VARASI ACCOUNT MANAGEMENT

SETUP AND CONFIGURATION GUIDE

Table of Contents

1. Setup Requirements

- My domain should be enabled and deployed for all users in the Salesforce Org. It is required for the lightning components to work properly in the lightning interface. Varasi Account Management is not supported in Classic.
- Account Teams should be enabled in the org. To enable Account Teams, go to Setup > Account Teams.

2. Post Installation Steps

- Varasi Account Management App has the following fields on Account. Modify your account layouts to include these fields as needed
  - Strategic Account: Checkbox to mark an account as strategic
  - Your Company: Checkbox to mark one of the Accounts as your company account so that you can add internal company contacts against the account to refer in business reviews or goals etc.
- The Varasi Account Management App contains several flows and reports. Ensure the profiles which use the app have the appropriate permissions to run flows, reports and dashboards
- Account Target is an object in the Varasi Account Management App. A target needs to be linked in an opportunity so that it can be reported on. Ensure that the "Account Target" field is added to Opportunity layout and filled up if account target reporting is to be used.
- Provide access to the Varasi Account Management report folder to the users needing reports access

3. Varasi Account Management App Permissions

The Varasi Account Management App comes with the following permission sets.
Review your access requirements and assign the permissions sets accordingly.

"Varasi Account Management User" Permission Set: Assign this permission set to all the users of the Varasi Account Management App. This permission set grants access to all custom objects, fields, flows, classes, dashboards, reports for using the app.

"Varasi Account Management Admin" Permission Set: Assign this permission set to the admin of the Varasi Account Management App. It contains the above permission plus a few additional permissions for configuring the app.

The admin gets the following additional permissions through this permission set:

- Edit Access to Following Configuration Objects
  - Engagement Activity Flow Configuration
  - Health Metrics Configuration
  - Checklist Template
  - Checklist Template Item
- Access to the Setup Page which contains "Account Cadence and Insights Status" custom component. This component is used to schedule daily Account Insights and Account Cadence runs. It also shows the status of the last completed and upcoming scheduled run.
- Access to custom labels "Batch_Size" and "Engagement_Activity_Schedule_Time"
- Edit access to "Calendar Configuration", "Action Class Configuration", "Filter Class Configuration", "Filter" Custom Metadata types to configure related objects for Account Calendar view

3. Varasi Account Management Pages

The Varasi Account Management App comes with an account record page (Account_Record_Page_Acct_Mgmt). The record page contains all the related objects as well as custom components related to the account in Varasi Account Management. You can set this record page as a standard record page for accounts in your org or use the components from the below list on your account record page.

Custom components in the Account Record Page

- relationshipHierarchyNew: Account Relationships Custom Component
- fileExplorer: File and Folder View Custom Component
- calendar: Account Calendar Custom Component (Regular Size)
- miniCalendar: Account Calendar Custom Component (Mini Size)

Account Management Home page contains the dashboard "Account Management Dashboard", which shows key account management metrics.

4. Configuring the Varasi Account Management App

Go through the following setup steps to configure the Varasi Account Management app for your use.

4.1 Your Company

Setting an Account as *Your Company* enables you to track various internal employees as Contacts of this account and reference them in various appropriate areas. E.g. an employee stored as a Contact on this account can be referenced in a health metric record as a notable contributor for a month. Any specific highlights or work of the employee can be captured and highlighted in the metrics as well as business review tracking.

To set an account as Your Company account, check the “Your Company” field on the Account. Contacts from selected internal accounts are available to be selected as notable contributors in Health Metric records, attendees on business reviews as well as contributors in an account goal record.

4.2 Health Metrics

Standard health metrics to track across all strategic accounts can be configured in the **Health Metrics Configuration** object. Following are the fields in the Health Metrics Configuration

- Metric Category: This is a picklist field. Add categories as picklist field values in this field to categorize the metrics
- Name, Display Name: Provide a name for the metric. You can specify a separate display name that can be used for reporting purposes.
- Active: Check the Active checkbox to make the health metric active. Only active metrics show up in the lookup field when creating a new account health metric record for any account.

4.3 Checklist Templates

Checklist templates can be set up to be used across various areas of the Varasi Account Management App. Configured checklist items from these templates can be inserted as Salesforce Tasks at various places such as on Account, Business Review, Goals etc. Use the following steps to configure Checklist Templates

- Navigate to the Setup page of the Varasi Account Management App
- In the “Checklist Template” section click on New to create a new checklist template
- Provide a name for the checklist template, check the Active checkbox to make the template active.

- Once the **Checklist Template** record is created, click on New on the **Checklist Template Item** section to create a checklist template item.
- Assign a name to the Checklist template item. This will be the subject of the Salesforce task when tasks are created from the checklist template.
- Varasi Account Management App comes with a few sample checklist templates out of the box. These templates are Account Onboarding, Quarterly Business Review, New Initiative Kickoff and Handover, Major Escalation, and Account Planning.
- To enable creation of tasks from checklist for an object, add an action on the object with following configuration
    - Click on "New Action" for the desired object
    - Action Type: Flow
    - Flow: Create Tasks for Checklist Template Items
    - Standard Label Type: None
    - Label: Create Tasks from Checklist
    - Name: Create_Tasks_from_Checklist
- Once the above action is created, ensure you add the created action to the "Salesforce Mobile and Lightning Experience Actions" section on the object's layout.

4.4 Account Insights

Account Insights are pre-configured patterns identified among various strategic accounts. These insights help you identify good or bad news early. The configured Account Insights patterns are evaluated every day and the resulting insights are created against a strategic account. You can configure account insights to identify patterns such as a decline in health score over a period, lack of relevant activity on an account, high number of open cases, lack of account relationships with high score etc. Such account insights in strategic accounts can then be reported on for subsequent action.

Following are the steps needed to create a new account insight record. In the Setup page, go to the "Account Insights" section. This is a list view of "Engagement Activity Flow Configuration" object with a record type of Account Insight. Create a new record of "Engagement Activity Flow Configuration"

- Select Record Type: Account Insight or Account Cadence. Select Account Insight
- Name: Give the Account Insight a name
- Filter Flow Name: This should be the API name of the flow which will further filter the strategic accounts into the accounts of interest for the given account insight. If using a flow from a managed package, specify the flow name along with namespace, such as varasi_am:NoRecentAccountActivityFilter. If Account Insight is going to identify accounts with more than 2 high severity open cases, then the filter flow should filter the incoming strategic accounts by the number of high-severity open cases and only

return those accounts with more than 2 such cases. The flow should have the following variables in it with the specified name.

- activityId: This should be a text variable available for input. The id of the engagement activity configuration record will be passed in this variable by the Varasi Account Management App when the insight runs.
- strategicAccountIds: Declare this as a Text Collection variable available for input. Varasi Account Management App will run for all strategic accounts (based on Strategic Account checkbox on Account) in batches and pass the current batch's account ids in this variable to the filter flow
- filteredRecordIds: Declare this as a Text Collection variable available for output. Apply the insight criteria on the input strategic accounts and add the account ids of qualified accounts in this output variable. Refer to the sample flows to see how this variable is populated for the sample use cases. You can clone the sample template flow to create similar account insight filter flow as per your desired criteria

- Action Flow Name: This should be the API name of the flow which will perform some action on the filtered set of accounts. If using a flow from a managed package, specify the flow name along with namespace, such as varasi_am:CreateAccountInsights. The flow should have the following variables in it with the specified name
    - activityId: This should be a text variable available for input. The id of the account insight configuration record will be passed in this variable by the Varasi Account Management App when the insight runs.
    - filteredRecordIds: Declare this as a Text Collection variable available for input. The Varasi Account Management App will pass the filtered account ids from filter flow in this variable. You can perform the action to insert a record in Account Insight Object for each of the identified account with the specified text. You can clone the sample Create Account Insights action flow to create a similar action flow.
- Active: Mark the insight as active. Only the active insights are run by the Varasi Account Management App.
- Insight Text Message: Add some insight message that you can use when creating the account insight record. The "Engagement Activity Flow Configuration" is available in the action flow in the form of activityId. The activityId can be used to query this record and then use the Insight Text message in the account insight record.

The Varasi Account Management App comes with the following sample Account Insights pre-configured. You can use these as a reference to configure additional account insights as per your requirements.

- No account activity (Task, Event or Email) within the last 60 days: Identifies strategic accounts without any activity for a long period.
- Empty pipeline: Identifies strategic accounts without any opportunities in the pipeline.
- Health Score Drop: Drop of more than 40% in health score over 2 month period.

4.5 Account Cadences

Account Cadences are pre-configured criteria for reminding or performing some action on a strategic account on a recurring basis. These cadences can be used to remind the account managers to perform some important actions for the strategic account by creating a task for them. The cadences can also be used to create cases or other custom object records regularly based on pre-defined criteria.
Following are the steps needed to create a new account cadence record. In the Setup page, go to the “Account Cadence” section. This is a list view of “Engagement Activity Flow Configuration” object with a record type of Account Cadence. Create a new record of “Engagement Activity Flow Configuration”

- Select Record Type: Account Insight or Account Cadence. Select Account Cadence
- Name: Give the Account Cadence a name.
- Filter Flow Name: Similar to Account Insights, this should be the API name of the flow which will further filter the strategic accounts into accounts of interest for the given account cadence. If using a flow from a managed package, specify the flow name along with namespace, such as varasi_am:NoRecentBusinessReviewFilter. If an Account Cadence is going to identify accounts for annual review based on some date, then the filter flow should filter the incoming strategic accounts and keep only those with their anniversary today based on the given date. The flow should have the following variables in it with the specified name
    - activityId: This should be a text variable available for input. The id of the engagement activity configuration record will be passed in this variable by the Varasi Account Management App when the cadence runs.
    - strategicAccountIds: Declare this as a Text Collection variable available for input. Varasi Account Management App will run for all strategic accounts (based on Strategic Account checkbox on Account) in batches and pass the current batch’s account ids in this variable to the filter flow
    - filteredRecordIds: Declare this as a Text Collection variable available for output. Apply the cadence criteria on the input strategic accounts and add the account ids of qualified accounts in this output variable. Refer to the sample flows to see how this variable is populated for the sample use cases. You can clone the sample template flow to create similar account cadence filter flow as per your desired criteria

- Action Flow Name: This should be the API name of the flow which will perform some action on the filtered set of accounts. If using a flow from a managed package, specify the flow name along with namespace, such as varasi_am:CreateNewTaskAction. The flow should have the following variables in it with the specified name
    - activityId: This should be a text variable available for input. The id of the engagement activity configuration record will be passed in this variable by the Varasi Account Management App when the insight runs.
    - filteredRecordIds: Declare this as a Text Collection variable available for input. The Varasi Account Management App will pass the filtered account ids from filter flow in this variable. You can perform the action to insert a record in Case/Task Object for each of the identified account. You can clone the sample Create New Task action flow to create a similar action flow.
- Active: Mark the cadence as active. Only the active cadences are run by the Varasi Account Management App.

The Varasi Account Management App comes with following sample Account Cadences pre-configured. You can use these as reference to configure additional account cadences as per your requirements.

- Business Review Reminder Tasks
- Contract Expiry/Renewal Reminder Case

4.6 Account Cadence and Insights Status

The configured Account Cadence and Account Insights are evaluated daily by a batch Apex job called "EngagementActivityBatch". Use the Account Cadence and Insights Status section of the setup page to view the currently scheduled status of the batch job.

- Scheduling the Batch Job: The daily batch execution time is configured in a custom label named "Engagement_Activity_Schedule_Time". By default, it is scheduled to run at 1AM as per your org time zone. Click on the **Schedule** button to schedule the daily run.
- Terminating the Batch Job: If a batch job is already scheduled then a button **Terminate** will appear. Click on Terminate to stop the batch job from running daily.
- Changing the Batch Size: The daily Account Cadence and Account Insight job is run for all strategic accounts. The batch job is run with a default batch size of 50. The batch size can be changed by changing the custom label **Batch_Size**.
- One-Time Execution of Batch Job: The Account Cadence and Account Insight apex batch job can be run one time by clicking the **Execute** button. You can use this option

to test any configured Account Cadence and Account Insights by running the batch job once.

4.7 Bulk Updates for Account Managers

The Varasi Account Management App provides a "Bulk Update" function for the administrator/manager role. Using the bulk updates, you can create cases, create tasks, create events, send emails, assign owner, close cases in bulk. It can be used by managers to perform these bulk actions related to accounts, opportunities of interest by providing a filtering criteria. The bulk action can be first "previewed" to check which records will be impacted. Once you are satisfied with the preview, you can proceed with the actual execution of the bulk action. Following steps are needed to create a bulk action

- Click on "New Bulk Action" to start a new update
- Give it a name so that you can come back to it later to review results. Each bulk action is available as a record in "Action Plan" object.
- Select object to perform the bulk action for. The object is used as a source for your criteria and then the action is performed for all the filtered records of that object. You can select Account, Contact, Lead, Opportunity, Case or Contract.
- In the filter configuration, select filter type
    - Filer Type = "Plan Object Fields" if you want to set up the criteria based on the selected object in the set above. E.g. if you want to filter certain accounts of interest based on fields on Account object itself then you will select object as Account and filter type as plan object fields.
    - Filter Type = "Parent Object Fields" if you want to apply filter based on the selected object's parent object. E.g. if you want to filter certain cases of interest based on the Account object fields rather than Case object fields, then you will select object as Case and filter type as parent object fields
    - Filter Type = "Child Object Fields" if you want to apply a filter based on the selected object's child records. The conditions can be applied on aggregate metric (sum or count) of the child records.
- You can add more than 1 filters
- Filter Condition: By default, all the filters are applied with an AND condition. But you can apply a different custom condition by providing a filter condition similar to Salesforce list view filter logic.
- Click on Save to save it and revisit later. Click on "Preview" to run the criteria on the selected objects and check how many objects pass the given criteria
- The filter preview will take some time as it processes through all the records of interest. Click on "Refresh" to refresh the status and view the filtered records list. These are the records on which the subsequent action will take place.
- If the filtered records look good then click on Next to proceed to action configuration.

- You can select from the available actions such as create case, create task, create event, send email, close case and assign owner.
- After selecting an action, fill the fields needed for the corresponding action and click on “Execute” to run that action on the filtered set of records. Clicking on Execute will result in bulk record creation, update or email sends based on filter criteria in the earlier step.
- Each preview and execution attempt results in a batch execution to apply the criteria over all the records of the selected plan object. The details of the executed batch for each preview or execution are available in “Plan Execution Summary” record. This record contains the summary of the status, number of records processed as well as filtered. A CSV file containing the record details is stored in the system as a document. You can delete older execution summary records which are no longer needed.

4.7 Account Calendar

The Account Calendar provides a calendar view of all important events on the strategic account’s timeline. You can configure the Calendar view to highlight a strategic account’s Tasks, Cases, Events as well as other important dates such as business review meetings or insights. The calendar view is available as a large calendar component (component name: calendar) and as a small calendar component for a sidebar (component name: miniCalendar). Configure the Calendar component as follows:

- Navigate to Setup Page of Varasi Account Management App > Calendar Configurations.
- You can view some sample calendar configurations here.
- Click on New to create a new configuration record.
- Fill up the values for the new calendar configuration record as follows
    - Label: Label for the configuration record
    - Object Name: Name of the object linked to Account to show on Calendar. E.g. Case, Task or Custom object such as varasi_am__Account_Goal__c. Provide custom object name along with any namespace.
    - Account Lookup Field: The API name of the account lookup field on the above object. An account lookup is required to show the records from the given object on a strategic account’s calendar
    - Date Field Name: The API name of the date field on the object. This date will determine where the record will appear on the Calendar. E.g. if you want to show an account goal on the calendar based on the goal’s target date then use varasi_am__Target_Date__c in the date field name.
    - Field to Show on Calendar: API name of the field from the object to show on the Calendar. This can be typically the name of the record or subject in the case of Task.

- Icon Type and Icon: Specify an icon type and icon to display on the calendar component when showing this record. Use the details from Salesforce Lightning Design System (SLDS Icons).

You can configure multiple object records to be shown on the account calendar. Once configured, place the calendar component on your active Account record page.

4.8 Files and Folders

The *fileExplorer* LWC enables you to organize files for an account in folders. You can use the Files and Folders tab to organize all the files in different folders. You can create folders, sub-folders as well as upload files in those folders directly from this component. Place this component on your account record page to use it. The default account record page in the app already contains the component.

5. Varasi Account Management Key Objects

Varasi Account Management contains following key custom objects to manage specific account information

Custom Object Name	**Description/Purpose**
Account Target	• Account level revenue targets for specific periods can be tracked using this object • Account Targets can be used together with Opportunity to track specific set targets and their achievement
Account Health Metrics	• Monthly (or periodic) account-specific health metric record • Can be reported on to show trend of health metrics over a period of time
Account Plan	• Yearly Account plans
Account Goal	• Soft Goals tracking • Track progress of the goals through status
Business Review	• Regular Business Review Information • Meeting Details, Attendees, Next Steps, Meeting Assessment
Company Offerings	• Company Offering and its status against the target account department

Account Budget, Account Budget Detail, Account Expense Detail	● Account level Budget and Expenses
Program, Program Track, Track Milestone	● Account level Programs and corresponding Tracks and Milestones
Account Recommendation	● Account Insight records created by daily batch job can be stored here to be referenced against an account
Project, Project Task	● Account Project and Project task records
Calendar Configuration	● Calendar configuration to enable viewing of object events on the calendar component
Bulk Action Plan, Rule Action Configuration, Rule Filter Configuration, Plan Execution Summary	● Objects related to the bulk operation on accounts/opportunities/cases.

Table 5.1: List of Objects

