

Varasi Ops Helper

User Guide

Table of Contents

1. Welcome to Varasi Ops Helper	2
1.1 What is Ops Helper	2
1.2 Why Varasi Ops Helper	5
1.3 Varasi Ops Helper for your Salesforce Instance	6
Table 1.3.1: List of Objects	6
1.4 Prerequisite	6
1.4.1 Steps to Enable My Domain	6
Figure 1: Search Domain in the Quick find box in Setup	7
Figure 2: Give your own domain name and Click on Check Availability	7
Figure 3: Acknowledgement of Domain ready	8
Figure 4: Once ready, click on Deploy to Users	8
2. Using Varasi Ops Helper	9
2.1 Getting Around with the Varasi Ops Helper	9
Figure 5: Varasi Ops Helper App in App Launcher	9
2.2 Create an Action Plan	10
Figure 6: New Action Plan	10
2.3 Create a Pre-Filter (Optional)	10
Figure 7: Pre-Filter	11
2.4 Create Filter	11
Figure 8: New Filter	12
2.5 Configure Filter	12
Figure 9: Example of Plan Object Fields based Filter	12
Figure 10: Example of Child Object Fields based Filter	12
Figure 11: Example of Parent Object Fields based Filter	13
2.6 Create an Action	13
2.7 Action Plan Simulate/Execute/Schedule	13
Figure 12: Simulations, Executions, Schedule tabs	14
Figure 13: Upcoming Scheduled Plans	14
2.8 Audit Log Cleanup	15
3. What Next	15

1. Welcome to Varasi Ops Helper

1.1 What is Ops Helper

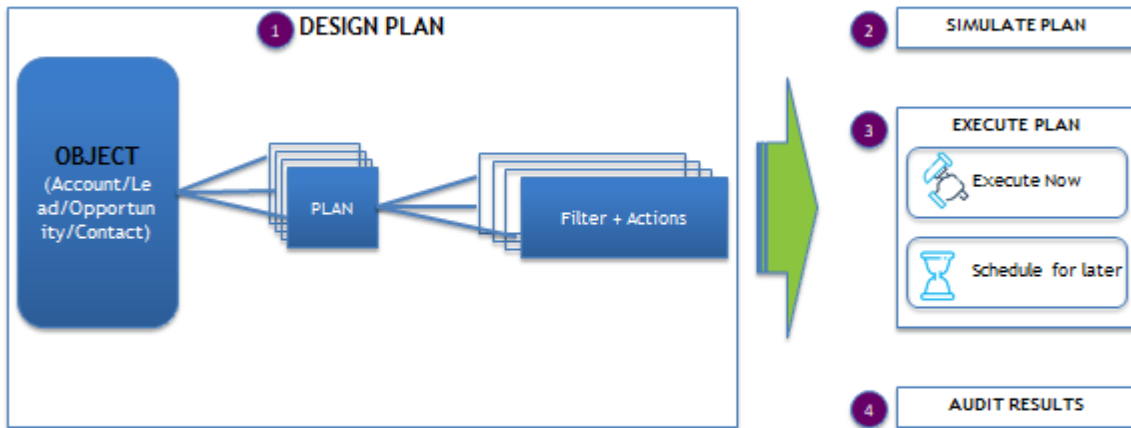
Varasi Ops Helper enables business users to drive best practices and adoption using Salesforce automation and bulk operations without developer support. Users can set up automations and bulk operations either for one-time execution or to execute on a recurring basis. They can set up actions such as creating a case, creating a task, sending email on a filtered set of records with a business user friendly UI.

Each automation activity begins by creating an Action Plan. The action plan contains all the filtering logic as well as configurations for actions that need to be taken (e.g. creating tasks). A new action plan is typically created for each automation activity to be performed. Since each plan works on only 1 object, multiple plans need to be created for activities on multiple objects.

The action plan works on a plan object. This is the source object from where records will be evaluated for automation activity. Currently Account, Contact, Contract, Lead and Opportunity are supported plan objects. A plan contains configurations (Filters + Actions) that work on each record of the plan object. Here, a filter defines the criteria to select plan object records (e.g. Opportunities in “Proposal Stage”), and action defines the step that will be taken on the plan object record if filter condition is met (e.g. Create Task).

Once the Action Plan is ready with 1 or more Filter + Action steps, it can be simulated, executed immediately or scheduled for execution in future. Below diagram provides a high level structure of the Varasi Ops Helper

Varasi Ops Helper in a Nutshell



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- **Action Plans:** Any Automation activity begins with an Action Plan. An action plan determines the plan object (Account, Opportunity, Contact etc.) on which Ops Helper will work. An action plan contains filters and actions which drive the Varasi Ops Helper automation.
- **Filter :** A set of filters are added to each action plan to filter specific records of interest. Each filter has a corresponding action. So the plan object records filtered by a filter are then used for the corresponding action. e.g. if you want to send an email to owners of all opportunities in the proposal stage. Then a filter can be applied on the stage field on opportunity.
- **Pre-Filter:** A Pre-Filter filters only relevant records from the plan object required for the purpose of automation. e.g. you can set a pre-filter to filter accounts created only after a specific date.
- **Action:** Each filter has an action associated with it. The action performs certain activities such as creating a case, creating a task, sending an email etc. on all the source records filtered by the corresponding filter.
- **Plan Simulation:** Simulation of an action plan allows you to see which plan object records are getting filtered by each of the configured filters. It allows you to verify that the correct source records are being acted upon.
- **Plan Execution:** Executing an action plan performs all the actions on the filtered set of records in each filter.
- **Plan Schedule:** An action plan can be scheduled to be executed at a later time. It can be scheduled for one time or recurring execution (weekly or monthly).

- **Plan Execution Summary:** A plan execution summary shows the details of a simulation or execution run. It shows the status of action on each source record. The summary can be downloaded in csv for further analysis or reporting.

1.2 Why Varasi Ops Helper

Varasi Ops Helper aims to improve productivity and Salesforce system adoption. It enables Sales Leaders, Service Leaders, Marketing Leaders and Operations Leaders accomplish more through the system by setting up automation without developer support. The app can also be used by individual users to organize and plan better.

Internal Salesforce super users or leaders need to perform many activities to ensure best practices are followed. e.g. Creating follow up tasks for owners of certain opportunities, creating a case on specific accounts for a product upgrade, sending email to internal sales representatives to inform them of some updates for specific contacts. Getting help from internal Salesforce admin to perform such activities again and again is not practical. It is also not cost effective to engage consultants to customize Salesforce for every such need.

Varasi Ops Helper is 100% Salesforce Native application & Lightning Ready. It is designed for those business users who want to encode sales process best practices in Salesforce and leverage the platform to the fullest. Varasi Ops Helper can be used to schedule certain best practice automations to run on a recurring basis.

1.3 Varasi Ops Helper for your Salesforce Instance

Varasi Ops Helper currently supports following Standard objects as source: Account, Contact, Contract, Lead, Opportunity

Custom Object Name	Description
Action Plan	Action plans for performing automations
Rule	Tracks list of filter-action steps for each action plan
Rule Filter Configuration	Configuration settings such as fields, operators, values to filter by for each filter
Rule Action Configuration	Configuration settings such as fields, values for each action
Plan Audit Summary	Audit details of records satisfying each filter. This summary is created for each simulation as well as execution run

Table 1.3.1: List of Objects

1.4 Setup Requirements

- My domain should be enabled and deployed for all users in the Salesforce Org. It's required for the lightning components to work properly in the lightning interface. Varasi Ops Helper is not supported in Classic.

1.4.1 Steps to Enable My Domain

- From Setup, enter **Domain** in the Quick Find box, then select **My Domain**. You will find **My Domain** under **Company Settings** sub menu.

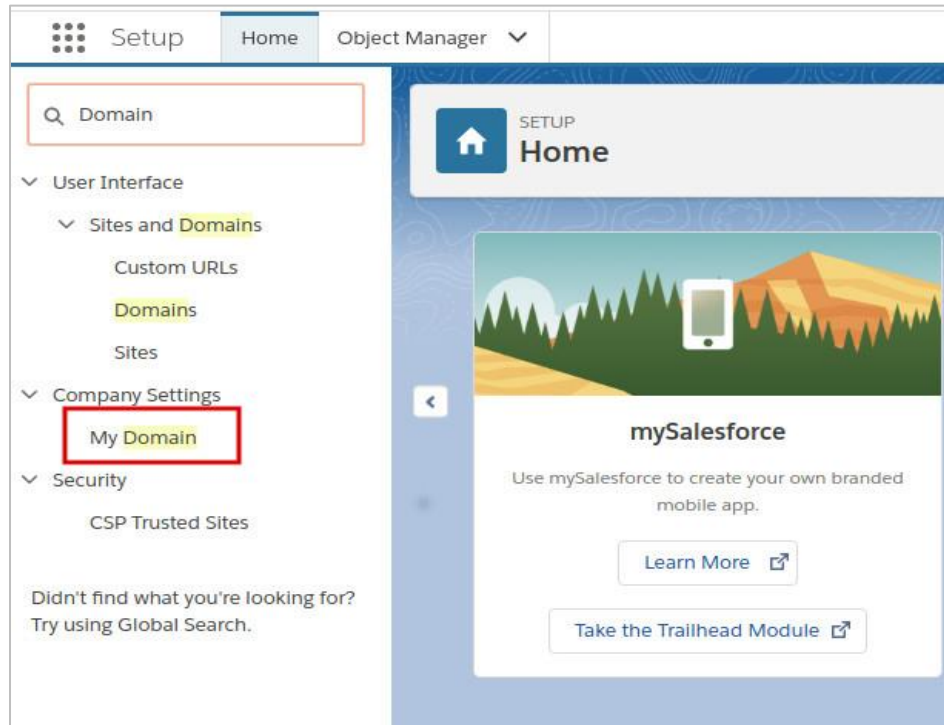


Figure 1: Search Domain in the Quick find box in Setup

- Enter the name for your subdomain (1).

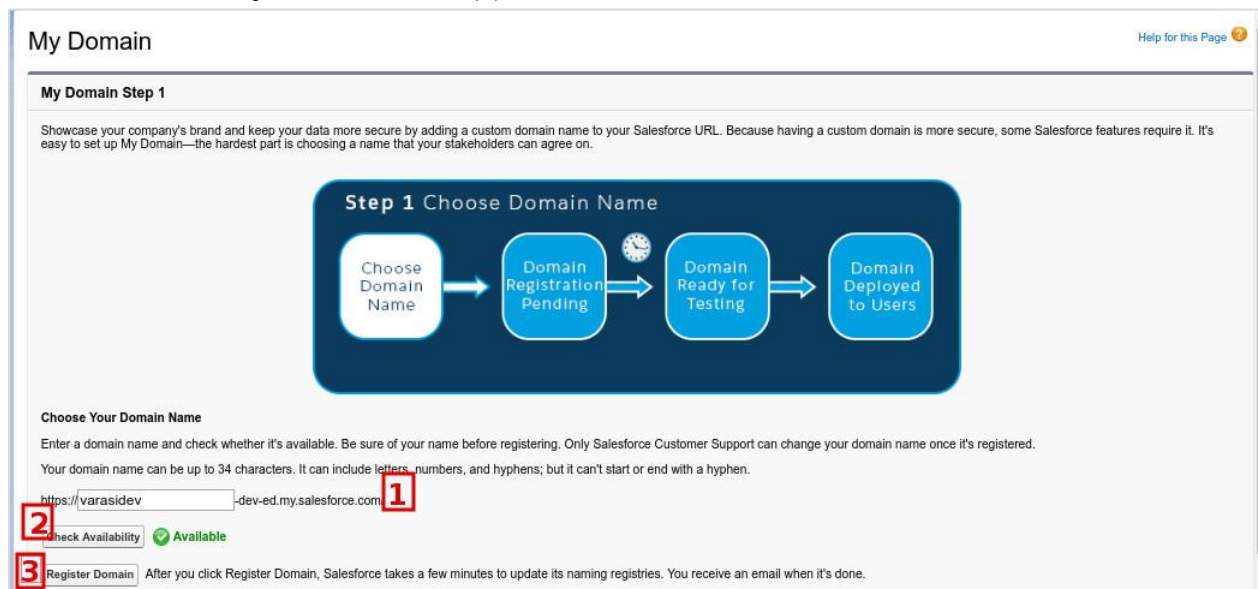


Figure 2: Give your own domain name and Click on Check Availability

- Click **Check Availability** (2). Salesforce checks whether this domain name is already in use.
- Click on the Register **Domain** button when you see **Available** (2) green text.
- You will receive an email telling you that the process is completed. Behind the scenes, Salesforce prepares your subdomain and updates its domain name registries. It can take a few minutes.
- Refresh current page. You can see **Log In** button

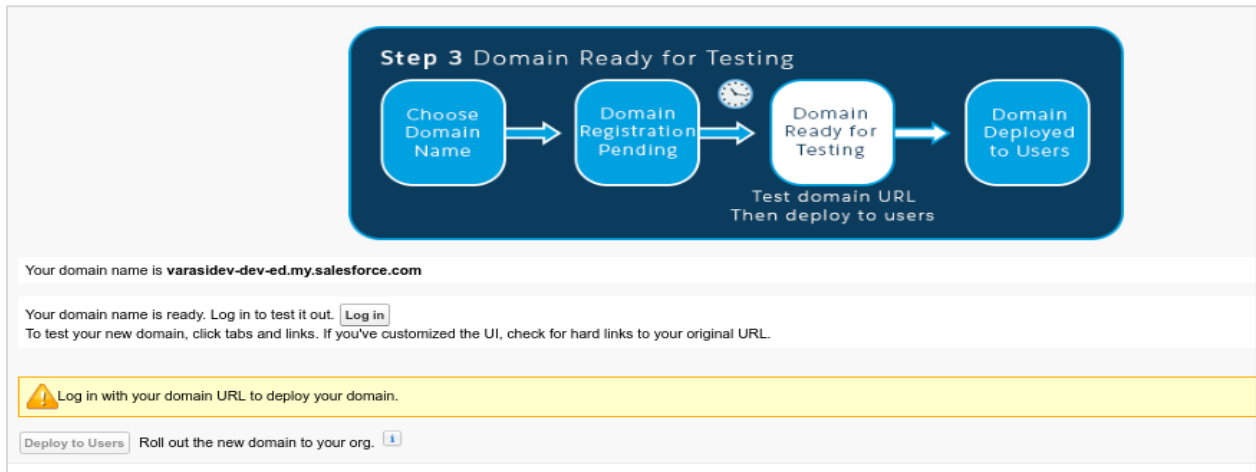


Figure 3: Acknowledgement of Domain ready

- Click on **Log In** button. Browser may prevent from opening login window. Log In into your org using above registered subdomain.
- Open **My Domain** page as mentioned in step 1. Now you can see that **Deploy to users** button is enabled

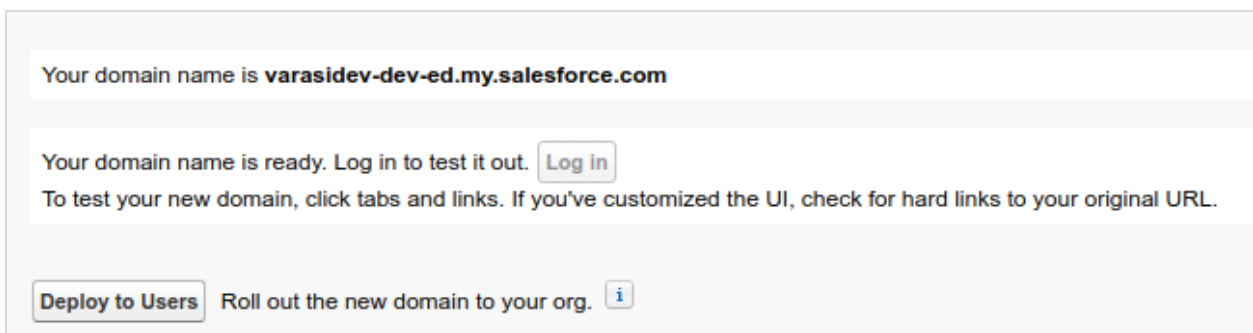


Figure 4: Once ready, click on Deploy to Users

- Click on **Deploy to users** button. You will receive a confirmation popup with the message 'When you deploy the new domain, we activate it immediately. Only Salesforce Customer

Support can disable or change your domain name once it's deployed.' Click **Ok**. Now you are done with all the steps necessary to register **My Domain**.

For more information, refer to the Salesforce help documentation for My Domain
https://help.salesforce.com/articleView?id=domain_name_overview.htm&type=5

2. Using Varasi Ops Helper

2.1 Navigating through the Varasi Ops Helper

Once you have installed the Varasi Ops Helper package in your Org, follow the below steps to browse to Varasi Ops Helper App

- Click the App Launcher in Salesforce
- Click Varasi Ops Helper

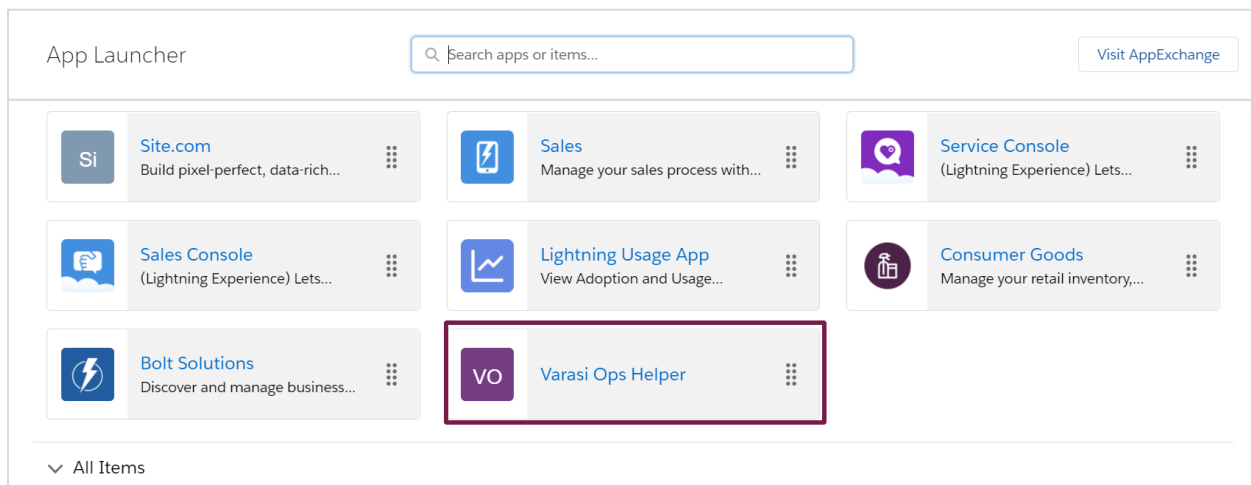


Figure 5: Varasi Ops Helper App in App Launcher

- In the Varasi Ops Helper app, you see the following tabs.
 - Tab Details
 - **Ops Helper Home:** App Home Page
 - **Action Plans:** Create/View list of Action Plans
 - **Plan Execution Summaries:** Create/ View list of plan execution summaries

2.2 Create an Action Plan

Any new automation activity can be started by first creating an action plan.

- Click on **Action Plans** tab
- Click **New**
- Enter details such as Name, Description of the plan
- Select the plan object
- Batch size: Leave it default.
- Click **Save**

The screenshot shows a 'New Action Plan' dialog box. The title is 'New Action Plan'. The form contains the following fields:

- Action Plan Name:** A text input field with the value 'Opportunity Review'.
- * Object Name:** A dropdown menu with 'Opportunity' selected.
- * Batch Size:** A text input field with the value '50'. There is an information icon (i) next to the label.
- Description:** A text area with the text 'Assign a "Review with Manager" Task to owners of all high value opportunities in Proposal stage.'

At the bottom right of the dialog are two buttons: 'Cancel' and 'Save'.

Figure 6: New Action Plan

2.3 Create a Pre-Filter (Optional)

If there are certain source records that are not relevant for the current action plan, then select only the relevant records for processing by applying a Pre-Filter. This is an optional step and can be skipped completely by directly applying relevant filters as per next step

- In a plan,
- Click the **Location** Tab

- Click **New** on the right side just below Tabs Navigation bar
- Enter the Location details i.e Name, Address, Manager, Type, Description
- Click **Save**.

The screenshot shows a web interface with a top navigation bar containing 'Filters', 'Pre-Filter (Optional)', 'Simulations', 'Executions', and 'Schedule'. The 'Pre-Filter (Optional)' tab is selected. Below the tabs, there is a configuration area with four sections: 'Field' (containing a minus button and a dropdown menu with 'Opportunity Type'), 'Operator' (containing a dropdown menu with 'Equal To'), 'Comparison Type' (containing radio buttons for 'Value' (selected) and 'Field'), and 'Type' (containing a dropdown menu with 'New Customer'). A plus button is located below the 'Field' section. At the bottom right, there are 'Cancel' and 'Save' buttons.

Pre-Filter where Opportunity Type = “New Customer”

Figure 7: Pre-Filter

2.4 Create Filter

Filter is a criteria used to filter records from Plan Object.

- Click the **New Filter** button
- Give it a descriptive name e.g. “High Value Opportunities in Proposal Stage”
- Update filter order. The order defines the sequence of filters matched for each source record. Action for the first matching filter is executed. This works like the “Order” field on Lead/Case assignment rule entries.
- Click **Save**.

The screenshot shows a 'New Filter' form. At the top, it says 'New Filter'. Below that, there is a section for '* Action Plan' with a dropdown menu showing 'Opportunity Review' and a close button. Below this is a 'Filter Name' section with a text input field containing 'High Value Opportunities in Proposal Stage'. Below that is a '* Filter Order' section with a text input field containing '10'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Figure 8: New Filter

Multiple filters can be added and they are evaluated as per Filter Order. If a record doesn't match a filter criteria then it is evaluated for the next filter as per filter order. Action is only executed when a plan record matches the first filter criteria as per filter order.

2.5 Configure Filter

Configure the filter to select the required subset of plan object records. You can add 3 types of filters in configuration entries. Multiple filter configuration entries can be added by clicking the “+” button. Each entry is combined with an “AND” with other entries to create complete filter logic. The 3 filter types in configuration entries are

1. **Plan Object Fields:** Use this type to filter plan object records by its own fields
2. **Child Object Fields:** Use this type to filter plan object records by aggregates of its child fields. e.g. you can filter Accounts where count of opportunities “Closed Won” is more than 0.
3. **Parent Object Fields:** Use this type to filter plan object records by the fields on its parent object. e.g. use this type to filter Opportunities by the Account Rating.

Filter Configuration

Filter Type

Plan Object Fields

* Field

Account Type

Operator

Equal To

Comparison Type

☒ Value
 ☐ Field

Type

Customer - Direct

Filter Accounts where Account Type = “Customer - Direct”

Figure 9: Example of Plan Object Fields based Filter

Filter Configuration

Filter Type

Child Object Fields

Filter Account Where

Operation

Count

Of

Child Objects

Case

Operators

Greater Than

Value

0

And

Field

Status

Operation

Equal To

Status

Escalated

Filter Accounts where Count of Escalated Cases is > 0

Figure 10: Example of Child Object Fields based Filter

Filter Configuration

Filter Type

Parent Object Fields

* Field

Owner > First Name

Operator

Contains

Comparison Type

☒ Value
☐ Field

First Name

John

Filter Accounts where Account Owner Name contains “John”

Figure 11: Example of Parent Object Fields based Filter

2.6 Create an Action

Once filters are created, an action can be added to each filter. The action is performed on all plan object records matching the filter criteria as per filter order. Various actions are available to configure as below

- **Create Case:** This action creates a case on each filtered plan object Account. If Contact/Contract or Opportunity is selected as plan object, then the action creates a case on the Accounts linked to the corresponding Contact/Contract or Opportunity record.
- **Close Case:** This action closes cases with specified status or specified subject on each filtered plan object Account. If Contact/Contract or Opportunity is selected as plan object, then the action closes cases on the Accounts linked to the corresponding Contact/Contract or Opportunity record.
- **Assign Owner:** This action assigns the selected user as owner of the filtered plan object records.
- **Create Task:** This action creates a task on each filtered plan object record and assigns it to the plan object record owner. The task is created as per specified subject, status and due date.
- **Send Email:** This action sends an email for each filtered plan object record. The email can be sent to any User or Contact field or to an email field on the plan object record. Email can be composed directly in this action or an email template can be selected.

2.7 Action Plan Simulate/Execute/Schedule

After action Plan filters and actions have been configured, the plan is ready for execution. But before executing, it can be simulated to see which plan object records are getting filtered by each of the configured filters. It allows you to verify that the correct source records are being acted upon.

- Click on **Simulate Plan** button
- Click **Simulate**

A new tab opens, which shows the details of each filtered plan object record against the corresponding filter name.

Once satisfied with simulation results, the plan can be executed by clicking the **Execute Plan** button. The Action Plan can also be scheduled for execution one time at a later date or it can be scheduled for recurring weekly or monthly execution.

The status of each simulation or execution is available as a “Plan Execution Summary” and is accessible from “Simulations”, “Executions”, “Schedule” tabs on the Action Plan. A list of all upcoming plans executions is also shown on the app home page. A scheduled plan can be aborted from home page or the “Schedule” tab of an Action Plan.

Filters	Pre-Filter (Optional)	Simulations	Executions	Schedule
Simulation Summary (10)				
Plan Name	Simulated On	Records Simulated	Status	
Account Case Plan : 11/5/2020, 10:03 PM	11/05/2020, 10:03 PM	23	Simulated	
Account Case Plan : 11/5/2020, 10:01 PM	11/05/2020, 10:01 PM	23	Simulated	
Account Case Plan : 11/5/2020, 9:58 PM	11/05/2020, 09:58 PM	23	Simulated	

Figure 12: Simulations, Executions, Schedule tabs

Scheduled Plan Executions	
Plan Name : Account Case Plan	▼
Execution Time : 11/11/2020, 01:00 AM	
Plan Name : Account Ownership	▼
Execution Time : 11/16/2020, 06:00 AM	

Figure 13: Upcoming Scheduled Plans



2.8 Audit Log Cleanup

Action Plan simulation and execution details are stored as audit log files in a folder. This takes up the space from an org's File storage allocation. Historical audit log data files can be deleted from Varasi Ops Helper home page. All logs generated before a certain date can be deleted to free up space.

3. What Next

We are constantly working on improving the Varasi Ops Helper app. New features are added to it regularly. So, lookout for new versions of our app on the AppExchange.

We can also customize the Varasi Ops Helper app for your specific needs related to Salesforce best practices and Sales operations automation.

For any customization or Salesforce CRM related solutions, do reach out to us

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