
Phase 4 – Step-by-Step Implementation

1. Validation Rules

(a) Case: Require Resolution on Close

AND(

ISPICKVAL(Status, "Closed"),

ISBLANK(Resolution_Summary__c)

)

Error Message: “Resolution Summary is required before closing the case.”

(b) Onboarding Task: Prevent Completion Without Prerequisites

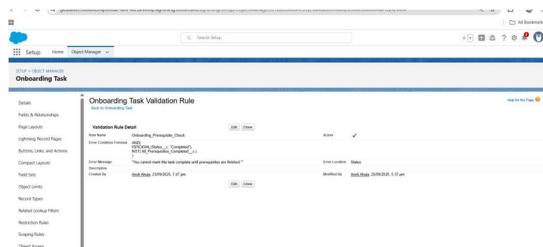
AND(

ISPICKVAL(Status__c, "Completed"),

NOT(Prerequisite_Completed__c)

)

Error Message: “You cannot mark this task complete until prerequisites are finished.”



(c) Usage Metrics: Health Score 0–100

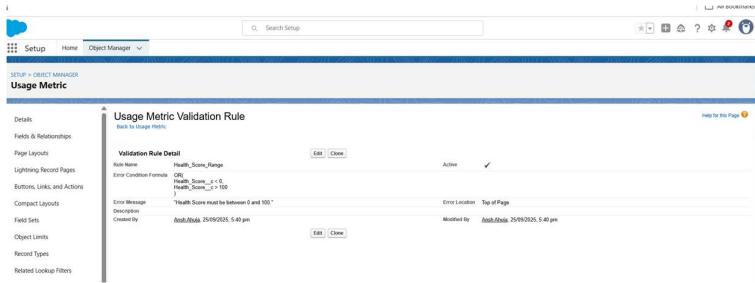
OR(

Health_Score__c < 0,

Health_Score__c > 100

)

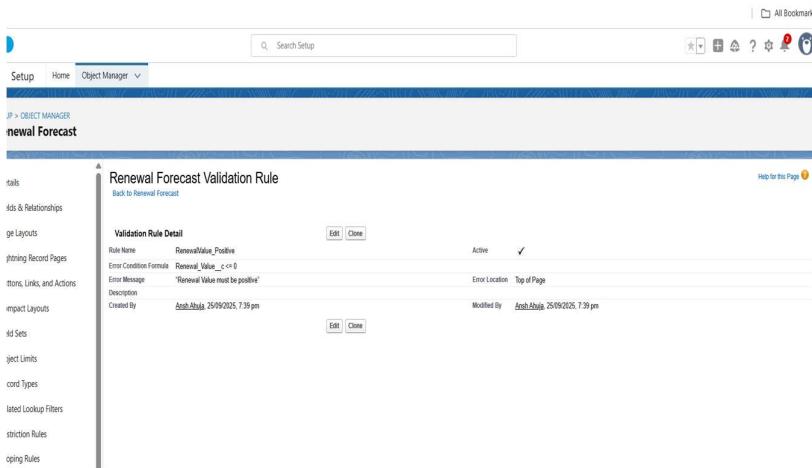
Error Message: “Health Score must be between 0 and 100.”



(d) Account: Renewal Date Must Be Future

`Renewal_Date__c < TODAY()`

Error Message: "Renewal date cannot be in the past."



2. Workflow Rules

(⚠️ *Salesforce recommends Flows instead, but if required for your project, do these)*

(a) High Priority Case → Escalation Email

- Rule Criteria: Priority = High AND Status <> Closed
- Action: Email Alert → Send to Customer Success Manager.

(b) Renewal Reminder Email

- Rule Criteria: Renewal_Date__c = TODAY() + 30
- Action: Email Alert → Send to Account Manager.

3. Process Builder

(a) Update Account Health Score (Usage + Cases)

- Object: Usage Metrics
- Criteria:
 - $\text{Usage_Percentage_c} < 50$
 - $\text{Open_Cases_c} > 5$
- Action: Update Account → $\text{Health_Score_c} = 30$ (Red zone).

(b) Auto-Update Account Status After Onboarding

- Object: Onboarding Task
- Criteria: All tasks completed
- Action: Update Account → $\text{Status_c} = \text{"Live Customer"}$.

4. Approval Process

(a) Renewal Discount Approval

- Object: Opportunity

- Entry Criteria: Discount_c > 0.20
- Steps: Send to **Manager Role** for approval.

Active Approval Processes		Reorder	Description
Action	Process Order	Approval Process Name	
Edit Deactivate	1	Renewal Discount Approval	Approves any Opportunity with Discount_c > 20%

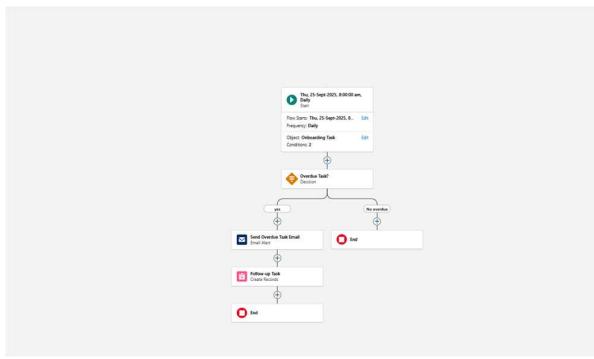
(b) Case Closure Approval

- Object: Case
- Entry Criteria: Priority = High AND Status = Closed
- Approver: Support Manager.

FLows

A. Scheduled Flow – Overdue Onboarding Task Reminder

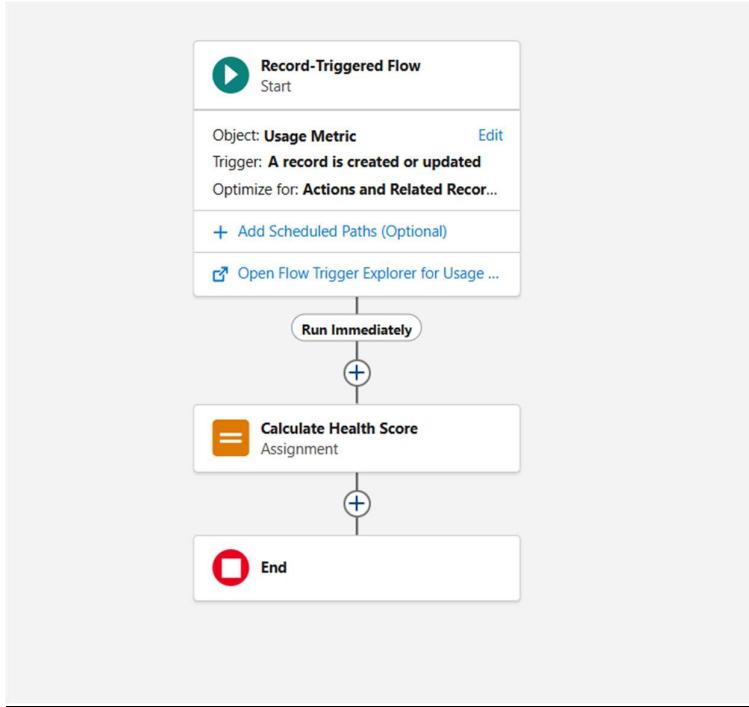
1. Setup → Flows → New → Scheduled Flow.
2. Object: Onboarding Task.
3. Schedule: Daily at 8 AM.
4. Decision: Status != 'Completed' AND Due Date_c < TODAY().
5. Action: Send Email Alert to Assigned To.



Health Score Calculation

1. Go to Setup → Flows → New Flow → Record-Triggered Flow.
2. Object: Usage Metrics_c (or main object where you track health).
3. Trigger: When record is created or updated.
4. Condition: None (always run).
5. Action → Update Records.

- Choose Usage Metrics c.Health Score c field.
- Formula Example:
- $(\text{Usage Metrics}_c.\text{Product Usage Score}_c * 0.7) + (1 - (\text{Support Cases}_c.\text{Open Cases}_c / \text{Support Cases}_c.\text{Total Cases}_c)) * 100 * 0.3$
- Save.



F. Notifications & Tasks

1. Custom Notification: “Low Health Score for Account XYZ” → goes to CSM.
Setup → Notifications → New Custom Notification → assign to CSM profile.
2. Auto Task Creation:
In Flow, when Support Case Escalation Level = L2/L3 → Create Task for Support Agent → Subject: “Follow up on escalated case”.

Deliverables After Phase 4

- Validation rules active
- Scheduled Flow for Overdue Tasks

- Health Score auto-calculated
- Renewal reminders automated
- Approval process
- Notifications & auto tasks