** & click his name to open it up now
153. Look down under **Upcoming & Overdue** and click on **Email** to update the task you just completed
154. Now on the **Email** task page, click **Mark Complete** (upper middle) so it changes to **Completed**
155. Then click **Kyle Reese** under **Name** on the left to get back to his lead page
156. Scroll down the **Activity** panel and you'll see the **Upcoming & Overdue** section is empty now—the **Email** task you just completed has moved down onto an activity history timeline, along with the **Email** itself, complete with <month • year> headers for tracking everything you've done w/Kyle
157. And notice, next to "In response to your…", SF tells you how long ago "Kyle" (you) opened the email! (a little scary, privacy-wise, but super-helpful when you're gauging Kyle's engagement before making another call or sending another email)

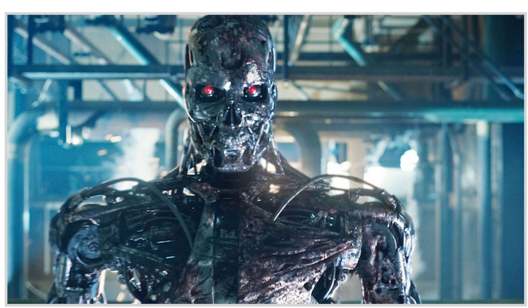
158. Now you know “Kyle” has read his email, so scroll up if you need to, find the blue **Open - Not Contacted** arrow-bar & click the blue ✓ **Mark Status as Complete** button (far right side) to change his status to **Working - Contacted** so you (& Riley) will remember what stage he’s at



So, bottom line—turning cyborg saved me. I can deal with the overload bc I offloaded the tedious stuff (lead assignment, sending notifications) to SF—“process automation” as prof would say. And I’m CRM-i-fied. I get all my leads out of email & into my SF database as lead records, with histories to track tasks & reminders, etc. Now I can focus on the human stuff like communicating with Riley & my leads. Another happy ending. And BTW—if you made it this far, that means you’re a cyborg too now, you know.

CONGRATULATIONS!

(Now…just don’t be evil.)



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!