# 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-geek could go!*

## Prep: Get ready

- ☑ To make this one work, you need to have most of **Lab 3a** (**Steps 1-128**) completed successfully first.

## Learning Objectives: What to "get"

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

## 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 31**, your screen should match the one in the lab, showing the **Chatter** (social media) exchange between you and Riley. (20 pts)

2. After **Step 120**, you should be seeing the **Today's Leads** list view, showing the lead you added by API with the weird name you made from your own. (10 pts)

3. After **Step 137**, you should be seeing the **Details** tab of the Miles Dyson lead page, showing the fields with data entered from your web form. (25 pts)

4. After **Step 139**, you should be seeing the **Upcoming & Overdue** activities list, showing the new task to send an email & the history timeline should show a thank-you email's been sent. (45 pts)

## 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 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 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

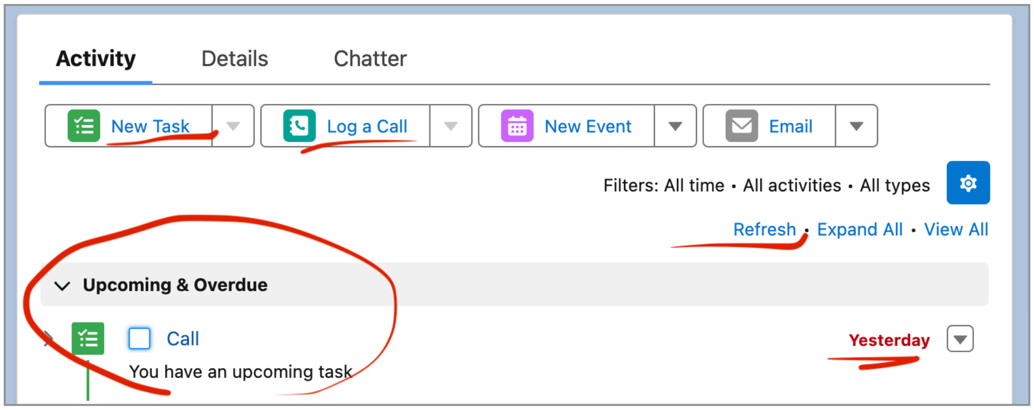
(Oh, the humanity!)

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. Let's see how SF helps you track all the interactions or "touchpoints" you have with a lead so you can quickly see the history and where things stand with them whenever you need to:

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 showing up, then pull down **Recently Viewed** to change the list view to **All Open Leads** and find him in the full list)
3. Click **New Task** (under the **Activity** tab) and then, in the popup, in the **Subject** slot, click the magnifying glass and select **Call**
4. Set the **Due Date** to whatever yesterday is for you now & click the blue **Save** button (bottom right)

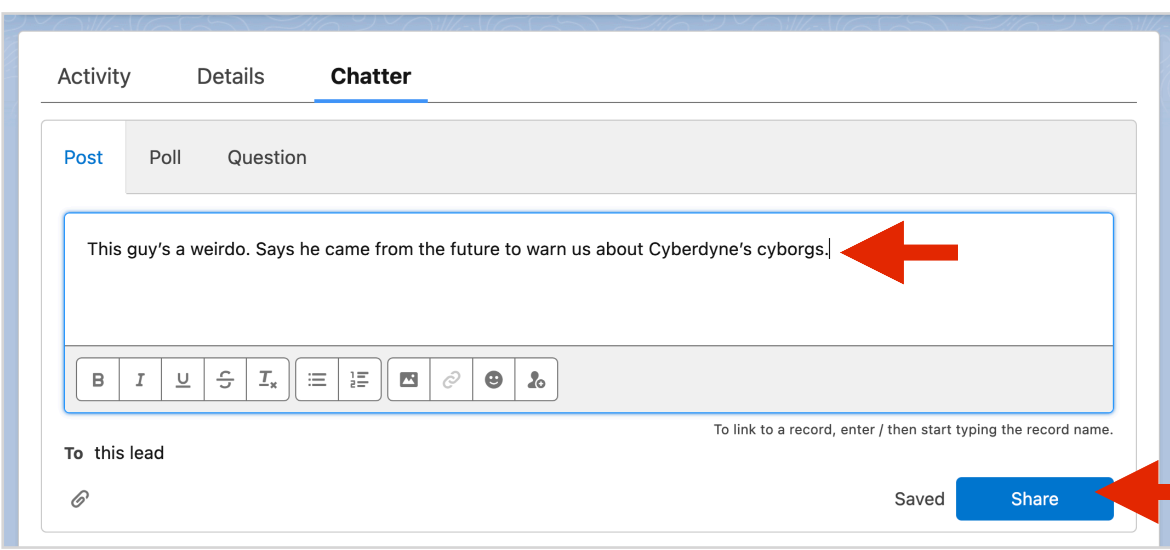
Now you should see your new **Call** task on the **Activity** history timeline under **Upcoming & Overdue** and it should say **Yesterday** in red on the right–SF's alerting you to get caught up so you make that call!



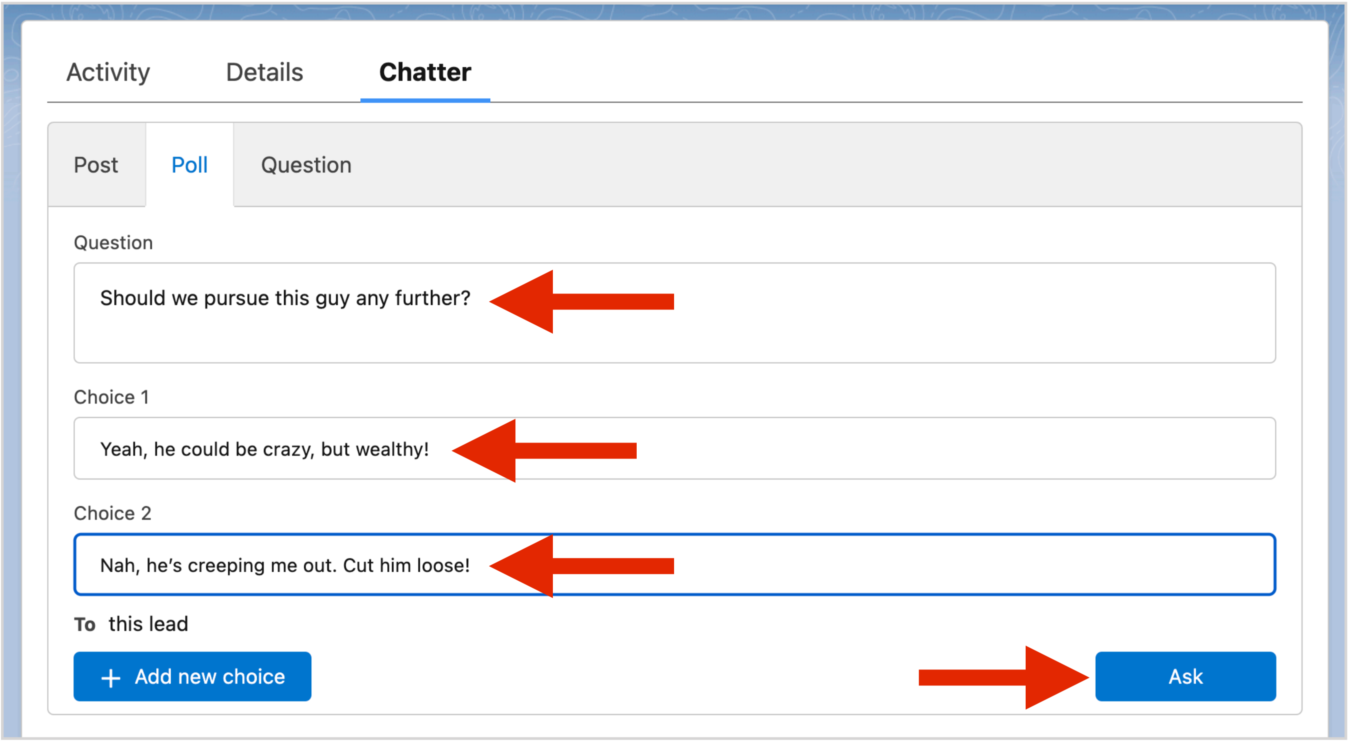

5. Now, pretending you just called him, click **Log a Call** and in the **Comments** textbox, enter "Sounded like a nut case. Kept ranting about being from the future." and click **Save**
6. Then click the checkbox next to your **Call** task and SF will draw a line through it to show it's done
7. Click the blue **Refresh** link and you'll see SF moves the task down, out of **Upcoming & Overdue**, into the **Activity** history timeline with the email items you did before

So besides helping you track your lead touchpoints, 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 **Details** 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 Cyberdyne's cyborgs." and hit the blue **Share** button to post it



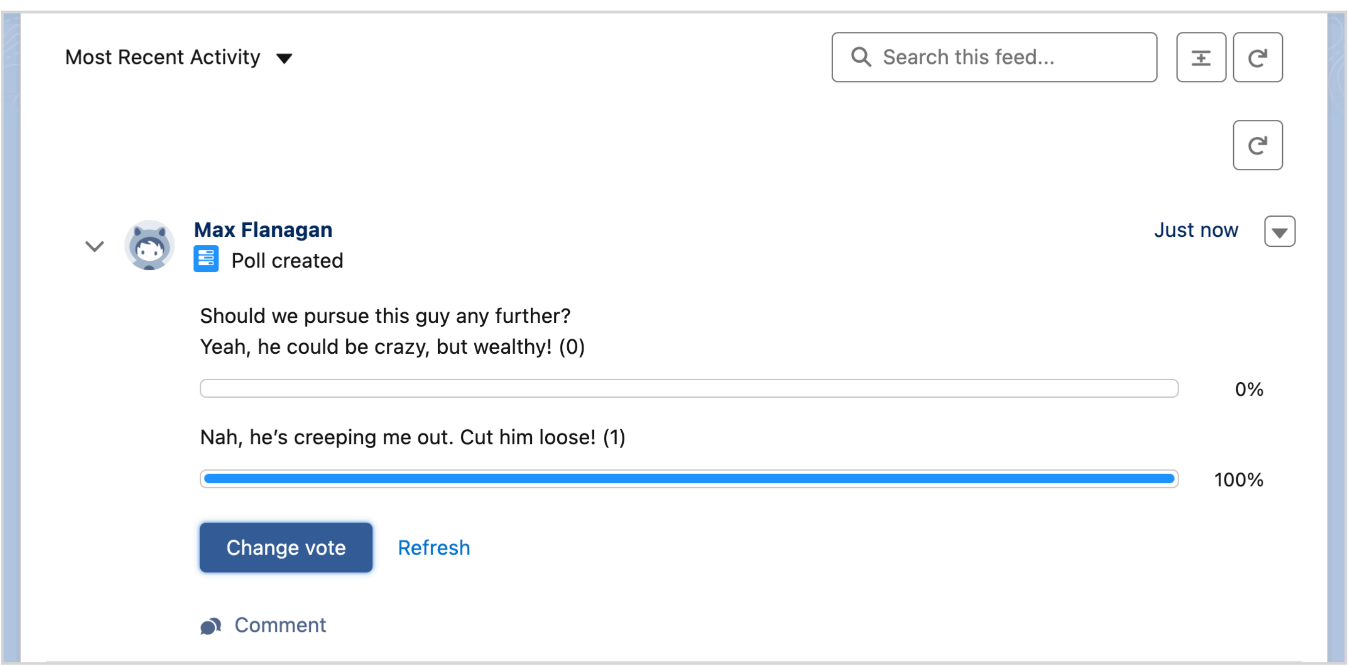
11. Now, to get help from your peeps (eg Riley), click the **Poll** tab (next to **Post**)
12. Click on **What would you like to ask?** and enter "Should we pursue this guy any further?"
13. Below, in the **Choice 1** textbox, enter "Yeah, he could be crazy, but wealthy!"
14. In the **Choice 2** textbox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



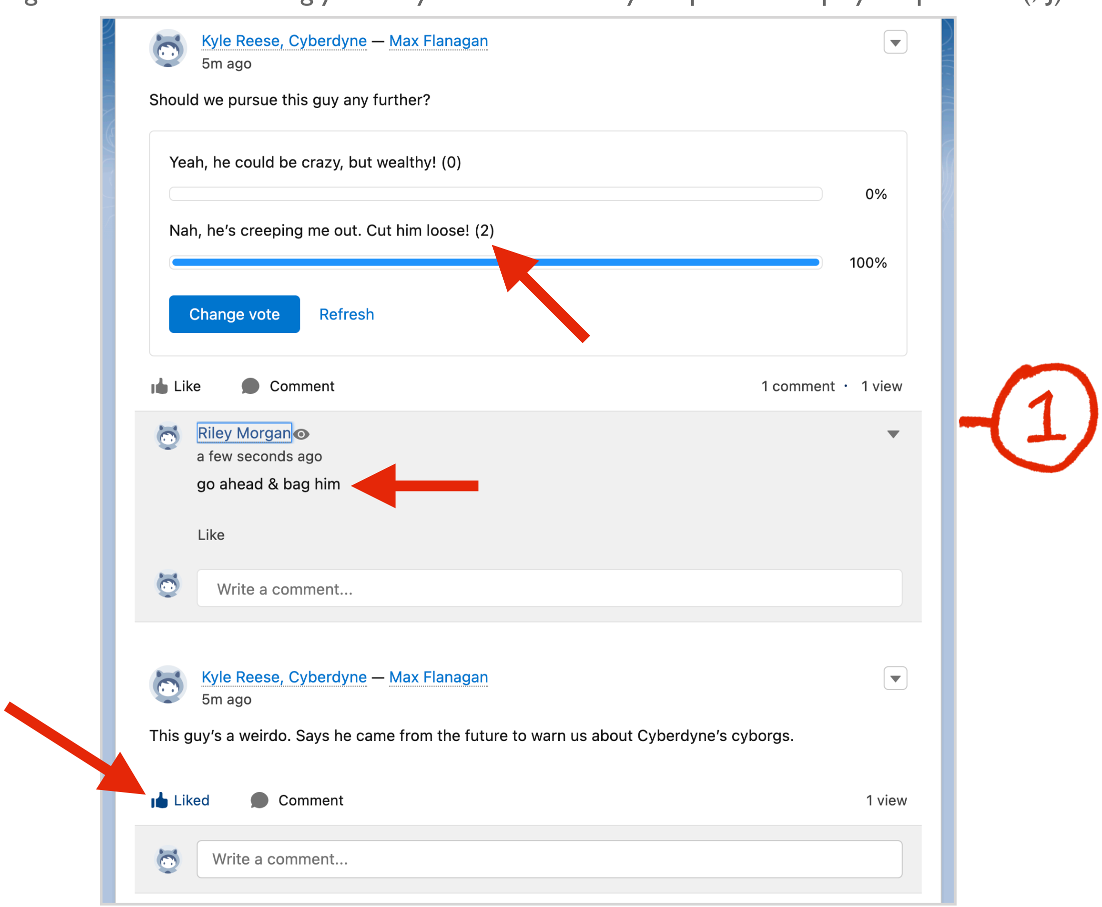
Now, to see what it looks like to Riley, you can log out of your account and log in as her (remember, last time you created her as a user in your SF "org") but to make it easy, reset her password first:

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 & click **Reset Password(s)** to make SF send another account activation msg to "Riley's" email (*you were supposed to set Riley's email address to be same as yours when you set her up as a user last time–whatever you set it to then, that's where this msg will go now)*
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), social media style:

24. Kill the **Welcome to Lightning Experience** popup, if it pops up, by clicking the **X** (upper right)
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 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 **Comment** (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

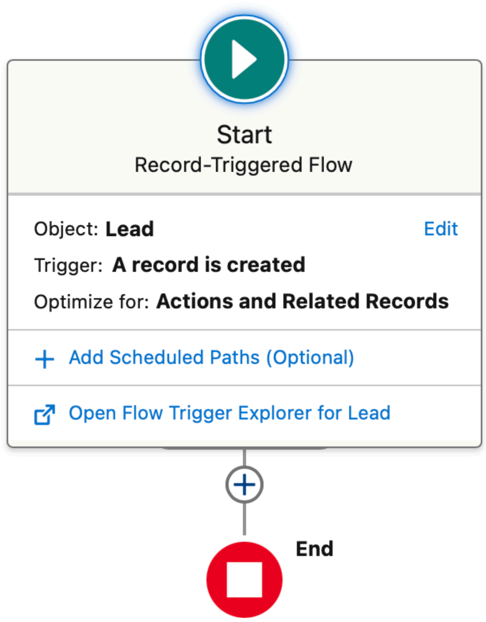
(everything but a time-machine)

So things were definitely better, but when I got those lead emails from our website visitors, I still had to enter their info by hand & create the follow-up task for me/Riley every time–tedious busywork–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–SF calls them "Flows"–you can map out a set of steps (aka a "process") you want SF to do automatically (eg create a task for someone) when something triggers it (eg when a new record gets added). Like you can say:

> *Whenever a new lead gets added & assigned to me, automatically create a task saying to send them an email (to ask about calling) & assign that to me too. Same for Riley when a new lead gets assigned to her.*

Then every new lead will trigger the **Flow** that creates the new task on them & assigns it to whoever! Behold:

33. First 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. Go to **Setup** and then, on the lefthand menu, way down under **PLATFORM TOOLS**, find & click **Process Automation** and under that, click **Flows**
35. You'll see a list of built-in **Flows** you can choose but you want to make your own, so click **New Flow** in the upper right corner and then, in the **New Flow** popup, click the blue **Next** button (lower right)
36. On the **New Flow** popup, click **Record-Triggered Flow** so it gets a blue border & checkmark in the corner because we want the new task to get created whenever a new lead record gets added
37. Click the blue **Create** button in the bottom right corner of the popup
38. Next you'll see a little diagram of your new flow w/a box saying it'll be triggered whenever **A record is created** (added) but now you need to tell it which **type** of record being added should trigger it, so type "Lead" into the **Object** slot at the top of the form on the right and click off the slot
39. Now you need to say **what** you want done when it's triggered, so hover over the tiny circle below the box in the diagram and click the plus sign (**+**) so you can add what SF calls "an element"

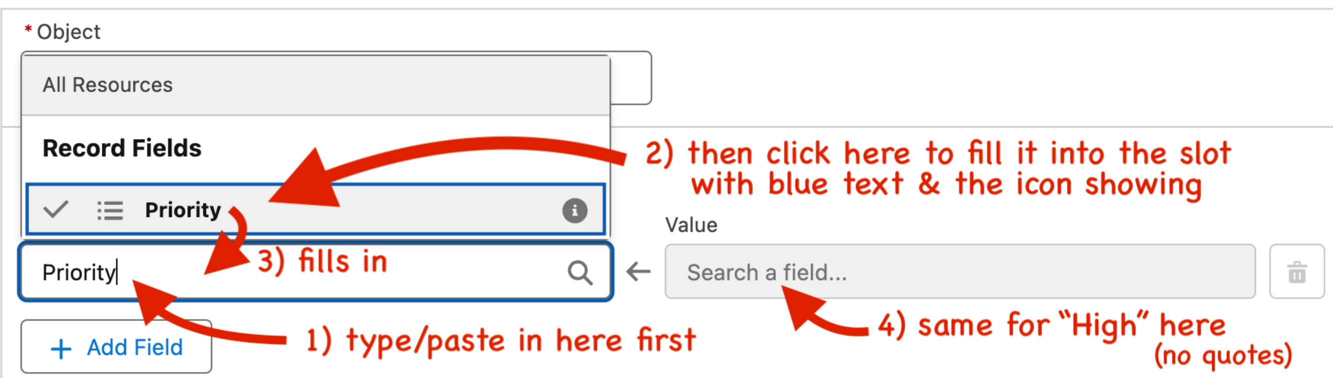


40. The **Add Element** box that opens up is scrollable (!) so scroll way down to find & click on the pink plus sign icon labelled **Create Records**
41. In the **Label** form slot on the right, copy/paste this: "Create a task on the new lead" (w/out the quotes)
42. **Tab** to auto-fill the **API Name**
43. Under **How to Set Record Field Values**, select **Manually**
44. Below that, under **Create a Record of this Object**, in the **Object** slot, type "Task" (no quotes) and hit **Tab** or just click somewhere off of that form slot so it finishes filling in

So now SF knows every time a lead record gets added, it should *automatically* create a new task record to go with it. Cool. But you still need to tell what it should put in these tasks' field values when it creates them.

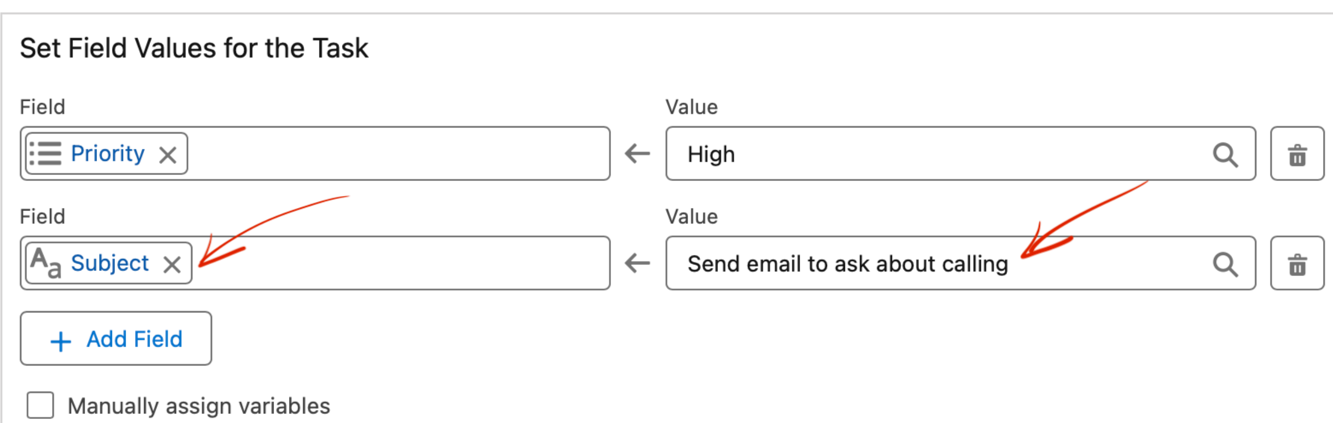
So, under **Set Field Values for this Task**, you'll see where you can fill in **Field <– Value** pairings. Those tell SF what values should go into what fields. Like maybe you might want SF to set the **Priority** field to **High** for each of these tasks. Cool. You can totally do that. But first:

45. If SF has already filled in some of the rows' field names by default, like **IsRecurrence** or whatever, just get rid of those by clicking the garbage can icon on the right end of those rows until you're down to just one empty row showing
46. Now in that one row, in the **Field** slot, type over **Search Fields...** to enter "Priority" (no quotes) and click on the Priority symbol thing that pops up ( **Priority**) to fill it into the slot, and then, in the box to the right for **Value**, do the same thing to fill it with "High" (no quotes)



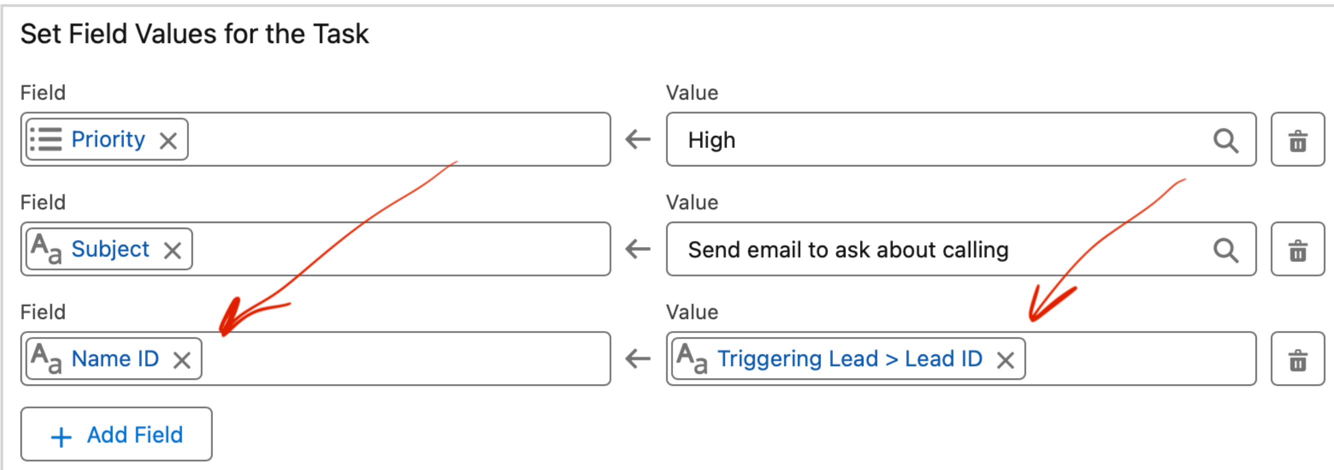

Now add a row to tell SF what to set the **Subject** of the new task to each time:

47. Click **+ Add Field** (blue) on the lower left
48. In the new empty **Field** slot you just added <u>below</u> **Priority**, enter "Subject" (no quotes)
49. In the **Value** slot next to that, copy/paste "Send email to ask about calling" (no quotes)



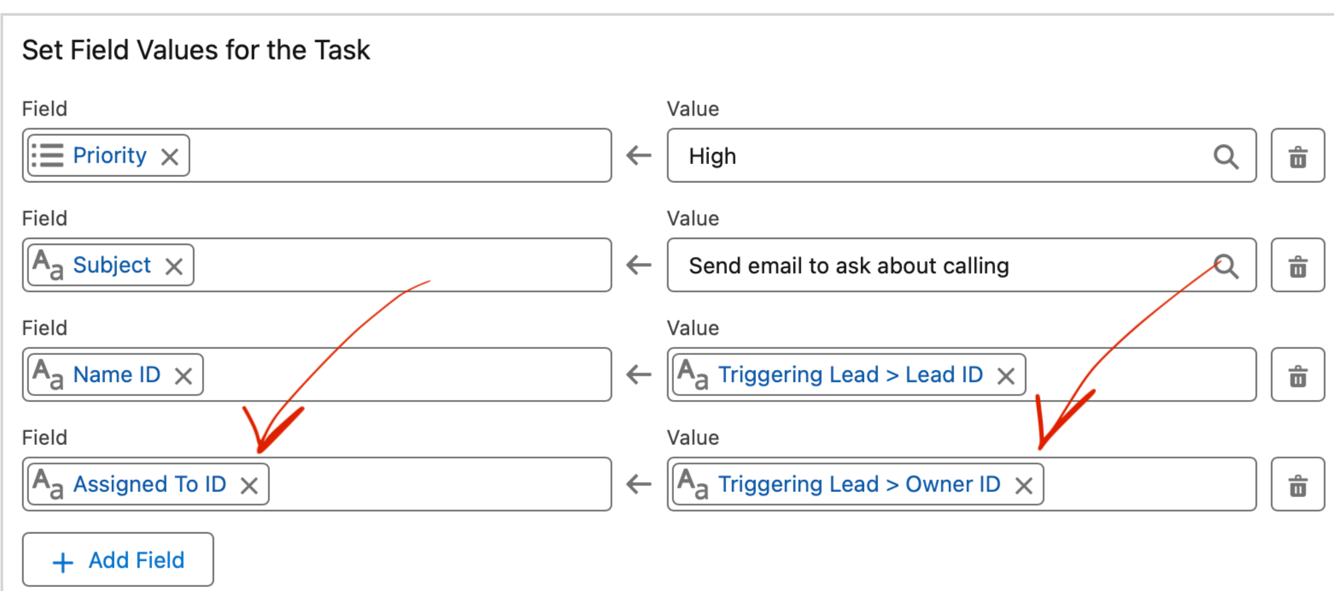
Now you need to tell SF "this new task goes with whatever lead just triggered this flow":

50. Click **+ Add Field** (blue) on the lower left
51. In the new empty **Field** slot you just added <u>below</u> **Subject**, copy/paste "Name ID" (no quotes) meaning "the lead that the new task should go with" & click it in the popup ( Aa **Name ID**) to fill it in
52. Next to that, in the **Value** slot, copy/paste "{!$Record.Id}" (no quotes) & just click off the slot to change it to "Aa Triggering Lead > Lead ID X" meaning "the lead that triggered this flow"



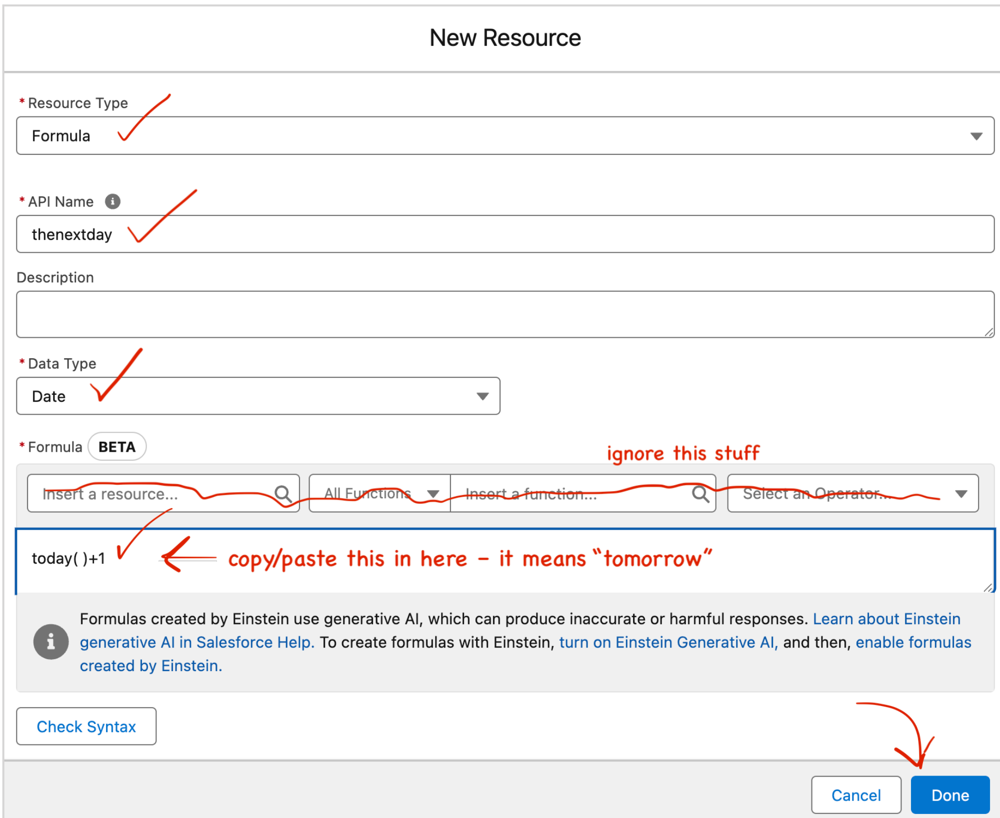

Next, tell it who should be assigned ("own") this new task (you or Riley). The **Lead Assignment Rule** you made before will have already set the owner of the new lead record automatically, so now you can just say "whoever owns the lead that triggered this flow should also be the owner of this new task being made":

53. Click **+ Add Field** (blue) on the lower left & scroll down
54. In the new empty **Field** slot you just added <u>below</u> **Name ID**, copy/paste "Assigned To ID" (no quotes) meaning "the owner of this new task being created" and click it in the popup to fill it in
55. Next to that, in the **Value** slot, copy/paste "{!$Record.OwnerId}" (no quotes) & just click off the slot to change it to "Aa Triggering Lead > Owner ID X" meaning "the owner of the lead that triggered this flow"

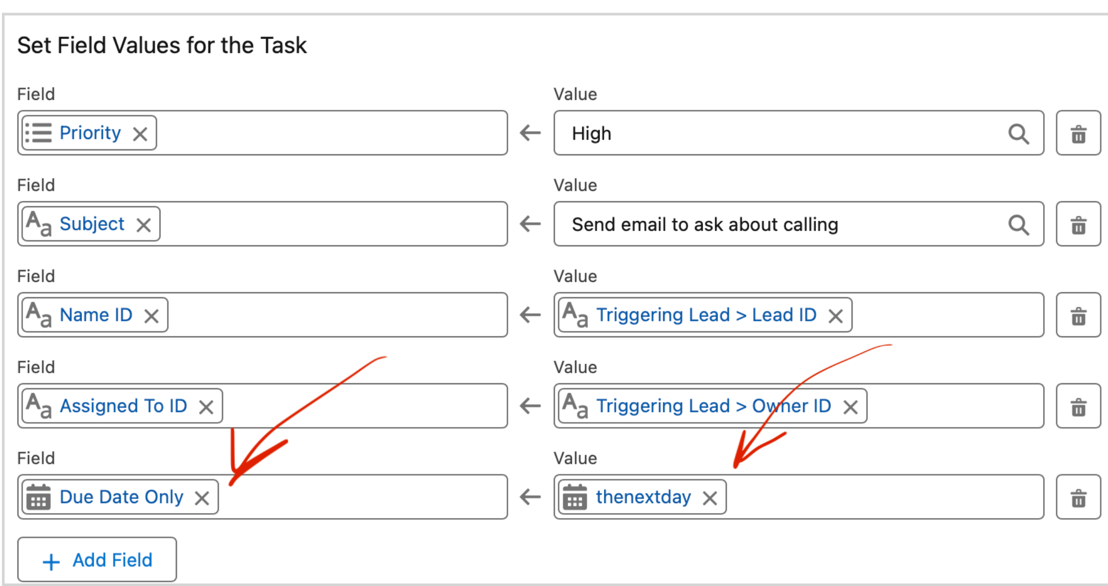


Now tell SF to set the **Due Date** to one day after now (today), ie the day after the lead got added:

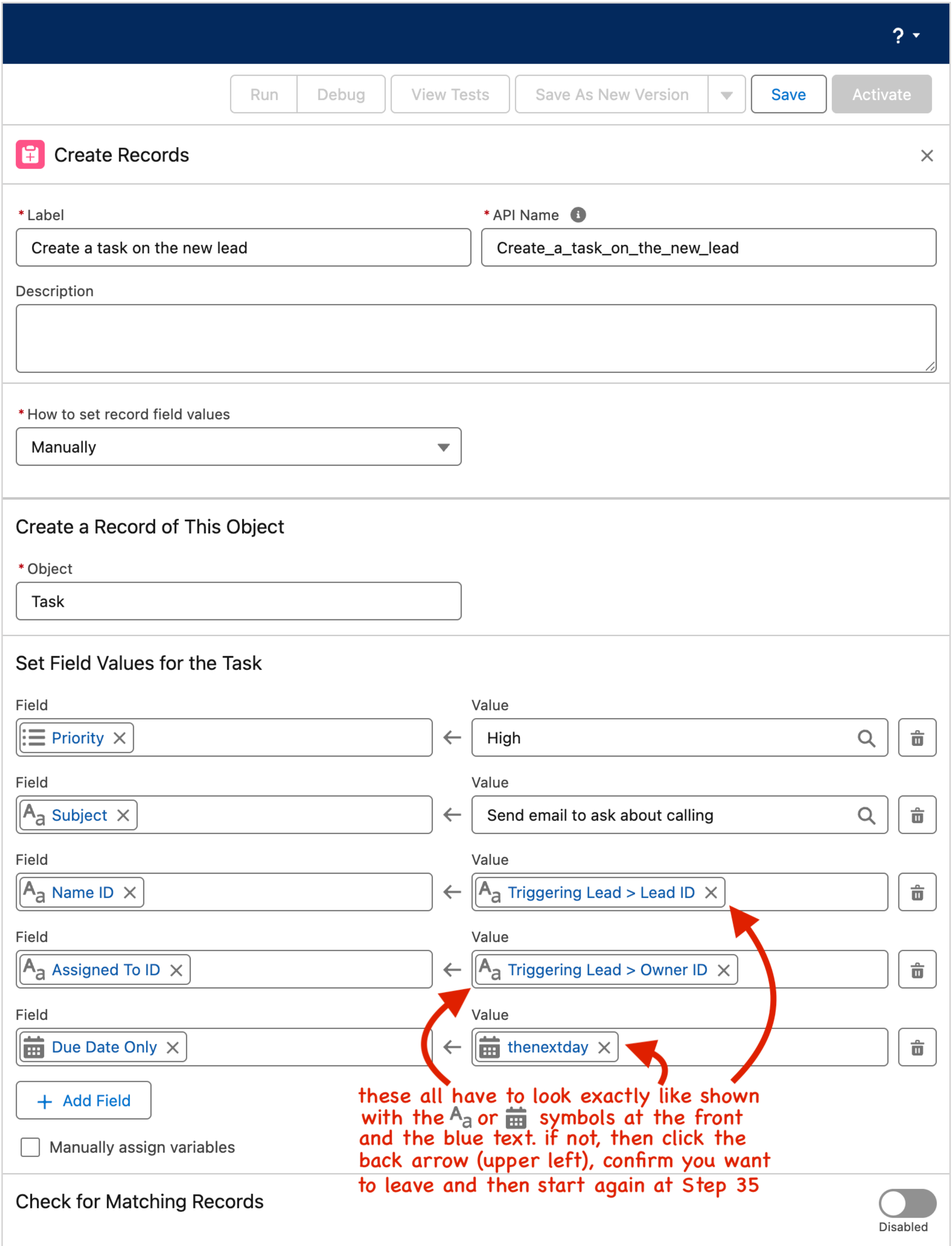
56. Click **+ Add Field** (blue) on the lower left
57. In the **Field** slot, copy/paste "Due Date Only" (no quotes) & click it in the popup to fill it in
58. In the **Value** slot click on the **M/d/yyyy** in that slot to get a drop-down
59. Click on **+ New Resource** at the bottom of the drop-down
60. Then, in the **New Resource** popup, click on **Select…** and choose **Formula** from that drop-down
61. In the **API Name** slot that appears, copy/paste "thenextday" without the quotes (no spaces allowed)
62. For **Data Type**, click **Select…** and then choose **Date**
63. Under the **Formula** field, skip down past "Insert a Resource…" down to the big text box below and copy/paste "today()+1" which is SF's way of saying "tomorrow" no matter what day it is now




64. Make sure your form looks exactly like the one above and then click the blue **Done** button and click off the slot to fill in the value as shown below



65. Now, check to make sure your **Create Records** form looks *exactly* like the one below–if not, then on the upper left, on the dark blue bar next to where it says **Flow Builder**, click the left arrow and then confirm you want to leave, and when you're back on SF's **Flows** page, you can just return to **Step 35** & go from there to try again



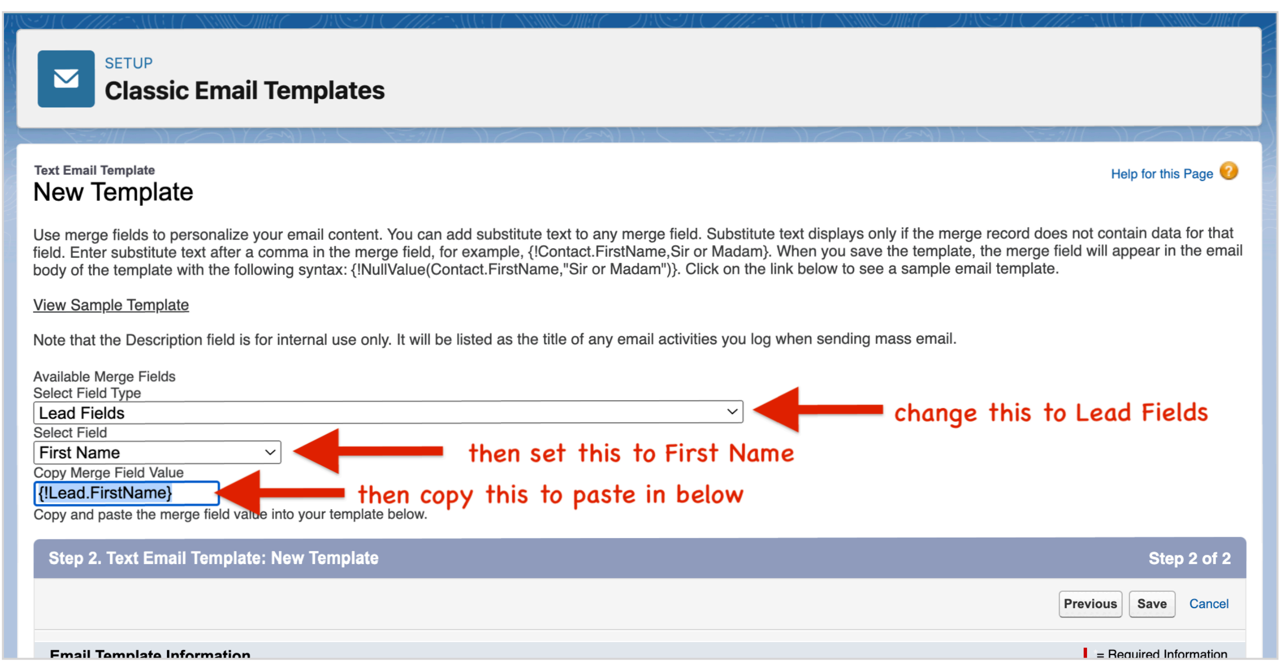
66. Now click the **Save** button on the upper right
67. On the popup, for **Flow Label**, enter "Automatically add an email task to every new lead" (no quotes)
68. Tab to auto-fill the **Flow API Name**
69. Click the blue **Save** button in the lower right corner
70. Click the **Activate** button on the upper right
71. Click the left arrow on the upper left to get back to SF's **Flows** page

Ok, cool. Now whenever a new lead gets added & assigned to you or Riley, SF will *automatically* create the emailing task for that lead and give it to whichever of you got assigned to her/him. Cyborgs rule! (in a good way)

But, now fasten your seatbelts, bc I'm taking you full-send-cyber! I figured out how to create a web form to go in our fancy web site where leads can submit their info *straight to our SF database* instead of emailing me. Hah!

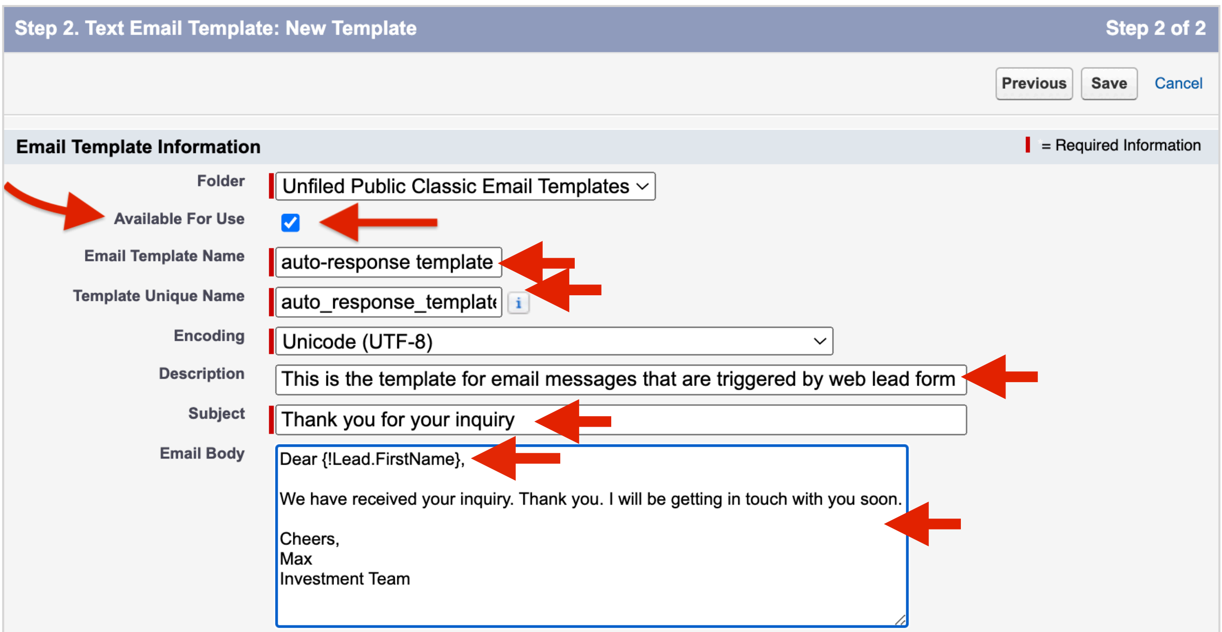
First, before making the form, I created another email template—this one for sending an instant, "personalized" thank-you message to leads automatically, as soon as they submit their info to the new form:

72. On the lefthand menu, toward the top, under **ADMINISTRATION**, click **Email** and under that, click **Classic Email Templates**
73. 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**
74. On the next page, scroll down to the pane labeled **Step 2. Text Email Template: New Template**, check the **Available for Use** checkbox
75. For **Email Template Name**, enter "auto-response template for incoming web leads for me"
76. Just tab or click on the **Template Unique Name** textbox and it will auto-populate with the underscore-embedded name
77. For **Description** enter "This is the template for email messages that are triggered by web lead form submits"
78. For **Subject** enter "Thank you for your inquiry"
79. Back up above, find the menu that says **Contact Fields** and change it to **Lead Fields**
80. Then, below that, under **Select Field**, use the blank drop-down to select **First Name**



Then, below where you selected **First Name**, the **Copy Merge Field Value** textbox got filled in–copy that now so you can paste it in this next step:

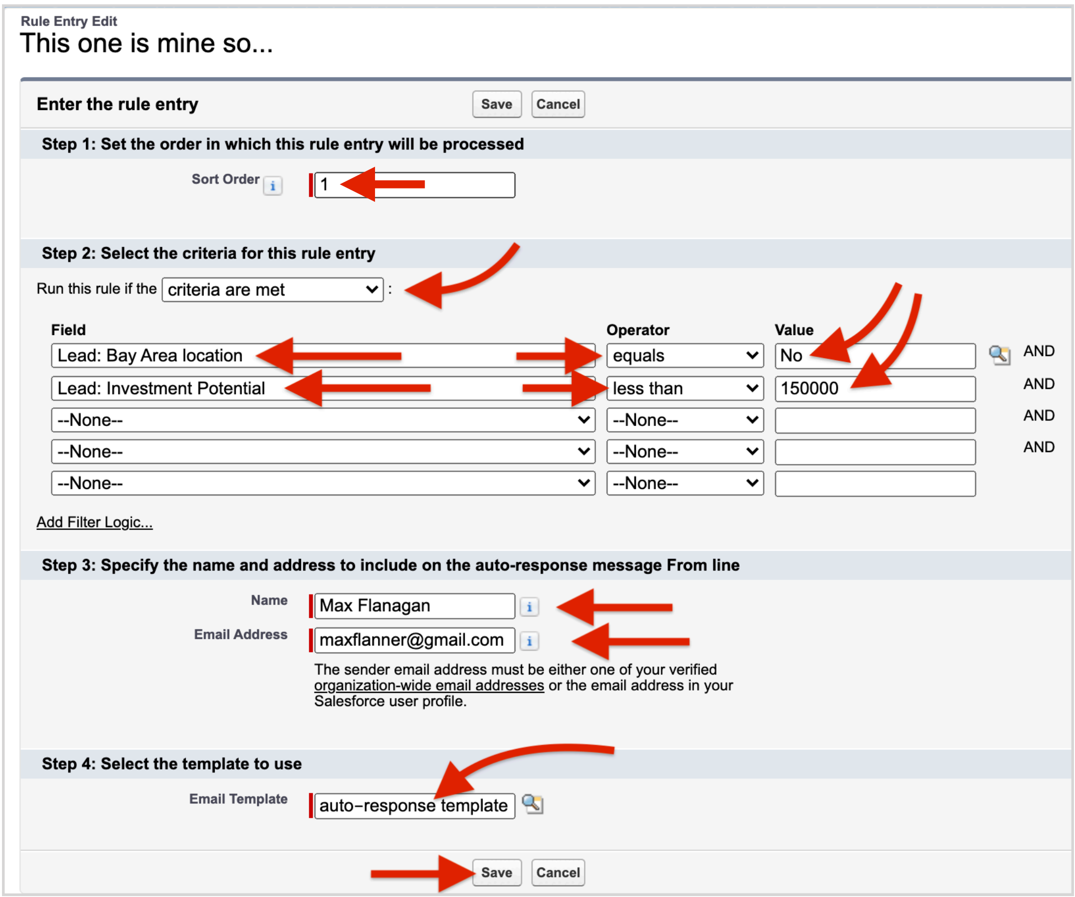
81. In the **Email Body** textbox, type "Dear " (including the trailing space) and then paste in what you copied for the lead's first name & add a comma after it, at the end
82. Leave one blank line and then "We have received your inquiry. Thank you. I will be getting in touch with you soon."
83. Leave 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
84. 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":

85. Go to **Setup** if you need to and, on the left, under **PLATFORM TOOLS**, click **Feature Settings** and under that, **Marketing** and under that, **Lead Auto-Response Rules** & click the **New** button
86. For **Rule Name**, enter "This one is mine so..."
87. ***Critical!*** Click the **Active** checkbox and then click the **Save** button
88. Now you'll see the new rule appearing on the **Web-to-Lead Auto-Response Rules** page
89. Click on the name you gave it—**This one is mine so**... to open it up
90. In the **Rule Entries** section at the bottom, click the **New** button
91. Under **Step 1: Set the order in which this rule entry will be processed,** for **Sort Order,** enter the number "1"
92. Under **Step 2: Select the criteria for this rule entry**, make sure **Run this rule if the** drop-down menu shows **criteria are met**
93. In the first row under **Field**, use the drop-down menu to select **Lead: Bay Area location**
94. Use the **Operator** drop-down menu to the right on that same row to select **equals**
95. 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 **Insert Selected** (or just type in "No")
96. On the 2nd criteria row, right below the one you just set, use the drop-down menu under **Field** to select **Lead: Investment Potential**

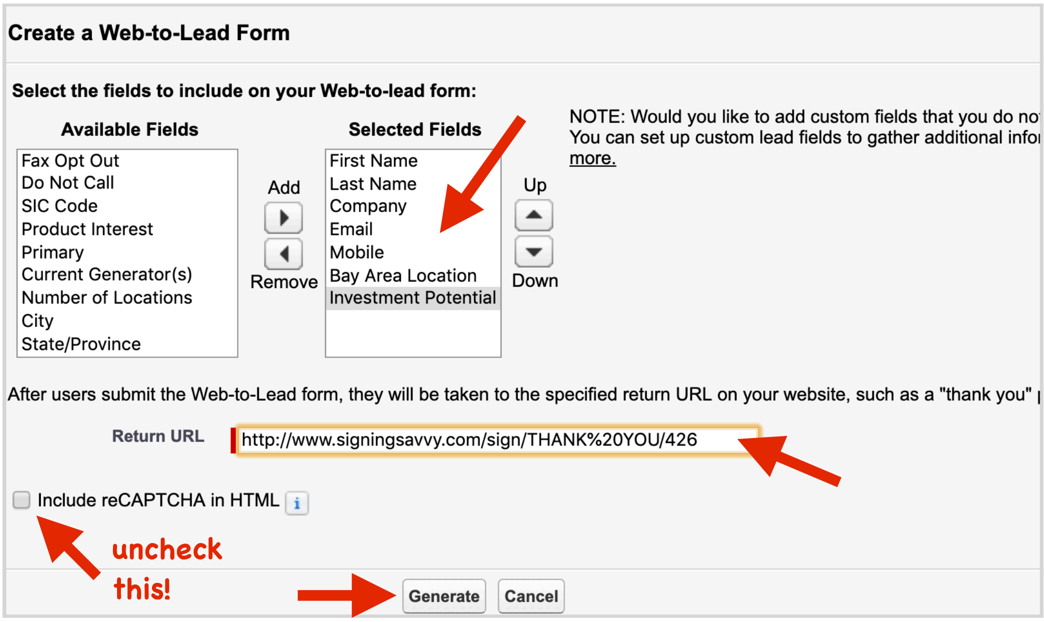
97. Use the **Operator** drop-down menu on that same 2nd row to select **less than**
98. In the **Value** textbox on that same 2nd row, enter "150000" (4 zeros—make sure!)
99. Below, under **Step 3: Specify the name and address to include on the auto-response message From line,** enter your first and last name
100. 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!
101. 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
102. 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:

103. Back on the lefthand menu, down below **Lead Auto Response Rules**, click **Web-to-Lead** (**Setup** > **PLATFORM TOOLS** > **Feature Settings** > **Marketing** > **Web-to-Lead**)
104. Under the **Web-to-Lead Settings,** click the **Create Web-to-Lead Form** button
105. 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)
106. Do the same for **State/Province** (don't need it either)
107. Click **Company** to highlight it and then click the **Up** button immediately to the right to move it above **Email**
108. 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
109. In the **Available Fields** list, click **Bay Area location** to highlight & **Add** to move it over too

110. In the **Available Fields** list, click **Investment Potential** to highlight it and click the **Add** button immediately to the right
111. 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
112. 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">

<!--  ----------------------------------------------------------------------  -->
<!--  NOTE: Please add the following <FORM> element to your page.             -->
```

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"?

**This is your unique "oid" value, you'll need it in a second!**

```
<form action="https://webto.salesforce.com/servlet/servlet.WebToLe

<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 free API tutorial.)

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="** (we're skipping the form handler & going 100% straight API, baby):

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

113. Copy this & paste into a new tab in your browser but **DON'T** send it yet (don't click **Enter**, just paste)
114. 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 just your ID number (NOT the quotes)
115. Back where you pasted that link above, at the end, add "&oid=" (w/ lowercase "i" not "L" & no quotes) & then paste in your Org ID after it (no spaces) so it looks like this **but with your Org ID** (be exact):

**Paste YOUR Org ID in here after the "oid=" part so the new record will go into YOUR "org", not Max's!**

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

116. 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 don't type quotes!

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

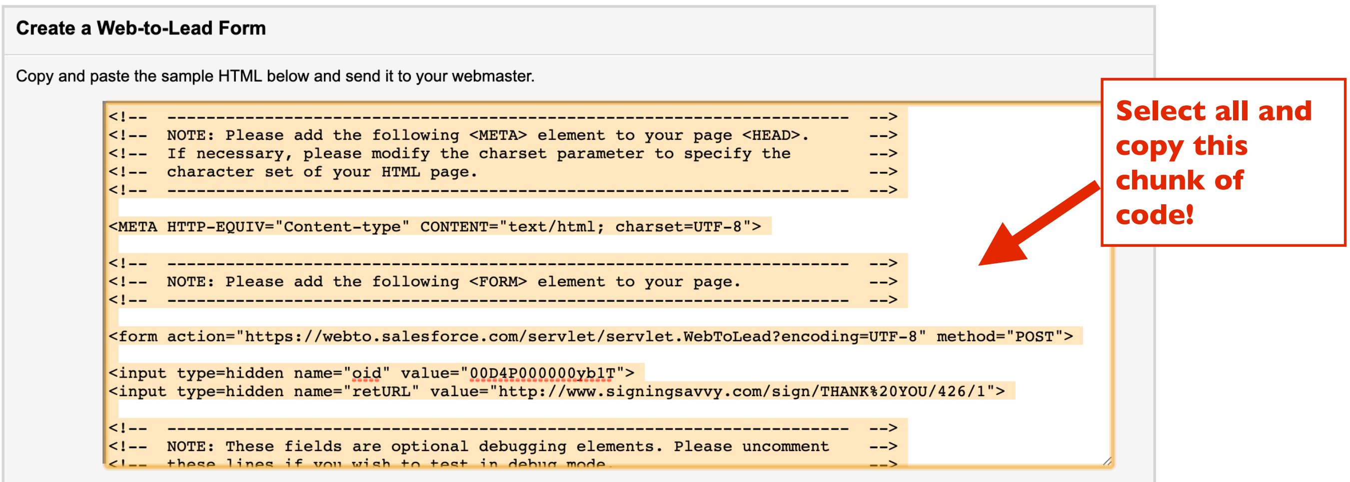
include the underscore!

117. You could add more (field=value) pairs but you get it, so just go ahead & hit **Enter/Return** to send 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!

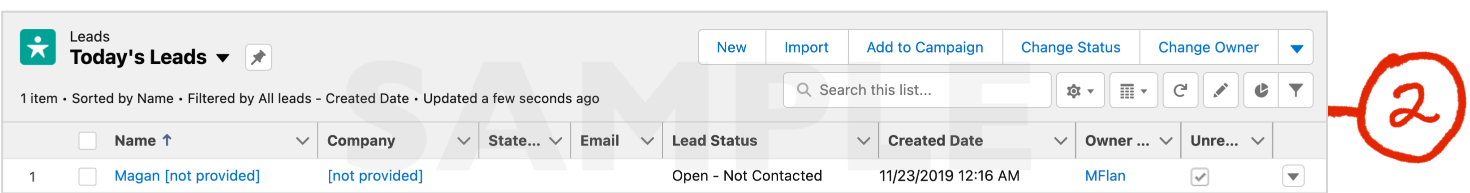
Go check it out but **FIRST DO THIS (super-important!)**:

118. 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 "select all" if you want: **Ctrl/Cmnd-A**)




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

119. Hit the **App Launcher** > **Marketing CRM Classic** & click your **Leads** tab and then IF it says **Intelligence View** on the upper left, then click **List View** on the upper right List View
120. Click the drop-down arrow 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…

Ok, back to setting up that web form. You've still got that chunk of HTML code copied, right? (If not, just redo **Steps 103-112** & come back here.) Now you just need to paste it into a file you can open in your browser. But you can't use Word–it'll embed all kinds of extra formatting that'll mess things up. Use a plain text editor that'll let you make a file with just exactly what you just copied. Luckily, there's a free, easy one on the web:

121. Just go to **https://texteditor.co** (yes, just ".co", NOT ".com")
122. Click **Create New Text File** and then paste in the HTML you copied earlier
123. In the upper left corner, select & type over "Untitled.txt" to change the filename to "myweb2lead.html"
124. Click the **Download** button in the upper right corner and it'll drop the file into your **Downloads** folder or wherever you have your downloaded files set to go

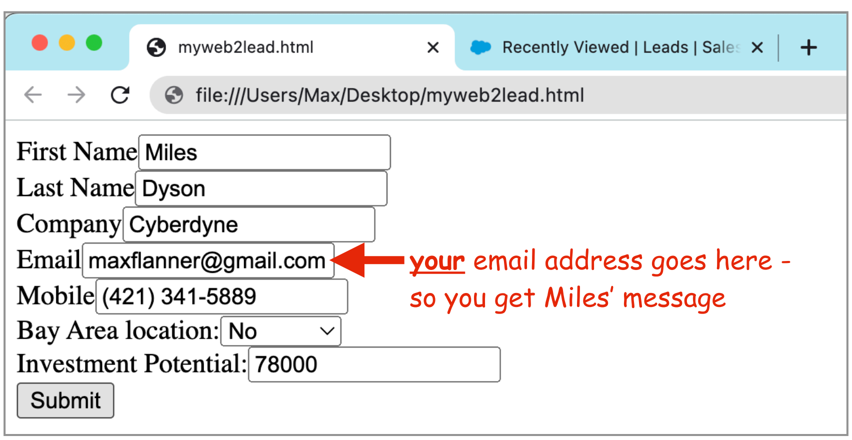
Now, do you realize what you've got there, in your little file? It's a fully functional web form page! You could put it on a website where potential leads could fill it out & when they click **Submit**, SF would do all this, *automatically*:

- 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/Riley, under the **Upcoming & Overdue** activity list for that lead, telling you/Riley to follow up, within 24, by sending them an email to ask about calling,
- 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:

125. On your computer, find the file you just created, **myweb2lead.html**, (probably in your **Downloads** folder) and double-click to open it up in your browser OR, in your browser, go to **File** > **Open File …** and find & select **myweb2lead.html** to open it
126. For **First Name & Last Name,** enter "Miles" and "Dyson" (from Terminator 2—he was the scientist that created the bad borg technology)
127. For **Company**, enter "Cyberdyne"
128. For **Email**, use your own email address so you can see & open the thank-you message
129. Make up a random number for **Mobile**
130. Select **No** for **Bay Area Location** (important—this lead is yours, not Riley's!)
131. For **Investment Potential** enter a number less than 150000, like 78000
132. Click **Submit**

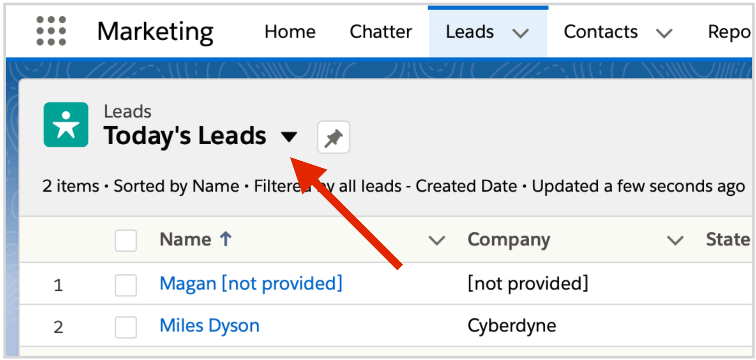



You should see the cool sign-language thank-you video now playing in your browser. (Ours takes you to a real thank-you page on our site, of course.)

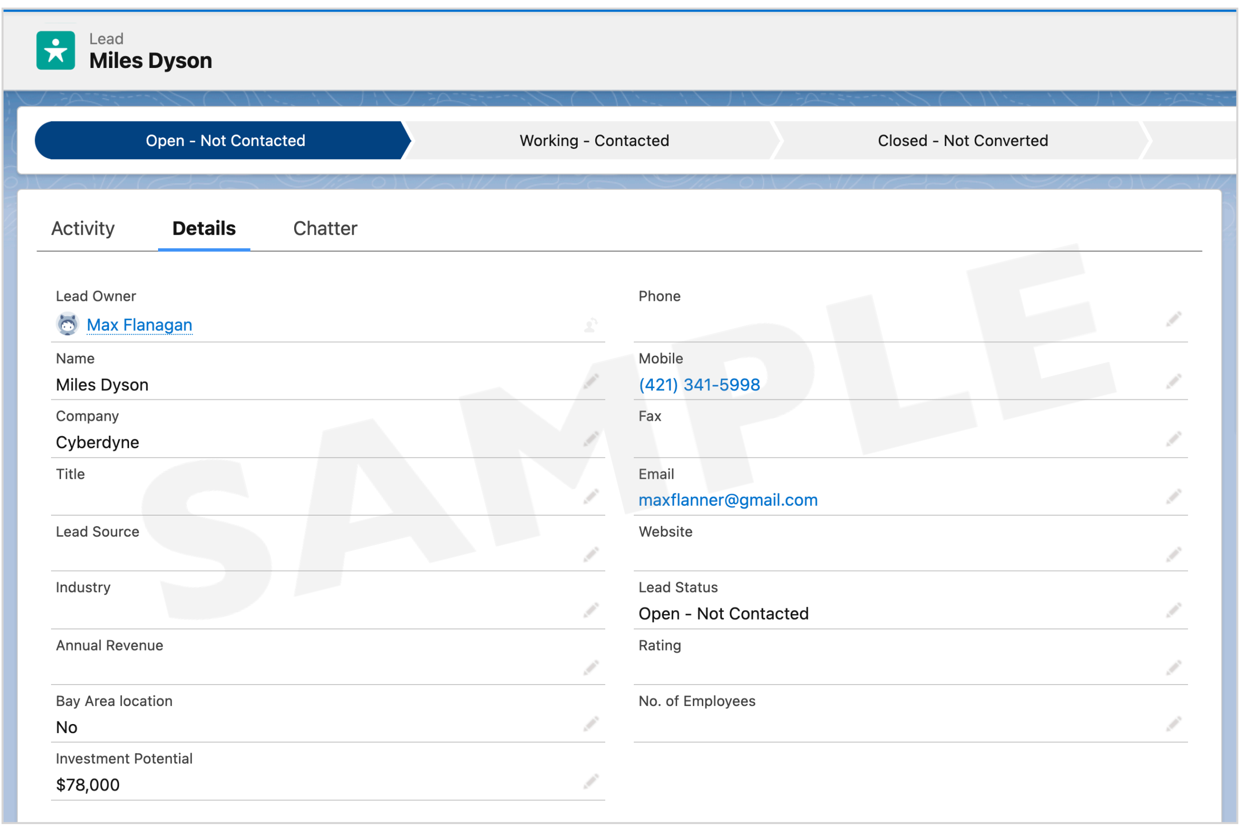
133. Check your email (as Miles) for the thank-you message
134. Check your email (as you) for the alert message about your new lead, Miles

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

135. 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.)




136. Click on Miles to open up his **Lead** record
137. Click on the **Details** tab (under the blue **Open - Not Contacted** bar) 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!)



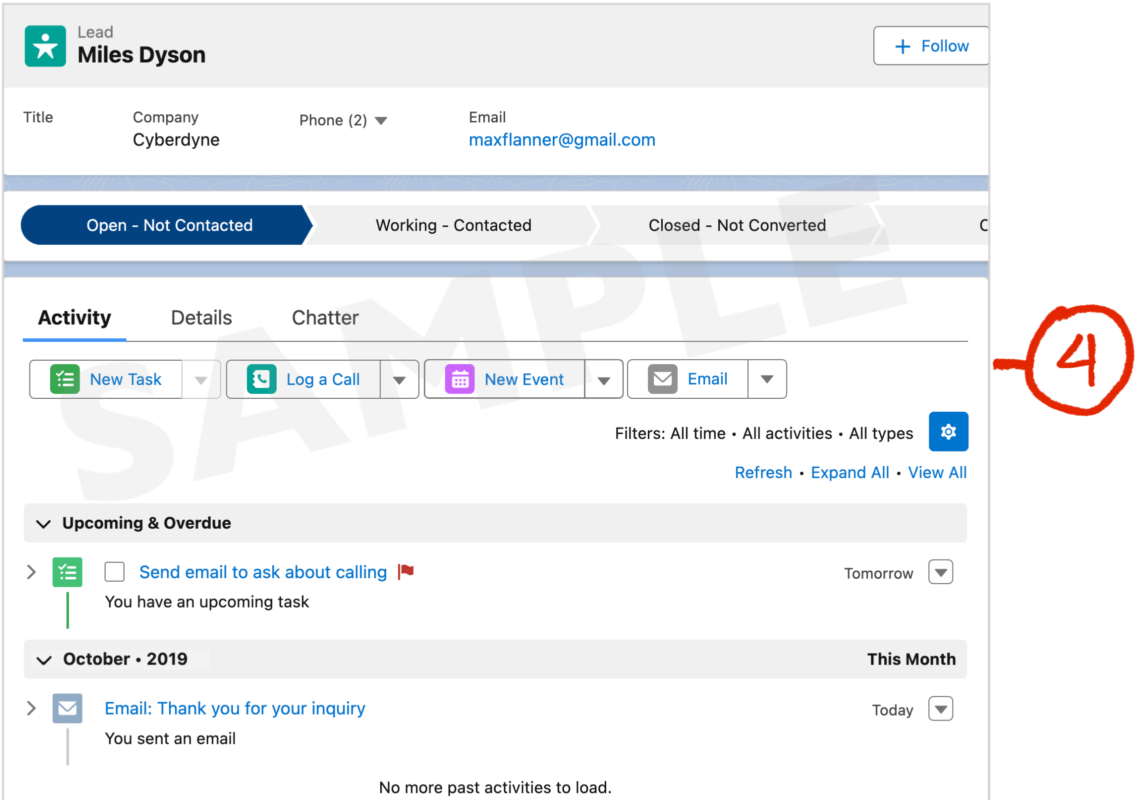

3

138. 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...

139. Click on the **Activity** tab and scroll down to see the "to-do" task that your flow 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!**