



Business Use Case: 01

Auto-Close Tasks After Due Date

A company wants to automatically mark Tasks as completed if they are past their due date and are still open.

For example, if a Task's Status is 'Not Started' or 'In Progress', and the ActivityDate (Due Date) is before today, then set the Status to 'Completed'.

This helps clean up old, unattended tasks that were never manually updated.

Apex Code



```
public class TaskAutoCloser {  
    // This method will find open tasks past due and mark  
    them as completed  
    public static void autoCloseOldTasks() {  
        // Get today's date  
        Date today = Date.today();  
        // Query tasks that are past due and not completed  
        List<Task> tasksToClose = [  
            SELECT Id, Status, ActivityDate  
            FROM Task  
            WHERE Status IN ('Not Started', 'In Progress')  
            AND ActivityDate < :today  
        ];  
        // Loop through each task and mark it as completed  
        for (Task t : tasksToClose) {  
            t.Status = 'Completed';  
        }  
        // Update the modified tasks  
        if (!tasksToClose.isEmpty()) {  
            update tasksToClose;  
        }  
    }  
}
```

Code Explanation



- `Date.today()`: Gets today's date.
- `SELECT ... FROM Task WHERE ...`: Finds tasks with a due date in the past and status as 'Not Started' or 'In Progress'.
- `for (Task t : tasksToClose)`: Loops through the results.
- `t.Status = 'Completed';`: Updates each Task's status.
- `update tasksToClose;`: Saves changes to Salesforce.

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Business Use Case: 02

Lead Qualification Scorer

A company wants to automatically score Leads based on some simple criteria so sales reps can prioritize them better.

Scoring rules:

- If Lead's AnnualRevenue is over ₹50,00,000 → Add 50 points
- If Lead's Industry is "Technology" → Add 30 points
- If Lead's Number of Employees is over 100 → Add 20 points

The total score is stored in a custom number field

Qualification_Score__c on Lead.

Apex Code



```
public class LeadQualificationScorer {  
    // Method to calculate and update qualification score for  
    a Lead  
    public static void calculateScore(Id leadId) {  
        // Query the lead record  
        Lead leadRecord = [SELECT Id, AnnualRevenue,  
Industry, NumberOfEmployees, Qualification_Score__c  
FROM Lead WHERE Id = :leadId];  
        Integer score = 0;  
        // Add 50 points if AnnualRevenue > 50,00,000  
        if (leadRecord.AnnualRevenue != null &&  
leadRecord.AnnualRevenue > 5000000) {  
            score += 50;  
        }  
        // Add 30 points if Industry is Technology  
        if (leadRecord.Industry != null &&  
leadRecord.Industry.toLowerCase() == 'technology') {  
            score += 30;  
        }  
        // Add 20 points if Number of Employees > 100  
        if (leadRecord.NumberOfEmployees != null &&  
leadRecord.NumberOfEmployees > 100) {  
            score += 20;  
        }  
    }  
}
```

```
}
```

```
// Update the custom qualification score field
```

```
leadRecord.Qualification_Score__c = score;
```

```
// Save the updated lead record
```

```
update leadRecord;
```

```
}
```

```
}
```



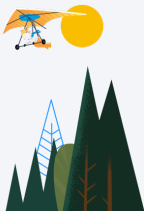
Code Explanation

- Query Lead by Id with required fields.
- Initialize score variable to 0.
- Check each condition and add points accordingly.
- Store the calculated score in Qualification_Score__c (a Number field).
- Update the Lead record.

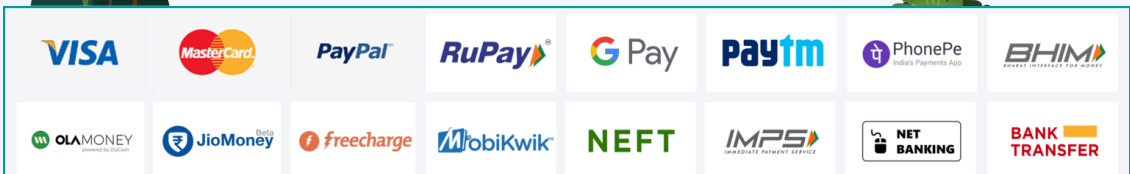
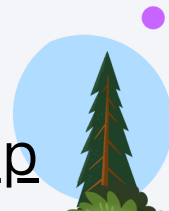
Note:

Make sure Qualification_Score__c is created on Lead as a Number field (recommended length 3, decimal places 0).

You can call this method from triggers, batch jobs, or manually to update scores.



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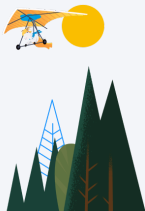
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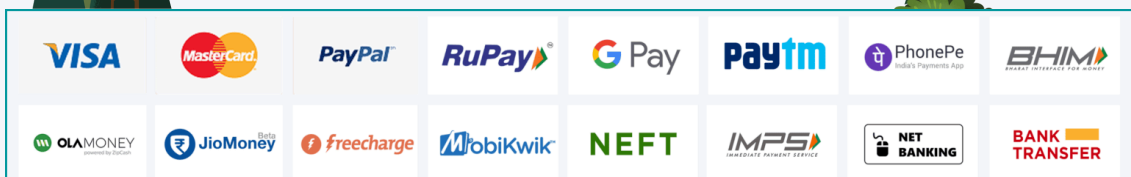
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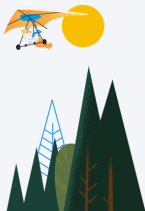


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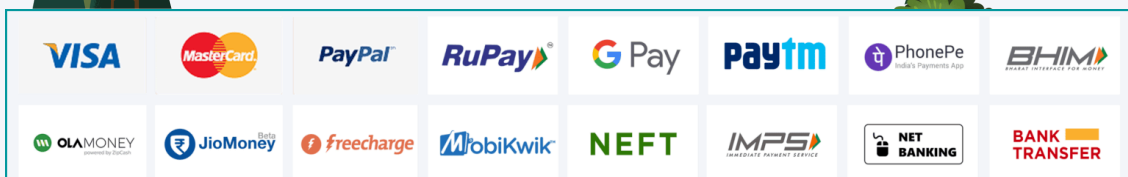
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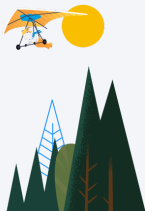


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