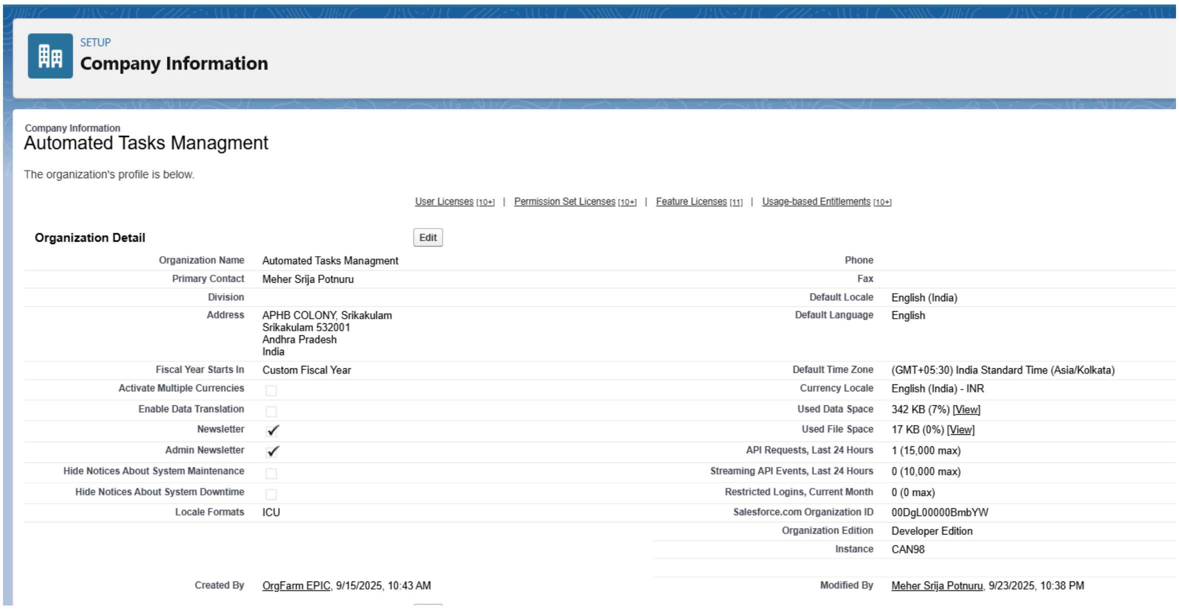
Automated Tasks Manager

Phase 2: Org Setup & Configuration

This phase is like laying the foundation for a smooth task management ecosystem in Salesforce. Before we automate reminders or escalations, we must ensure that the organization settings, profiles, security, and data visibility are properly configured. Getting this right ensures scalability, accountability, and long-term maintainability of the Automated Task Management system.

Company Profile Setup

The company information has been configured to reflect the organization's identity and task management needs.



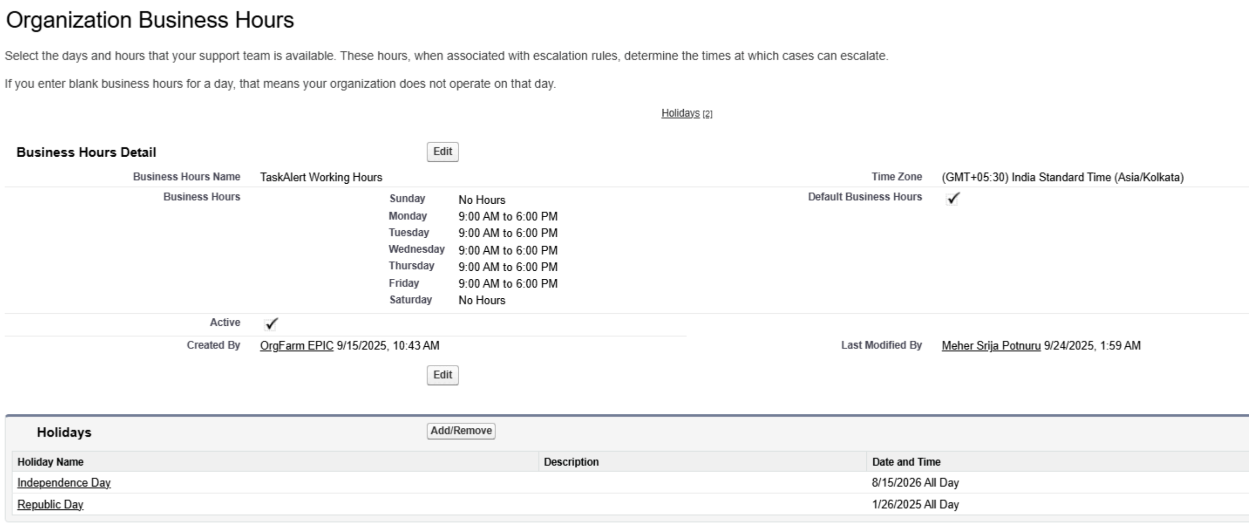
- **Organization Name:** Automated Tasks Management
- **Primary Contact:** Meher Srija Potnuru
- **Address:** APHB Colony,Srikakulam,Andhra Pradesh,India.
- **Default Locale:** English (India)

- **Default Language:** English
- **Time Zone:** India Standard Time (GMT+05:30, Asia/Kolkata)
- **Currency Locale:** INR (English - India)
- **Multiple Currencies:** Enabled

This ensures all users experience Salesforce in their local context for reminders, deadlines, and escalations.

Business Hours & Holidays

Defining business hours is critical to determine when reminders, escalations, and follow-ups should be sent.

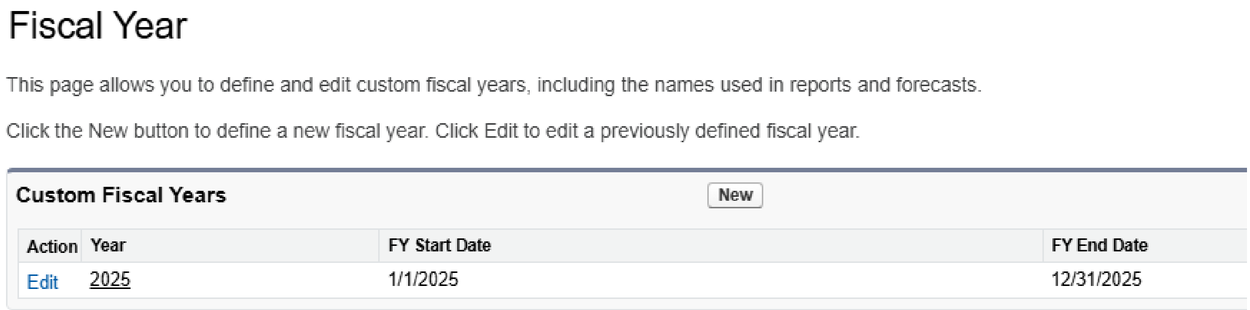


- **Business Hours Name:** TaskAlert Working Hours
- **Schedule:** Monday to Friday – 9 Hours
- **Default Business Hours:** Enabled
- **Active:** Yes
- **Holidays Configured:** Two Holidays – All Day

These settings ensure that overdue tasks escalate only during active working days, avoiding unnecessary alerts on holidays.

Fiscal Year Settings

All reporting, workload distribution, and productivity insights will align with the company's **Custom Fiscal Year**. This ensures that dashboards reflect accurate quarterly and annual task completion metrics.


Fiscal Year

This page allows you to define and edit custom fiscal years, including the names used in reports and forecasts.

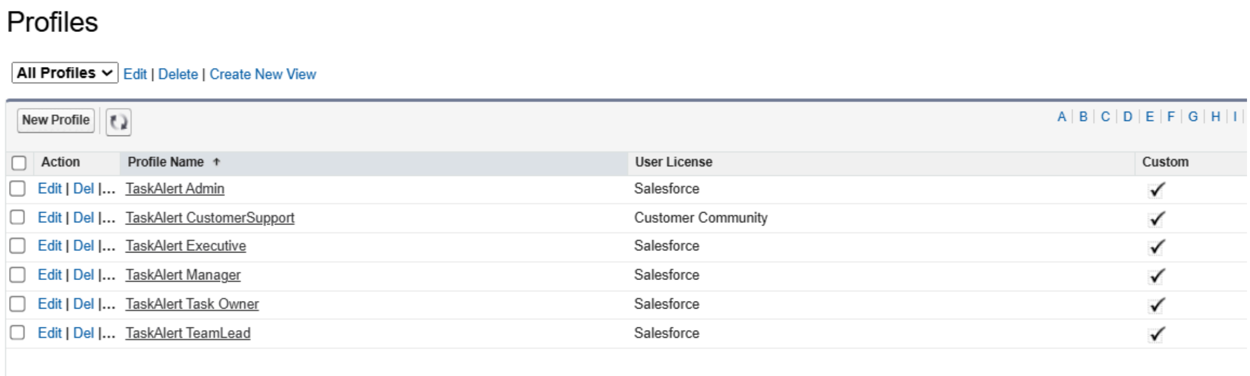
Click the New button to define a new fiscal year. Click Edit to edit a previously defined fiscal year.

Custom Fiscal Years New

Action	Year	FY Start Date	FY End Date
Edit	2025	1/1/2025	12/31/2025

Profiles

Adopted a **Minimum Access security model**. Never assign the standard **System Administrator** profile to anyone but dedicated admins. Clone the **Standard User** profile to create custom profiles for key personas in the Automated Task Management project:


Profiles

All Profiles Edit | Delete | Create New View

New Profile

A | B | C | D | E | F | G | H | I

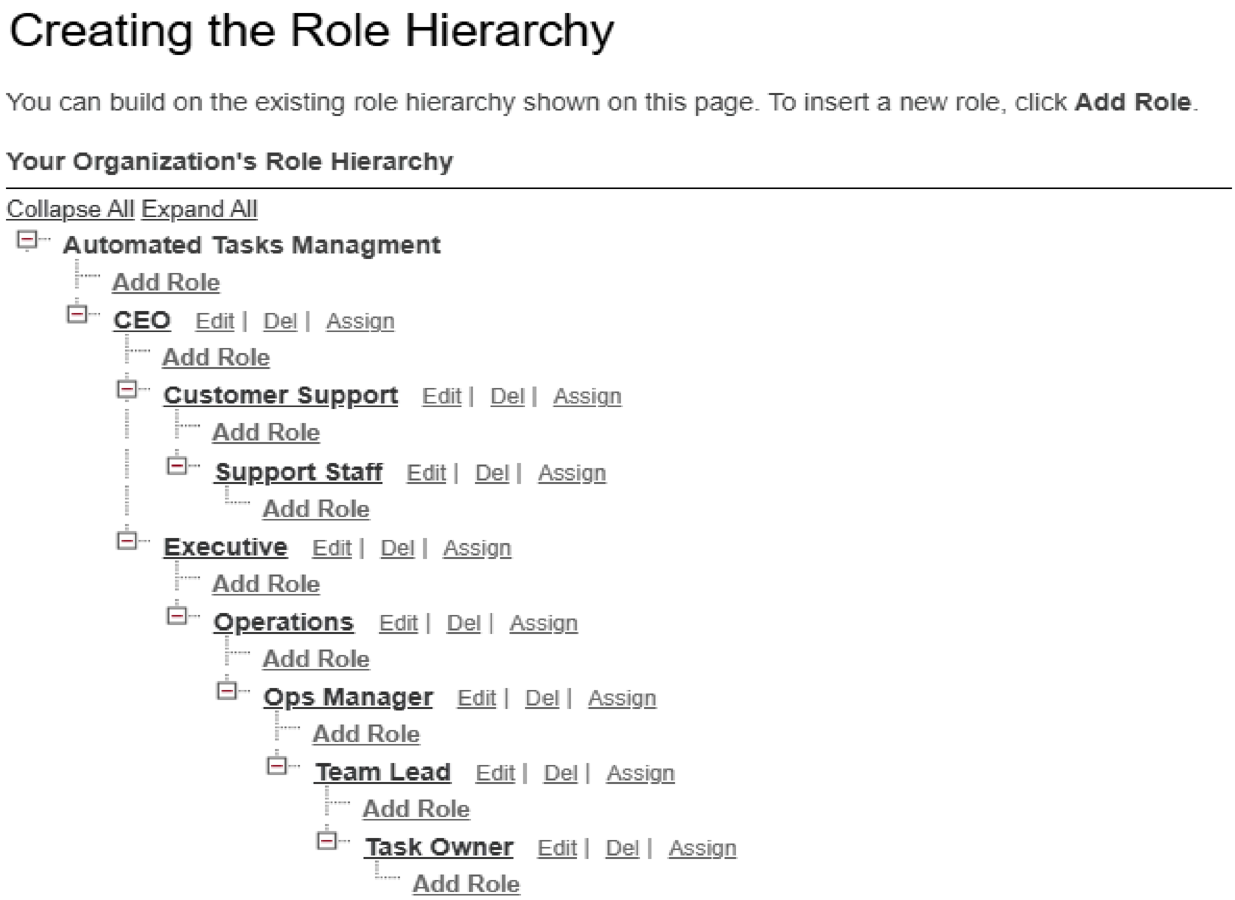
Action	Profile Name ↑	User License	Custom
Edit | Del |...	TaskAlert Admin	Salesforce	✓
Edit | Del |...	TaskAlert CustomerSupport	Customer Community	✓
Edit | Del |...	TaskAlert Executive	Salesforce	✓
Edit | Del |...	TaskAlert Manager	Salesforce	✓
Edit | Del |...	TaskAlert Task Owner	Salesforce	✓
Edit | Del |...	TaskAlert TeamLead	Salesforce	✓

- **TaskAlert Admin** – Full access to configure automation, dashboards, and security for the task management system.
- **TaskAlert CustomerSupport** – Access to customer tasks and cases in the community, with reminders and escalation features.
- **TaskAlert Executive** – View-only access to high-level dashboards and reports for productivity insights.
- **TaskAlert Manager** – Manage team tasks, oversee escalations, and monitor workload distribution.
- **TaskAlert Task Owner** – Limited access to their own tasks, reminders, and completion updates.
- **TaskAlert TeamLead** – Can monitor team tasks, assist with escalations, and coordinate between employees and manager.

Roles

Roles define the visibility hierarchy for tasks. Example:

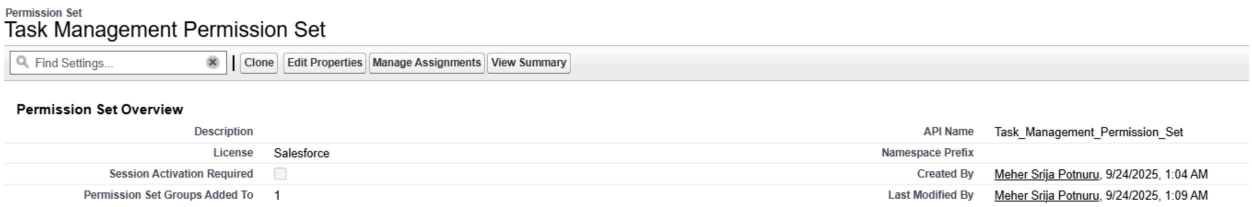
- **Executive** – Can view all task reports and productivity metrics.
- **Manager** – Can view and escalate overdue tasks for their team.
- **Employee / Sales Rep** – Can only see their assigned tasks and reminders.



Permission Sets

Used to grant additional access without modifying profiles. For example:

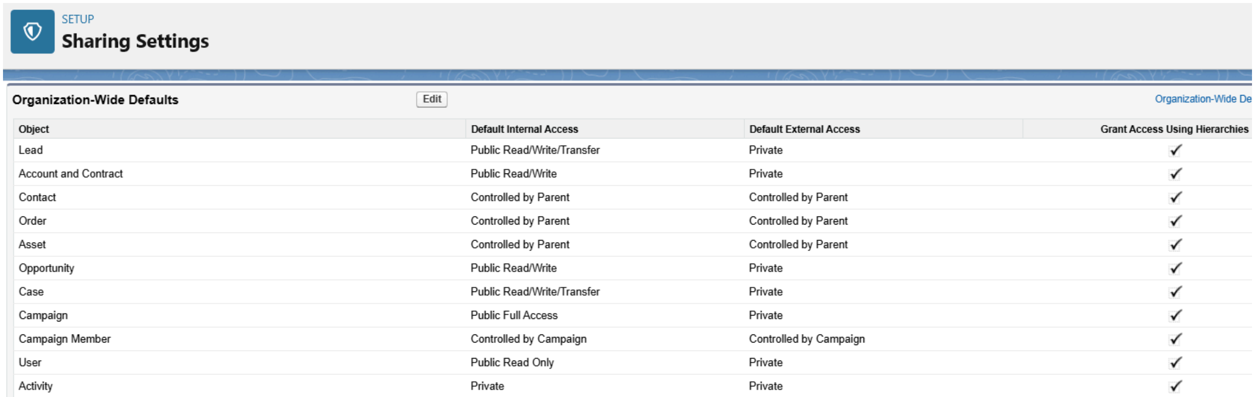
- **Reporting Access** – Provides dashboard/report visibility to specific users.
- **Escalation Management** – Grants managers the ability to reassign or escalate overdue tasks.



OWD (Organization-Wide Defaults)

To maintain accountability, OWD is set to **Private** for Tasks. This ensures:

- Employees see only their tasks.
- Managers see their team's tasks.
- Executives get reporting visibility without compromising task ownership.



SETUP
Sharing Settings

Organization-Wide Defaults Edit Organization-Wide De

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓

Dev Org Setup and Deployment basics

To ensure long-term scalability, modern DevOps practices are adopted:

- **Version Control** – All metadata tracked in Git.
- **Salesforce CLI (SFDX)** – Used for scripting, retrieving, and deploying metadata.
- **CI/CD Pipeline** – Automated testing and deployment using tools like GitHub Actions or Copado, reducing manual errors in automation flows.