PHASE - 9

Reports Implemented

We created custom reports to track task performance and escalation activity:

- **Tasks Status Report**

  - Filters: Status ≠ Completed, Due Date ≤ TODAY().
  - Fields included: Subject, Owner, Status, Due Date.
  - Format: Summary Report grouped by *Status*.
  - Purpose: Track overdue and pending tasks by user.

- **Escalation Report**

  - Custom Report Type: Task Escalations with related Task.
  - Fields: Escalation Number, Escalated To, Reason, Task ID.
  - Purpose: Monitor all escalated tasks and reasons.

- **Reminder Log Report**

  - Object: Reminder_Log__c.
  - Fields: Task ID, Reminder Date, Status.
  - Purpose: Track reminders sent daily.

Report: Tasks and Events
Task by Status

Total Records
7

Status ↑ ▼	Date ↑ ▼	Subject ▼	Account Owner ▼
☐ - (5)	9/25/2025	Meeting	-
	9/26/2025	Reports Submission	-
	9/30/2025	Email	-
	9/30/2025	Send Letter/Quote	-
	10/11/2025	Send Letter/Quote	-
Subtotal			
☐ In Progress (1)	9/26/2025	Email	-
Subtotal			
☐ Completed (1)	-	Test Task 2	-
Subtotal			
Total (7)			

Details

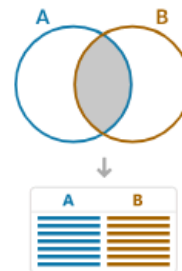|	
Display Label	custom report
API Name	custom_report
Description	For task managment
Created By	Meher Srija Potnuru, 9/27/25, 1:55 AM
Store in Cate...	other
Deployment ...	Deployed
Modified By	Meher Srija Potnuru, 9/27/25, 1:55 AM

Object Relationships

Task Escalations (A)

⌐..... with at least one related record from Activities (B)

Fields

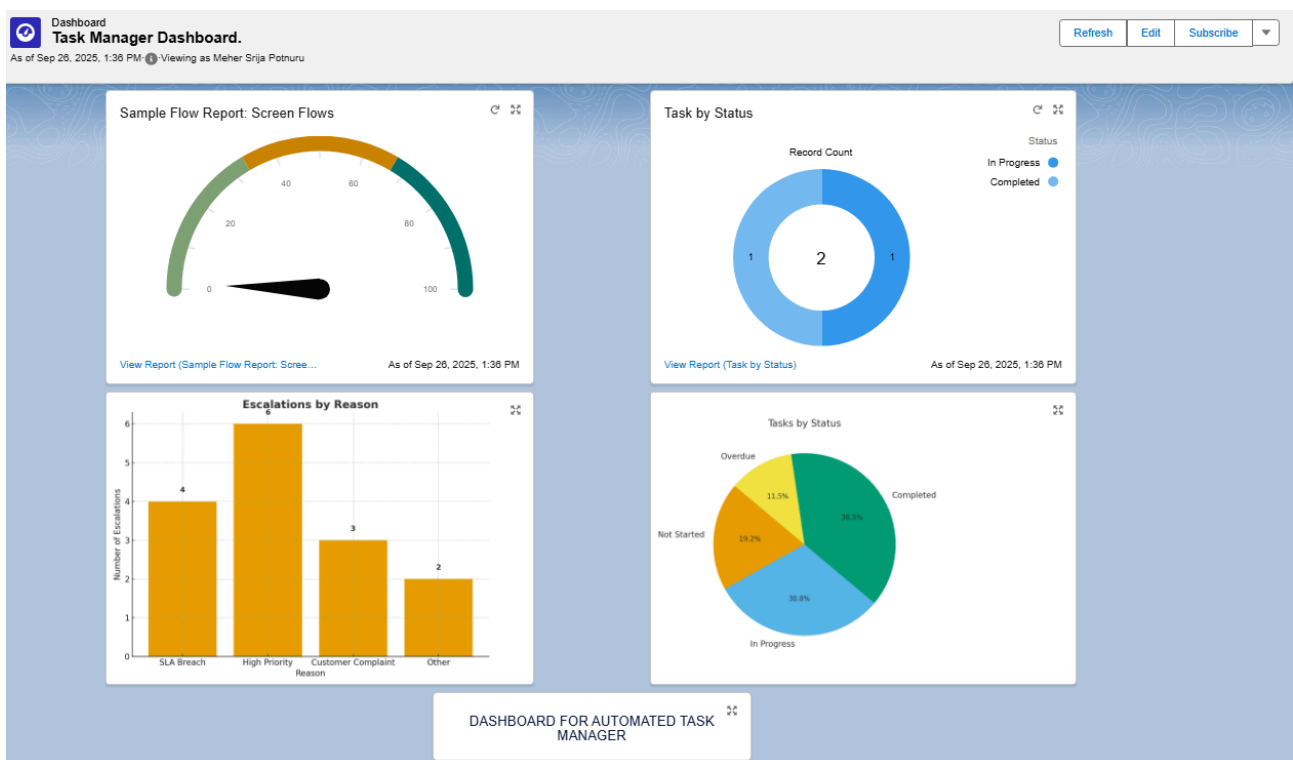| Source Object	Included Fields
Task Escalations	12
Activities	44

Dashboards Implemented

We converted reports into dashboards for real-time visualization:

- **Overdue Tasks Chart** → Bar chart showing count of tasks grouped by *Owner* (helps managers identify bottlenecks).

- **Task Status Pie Chart** → Distribution of tasks across *Completed, In Progress, Overdue*.

- **Escalations by Reason** → Donut chart showing most common escalation reasons (e.g., SLA Breach, High Priority).

These dashboards were added to the Home Page for quick access.

Security Review

- **Sharing Settings**

  - Task Escalation and Reminder Log objects set to *Controlled by Parent* (inherit from Task).

  - Tasks: follow standard Salesforce sharing rules (private → manager visibility).

- **Field Level Security (FLS)**

  - Verified that custom fields (Reminder_Sent__c, Escalation_Created__c, etc.) are visible to the right profiles (Managers, Users).

  - Sensitive fields hidden from standard users where not required.

- **Audit Trail**

  - Salesforce Setup Audit Trail automatically tracks config changes.

  - Documented key activations: Flow versions, Validation Rules, Page Layout updates.

Project Alignment

By completing Phase 9, the Automated Task Manager project ensures:

- Visibility of overdue tasks, reminders, and escalations for both end-users and managers.

- Stronger governance via field-level security and audit trail.

- A polished demo experience with dashboards on the Home Page.