VARASI ACCOUNT MANAGEMENT

FAQS.

Frequently Asked Questions

Table of Contents

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1.1 How should I mark an account as strategic?

Check the “Strategic Account” (API Name: varasi_am__Strategic_Account__c) checkbox on the account to mark it as a strategic account.

1.2 What is Your Company Account?

Create an account to represent your own company and check the “Your Company” (API Name: varasi_am__Internal_Account__c) checkbox on that account to mark it as your company account. You can then add your employees as contacts to this account. These employee contacts can then be referred for notable contributions or meeting attendees etc. in the Varasi Account Management App.

1.3 How can I add notable contributors to an account health metric?

Notable contributors on an account health metric are mentions of your internal employees who have contributed to health metric improvement for that instance. You can add your employees as Contacts on your company account and then reference them on an account health metric as notable contributors. Only contacts from Your Company (refer to above) are available to be selected here.

1.4 How do I set the batch size and schedule for Account Insights and Account Cadence job runs?

The account insight and account cadence job runs every day to identify the account insights as per configuration and create account cadence tasks and cases. To adjust the batch size of this job, change the value of the “batch_size” custom label. The time at which the job runs can be configured in the custom label “Engagement_Activity_Schedule_Time” (in HH:MM:SS) format. The default value is 01:00:00.

1.5 What is the difference between Account Insights and Account Cadence?

The purpose of Account Insights is to find any significant patterns in the account data and surface those patterns early on for proactive action. You can configure account insights flows to identify any *good signs* or *early warning* patterns in your account data.

The purpose of the Account Cadence is to automate the recurring tasks or reminder activities that you want your account managers to undertake. The cadences can be configured to automatically create a case or a task for existing *best practice* patterns.

1.6 I have configured the filter and action flows in Account Insights/Account Cadence but why is it not executing the flow?

Ensure that you enter the API names and not the display labels of the flows in the configuration on the Setup page.

1.7 How do I add the "Add Checklist Tasks' button on an object?

You can add the action "Add Checklist Tasks" on an object so that you can create tasks from pre-configured checklist templates. To do this, create an action on the object and select Flow for Type. Choose flow "Create_Tasks_for_Checklist_Template_Items" as the target flow. This screen flow allows you to choose a checklist template and add the template items as tasks.

1.8 Can I use the components in the Varasi Account Management App on my own account record page?

You can add any of the account page components in the Varasi Account Management App on your own account record page. Just modify the account record page in the Lightning app builder and place the component of choice on the page.