

Chatter Activity to Task Automation User Guide

Version 1.0

Twopir Consulting

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1. Introduction

Chatter Activity to Task Automation allows users to create Salesforce Tasks directly from Chatter posts and comments using simple commands. This guide explains setup, configuration, and usage.

2. Prerequisites

- Salesforce Lightning Experience recommended.
- Permission to manage Custom Settings.
- Access to install AppExchange packages.

3. Installation

Install the Chatter Activity to Task Automation package from the AppExchange. After installation, verify assignment of permissions and profile access.

4. Configure Trigger Settings

The TriggerSetting custom setting controls whether task creation is triggered from Chatter comments or posts. It contains two fields:

- **ChatterCommentTrigger** – Enables task creation from Chatter comments.
- **ChatterPostTriggerActive** – Enables task creation from Chatter posts.

Both are **Active by default**, and you may deactivate them anytime to temporarily stop automation.

How to Deactivate Trigger Settings

You can deactivate **either** Chatter comment-based automation, Chatter post-based automation, or disable both — depending on your requirement.

Below are the steps to update the TriggerSetting record.

Steps to Deactivate the Chatter Automation Triggers

1. Go to **Setup**.
2. In the **Quick Find** box, type **Custom Settings**.
3. Click **Custom Settings** from the list.
4. Find **TriggerSetting** and click **Manage**.

Setup Home Object Manager

Q Custom Setting

Custom Code

Custom Settings

Didn't find what you're looking for? Try using Global Search.

SETUP Custom Settings

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

Get Usage

View: All Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	Chatter_Task Creation	Public	List	tpcsf	The Chatter Task Creation custom setting includes a field TaskActivityDate (Number field). If you set this value to 5, then the due date for tasks (without a mentioned date) will be set to today + 5 days.	118	1	118
Manage	TriggerSetting	Public	List	tpcsf	The TriggerSetting custom setting contains two fields: 1 ChatterCommentTrigger 2 ChatterPostTriggerActive By default, both are active. You can activate or deactivate them anytime to enable or disable the task creation functionality.	120	1	120

5. Click New

SETUP Custom Settings

Custom Setting TriggerSetting [Help for this Page](#)

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

View: All Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New

Action	Name
Edit Del	ToDeactivateTrigger

6. To deactivate automation, check **TRUE** for the trigger you want to disable:

- **ChatterCommentTrigger** → disables task creation from *Chatter comments*
- **ChatterPostTriggerActive** → disables task creation from *Chatter posts*


Custom Settings

TriggerSetting Edit

Provide values for the fields you created. This data is cached with the application.

Edit TriggerSetting
Save Save & New Cancel

TriggerSetting Information		! = Required Information
Name	ToDeactivateTrigger	
ChatterCommentTrigger	☒	
ChatterPostTriggerActive	☒	

7. Click **Save**.

Note:

You can disable **either one** or **both**, based on your org's requirement. Setting a specific checkbox to **TRUE** disables that specific trigger.

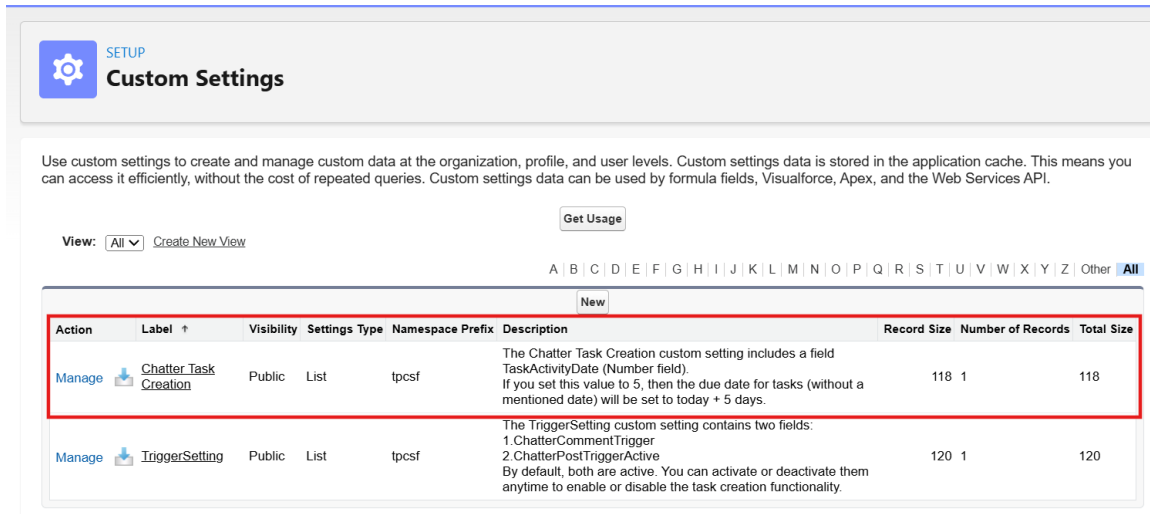
5. Configure Due Date Logic

When users create a task without entering a due date, the system uses the **Chatter Task Creation** custom setting to determine it:

- **TaskActivityDate (Number):** The number of days to add to today's date to set the default due date.

If no **#date (MM/DD/YYYY)** is provided *and* **TaskActivityDate** is blank, the system will automatically use **today's date** as the due date.

You can set a dynamic due date using the custom setting. Simply go to the **Chatter Task Creation** custom setting and enter the value you want based on your requirements, as shown in the images below.



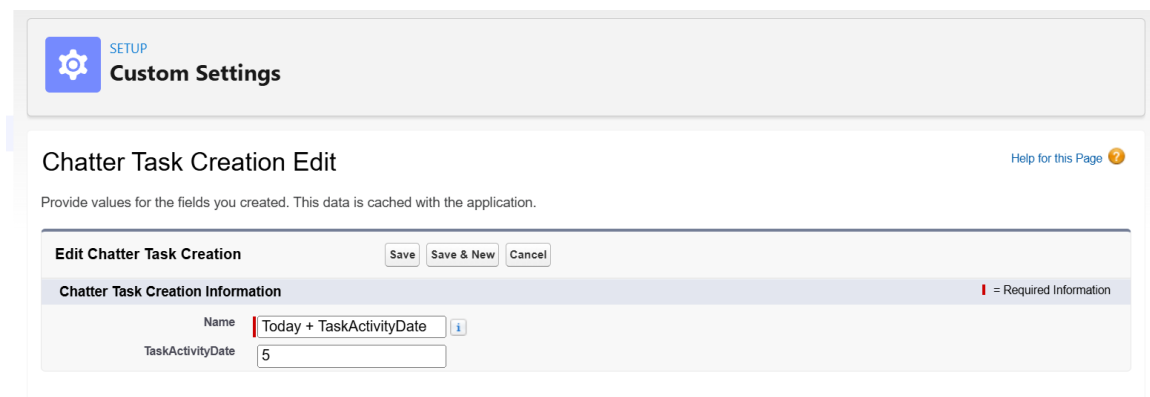
Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

View: All [Create New View](#) Get Usage

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	Chatter Task Creation	Public	List	tpcsf	The Chatter Task Creation custom setting includes a field TaskActivityDate (Number field). If you set this value to 5, then the due date for tasks (without a mentioned date) will be set to today + 5 days.	118	1	118
Manage	TriggerSetting	Public	List	tpcsf	The TriggerSetting custom setting contains two fields: 1. ChatterCommentTrigger 2. ChatterPostTriggerActive By default, both are active. You can activate or deactivate them anytime to enable or disable the task creation functionality.	120	1	120

Example: If TaskActivityDate = 5, tasks without a due date become due today + 5 days.



Chatter Task Creation Edit [Help for this Page](#)

Provide values for the fields you created. This data is cached with the application.

Edit Chatter Task Creation Save Save & New Cancel

Chatter Task Creation Information ! = Required Information

Name:

TaskActivityDate:

6. Create Tasks via Chatter

Step 1: Start with #task

Begin your Chatter message with #task (not case-sensitive). Press Enter and ensure it turns blue. **Do not format the text using bold or italics.**

Step 2: Mention the Assignee

Type @UserName to assign the task. Press Enter and confirm the username turns blue.

Step 3: Enter the Task Subject

On a new line, type a numbered list item starting with '1.' followed by a space, then add the task subject.

Example: 1. Prepare a follow-up email for new prospects.

Step 4: Add a Due Date (Optional)

Use #date followed by a date in MM/DD/YYYY format. Press Enter to convert it to blue.

Valid Example: #date 12/11/2025

Invalid Example: #date 12-11-2025

Step 5: Create Multiple Tasks

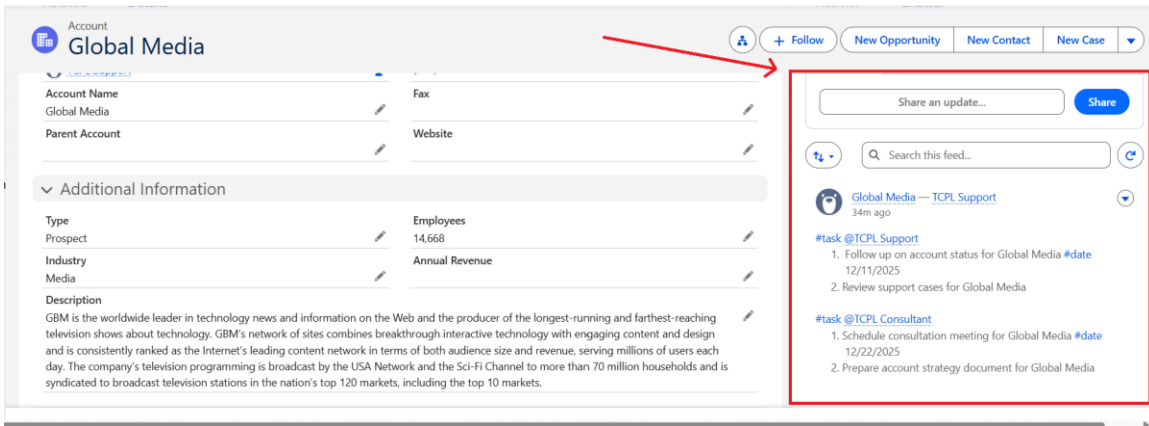
Press Enter and continue with numbered items (2., 3., etc.). Each entry becomes a separate task.

Step 6: Assign Tasks to Different Users (Optional)

To create tasks for another user, begin a new line with #task and repeat the same pattern.

7.Task Creation Examples

In below image shows that this is how you can create task



Account
Global Media

+ Follow New Opportunity New Contact New Case

Account Name Global Media	Fax
Parent Account	Website

Additional Information

Type Prospect	Employees 14,668
Industry Media	Annual Revenue

Description
GBM is the worldwide leader in technology news and information on the Web and the producer of the longest-running and farthest-reaching television shows about technology. GBM's network of sites combines breakthrough interactive technology with engaging content and design and is consistently ranked as the Internet's leading content network in terms of both audience size and revenue, serving millions of users each day. The company's television programming is broadcast by the USA Network and the Sci-Fi Channel to more than 70 million households and is syndicated to broadcast television stations in the nation's top 120 markets, including the top 10 markets.

Share an update... Share

Search this feed...

Global Media — TCPL Support
34m ago

#task @TCPL Support

1. Follow up on account status for Global Media #date
12/11/2025
2. Review support cases for Global Media

#task @TCPL Consultant

1. Schedule consultation meeting for Global Media #date
12/22/2025
2. Prepare account strategy document for Global Media

Share an update... Share

Search this feed...



Global Media — TCPL Support
34m ago

#task @TCPL Support

1. Follow up on account status for Global Media #date
12/11/2025
2. Review support cases for Global Media

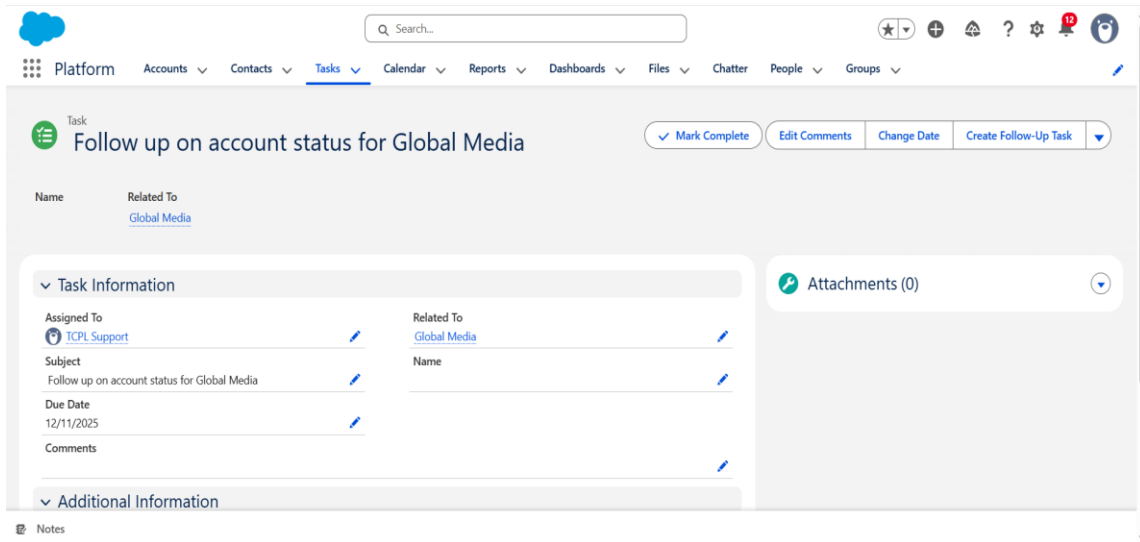
#task @TCPL Consultant

1. Schedule consultation meeting for Global Media #date
12/22/2025
2. Prepare account strategy document for Global Media

This is how we can easily create multiple tasks for different users using the **Activity to Task Automation** app

Example 1: Task with Explicit Due Date

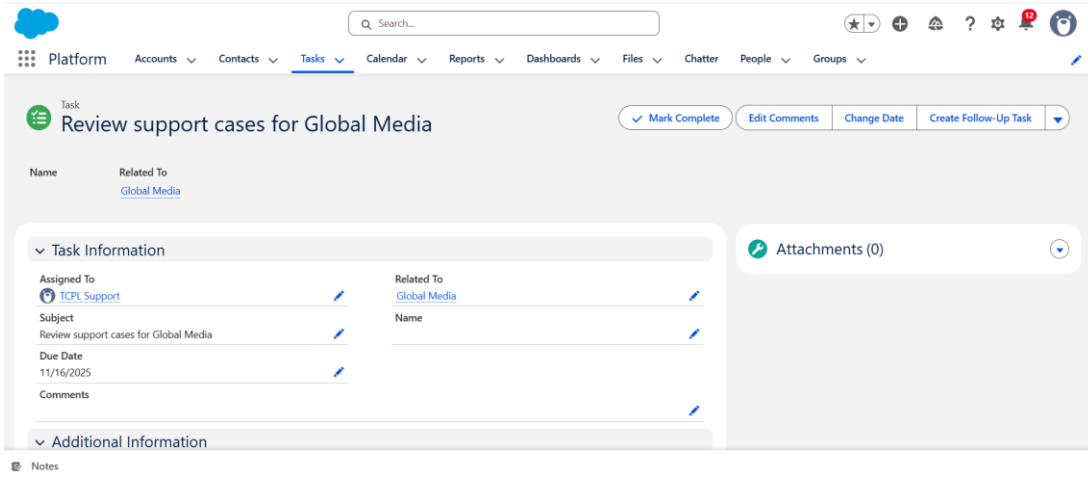
- Assigned To: TCPL Support
- Related To: Global Media (Account)
- Subject: Follow up on account status for Global Media
- Due Date: 12/11/2025



The screenshot shows a task management interface. At the top, there is a search bar and navigation tabs: Platform, Accounts, Contacts, Tasks (selected), Calendar, Reports, Dashboards, Files, Chatter, People, and Groups. The task title is "Follow up on account status for Global Media". Below the title, there are buttons: "Mark Complete", "Edit Comments", "Change Date", and "Create Follow-Up Task". The task details are organized into sections: "Task Information" and "Attachments (0)". Under "Task Information", there are fields for "Assigned To" (TCPL Support), "Subject" (Follow up on account status for Global Media), "Due Date" (12/11/2025), and "Comments". There is also a "Related To" section with a link to "Global Media".

Example 2: Task Without Explicit Due Date

- Assigned To: TCPL Support
- Related To: Global Media (Account)
- Subject: Review support cases for Global Media
- Due Date: System-calculated based on TaskActivityDate



The screenshot shows a task management interface. At the top, there's a navigation bar with options like Platform, Accounts, Contacts, Tasks (selected), Calendar, Reports, Dashboards, Files, Chatter, People, and Groups. A search bar is also present. Below the navigation bar, the task details for 'Review support cases for Global Media' are displayed. The task is assigned to 'TCPI Support' and is related to 'Global Media'. The subject is 'Review support cases for Global Media'. The due date is '11/16/2025'. There are buttons for 'Mark Complete', 'Edit Comments', 'Change Date', and 'Create Follow-Up Task'. On the right, there's a section for 'Attachments (0)'. At the bottom, there's a 'Notes' section.

8. Troubleshooting

- Ensure **#task**, **#date**, **Subject**, **@UserName** keywords are not bold or italic.
- Use MM/DD/YYYY format only.
- Always write the task subject using a **numbered** list (e.g., "1. Task subject"), not bullet points.
- Confirm TriggerSetting custom setting is active.
- Verify user has permission to create tasks.

9. Support

For assistance with setup or usage, contact **support@twopirconsulting.com** or schedule a meeting with our team.