TrueTaskTracker Guide

Welcome to TrueTaskTracker! This guide will help you navigate our Task Tracker app, designed for efficient task management.

Introduction

Why Task tracking matters

Task tracking is crucial for staying organized and on top of responsibilities. Here's why:

- Efficient Task Management: Create, assign, and monitor tasks in one platform.
- Improved Collaboration: Attach files, share updates, and comment on progress.
- Better Decision-Making: Real-time data helps optimize workflow.

Our Main Goal

Our Task Tracker aims to streamline project and task management using agile boards, fostering collaboration and clarity for all team members.

Core Functionality

- Agile Boards: Visualize projects and tasks in columns like "To Do," "In Progress," and "Completed."
- Flexible Task Management: Create, assign, and prioritize tasks by project, deadline, or team member.
- Clear Workflow: Centralized management for transparent task tracking and updates.
- Real-Time Updates: Instant reflection of task progress on agile boards.

- Improved Task Prioritization: Visual representation aids in focusing on high-impact tasks.
- Enhanced Collaboration: Seamless teamwork through centralized management.
- Streamlined Workflow: Clear visibility into project status eliminates inefficiencies.

In summary, TrueTaskTracker leverages agile boards to keep workflows organized and transparent, empowering teams to collaborate effectively and achieve their goals confidently.

Getting Started

Installing

Step 1: Accessing the Installation Link:

Go to AppExchange or just click here:

- Open your web browser and navigate to the Salesforce AppExchange platform.
- In the search bar, type “True Task Tracker” and press enter.
- Locate our Task Tracker application in the search results and click on it to access the application page.

Step 2: Initiating Installation:

- Once you're on the application page, look for the "Get It Now" button and click on it to initiate the installation process.

Step 3: Confirm Installation details:

- Review the permissions required by the Task Tracker application to ensure they align with your organization's policies and requirements.

- Click on the “Confirm and Install” to proceed with the installation.

Step 4: Choosing Your Role:

- You will be prompted to choose your role or user type within your Salesforce organization. Select the role that best aligns with your responsibilities and access needs.

Step 5: Installation Confirmation:

- After confirming the installation, you may be prompted to log in to your Salesforce account if you haven't already done so.

- Follow the on-screen instructions to complete the installation process. You may need to agree to additional terms and conditions.

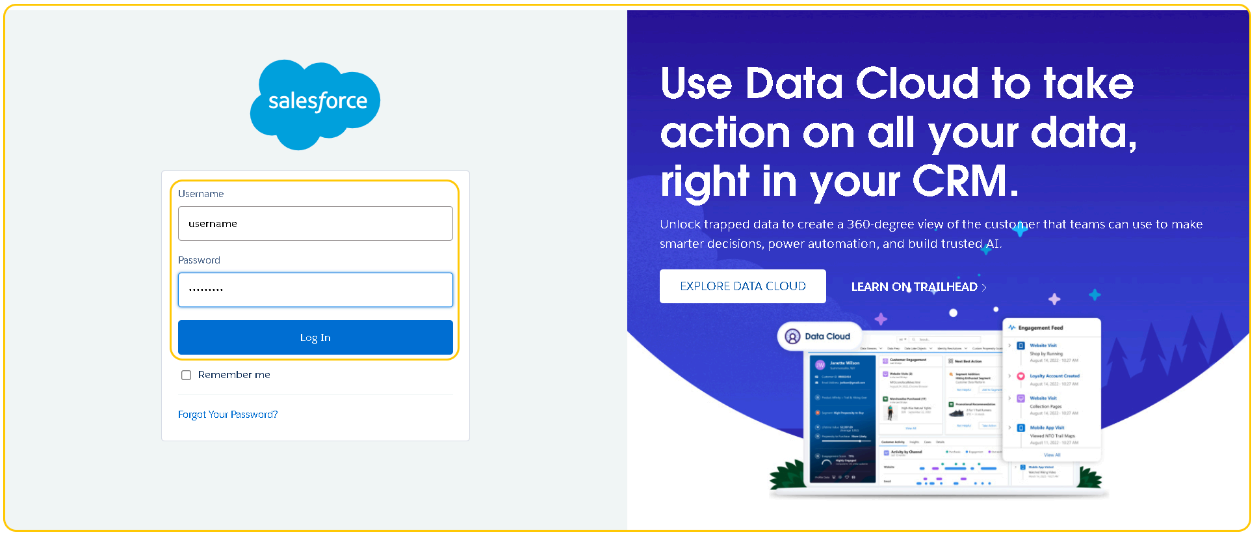
  After installation, you will receive e-mail letter from Salesforce support about successfully installing of our application.

Logging into application

Logging In and Accessing Task Tracker:

Log In to Salesforce:

- Open your web browser and navigate to the Salesforce login page.
- Enter your username and password in the respective fields.
- Click on the "Log In" button to access your Salesforce account.



Navigate to the Search Field:

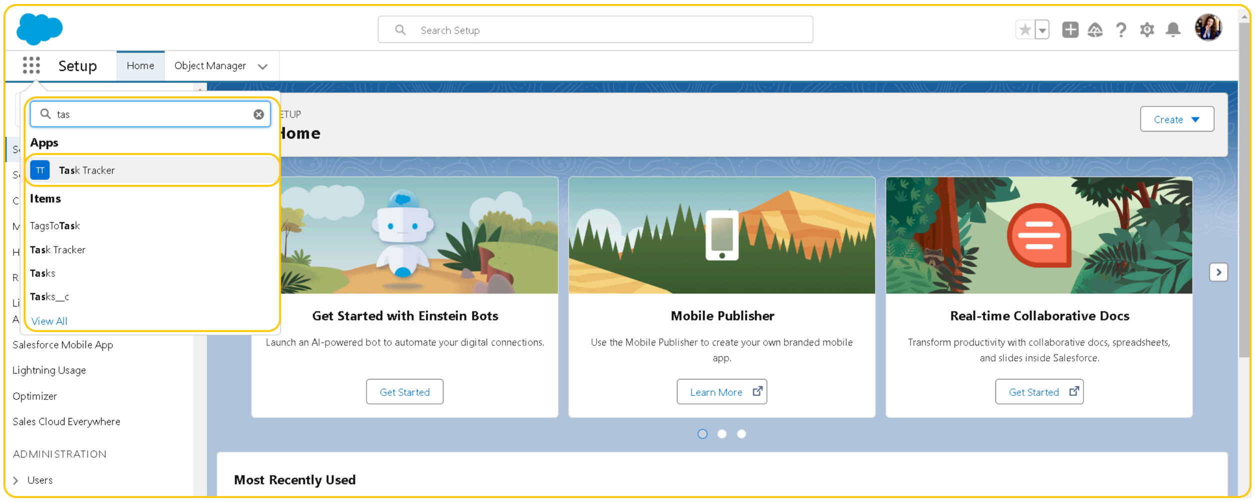
- Once logged in, you'll be directed to the Salesforce dashboard.
- Locate the search bar at the top of the page. It's typically situated in the header navigation.

Type "Task Tracker" in the Search Bar:

- Click on the search bar and type "Task Tracker" (without quotes) into the search field.
- As you type, Salesforce will start displaying matching results in a drop-down menu.

Select Task Tracker from the Search Results:

- Look and click on the for the "Task Tracker" option in the search results dropdown.



Access Task Tracker Module:

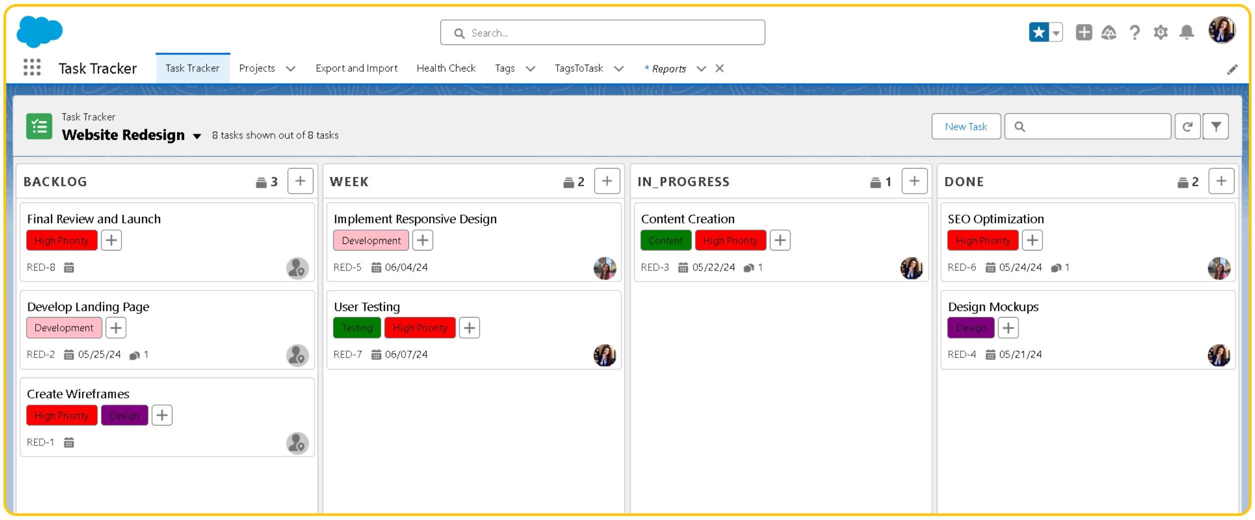
- Upon selecting "Task Tracker" from the search results, you'll be redirected to the Task Tracker module within Salesforce.
- Here, you'll find the main dashboard and navigation options for managing tasks efficiently.

Congratulations! You've successfully logged in to Salesforce and accessed the Task Tracker module. Now, you're ready to start organizing your tasks and maximizing your productivity with our intuitive task management solution.

Overview

The main page of Task Tracker serves as your hub for efficient task management. Here's what you'll find:

- Project Selection: Easily switch between projects.
- New Task Button: Quickly create new tasks.
- Search Bar: Instantly find specific tasks or projects.
- Refresh Button: Stay up-to-date with the latest information.
- Filters: Customize your task view.
- Task List: Organized view of your tasks.



Before using

Removing “Standard User Restriction” from Your Profile

Note: Before starting to work with Task Tracker, you should remove “standard user restriction” from your profile.

Follow these steps to modify your profile settings:

Tap on Your Profile Photo:

- Click on your profile photo located in the top right corner of the screen.

Go to Settings:

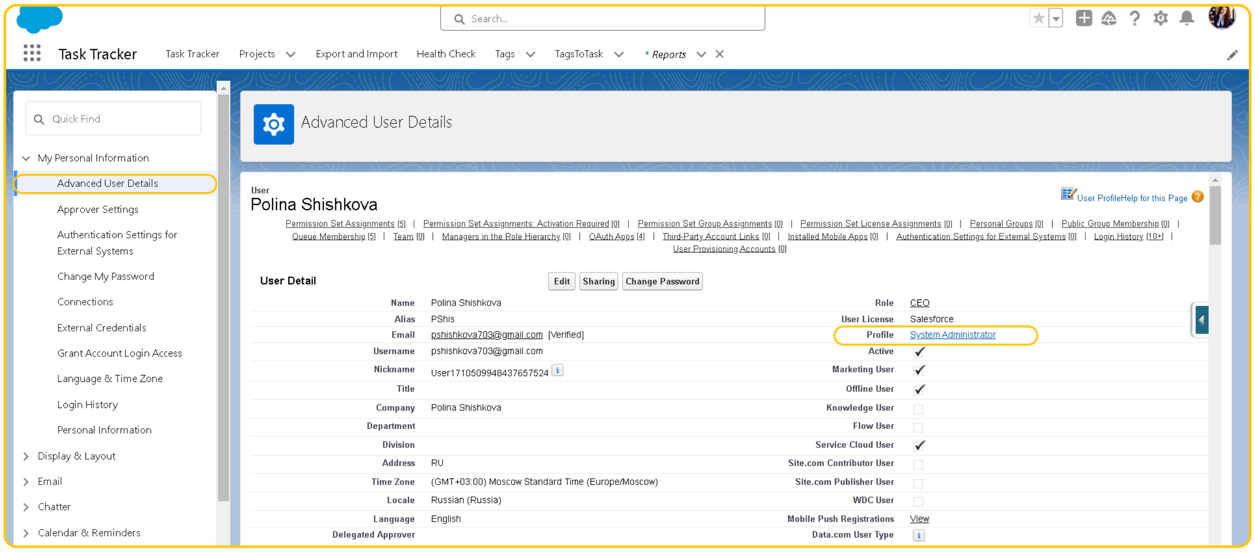
- From the dropdown menu, select "Settings".

Search for Advanced User Details:

- In the Quick Find search bar, type "Advanced User Details".

Choose "Profiles" Section:

- Select the "Profiles" section from the search results.

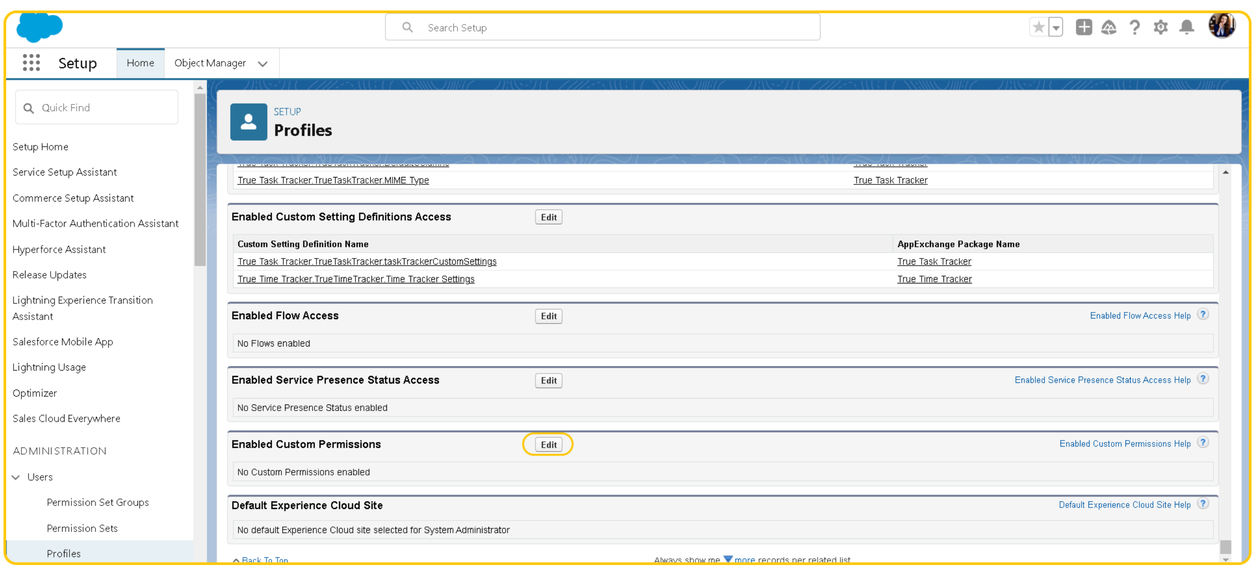


Scroll to "Enabled Custom Permissions":

- Within the Profiles section, scroll down until you find the "Enabled Custom Permissions" area.

Edit Custom Permissions:

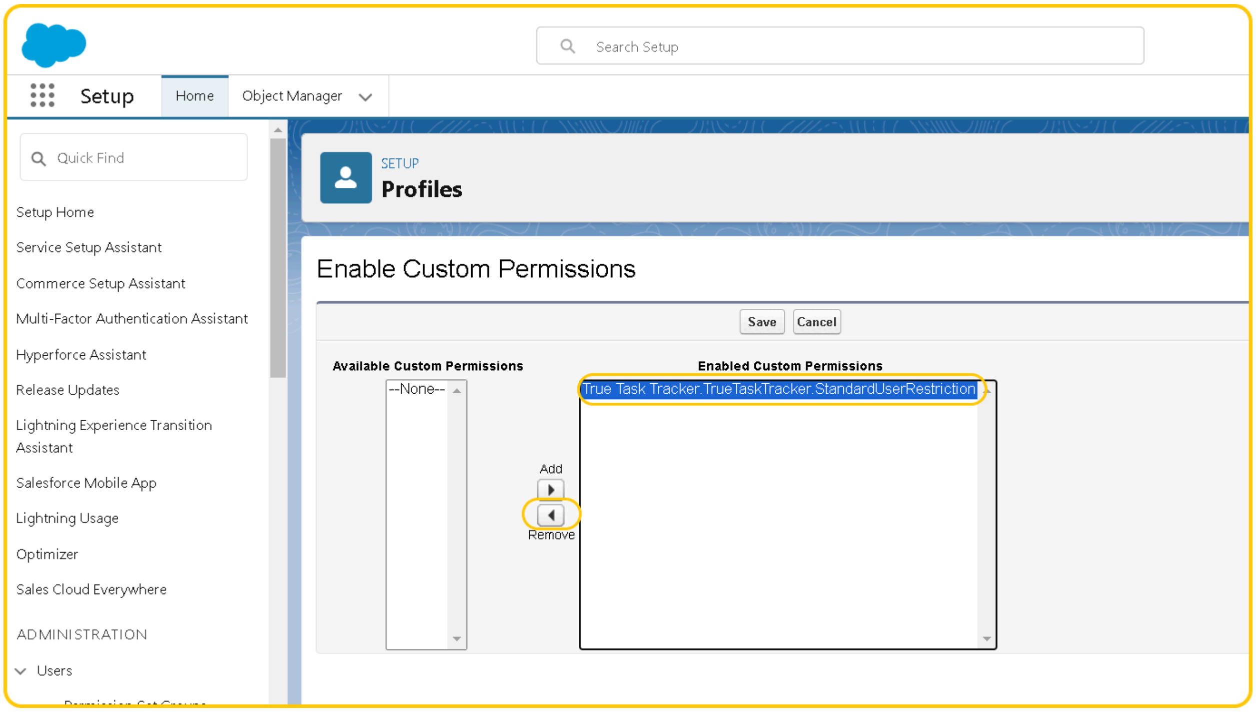
- Click on the "Edit" button next to "Enabled Custom Permissions".



Remove StandardUserRestriction:

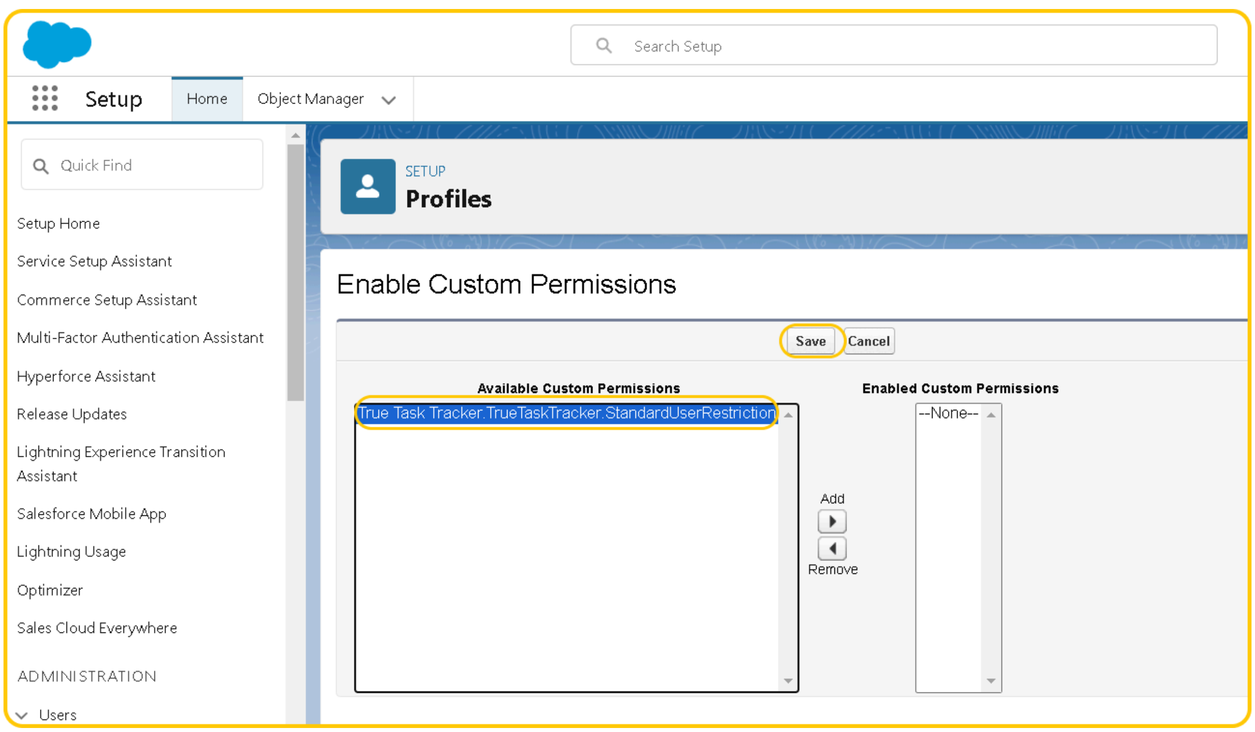
- In the list of permissions, find "True Task Tracker.TrueTaskTracker.StandardUserRestriction".

- Move it from the right side (enabled) to the left side.



Save Changes:

- Click "Save" to apply the changes.



Great! Now you can create projects in TrueTaskTracker without any restrictions.

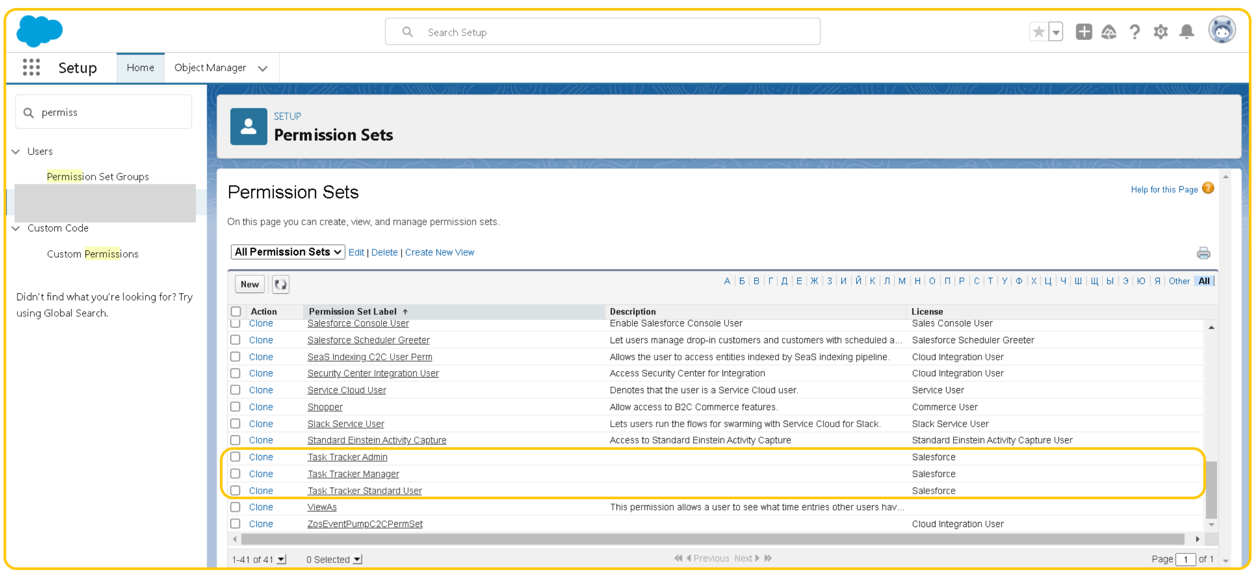
Permission Sets

Setup — Quick find — Permission sets — Manage assignment — Add your user — Next — Specify details — Assign — Done

Adjusting Permissions and Granting Access

Managing Permission Sets:

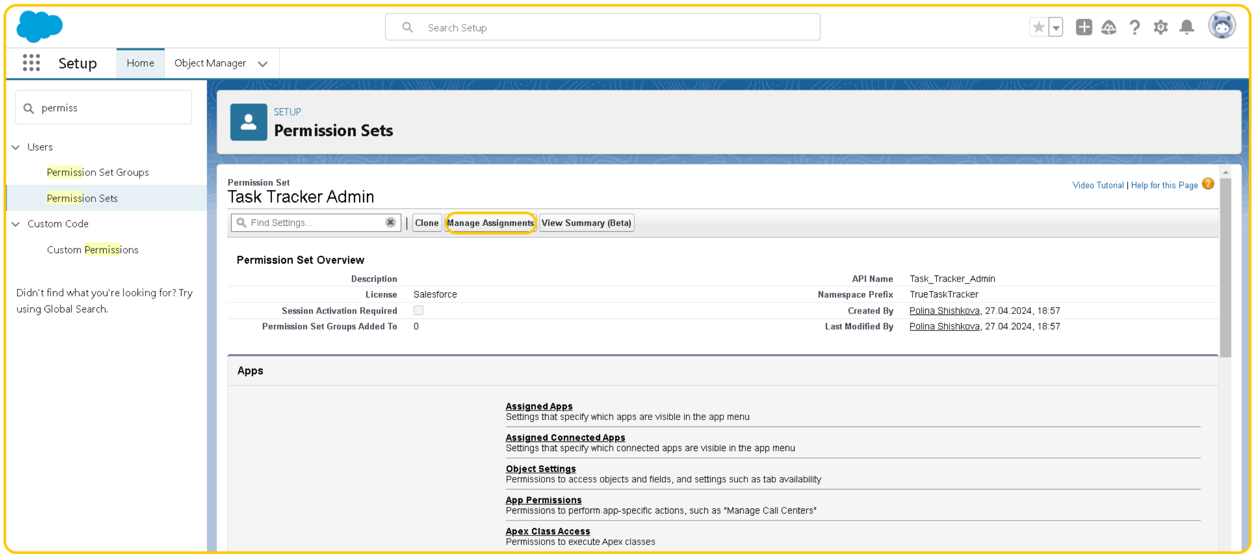
- To adjust permissions for users within your organization, navigate to the Salesforce Setup page.
- Search "Permission Sets" in search field and click on it.



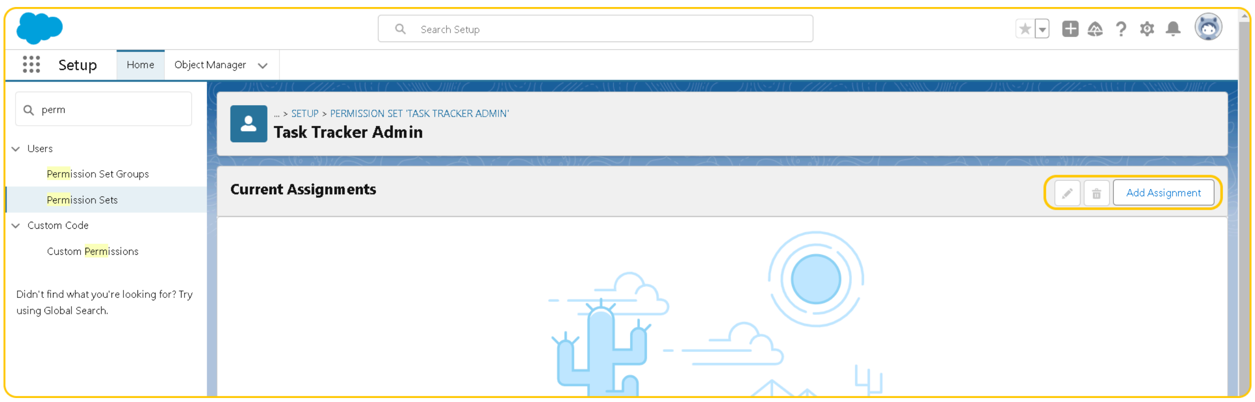
Depends on your role, choose admin, manager, or user permission set and assign it.

Admin Permission Set:

- Select the "Admin" Permission Set.
- Click on "Manage Assignments" to assign users who require administrative privileges, such as system administrators or IT managers.

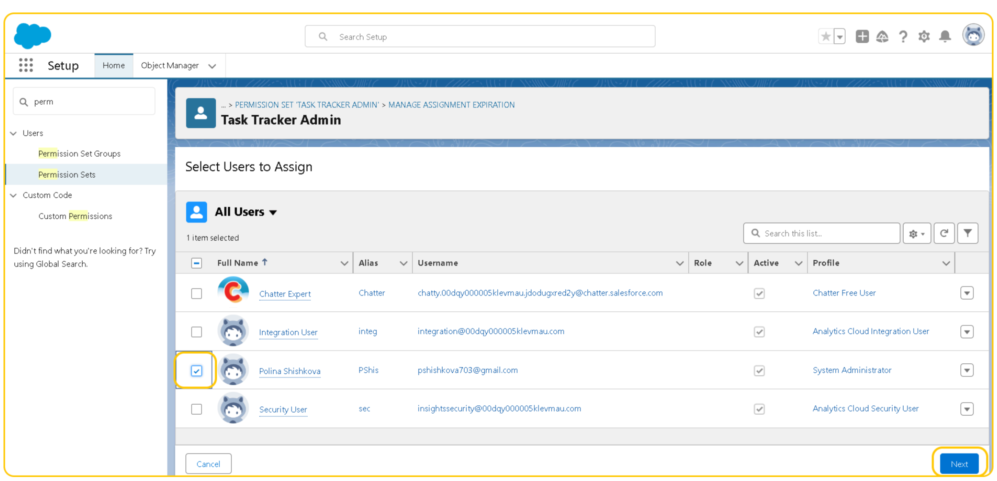


- In manage assignments window, click on add assignment button



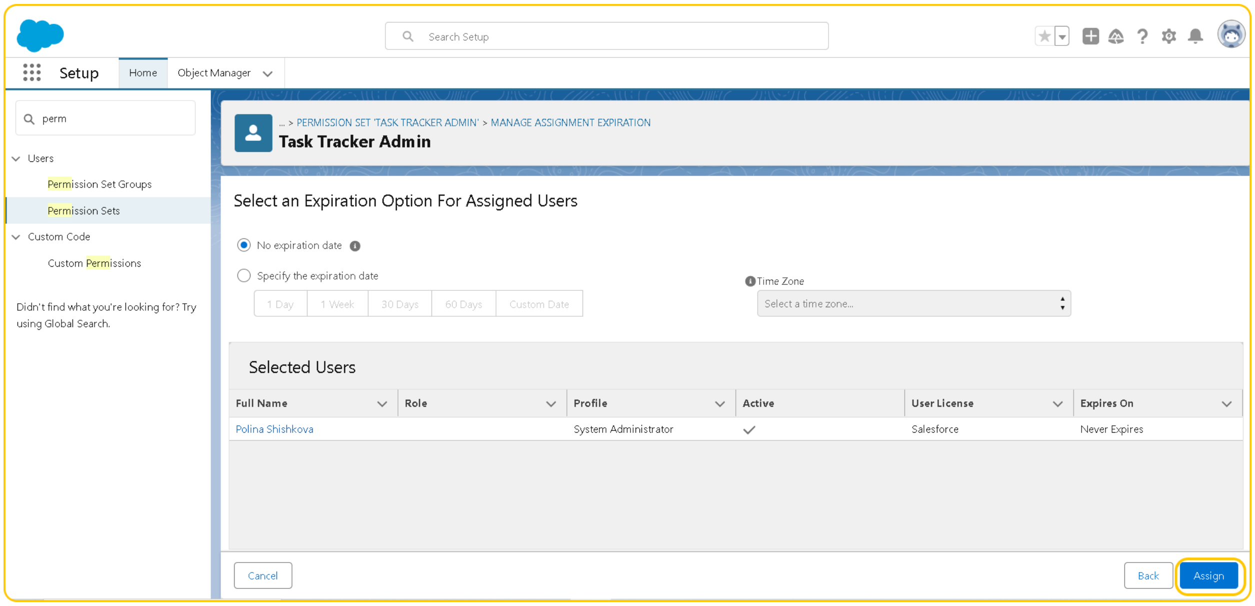
Add your user in assignment

- Mark your user and press "next"



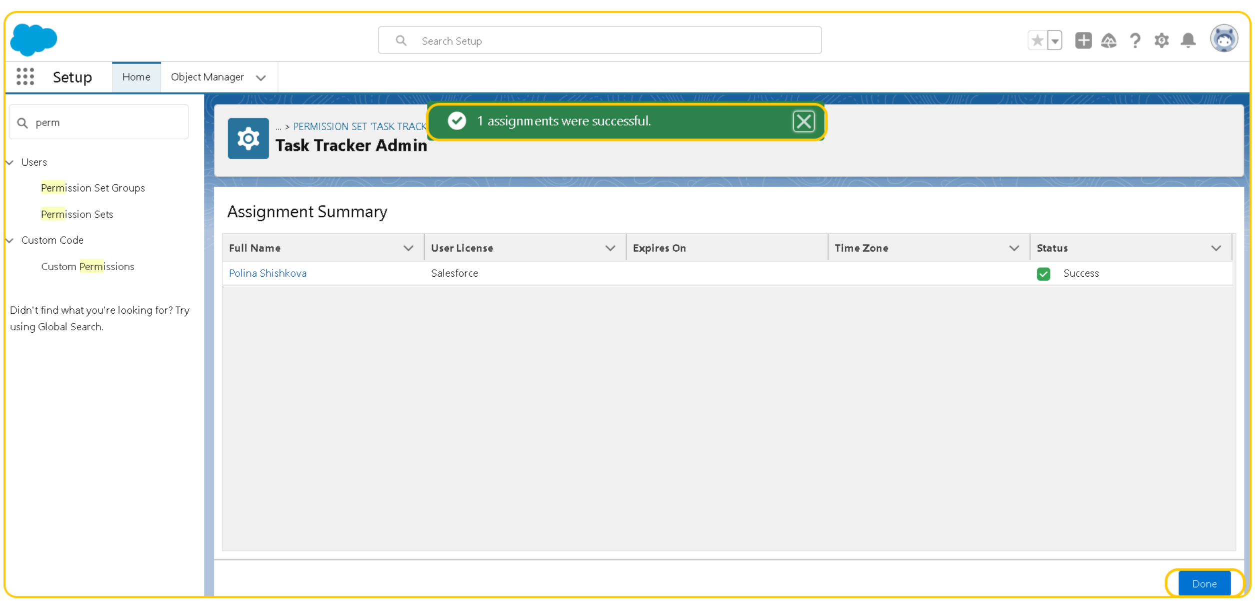
Specify and check details

- Choose an expiration date or choose “no expiration date” button
- Press “assign” button



Confirm permission

- You will see confirmatory notification
- Press “done” to finish



Use this instruction to assign any type of permission that we have in Task Tracker. Choose permission set according to your role.

Granting Access to Specific Projects

Setup — Quick find — Queue — Project — Edit — Queue members — Add user — Save

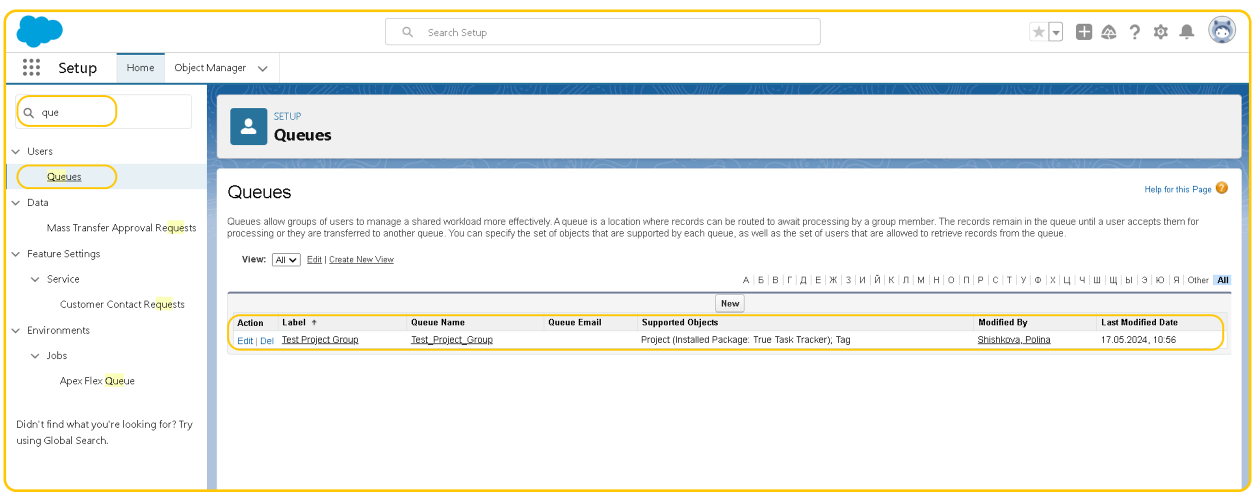
To grant access to a specific project, navigate to the Salesforce Setup page again.

- Search "Queue" in search field and click on it.

Locate Project Queue:

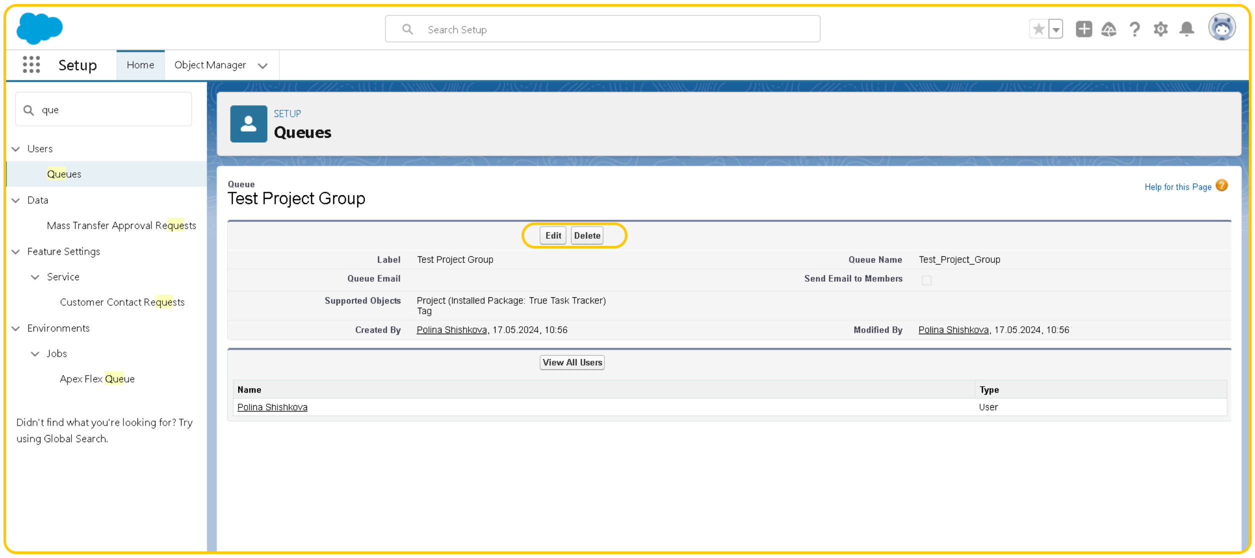
- In the Queues view, search for the queue related to your project. It should have the same name as your project.

Once you've located the project queue, click on it to access its details.



Add Users to the Queue:

- In the queue details, look for the “edit” option to add users.

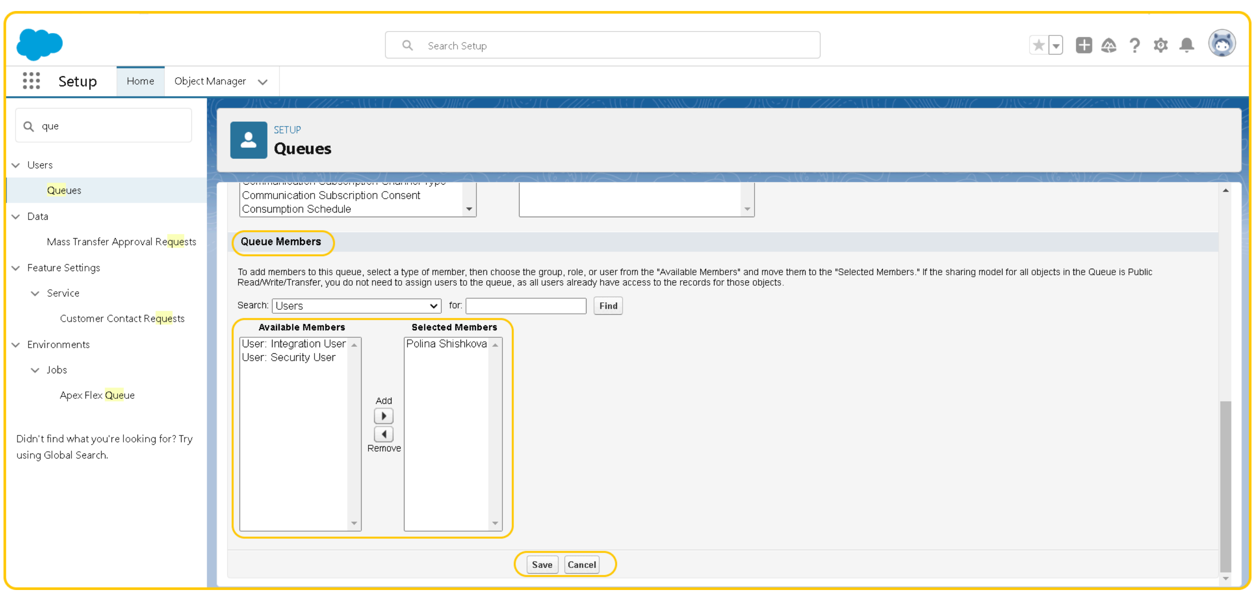


Add users who need access to the specific project by selecting their names from the available list.

- Locate the “Queue members” section and choose specific user

Save Changes:

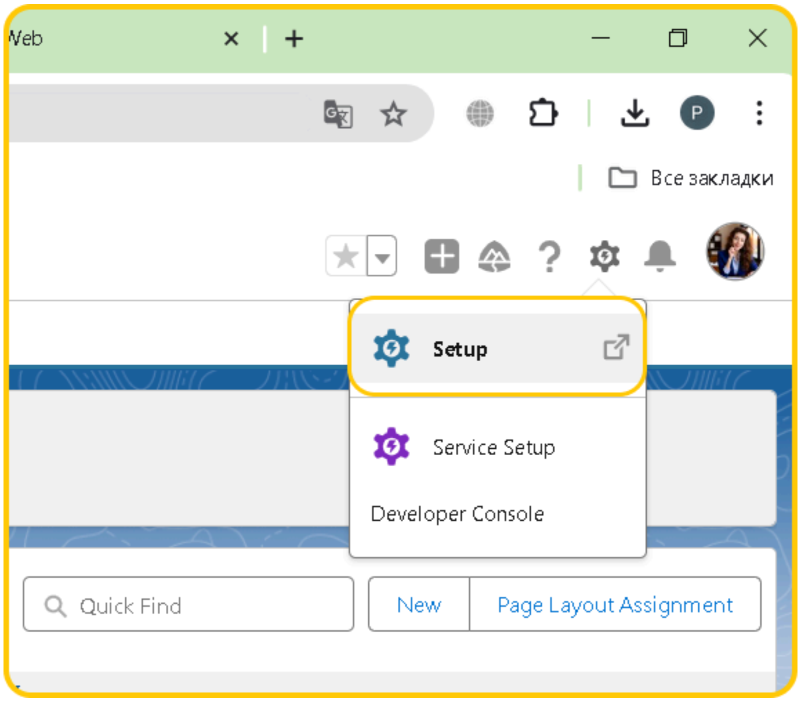
- After adding users to the project queue, remember to save your changes to ensure they take effect.



Customizing User Layout for Assignee Background Color

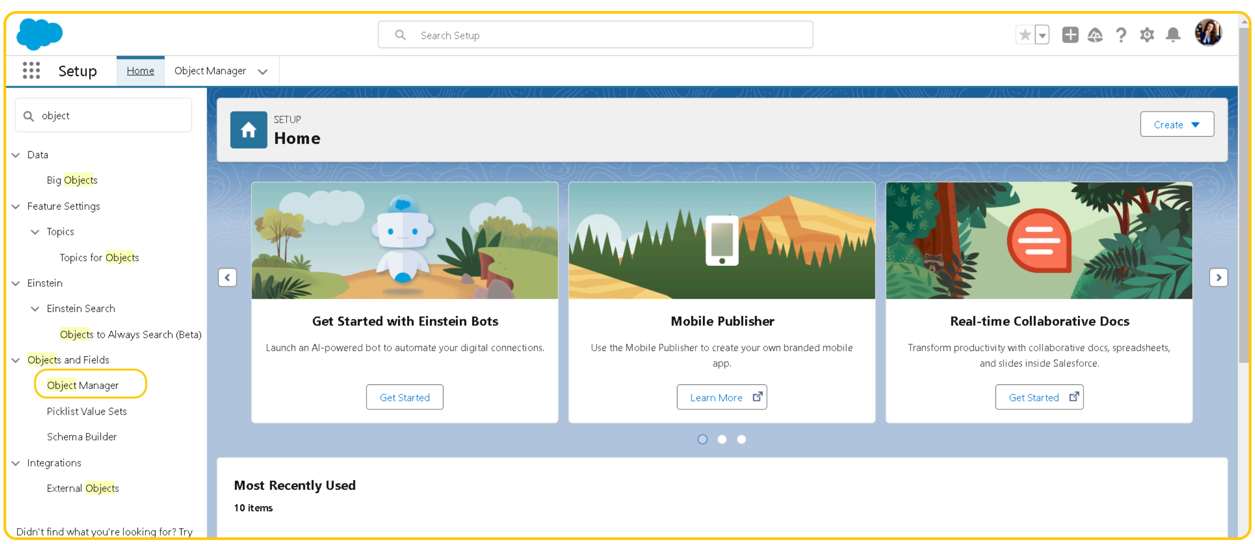
Navigate to User Layout Setup:

- Log in to Salesforce and navigate to the Setup page.

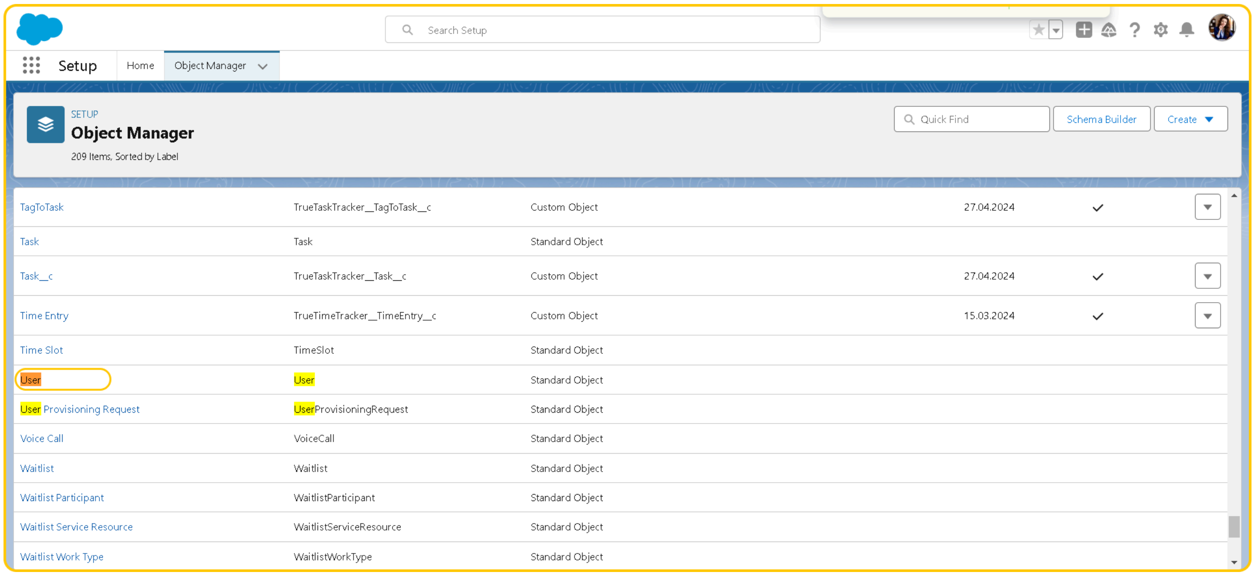


Access User Layout Settings:

- In the Setup menu, locate and click on "Object Manager."

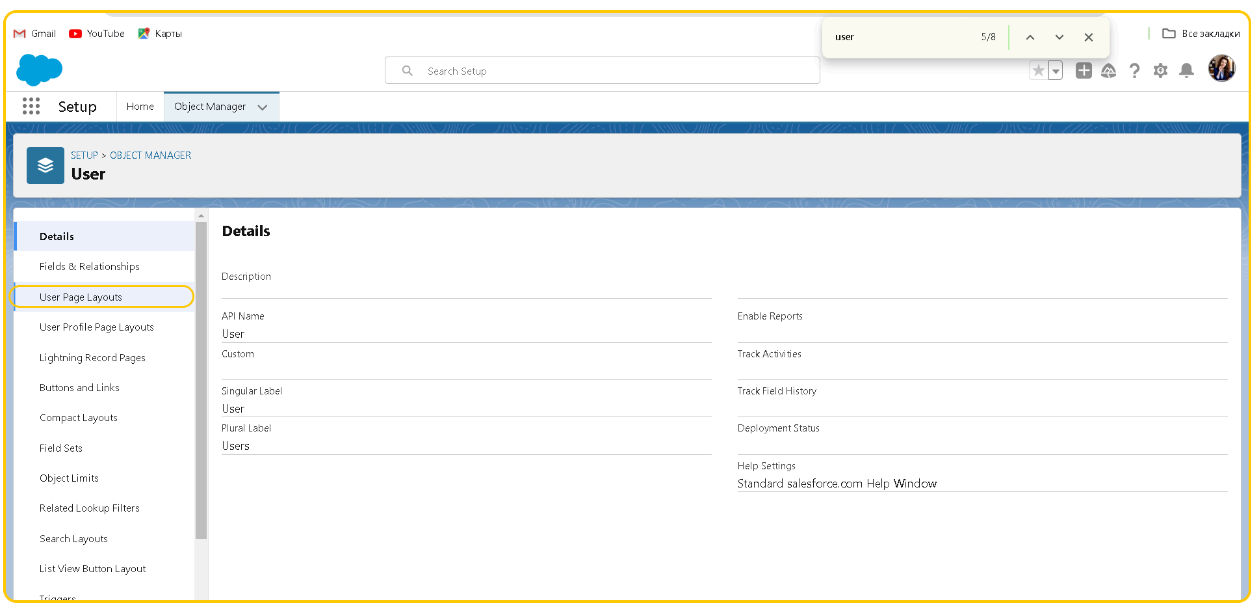


- Search for and select the "User" object from the list of available objects.



Edit User Layout:

- Within the User object settings, locate and click on "User Page Layouts."



- Select the page layout that you want to edit. This could be the default layout or a custom layout specific to your organization's needs.

Add Color Field:

- Once in the page layout editor, look for the section where you want to add the Color field. This could be under the User Details section or a custom section dedicated to task management preferences.
- Click on "Fields" to access the list of available fields.

Find and Add the Color Field:

- In the Fields section, search for the "Color" field.
- Drag and drop the Color field onto the desired section of the user layout.

Adjust Field Properties (Optional):

- If needed, you can adjust the properties of the Color field, such as its label or visibility settings, by clicking on the wrench icon next to the field.

Save Changes:

- Once you've added the Color field to the user layout and made any necessary adjustments, click on the "Save" button to save your changes.

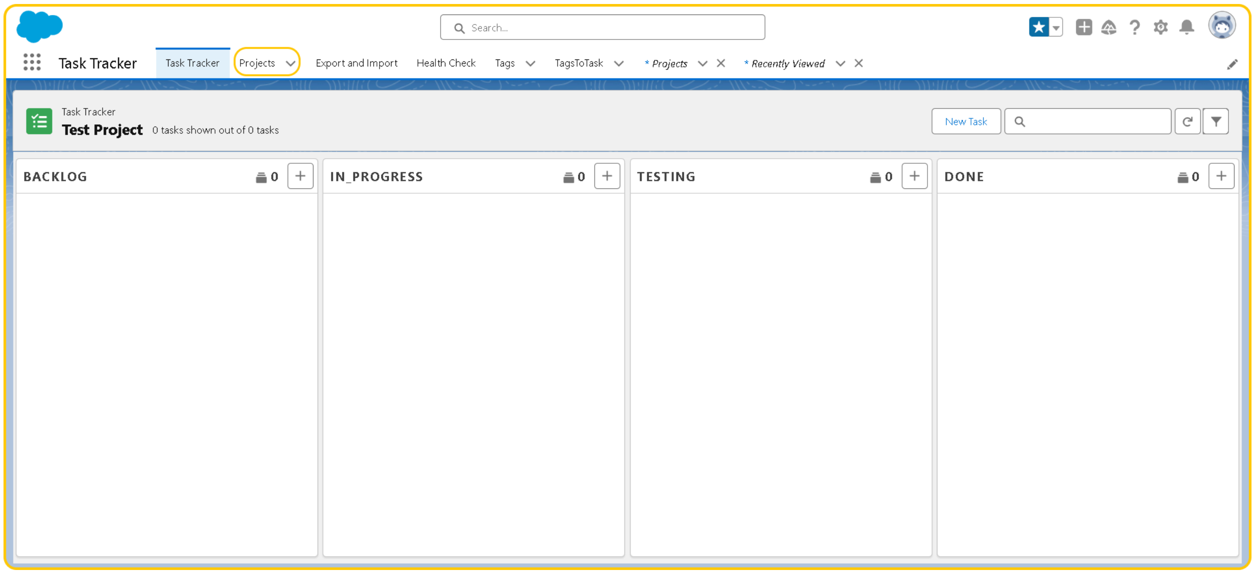
Create a project

Projects — New — Add details — Save

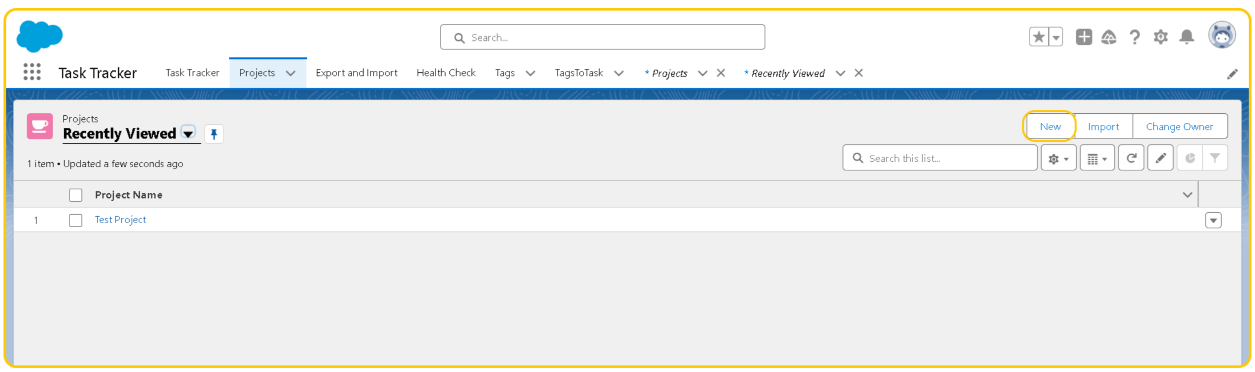
Now that you've accessed the Task Tracker application, it's time to kickstart your journey by creating your first project. Projects serve as the backbone of your task management system, providing a structured framework for organizing tasks, setting goals, and tracking progress.

Navigate to the Projects Tab:

- In the tab bar at the top of the Task Tracker interface, locate the "Projects" tab.
- Click on the "Projects" tab to access the Projects view.



- Click on the New Button:

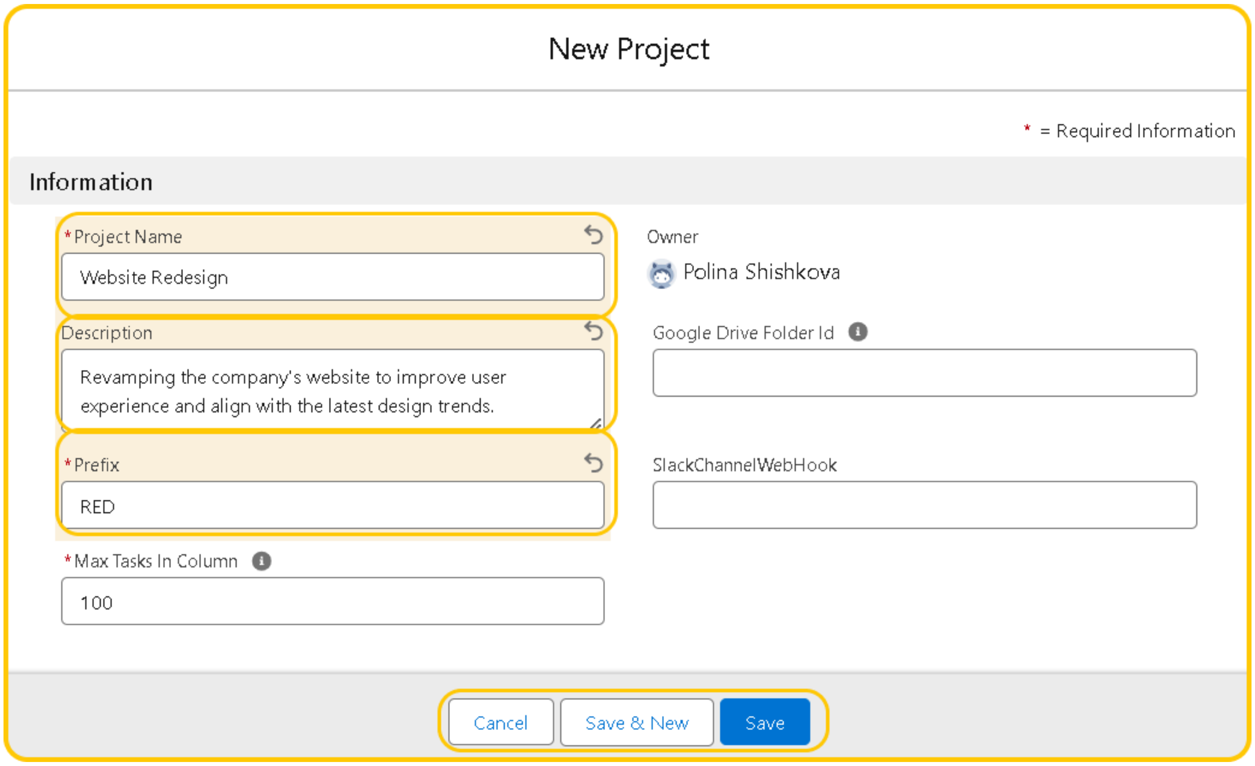


Fill in Project Details:

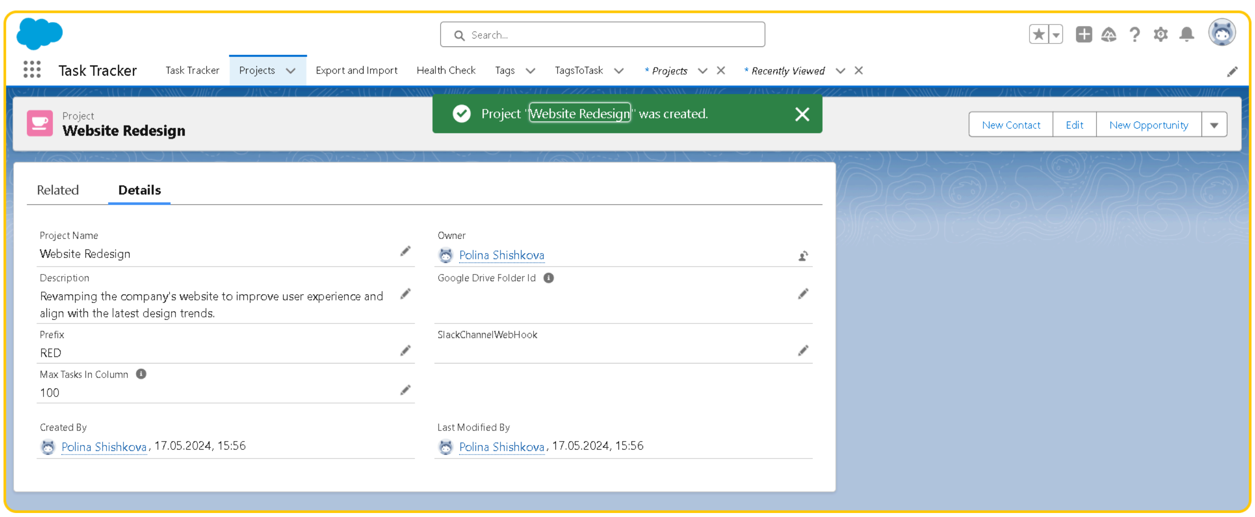
- Project Name — Enter the name of your new project.
- Project Description — Provide a detailed description of the project.
- Project Prefix — Assign a short identifier for your project.
- Max Tasks in Column — Set the maximum number of tasks allowed in each column.

Save Your Project:

- Once you've entered all the necessary information, review the details to ensure accuracy.
- Click on the "Save" button to save your new project.



After successfully creating the project, you will be redirected to the project details page when you can make any edits that you need.



Note: you are free to create no more than 3 projects.

Creating columns

Project - related - New - Add details - Save

To customize the columns in your project's main page, follow these steps:

- Open a Project: Click on the project name to open it.
- Project Details: You will be directed to the project details page.
- Switch to Related: Click on the "Related" tab to view columns associated with the project.

Note: you are free to create four columns for one project

In the Task Tracker, you can create customized columns for your projects to match your workflow. *By default, the columns include Backlog, In Progress, Testing, and Done.*

For efficient work, consider adding these additional columns:

To Do: For tasks that are ready to be started.

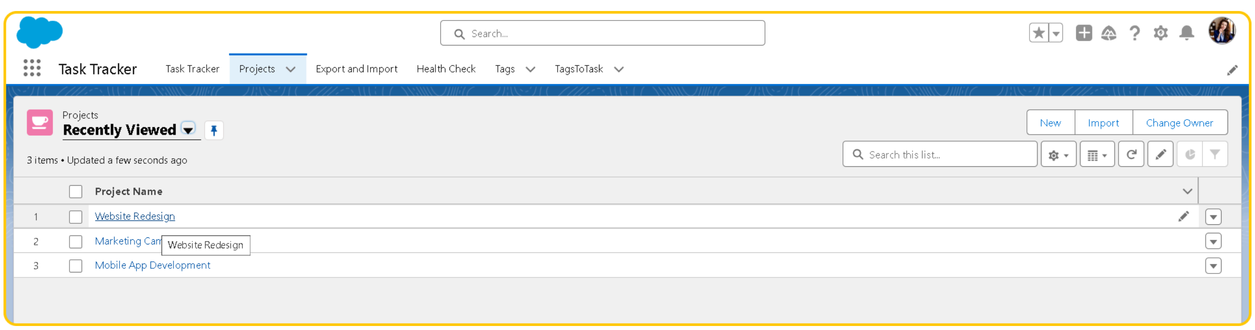
In Review: For tasks awaiting approval or feedback.

On Hold: For tasks that are temporarily paused.

Completed: For tasks that are finished but not yet closed.

To customize your columns:

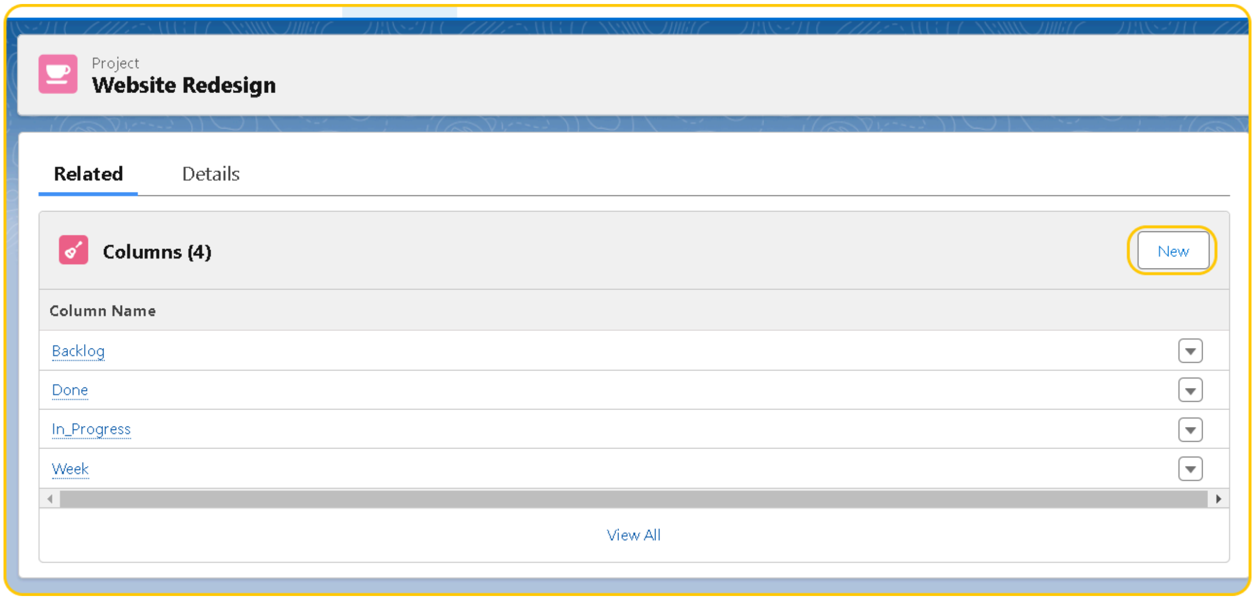
- Open any project by clicking on its name.



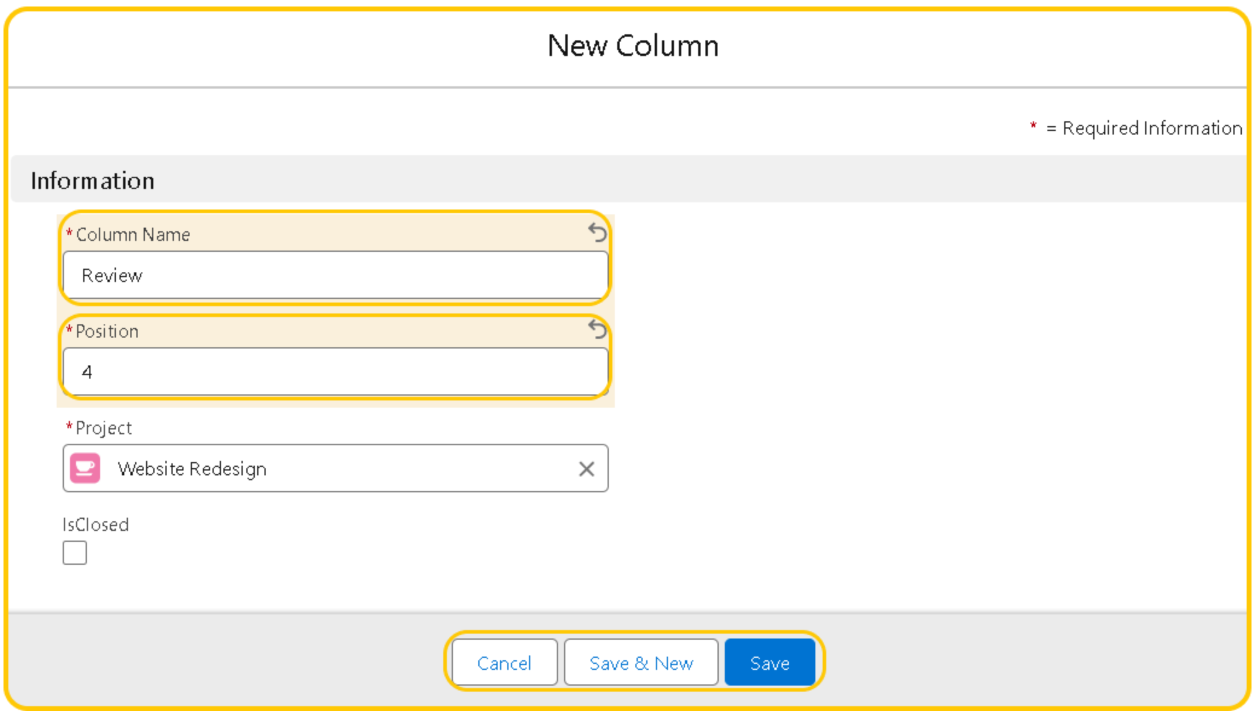
- You will see the project details.

- Switch to the "Related" tab to view and manage columns.

- Here, you can edit or delete existing columns, or create new ones by clicking the "New" button, filling in the details, and saving your changes.



- This flexibility allows you to tailor the task list view to your team's specific needs, ensuring an organized and efficient workflow.



Creating tags

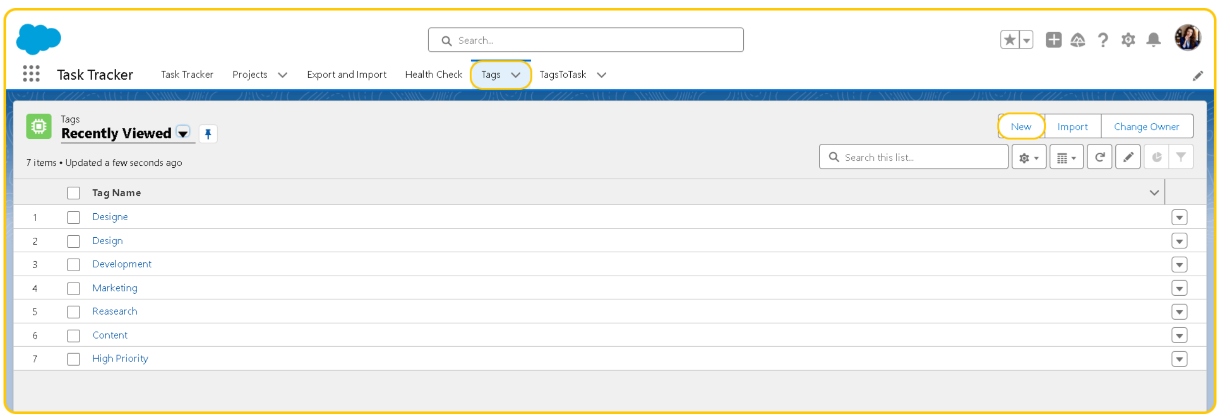
Creating tags in Task Tracker is a straightforward process that empowers users to categorize and prioritize their tasks effectively. Here's how users can create tags:

Navigate to Tags Window:

- Users can access the Tags window by locating it in the Task Tracker interface. Typically, this option is available in the main navigation menu or settings section.

Create a New Tag:

- Within the Tags window, users can initiate the creation of a new tag by selecting the "New" option. This action will prompt a form or dialog box to appear, allowing users to input the details of the new tag.



Enter Tag Name:

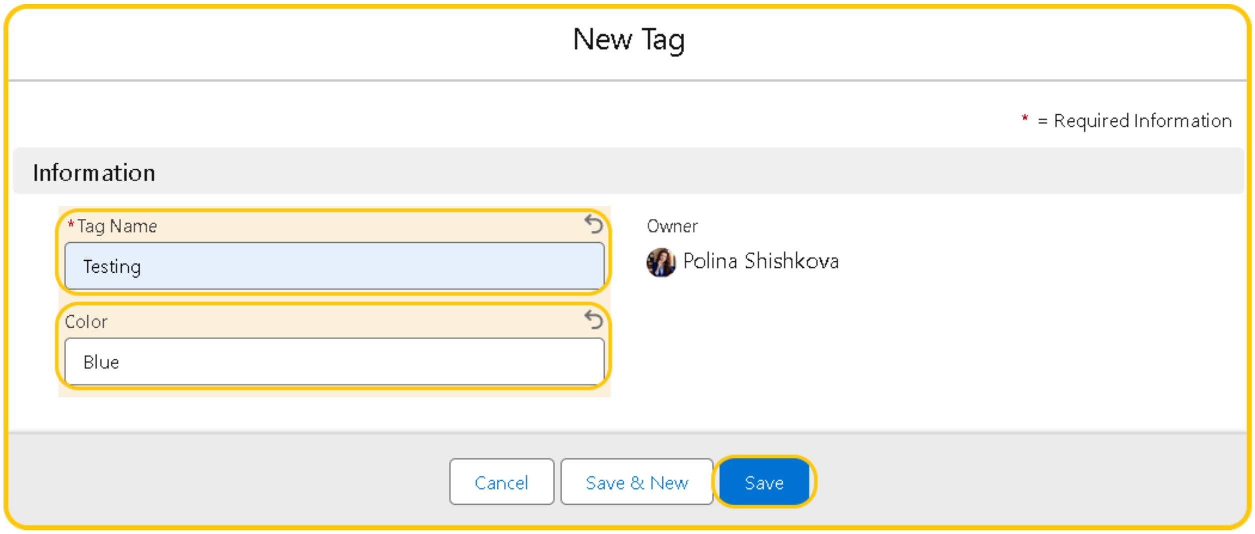
- In the provided field, users can enter the name of the new tag. This name should be descriptive and relevant to the category or priority level it represents, aiding in task organization and identification.

Choose Tag Color:

- Next, users can specify the color associated with the tag. This color-coding feature enhances visual differentiation between tags and facilitates quick recognition of tag categories or priorities.

Save Tag:

- Once the tag name and color have been specified, users can save the new tag by clicking the appropriate button or icon. This action finalizes the creation process and adds the new tag to the user's tag library.



By creating tags in Task Tracker, users can personalize their task management experience, organize tasks more effectively, and prioritize work according to their unique preferences and requirements.

Note: Administrators can create tags directly from the task editing window by typing any word and press Enter, a new tag will be created.

Navigating the Interface

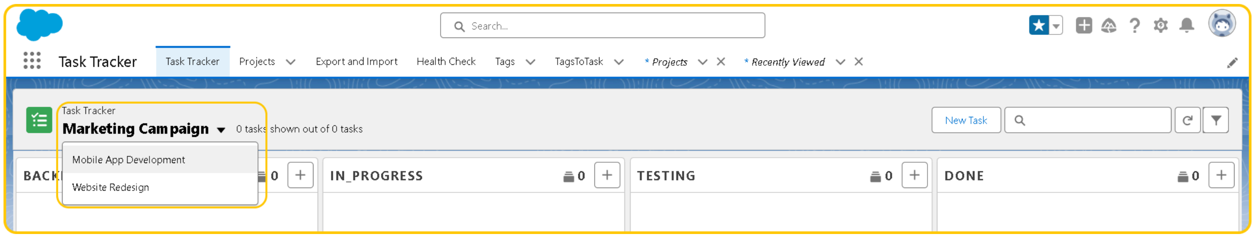
Main page overview

Upon accessing the main page of the Task Tracker application, users will encounter several navigation elements designed to streamline their task management experience:

Project Switch Button:

- At the top of the main page, users will find the "Project Switch" button.
- Clicking on the "Project Switch" button allows users to choose the project they are currently working on from a dropdown menu.

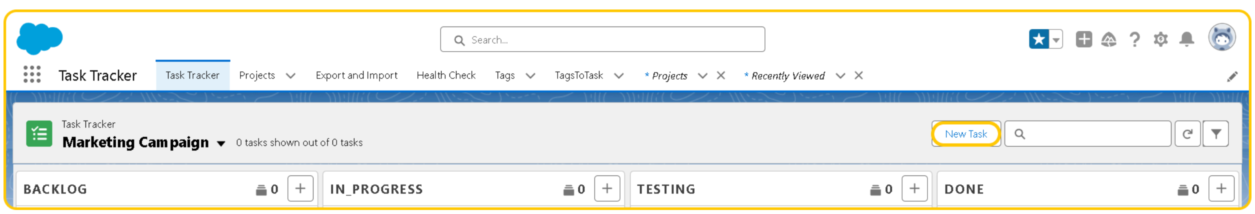
This feature enables users to focus on tasks associated with a specific project, enhancing organization and efficiency.



New Button:

- Adjacent to the "Project" button, users will see the "New" button.
- Clicking on the "New" button opens a menu of options for creating new tasks.

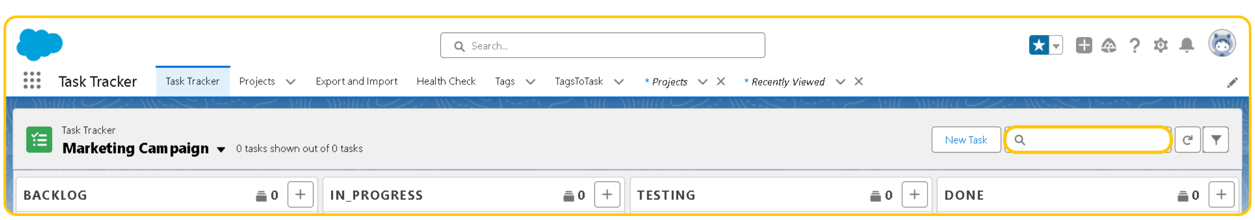
This feature empowers users to initiate new projects or tasks directly from the main page, streamlining the task creation process.



Search Window:

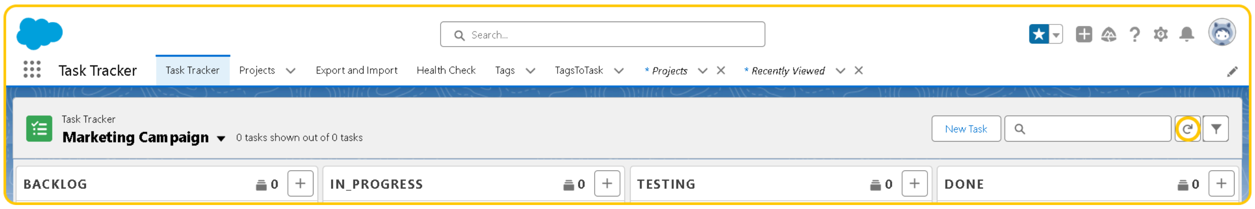
- Located prominently on the main page, the search window allows users to quickly search for specific projects or tasks.
- Users can enter keywords or phrases related to the project or task they are looking for, and relevant results will be displayed in real-time.

This search functionality facilitates efficient navigation and retrieval of information within the Task Tracker application.



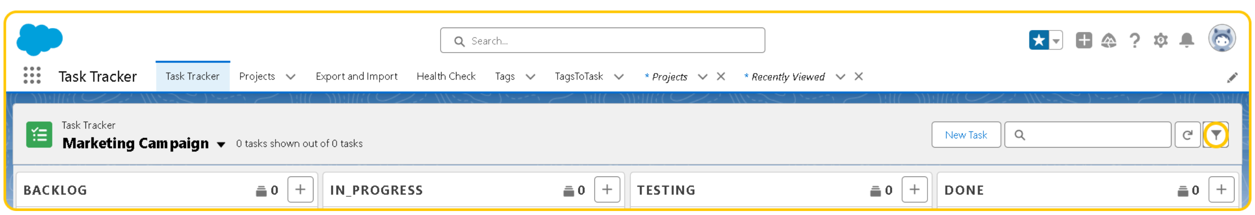
Refresh Button:

- Positioned alongside the search window, the refresh button enables users to refresh the page and update the displayed information.
- Clicking on the refresh button ensures that users have access to the most current data and status updates related to their projects and tasks.



Filters

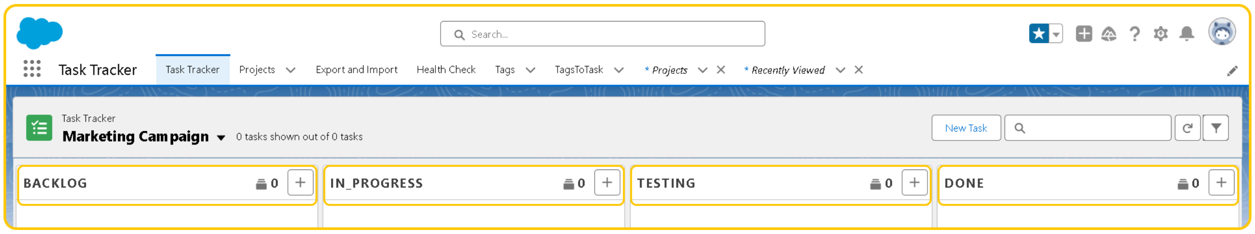
- Below the search window, users will find a set of filters that allow them to customize the display of projects and tasks based on specific criteria.
- This filtering functionality helps users focus on tasks that require immediate attention or meet certain criteria, improving task management efficiency.



Main page functionalities

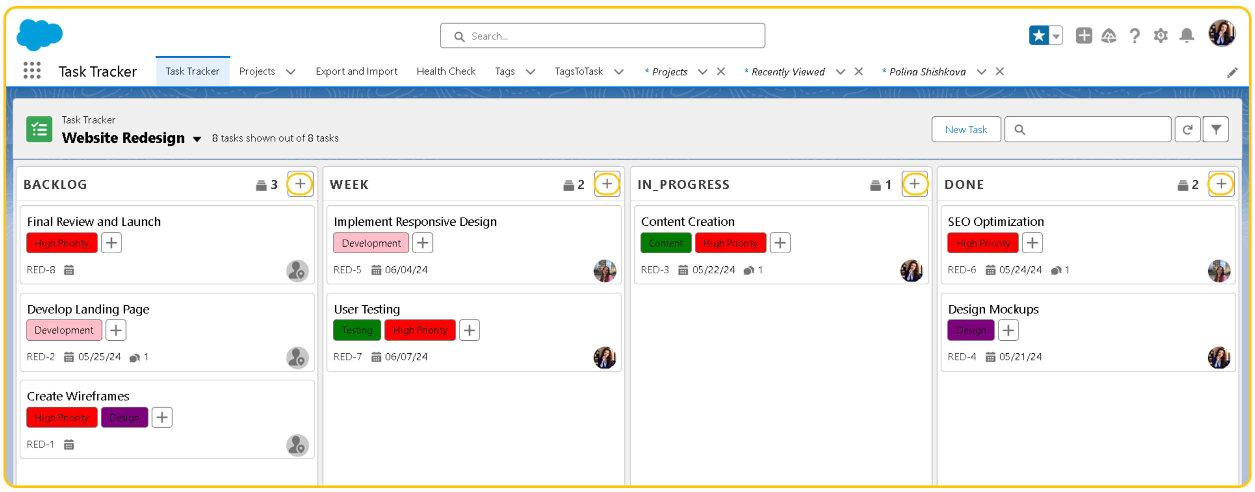
In the Task Tracker, you can create customized columns for your projects to match your workflow. By default, the columns include Backlog, In Progress, Testing, and Done.

Note: to start planning project task, firstly, you can collect all the tasks in column "backlog" to distribute them later.



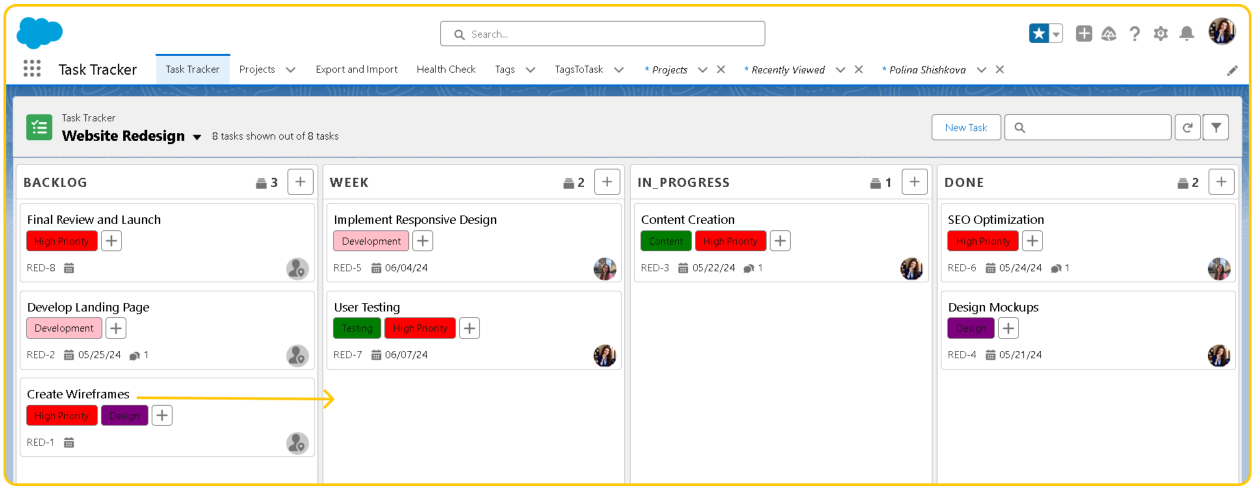
Create New Task:

- Users have the option to create a new task directly within each status column.
- This feature streamlines task creation and allows users to quickly add new tasks to the appropriate stage of the workflow.



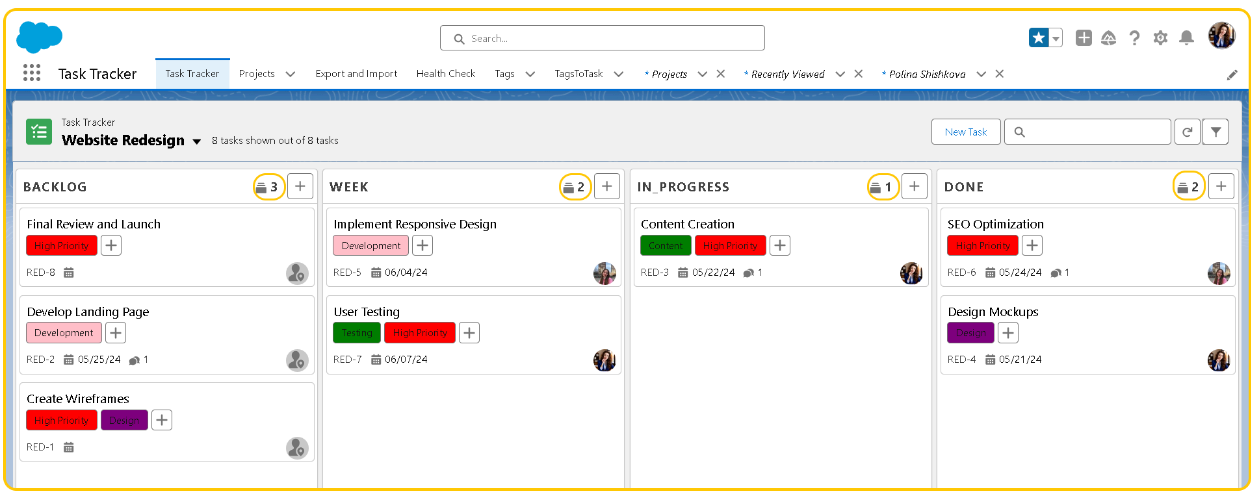
Drag-and-Drop Task Management:

- One of the key features of the Task Tracker application is its support for drag-and-drop task management.
- Users can easily drag tasks from one column to another, reflecting changes in status or priority.
- Additionally, users can rearrange tasks within a column by dragging them to different positions.
- This intuitive drag-and-drop functionality simplifies task management and allows users to quickly adjust task priorities and workflows as needed.



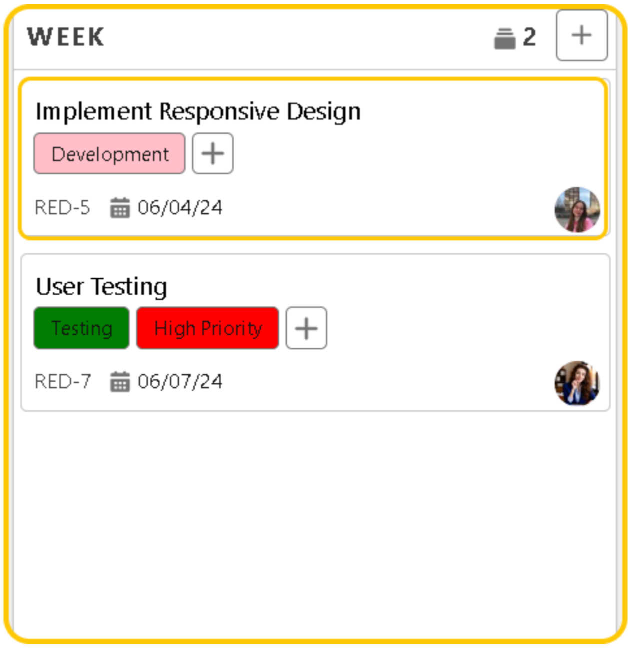
Number of tasks

In the Task Tracker, each column in your project's task list displays the number of tasks it contains. This is indicated by a small icon at the top of each column, showing the task count.



Tasks cards

Tasks on the main page of the Task Tracker application provides users with essential information about individual tasks, allowing for quick assessment and management. Here's an overview of the key components displayed within the task cards:



- Task Name

The task name serves as a concise and descriptive title that summarizes the task's purpose or objective.

- Tags

Tags provide additional context or categorization for tasks, allowing users to easily group and filter tasks based on common themes or attributes.

Tags can represent various categories, topics, or labels associated with the task, enhancing organization and searchability.

- Task Number

Each task is assigned a unique task number or identifier, facilitating reference and tracking across the Task Tracker application.

Task numbers help users quickly locate and reference specific tasks within the task list or when communicating with team members.

- Assigned Person

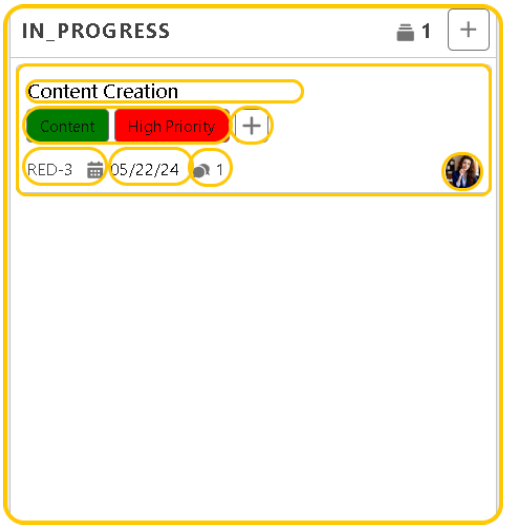
The assigned person indicates the team member responsible for completing the task.

- Due Date

The deadline date specifies the due date or deadline by which the task is expected to be completed.

- Number of Comments:

The number of comments indicates the level of activity and engagement associated with the task.

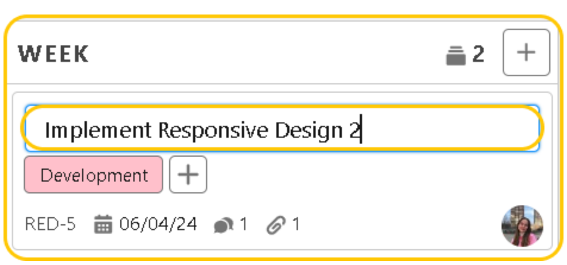


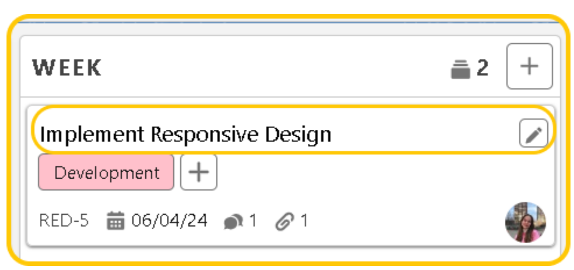
Inline Editing

Inline Editing offers users convenient and efficient ways to modify task details directly within Task Tracker. Here's how users can leverage this feature:

Edit Task Name

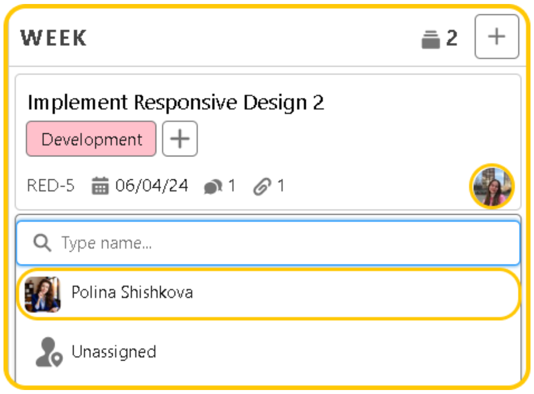
- Users can simply click on the task name to initiate inline editing. This allows them to quickly update the task name to reflect any changes or additional information.





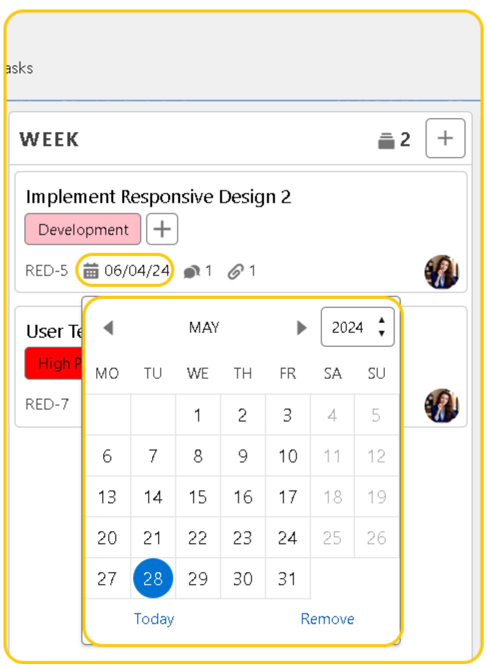
Assignee Task

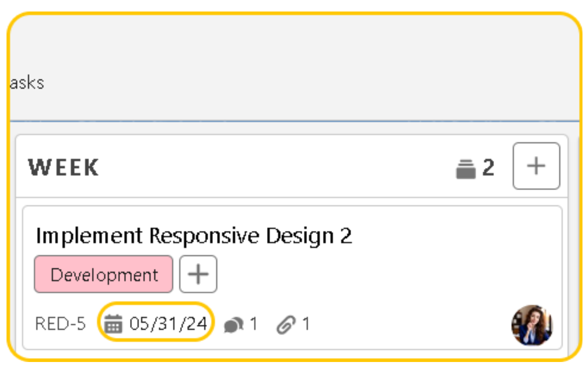
- With inline editing, assigning tasks to team members is a breeze. Users can easily change the assignee by clicking on the assignee field and selecting the desired team member from the dropdown menu.



Editing Due Date

Modifying task due dates is effortless with inline editing. Users can click on the due date field to bring up a calendar widget, enabling them to select a new due date or adjust the existing one with ease.

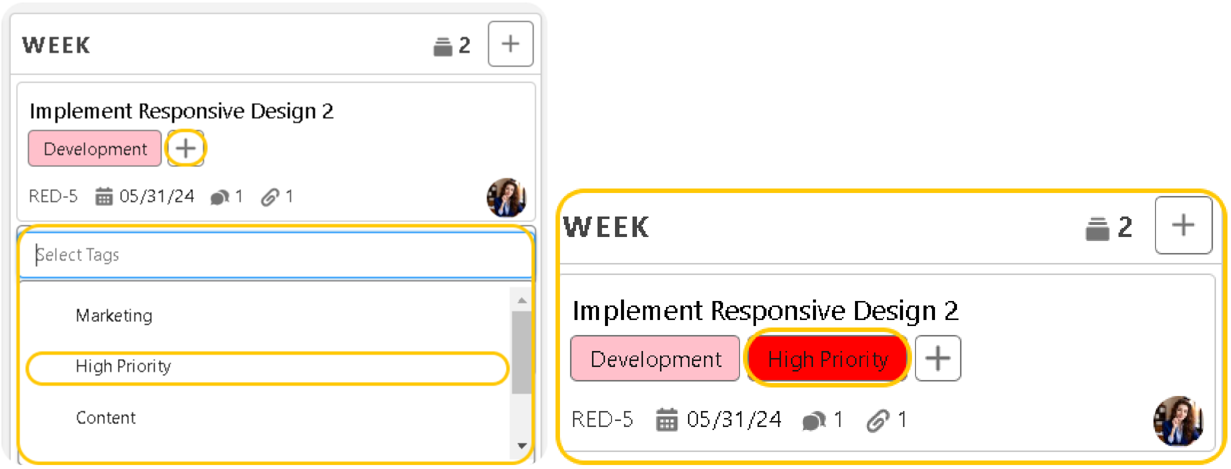




Adding Tags:

- Inline editing also supports the addition of tags to tasks. By clicking on the tags field, users can enter or select tags from a predefined list, allowing them to categorize tasks and prioritize them accordingly.

With Inline Editing, users can streamline their task management process by making quick updates and adjustments to task details directly within Task Tracker, enhancing productivity and workflow efficiency.

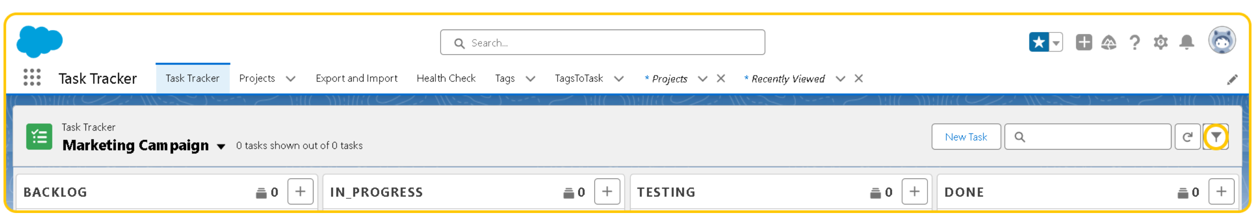


Filtering and Sorting Tasks

In the Task Tracker application, users have the ability to filter and sort tasks to focus on specific criteria and streamline their workflow. Here's how users can leverage filtering and sorting functionalities:

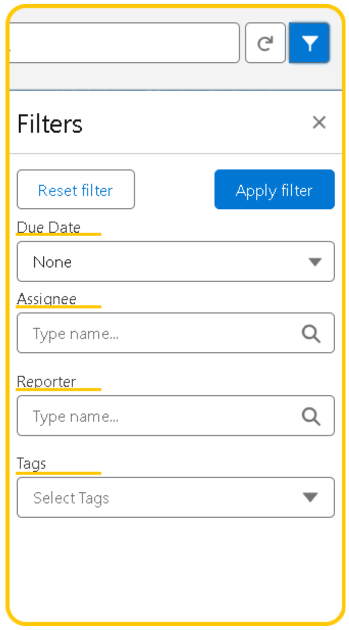
Accessing Filters:

- Users can access the filters by navigating to the filter button located within the task list interface.



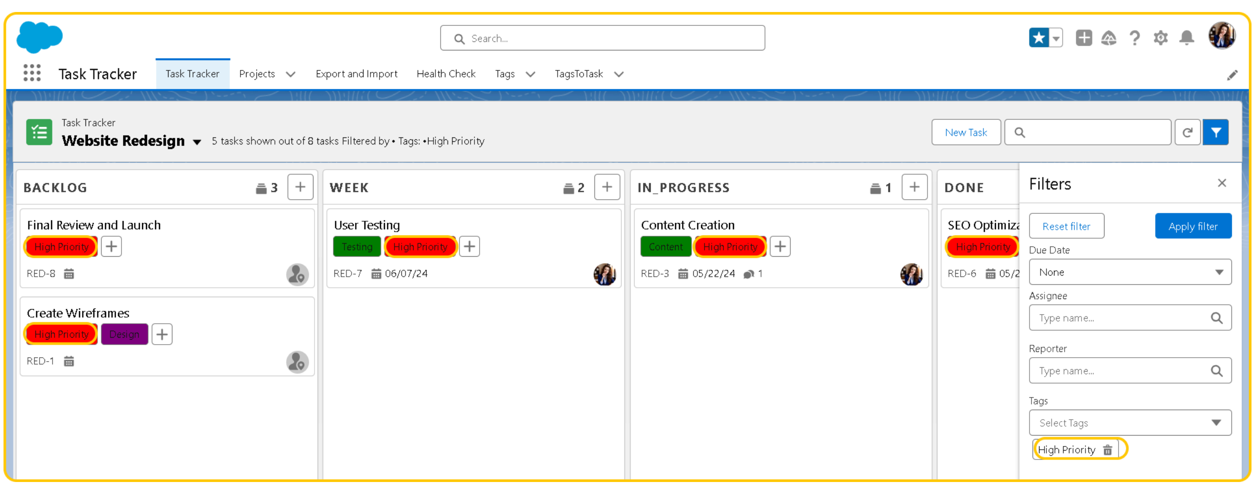
Customizing Filters:

- Upon clicking the filter button, users can customize filters based on various criteria such as date, assignee, reporter, and tags.
- Users can specify date ranges, select specific assignees or reporters, and filter tasks based on assigned tags.



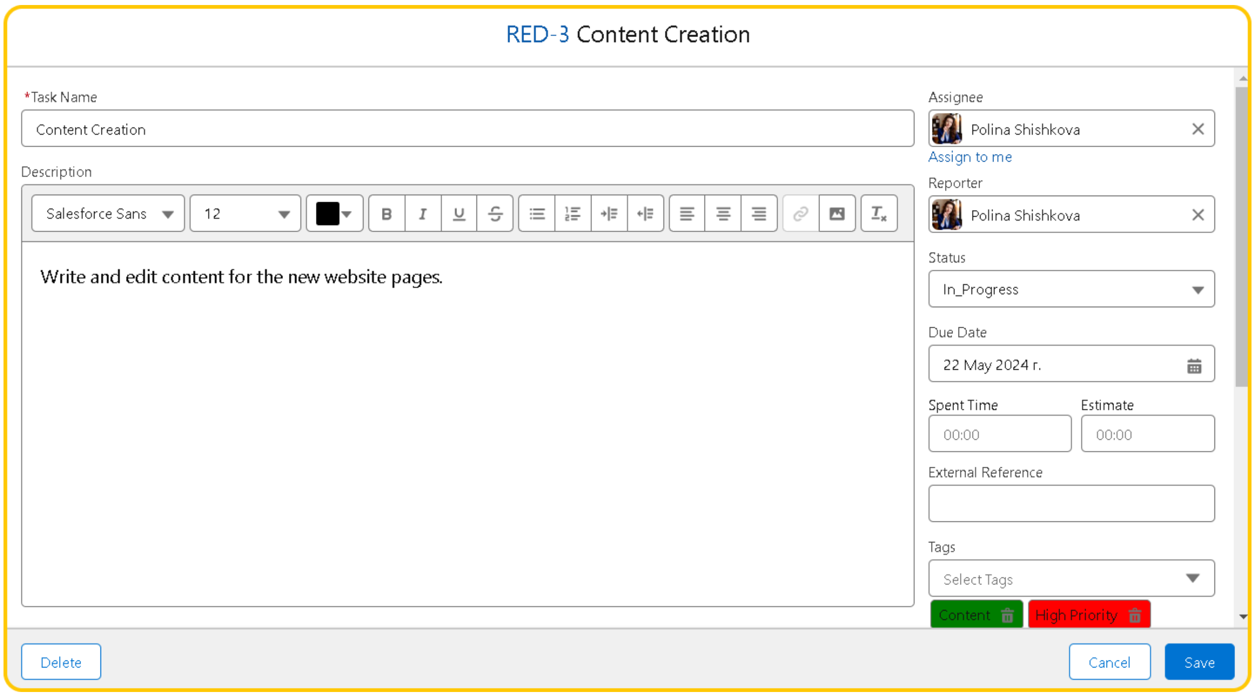
Quick Tag Filtering:

- To streamline the filtering process, users can simply tap on any tag displayed within the task list.
- Tapping on a tag automatically filters the task list to display only tasks related to that specific tag.
- This quick tag filtering feature enables users to instantly focus on tasks associated with particular categories or themes without the need for manual filter customization.



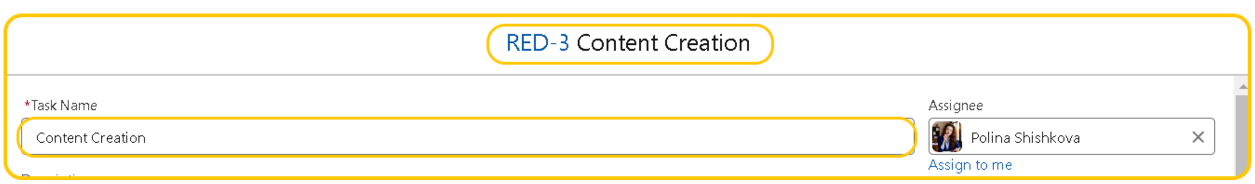
Viewing Task Details

The task detail window provides users with comprehensive information and tools for managing individual tasks within the Task Tracker application. Here's an overview of the key components and functionalities available within the task detail window:



Task Name:

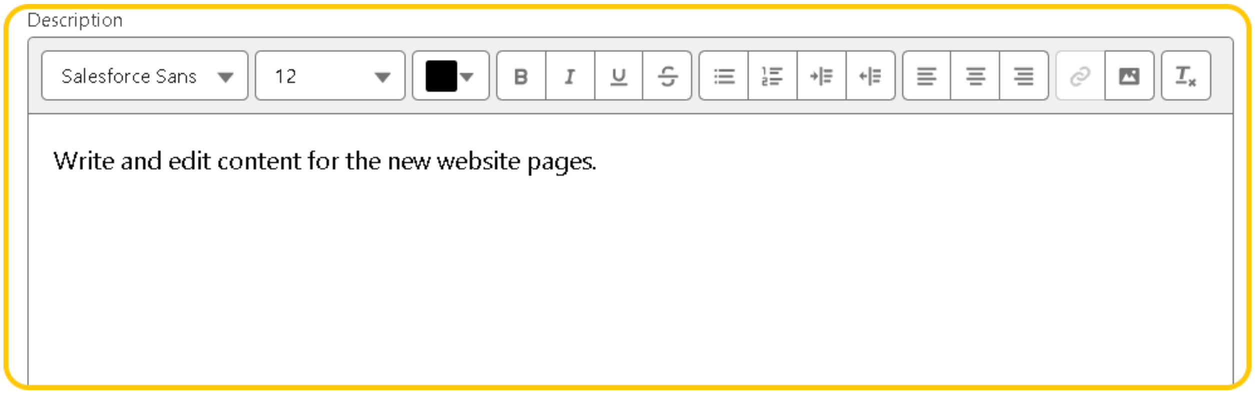
- The task name serves as the title of the task, providing a clear and concise description of its purpose or objective.
- Clicking on the task name allows users to access the detailed view of the task.



Description:

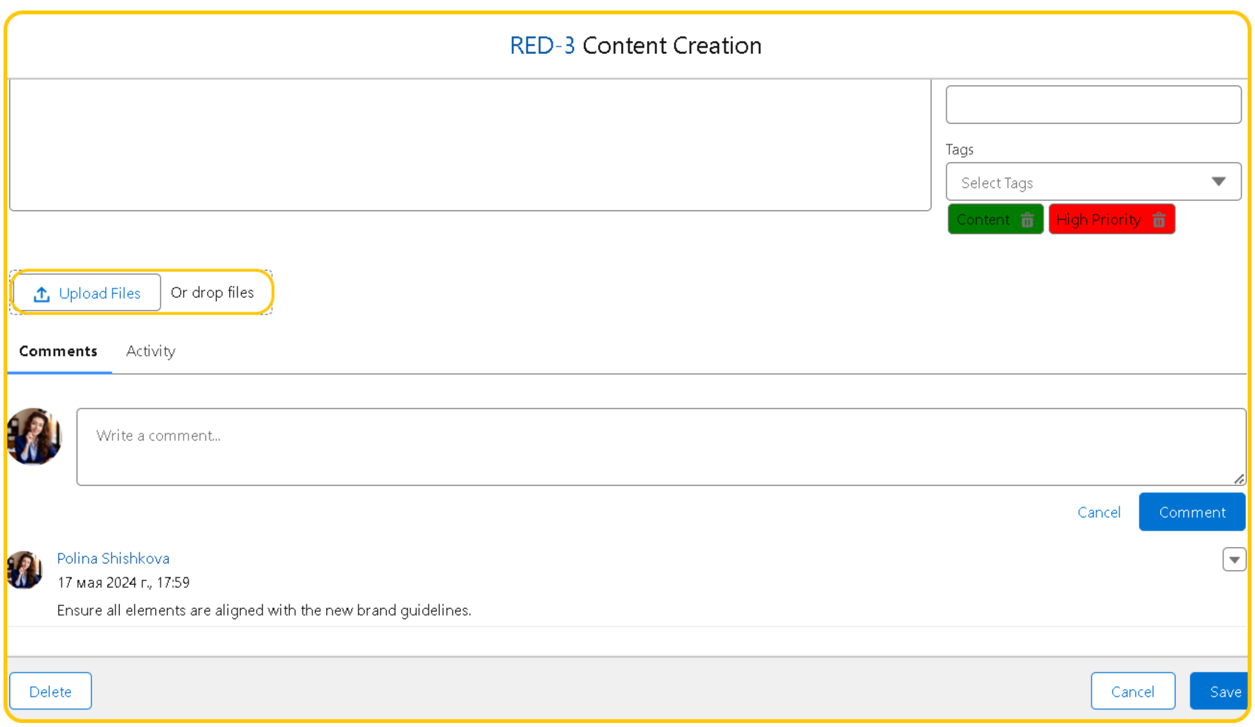
- The description field allows users to provide additional context, instructions, or details about the task.

- Users can format the text within the description field using standard text editing features, such as bold, italic, and text color changes.
- Additionally, users can insert images into the description field to provide visual aids or references related to the task.



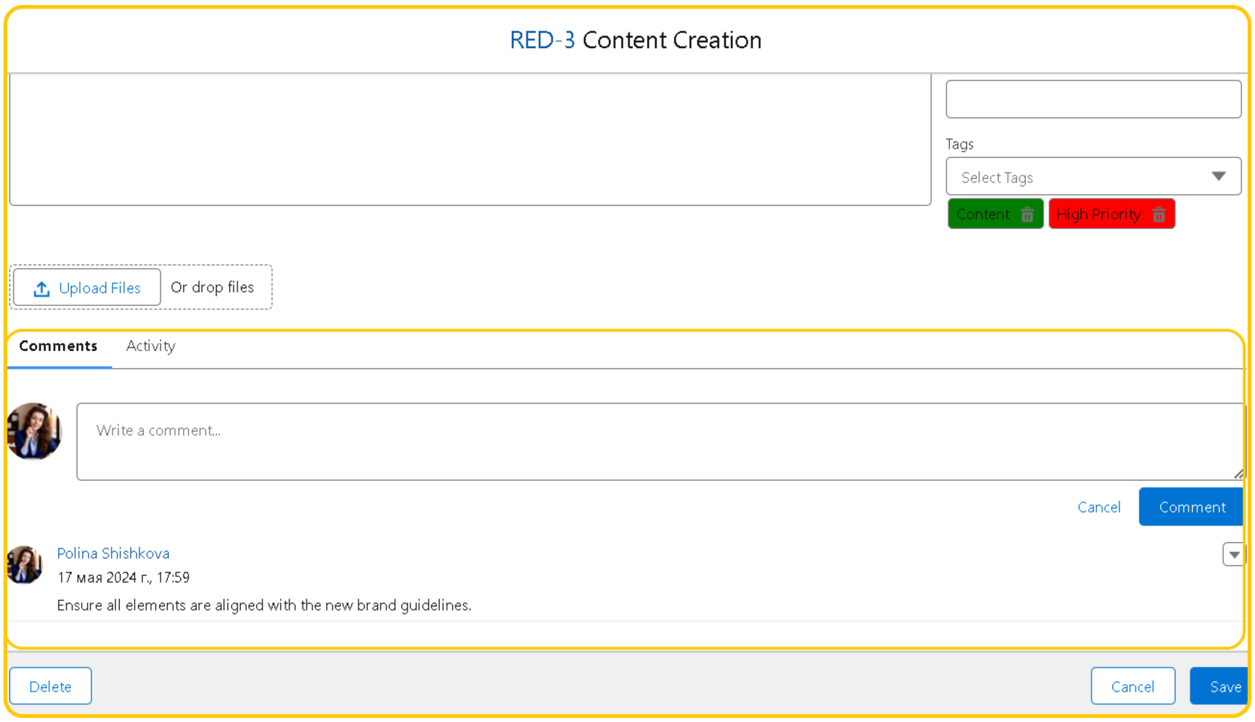
Upload or Drop Files Buttons:

- Below the description field, users can upload or drop files directly related to the task.
- This feature enables users to attach documents, images, or other relevant files to the task for reference or collaboration purposes.



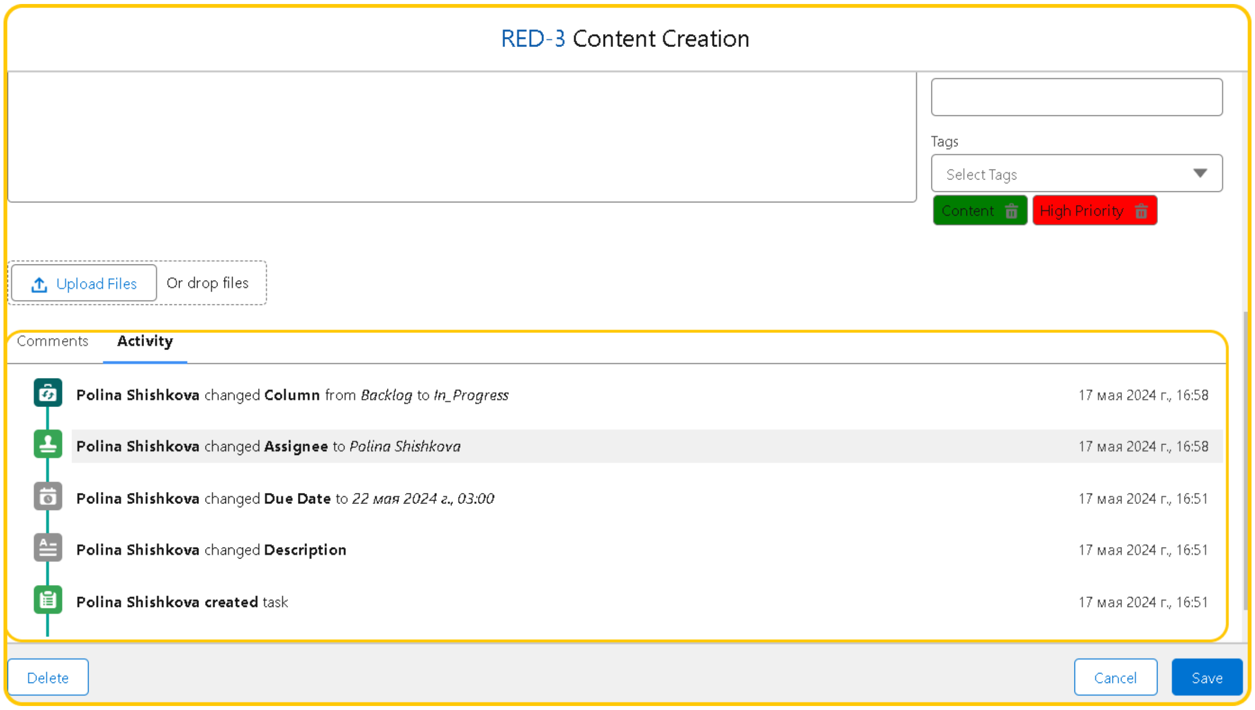
Comments:

- The comments section displays a chronological list of comments and updates related to the task.
- Users can view comments from other team members, add their own comments, and engage in task-related discussions.
- Comment threads provide a centralized space for communication and collaboration on task-related matters.



Activities:

- The activities section provides a log of activities and changes made to the task, including updates, status changes, and assignments.
- Users can track the work process and view a history of actions taken on the task, promoting transparency and accountability.



Assigned User:

- Indicates the team member who is assigned to work on the task.
- Assigning tasks to specific individuals promotes accountability and ensures clarity regarding task ownership and responsibilities.

Reporter:

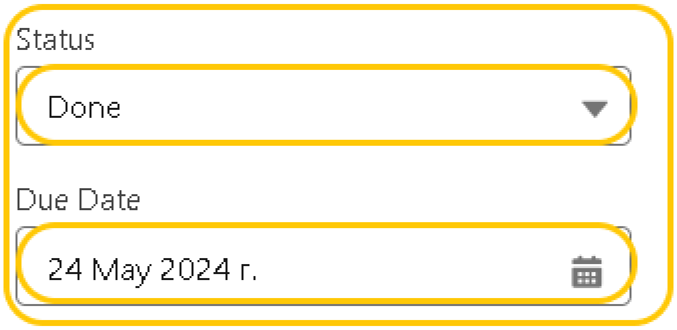
- Specifies the user who reported or created the task initially.
- The reporter provides context regarding the origin of the task and serves as a point of contact for inquiries or updates.

Status:

- Indicates the current status of the task within the workflow, such as "Week," "Backlog," etc.
- Status updates reflect the progress of the task and its position within the overall task management workflow.

Due Date:

The Due Date window in the task window allows you to set deadlines for tasks to ensure timely completion. Setting due dates helps in managing deadlines and keeping track of when tasks need to be completed, ensuring your project stays on schedule.

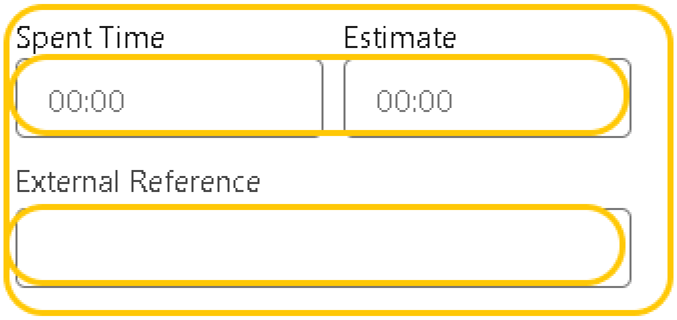


Spent Time and Estimate:

- Displays the amount of time spent on the task and the estimated time required for completion.
- Tracking spent time and estimates helps users monitor progress and allocate resources effectively.

External Reference:

- Provides links or references to external resources, documents, or websites relevant to the task.
- External references offer additional context or supporting materials for the task.



Tags:

- Tags provide additional categorization or labeling for the task, allowing users to easily group and filter tasks based on common themes or attributes.

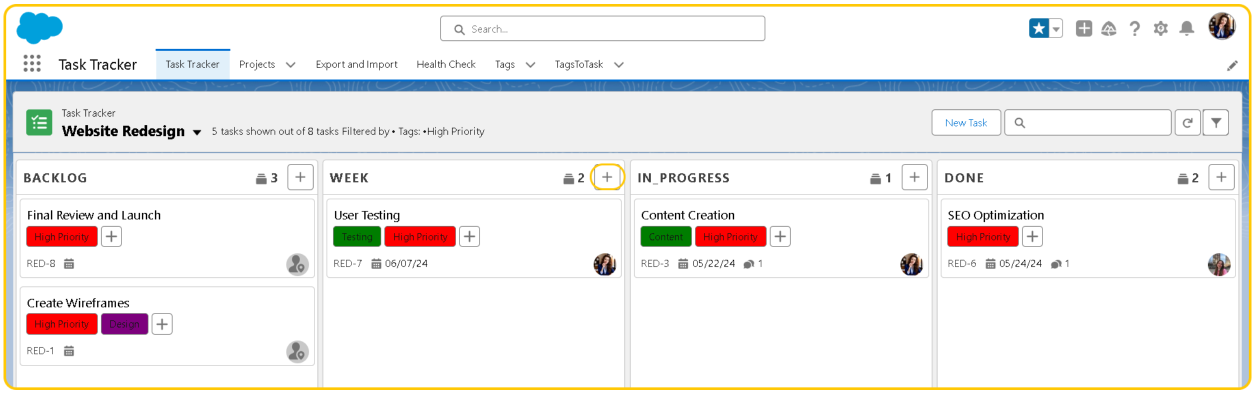
Managing Tasks

Note: you're a free to make no more than 50 tasks for each project

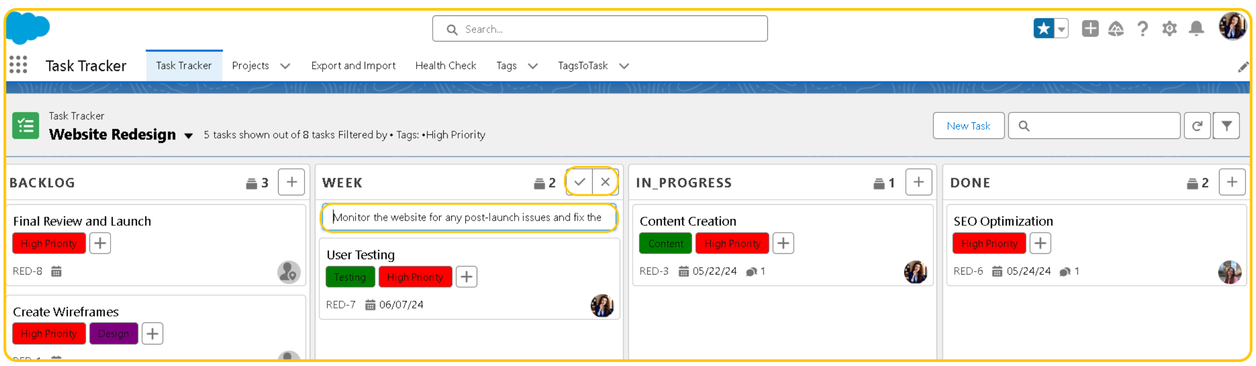
Creating a New Task

To create a new task in the Task Tracker application, you have several options:

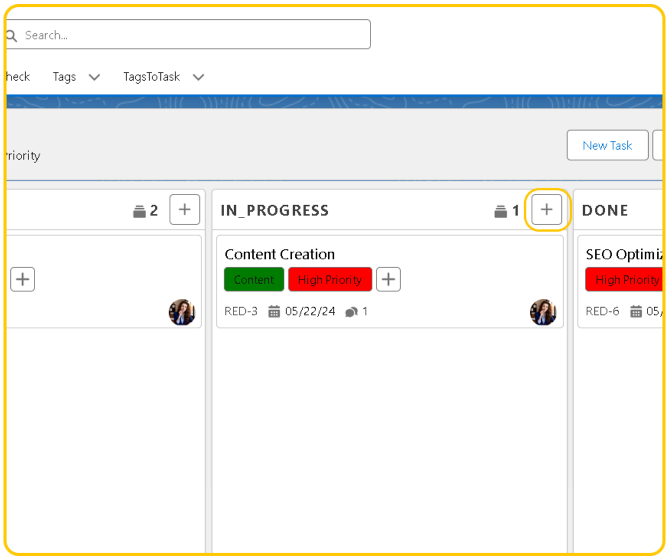
- Using Inline Creator:
    - Click on the "+" button to reveal the inline components for creating a new task.



- Type the name of your task directly into the inline creator and press enter.
- The task will be created instantly, allowing you to quickly add tasks without navigating away from the main page.



- Using the New Task Button:
  - Alternatively, you can click on the "New Task" button to open a modal for creating a new task.



- In the modal, fill in the fields with the necessary information:
    - Task name
    - Description
    - Comments and activities
    - Assigned user
    - Reporter
    - Status
    - Deadline date
    - External reference
    - Tags

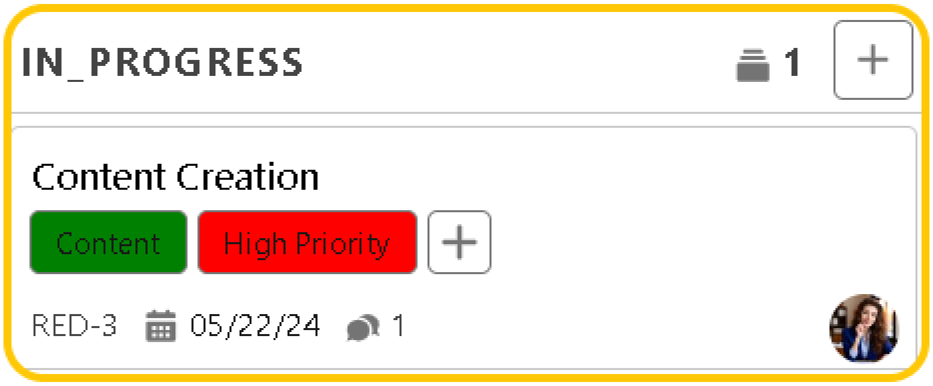
Assigning Tasks to Team Members

Assigning Tasks to Team Members:

Assigning tasks to team members is a crucial aspect of effective task management in the Task Tracker application. Here's how you can assign tasks to team members:

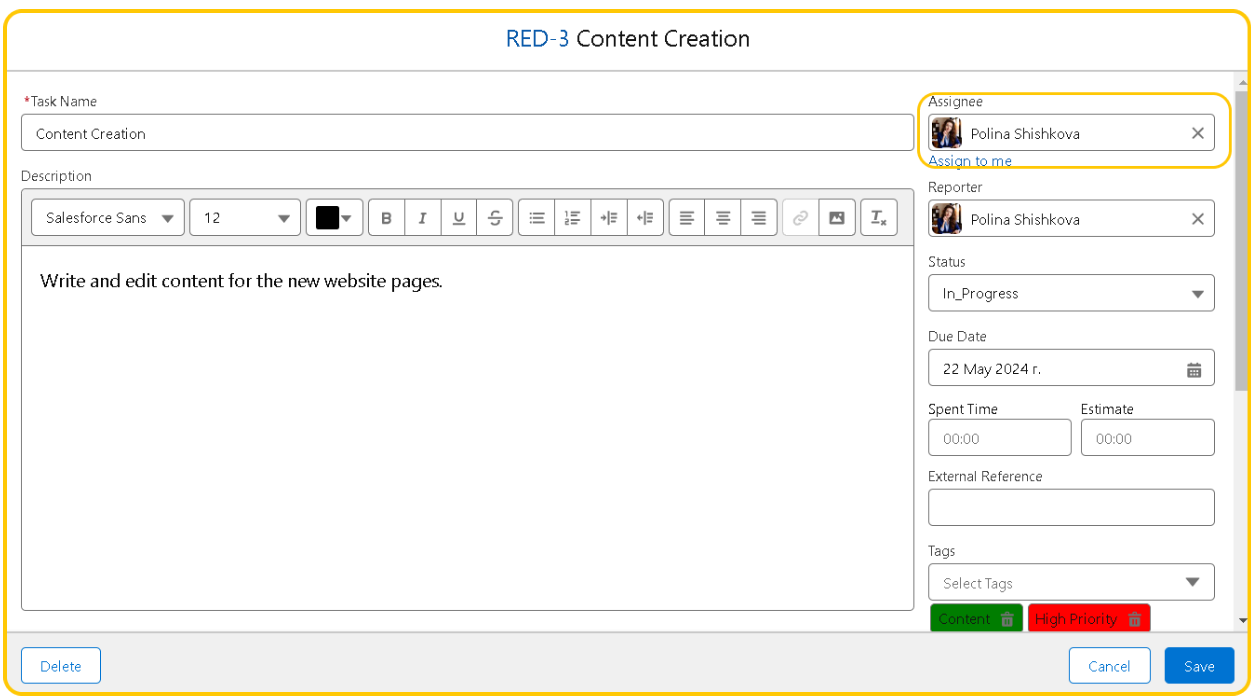
Accessing the Task Window:

- Navigate to the task window by clicking on the task name or selecting the task from the task list.



Choosing the Assignee:

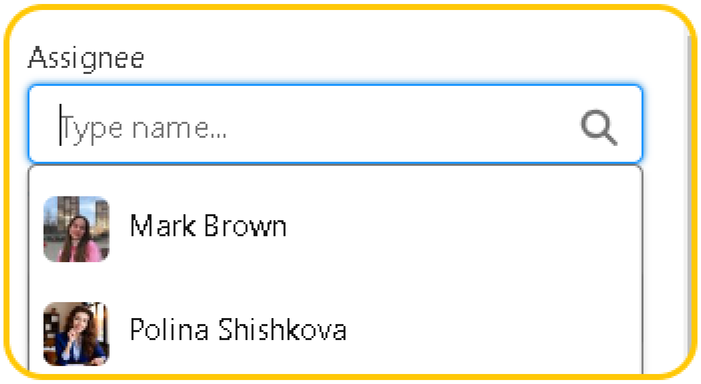
- In the task window, locate the "Assignee" field.
- Click on the Assignee field to open the dropdown menu of available users.



Selecting a User:

- From the dropdown menu, choose the team member to whom you want to assign the task.

- You can search for users by typing their name in the search bar, or scroll through the list to find the desired user.

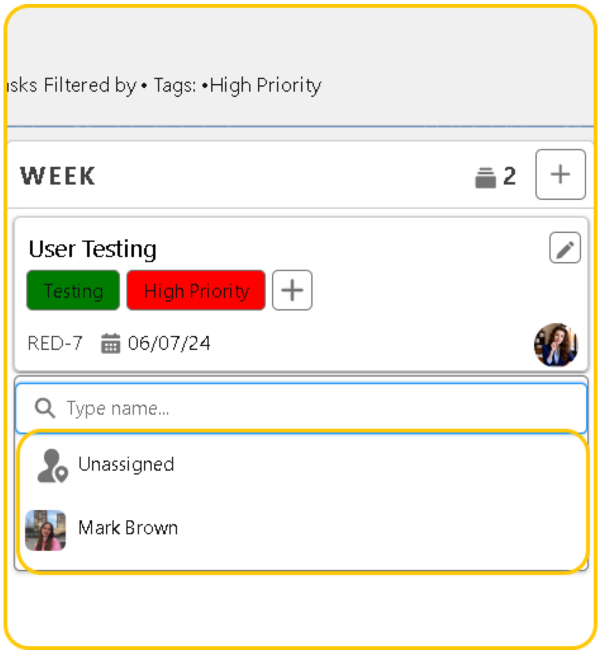


Confirming the Assignment:

- Once you've selected the appropriate user, the assignee field will update to display the chosen user's name.
- The task is now assigned to the selected team member, and they will receive a notification indicating their new task assignment.

Additional Options:

- In addition to assigning tasks directly from the task window, you can also assign tasks when creating a new task or editing an existing task.
- Simply locate the assignee field in the task creation or editing modal and follow the same steps to select a user from the dropdown menu.

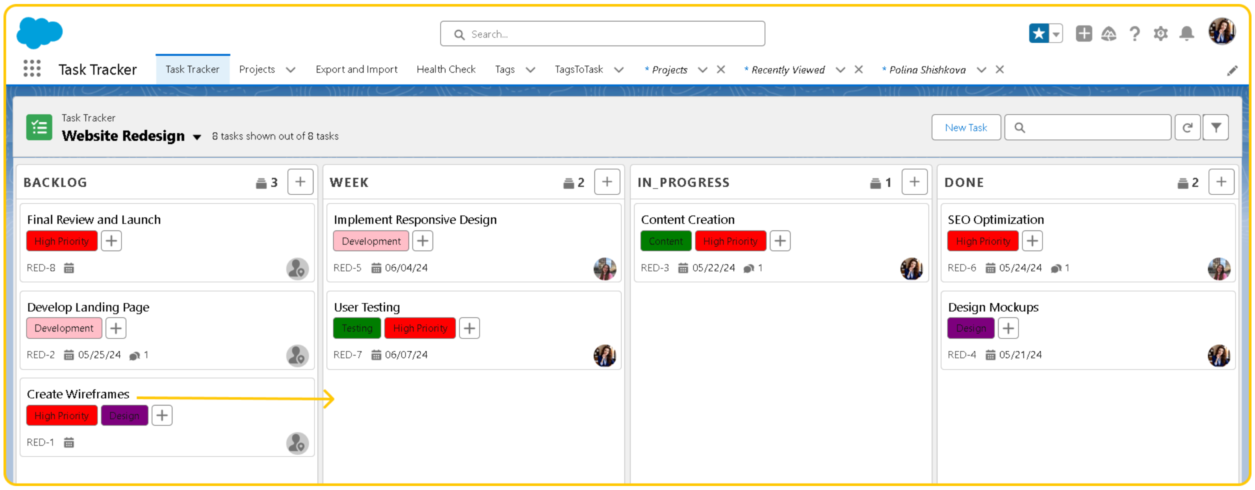


Updating Task Status

Updating task status is a fundamental aspect of managing tasks effectively in the Task Tracker application. Here are two ways to update task status:

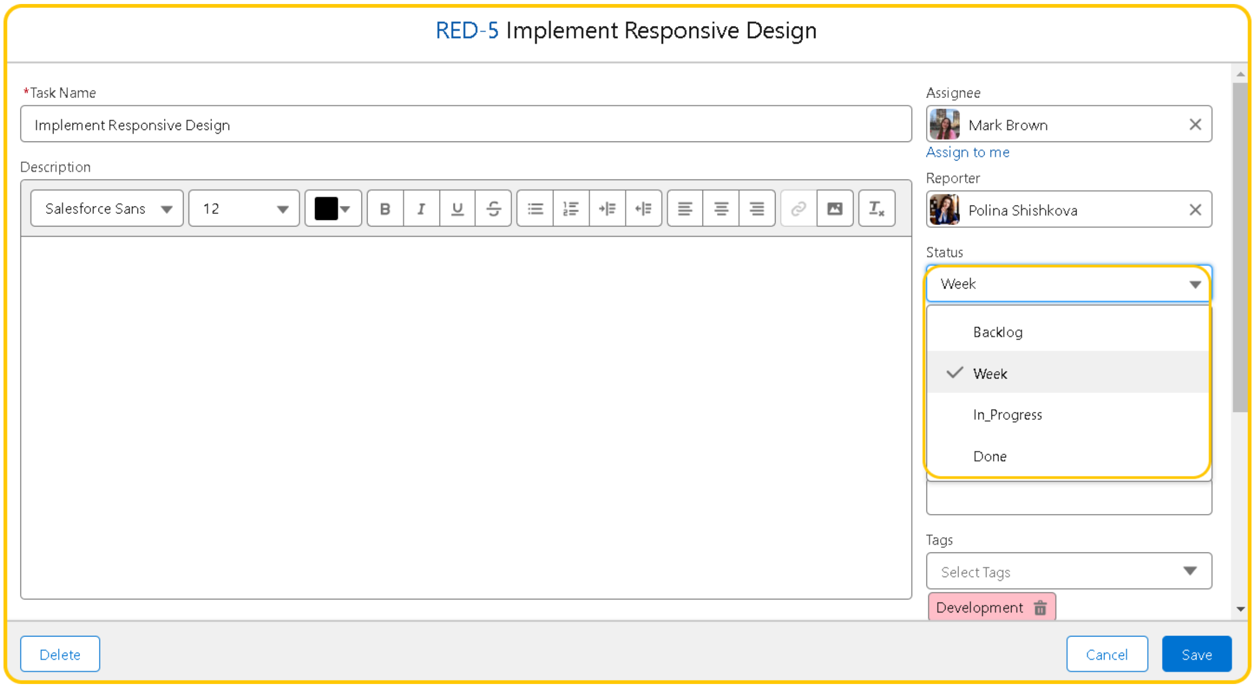
Dragging Tasks:

- One option for updating task status is to drag tasks through the task list columns.
- Simply click and hold on a task, then drag it to the desired column representing the new status (e.g., from "To Do" to "In Progress").
- Releasing the task in the new column automatically updates its status, reflecting the progress of the task within the workflow.

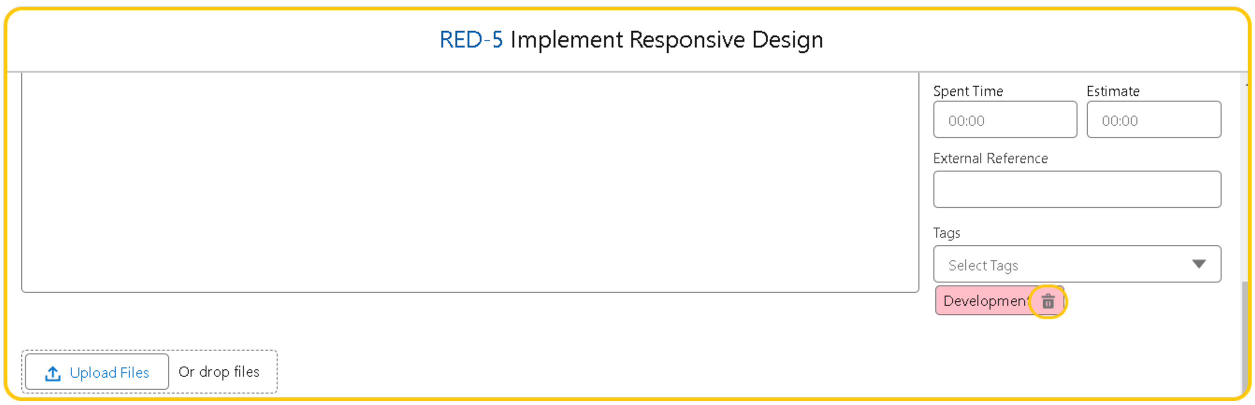


Using Task Window:

- Another option is to update task status directly from the task window.
- Open the task window by clicking on the task name or selecting the task from the task list.
- In the task window, locate the "Status" field.
- Click on the Status field to open the dropdown menu of available status options.
- Choose the desired status from the dropdown menu (e.g., "In Progress," "Review," "Done").
- The task status will be updated accordingly, reflecting the current stage of the task's progress.



- You can also delete any tag directly from task window



Setting Due Dates and Priorities

Setting due dates and priorities is essential for effective task management in the Task Tracker application. Here's how you can set due dates and priorities for tasks:

Setting Due Dates:

- To set a due date for a task, open the task window by clicking on the task name or selecting the task from the task list.
- In the task window, locate the "Due Date" field.

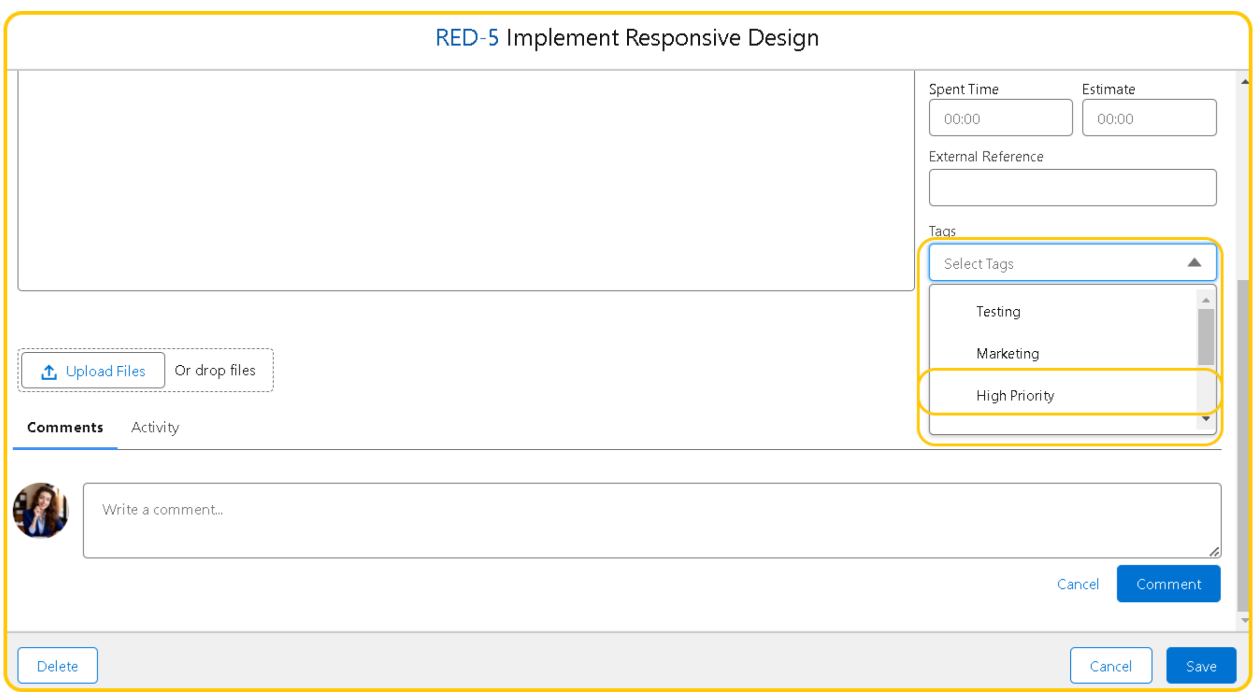
- Click on the Due Date field to open the calendar.
- Choose the desired due date from the date picker.
- Once you've selected the due date, it will be displayed in the Due Date field and in the task list as well.

Setting due dates helps establish deadlines for tasks, ensuring timely completion and effective task prioritization.

Setting Priorities using tags:

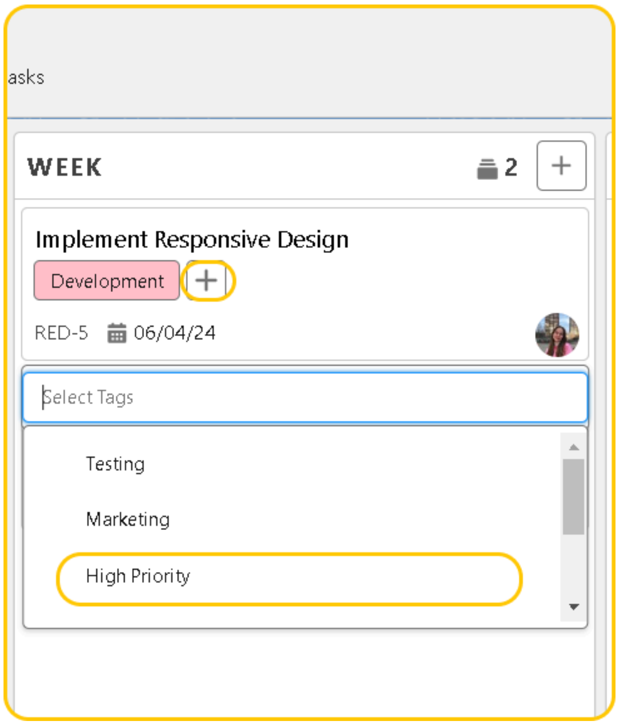
To prioritize tasks, you can use tags as markers or labels.

- Open the task window for the task you want to prioritize.
- In the Tags field, pick the tag that represents the priority level for the task.
- Once you've selected the appropriate tag, it will be associated with the task, indicating its priority level.
- Tags provide a visual indicator of task priorities, allowing users to quickly identify and focus on high-priority tasks.



Users can also add tags directly from the task list using the inline creator.

- Click on the "+" button next to the Tags field in the task list.
- A pick-list of available tags will appear.
- Choose the tag that you want to assign to the task from the pick-list.
- The selected tag will be added to the task, allowing you to quickly prioritize tasks without opening the task window.

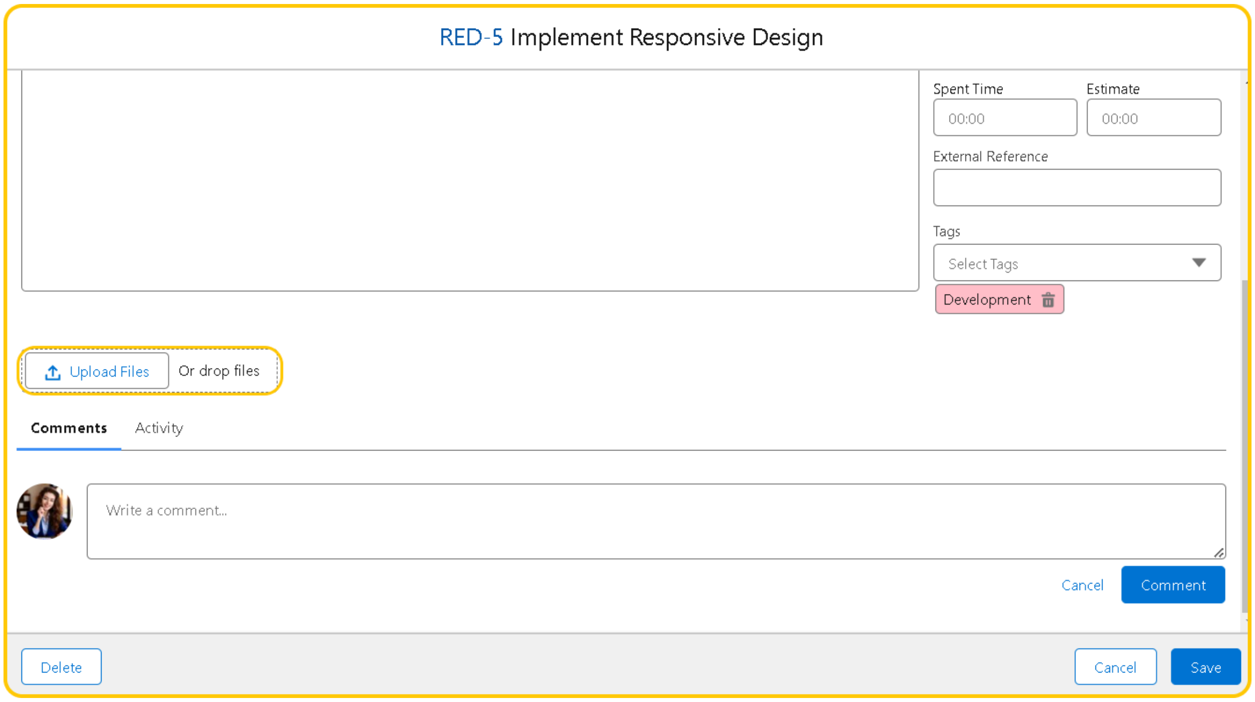


Attaching Files or Documents to Tasks

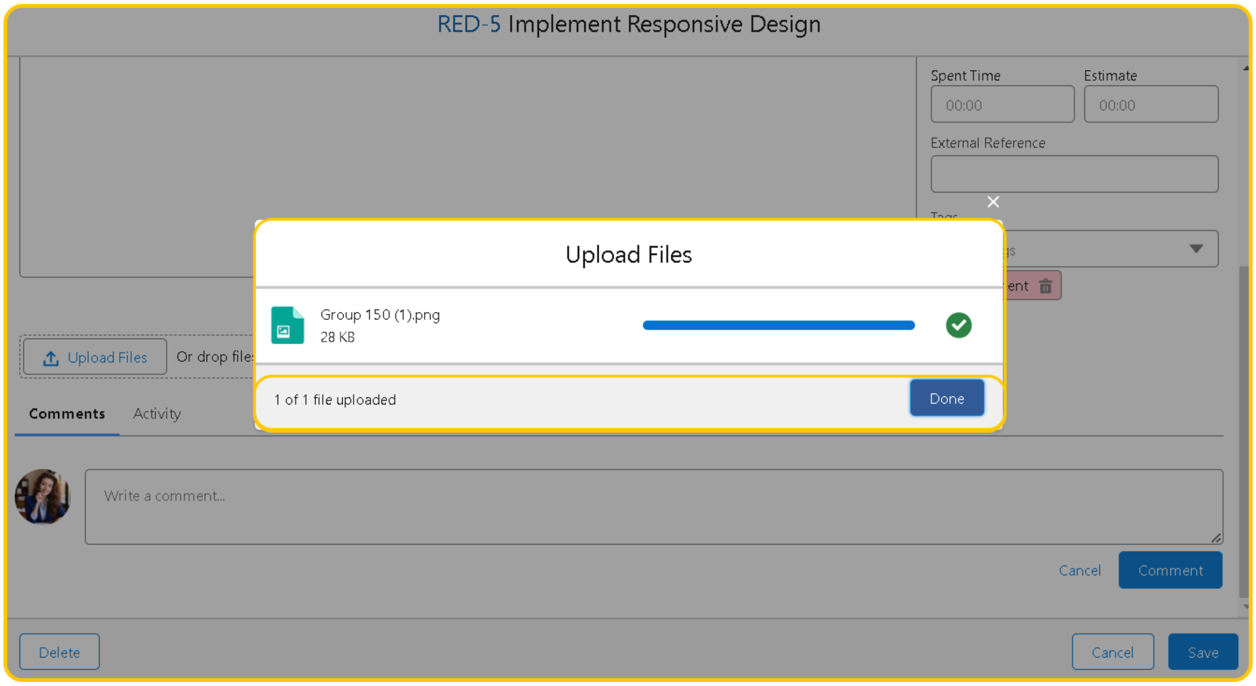
Attaching files or documents to tasks enhances collaboration and provides additional context for task completion in the Task Tracker application. Here's how users can attach files or documents to tasks:

Using the Task Window:

- Open the task window by clicking on the task name or selecting the task from the task list.
- In the task window, locate the "Upload File or Drop Files" button.
- Click on the button to open the file picker or drag-and-drop area.



- Select the file or document you want to attach from your local device using the file picker, or drag and drop files directly into the designated area.
- The attached files will be uploaded and associated with the task, providing easy access for team members working on the task.
- Users have the ability to add a file or document directly from their clipboard to task attachment section. You just need to paste the file from the clipboard. The task window should be in focus.



Pasting Files in the Description Field:

- Alternatively, users can attach files directly in the description field by pasting them from the clipboard.
- Copy the file or document to the clipboard from its source location on your device.
- Open the task window and navigate to the description field.

  Paste the file from the clipboard directly into the description field.
- The file will be attached to the task as a document, allowing team members to access it directly from the task window.

Save Your Task:

- Once you've filled in all the necessary information, click on the "Save" button to create the new task.
- Your task will be added to the task list, and you can start working on it immediately.

Congratulations on Creating Your First Task! Kudos on taking the first step in task management with Task Tracker! Your initiative will boost project success and team productivity. Explore Task Tracker's features to optimize your workflow further. Here's to your continued success!

Collaboration Features

Commenting on Tasks

Comments play a vital role in facilitating collaboration and communication among team members in the Task Tracker application. Here's how you can create a comment for a task:

Accessing the Task:

- Navigate to the task for which you want to add a comment. You can do this by clicking on the task name in the task list.

Adding a Comment:

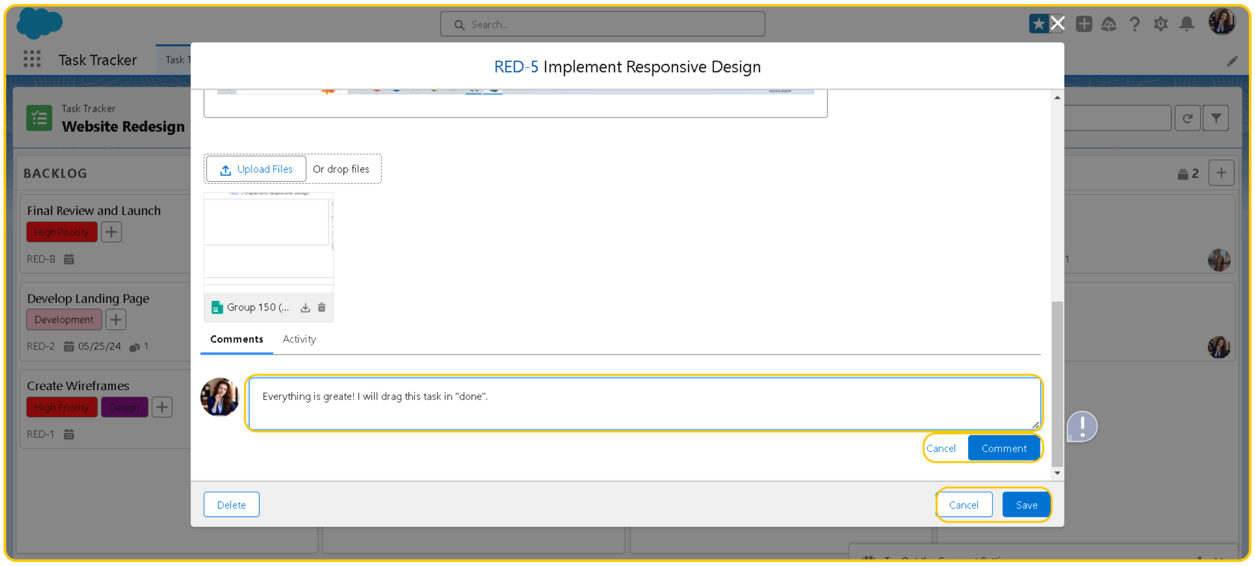
- Scroll through the task details until you find the comment section.
- In the comment field, type your comment, providing any relevant information, updates, or questions related to the task.

Posting the Comment:

- After composing your comment, tap the "Comment" button to post it.
- Your comment will be added to the task, visible to all team members with access to the task.

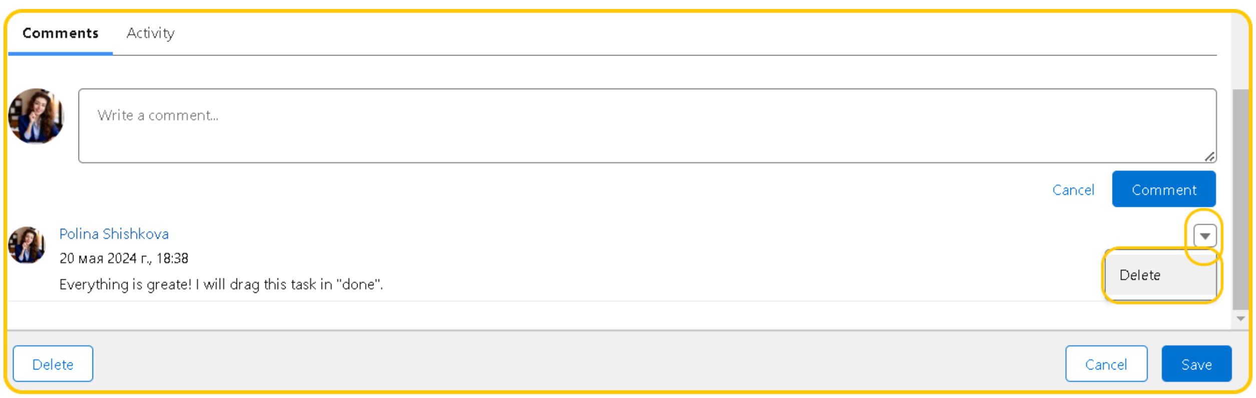
Viewing and Responding to Comments:

- Once posted, your comment will appear in the task's comment section along with any previous comments.
- Team members can view the comments, respond to them, and engage in task-related discussions to collaborate effectively.
- **Don’t forget to save task after posting a comment!**



Deleting Comments:

- If needed, you can delete your comment by clicking on the "Delete" button available next to your comment.
- Deleting a comment removes it from the task's comment history.



Showing activity history

The activity feature in the Task Tracker application allows users to track the history of changes made to tasks, providing valuable insights into task progress and updates. Here's how you can access and utilize the activity feature:

Accessing the Task Window:

- Navigate to the task for which you want to view the activity history. You can do this by clicking on the task name in the task list.

Switching to Activity View:

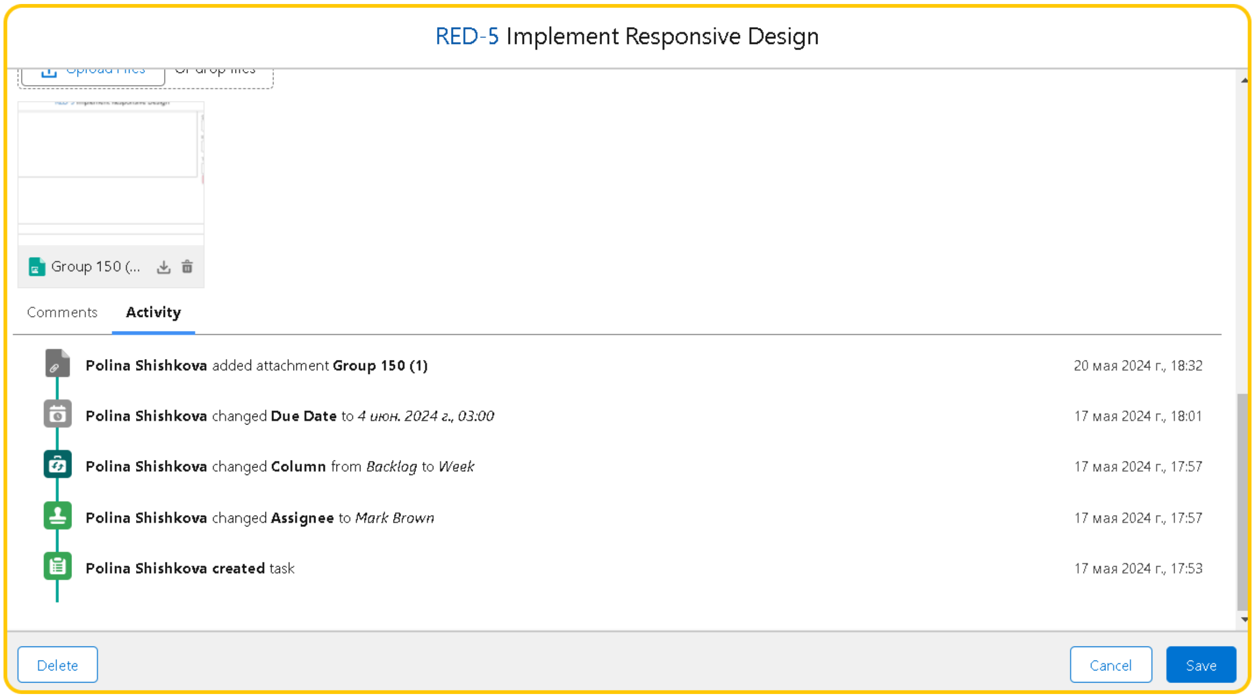
- Scroll through the task details until you find the comments section.
- Locate the "Activity" button within the task window and click on it.
- This will switch the view from comments to activity, displaying a chronological log of changes made to the task.

Viewing Task Changes:

- In the activity view, users can see a comprehensive list of changes made to the task, including modifications to the task name, description, assigned user, due date, status, and more.
- Each entry in the activity log is timestamped and includes the name of the user who made the change, providing transparency and accountability.

Tracking Task Progress:

- By reviewing the activity log, users can track the progress of the task over time, identify who made specific changes, and understand the evolution of the task from creation to completion.
- This feature is particularly useful for teams collaborating on tasks, as it ensures visibility into task updates and fosters effective communication and coordination.



Changing Task Notification

The Task Tracker keeps you informed about updates made by your team members with the "Refresh Board" notification. Here's how it works:

- Real-Time Updates: If someone from your team changes a task, you will receive a notification at the top of your board.
- Notification Message: The notification will prompt you with the message "Refresh Board" to inform you that there are updates.
- Viewing Changes: Click on the "Refresh Board" notification to reload the board and see the latest changes made by your team.

This feature ensures you are always up-to-date with the most current task information, facilitating better collaboration and project management.

Notifications

Email Notifications

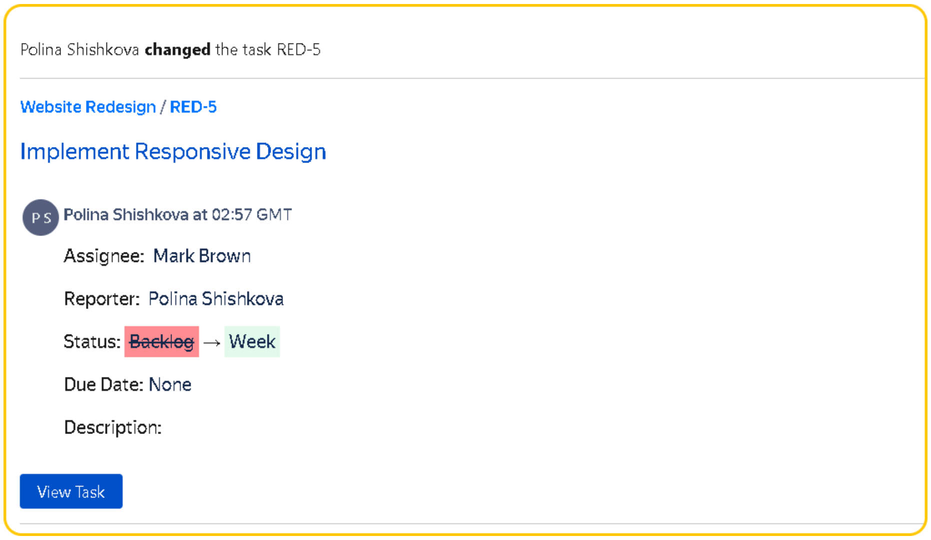
The Task Tracker app keeps you informed through various email notifications to ensure you stay updated on all important activities. Here are the types of email notifications you will receive:

New Task:

- Description: You will receive an email notification whenever a new task is assigned to you.
- Content: The email will include details such as the task name, description, due date, and the person who assigned it.

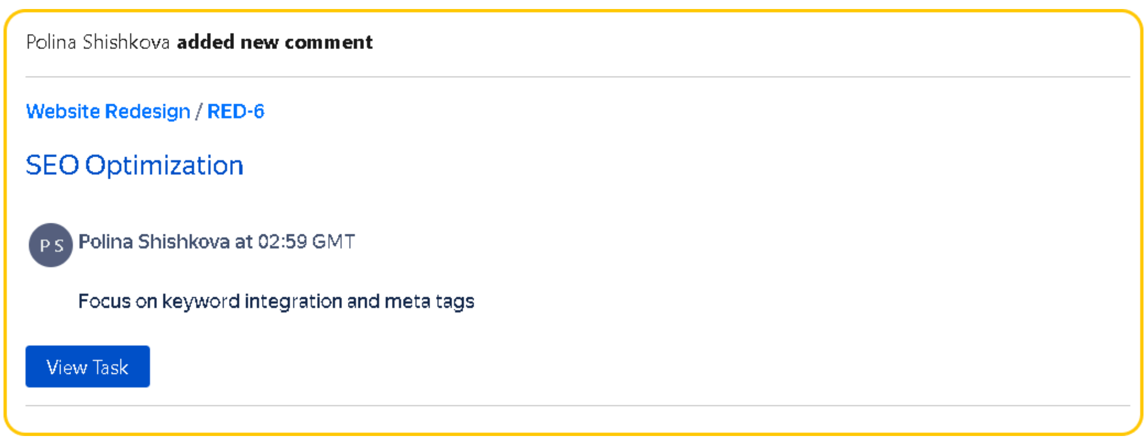
Task Changed:

- Description: When a task you are involved with is updated, you will receive an email notification about the changes.
- Content: The email will highlight what has changed, including updates to the task name, description, status, assignee, and due date.



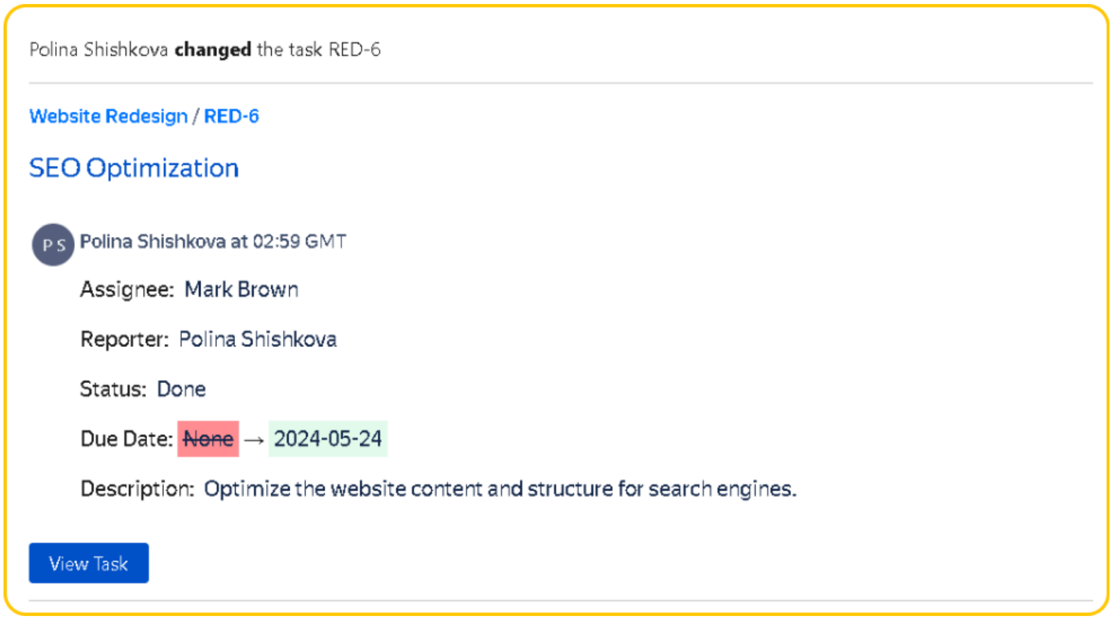
New Comment:

- Description: You will be notified by email whenever a new comment is added to a task you are assigned to or following.
- Content: The email will contain the comment text, the name of the commenter, and a link to view the task.



Task Due Date:

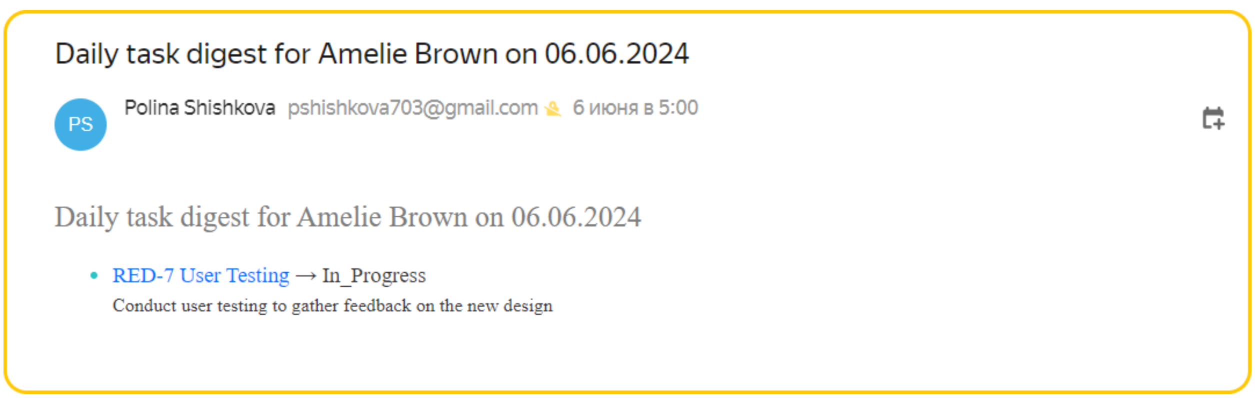
- Description: You will receive reminder emails as the due date for a task approaches.
- Content: The email will include the task name, due date, and a reminder to complete the task on time.



These email notifications help ensure you are always aware of new tasks, updates, comments, and upcoming deadlines, aiding in effective task management and timely completion of your projects.

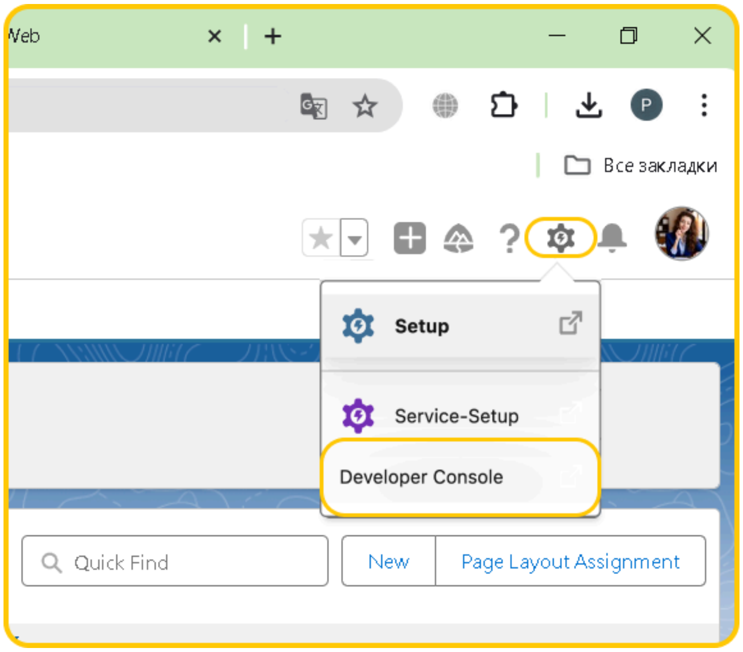
Daily task digest

The Due Date feature helps you stay on track by setting deadlines for your tasks. Additionally, our Daily Digest Email sends a summary of tasks that are due today straight to your inbox.

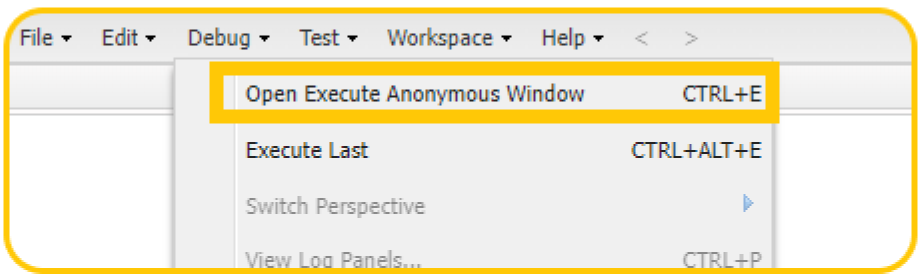


Here’s how to set it up:

1. Go to Setup: Access your Salesforce setup page.
   Select "Developer Console" from the dropdown menu.



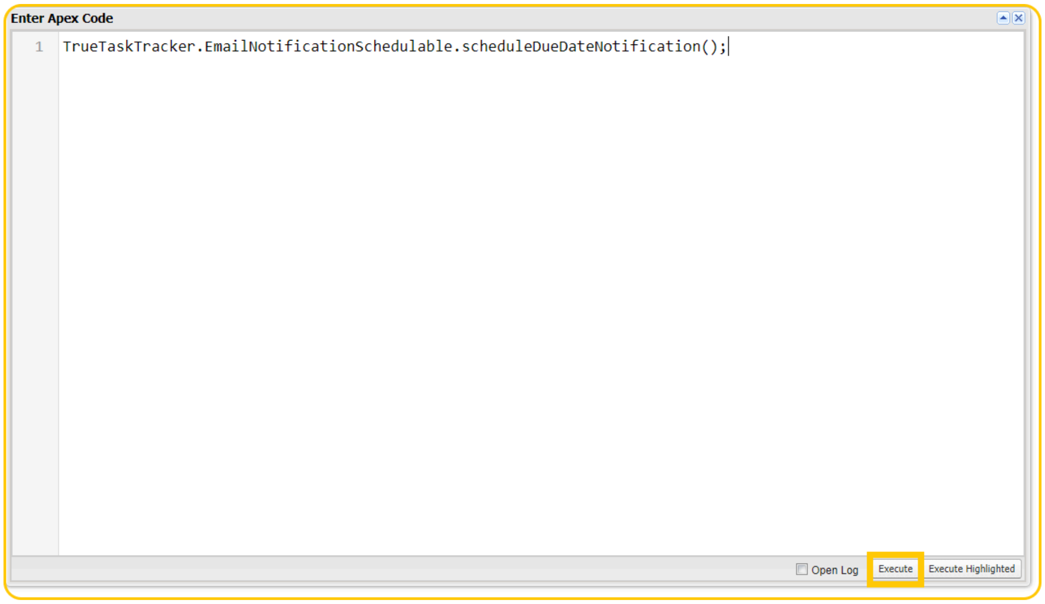
2. In the Developer Console, press CTRL+E or go to Debug > Open Execute Anonymous Window.



3. Execute Code: Paste the following code into the window:

TrueTaskTracker.EmailNotificationSchedulable.scheduleDueDateNotification();

4. Click Execute: Run the code by clicking the execute button.



By setting this up, you’ll receive daily emails with a description of tasks that are due, helping you stay organized and on top of your deadlines.

Task Reports and Analytics

While we don't have predefined reports and dashboards, you can take advantage of Salesforce's regular reporting tools to track your progress. With Salesforce's powerful reporting capabilities, you can create customized reports and dashboards tailored to your specific needs. This will help you monitor project performance, track task completion, and gain valuable insights into your team's productivity.

Tips and best practices

Organizing Tasks Effectively

Effective task organization is crucial for managing your workload and staying productive. With TrueTaskTracker, streamline your task management process:

1. Use Project Categories: Group related tasks by creating projects for clarity and focus.
2. Prioritize with Tags: Mark tasks by urgency or importance using tags within each project.
3. Set Clear Due Dates: Assign deadlines to ensure timely completion.

4. Utilize Task Lists: Break down larger projects into smaller tasks using task lists.
5. Customize Task Statuses: Reflect your preferred workflow by customizing task statuses.
6. Collaborate with Comments: Provide updates and feedback related to tasks using comments.
7. Track Changes with Activity Log: Monitor task modifications for accountability and transparency.
8. Review and Reflect: Regularly assess progress and optimize your workflow.

With TrueTaskTracker, organizing tasks effectively is easier than ever, helping you achieve your goals confidently.

Time Management Tips

Effective time management is essential for productivity. With TrueTaskTracker, manage your time effectively:

1. Set Clear Goals: Break larger goals into actionable tasks. Assign deadlines considering deadlines and availability.
2. Prioritize Tasks: Focus on high-priority tasks first using tags.
3. Plan Your Day: Review tasks each morning and identify top priorities.
4. Stay Focused: Minimize distractions and work on one task at a time.
5. Track Your Time: Monitor time spent on each task.
6. Take Breaks: Rest and recharge regularly.
7. Reflect and Adjust: Review progress and identify areas for improvement.

With TrueTaskTracker, effective time management is within your reach, helping you achieve your goals confidently.

Additional features

Additionally, TrueTaskTracker offers Google and Slack integration, allowing seamless synchronization with your accounts for enhanced productivity.

For more information, feel free to drop us an email at help@truesolv.com.

Contact us

Need Help or Have Questions?

Have a question about our task tracker or experiencing an issue? Don't hesitate to reach out! Our dedicated support team is here to assist you every step of the way. Whether you require guidance on using a feature, encounter a technical issue, or simply want to share your feedback, we're just an email away.

Contact us anytime at help@truesolv.com, and we'll get back to you as soon as possible. Your satisfaction is our top priority, and we're committed to ensuring that you have a seamless experience with our task tracker.

Thank you for choosing True Task Tracker! We look forward to assisting you!

Warm regards,

TrueSolv team