

Chatter Activity to Task Automation - FAQ

Introduction

Chatter Activity to Task Automation allows Salesforce users to create Tasks directly from Chatter posts or comments using simple structured commands. The app automatically interprets hashtags, mentions, and dates to generate Tasks with the correct owner, subject, and due date — without leaving Chatter.

This FAQ explains how the feature works, how to format commands, and how to troubleshoot common issues.

1. What is Chatter Activity to Task Automation?

Chatter Activity to Task Automation enables users to convert Chatter posts or comments into Salesforce Tasks using commands like:

#task @UserName

1. Task subject #date MM/DD/YYYY

It supports Chatter Posts, Chatter Comments, Lightning Experience, and Salesforce Classic.

2. How do I enable or disable task creation?

Task creation is controlled by the TriggerSetting custom setting.

Navigate to:

Setup → Custom Settings → TriggerSetting → Manage

- ChatterPostTriggerActive — controls automation for Chatter posts

- ChatterCommentTrigger — controls automation for Chatter comments

Both are active by default.

3. What is the correct format for creating a task in Chatter?

Correct structure:

#task @UserName

1. Task subject #date MM/DD/YYYY

Guidelines:

- Start with #task
- Mention the assignee using @UserName
- Use numbered lines
- Optional due date using #date

Example:

#task @TCL Suppot

1. Task Subject #date 11/25/2025

4. What if I do not enter a #date?

If no #date is included, the system checks TaskActivityDate in the custom setting.

- If TaskActivityDate = 5 → due date = today + 5 days
- If blank → due date = today

5. Can I create multiple tasks in one Chatter post?

Yes. Example:

#task @UserName

1. First task #date 05/01/2025
2. Second task

Tasks without #date use the default due date.

6. Can I assign tasks to different users in a single post?

Yes. Use separate blocks:

#task @UserA

1. Task for UserA

#task @UserB

1. Task for UserB

7. What happens if the pattern is incorrect?

If formatting is invalid, no task will be created.

Common mistakes:

- Wrong date format
- Missing @UserName
- Missing numbered items
- Formatting (bold/italic) inside instructions

8. Are #task, @username, and #date case-sensitive?

No. Any letter case is accepted (e.g., #Task, #TASK, @UserName).

9. Can I specify the due date in another format?

No. Only MM/DD/YYYY is supported.

10. How do I change the default due date days (TaskActivityDate)?

Go to:

Setup → Custom Settings → Chatter Task Creation → Manage → Edit

Update the TaskActivityDate field.

- Set to 5 → today + 5 days
- Set to 0 → today

11. Does the automation work for both posts and comments?

Yes. Controlled by:

- ChatterPostTriggerActive
- ChatterCommentTrigger

Troubleshooting Guide

1. No Task is created:

- Ensure triggers are active
- Ensure format begins with #task
- Ensure date format is valid
- Ensure the user has Task creation permissions

2. Wrong Task owner:

- Ensure the @UserName matches the correct Salesforce username



3. Date parsing issues:

- Only MM/DD/YYYY is supported

Support

For support or setup assistance:

Email: support@twopirconsulting.com

Response Time: Within 24 hours (Mon–Fri)