



Task Management Getting Started

March 1, 2013 Edition

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Overview

The Task Manager lets you create, assign, and follow up on tasks with greater flexibility than standard Salesforce.com functionality. Using the task manager you can create a task that is reoccurring, assign it to an account, individual, or both, and then monitor its completion using a calendar view.

This document will help you install, configure, and use the Task Manager.

Support

Touchpoint Solutions is a Salesforce Consulting and ISV partner offering a range of services and custom solutions.

For questions and assistance regarding this application, or our services, please contact us at: support@touchpointcrm.com

System Requirements

Salesforce.com edition:

- Unlimited
- Enterprise

Limitations on Scheduling Tasks

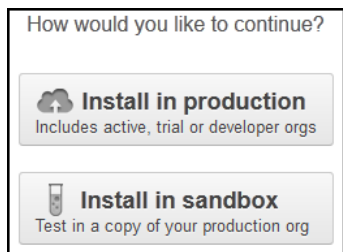
- For a daily series of tasks you can only schedule 100 tasks out
- For a weekly series of tasks you can only schedule 53 tasks out
- For a monthly series of tasks you can only schedule 60 tasks out
- For a yearly series of tasks you can only schedule 10 tasks out

Install

- Find the Territory Manager Application on the [AppExchange](#).
- Click **Get it Now**.



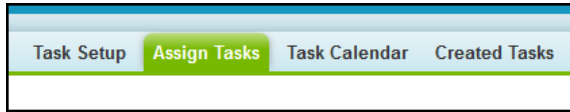
- Click **Login to the AppExchange**. Login using your Salesforce.com credentials and then decide whether to install the application in a production environment or a sandbox.



- Check the box next to the '**I have read and agree to the Terms and Conditions**' statement and then click **Confirm and Install**. Enter your Salesforce.com credentials a second time.
- Review the Package Installation Details and then click **Continue**.
- Approve the Package API Access by clicking **Next**.
- Choose a security level for the application by checking the button next to the '**Grant access to all users**' option and then click **Next**.
- Click **Install**.

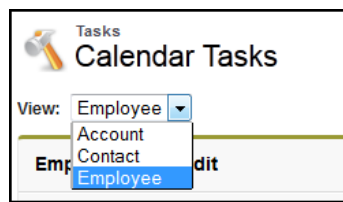
Use

To access the Task Management application select **Task Management** from the drop down menu on the top right hand side of the screen. The Task Management application is composed of four tabs: Task Setup, Assign Tasks, Task Calendar, and Created Tasks. Discover how to use these tabs below.



① Create a Task by following these steps:

- Click the **Task Setup** tab.
- From the View dropdown menu select either: Account, Contact, or Employee.



- Create a task by adding information to the fields on the **Calendar Tasks** page:

 **Calendar Tasks**

View: Account

Account Task Edit

Task Title Compliance Report

Task Body The Compliance Report must be completed using the data from...

Period Weekly

Rekurs every 1 week(s) on

☐ Sunday ☒ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

Priority Normal

Reminder ☒ On occurrence date at 8:00 AM for each occurrence

Submit

- Name the task and add a description.

Account Task Edit

Task Title Compliance Report

Task Body The Compliance Report must be completed using the data from the quarterly report..]

- From the **Period** dropdown menu select either: Daily, Weekly, Monthly, Quarterly, or Yearly.

Period Weekly

Daily
Weekly
Monthly
Quarterly
Yearly

(s) on

☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

Priority

- The period you select will determine which configuration options appear:

Period Daily

☒ Every weekday

☐ Every 1 day(s)

Period Weekly

Recurs every 1 week(s) on

☐ Sunday ☒ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

Period Monthly

☒ On day 1 of every 1 month(s)

☐ On the 1st day of every 1 month(s)

Period Quarterly

On day 1 of 1st month

Period Yearly

☒ On every December 1

☐ On the 1st day of December

- Set the priority for the task as either: High, Normal, or Low.
- The default reminder is set for the day of the occurrence at 8:00 AM. Click the check box to turn the reminder off, or use the drop down menus to schedule a different reminder date and time.

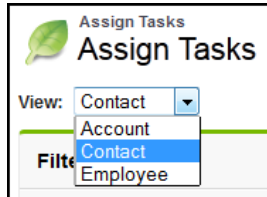
Reminder ☒ On occurrence date at 8:00 AM for each occurrence

- Click **Submit**.

② Assign a Task by following these steps:

- Click the **Assign Tasks** tab.

- From the Assign Tasks page you will select an Account, Contact, or Employee to associate the task with. Use the dropdown menu to make a selection. Your selection must correspond with the designation you gave the task. For example, to assign a task marked as a '**Contact**' when it was created, you must select '**Contact**' in this step.



- To find the account or contact you are searching for, use the Filter Accounts pane. Enter the information you know and then click **Submit**.

 A screenshot of the 'Filter Accounts' pane within the 'Assign Tasks' page. The pane has a title bar with a green leaf icon and the text 'Assign Tasks'. Below the title bar, there is a 'View:' label with a dropdown menu set to 'Contact'. The main area of the pane is titled 'Filter Accounts' and contains several input fields arranged in a grid. The fields are: 'Account Name' (with 'GenePoint' entered), 'Billing Country', 'Parent Account', 'Billing City', 'Owner Alias', 'Billing State/Province', 'Created Date' (with a 'To' field), and 'Billing Zip/Postal Code'. A 'Submit' button is located at the bottom right of the pane.

- On the bottom half of the page is the Search Result pane. In this pane you will see the results of your search. Locate the contact or account you are searching for, select it, and then click **Add**. You can also select all the search results by checking the '**Select All**' button.

 A screenshot of the 'Search Results' pane. The pane has a title bar with the text 'Search Results' and two radio buttons: 'Unselect All' (selected) and 'Select All'. Below the title bar, there are two columns: 'Available Contacts' and 'Selected Contacts'. In the 'Available Contacts' column, 'Edna Frank' is listed and highlighted in blue. Between the two columns, there are two buttons: 'Add' (with a right-pointing arrow) and 'Remove' (with a left-pointing arrow). The 'Selected Contacts' column is currently empty.

- Next select a Start Date and an End Date for the task. You can also check the box next to the '**Remind me 1 week prior to last task**' option to remind you when the task is scheduled to end.

Start Date: 12/17/2012

End Date:

☒ Remind me 1 week prior to last task

- On the right side of the screen in the Calendar Tasks pane, select the checkbox next to the task you want to assign. Then using the dropdown menu select whether the task will be assigned either to the account or contact owner, or to one of your Salesforce.com users. Then click **Submit**.

Calendar Tasks

Daily

☒ Sample Task

Task Assigned To

User Chatter Expert

Contact Owner

User

- On the Confirm Tasks page, you will verify that the assignment is correct and then click **Submit**. If you need to change the assignment, click **Go Back** to edit the assignment.

Confirm Task

Confirm the tasks below are correct

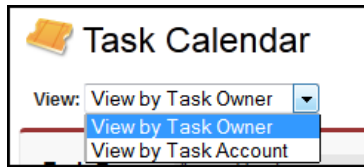
Edna Frank

Title Name	Task Body	Period	Recurrence	Assigned To
Sample Task	Make the assignment to...	Daily	Every weekday	Chatter Expert

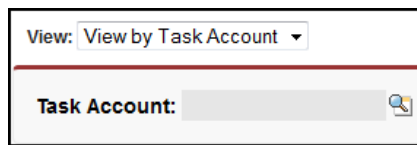
③ View Task Assignments by following these steps:

- Click the **Task Calendar** tab.

- From the View dropdown select either 'View by Task Account' or 'View by Task Owner.'



- Depending on your view select either a task owner or task account by clicking the search icon and using the Lookup search.



- The calendar will display all of the tasks associated with either the account you selected or the user. The calendar can only display the tasks for one owner at a time. Likewise, it can only display tasks assigned to one account at a time.

12/16/2012	12/17/2012	12/18/2012	12/19/2012	12/20/2012	12/21/2012	12/22/2012
	Contact Task Sample			Contact Task Sample		
12/23/2012	12/24/2012	12/25/2012	12/26/2012	12/27/2012	12/28/2012	12/29/2012
Contact Task Sample			Contact Task Sample			Contact Task Sample
12/30/2012	12/31/2012	1/1/2013	1/2/2013	1/3/2013	1/4/2013	1/5/2013
		Compliance Report Contact Task Sample				

④ Delete or Edit Task Assignments by following these steps:

- Click the **Created Tasks** tab.
- Click the **Go!** button next to the **View: All** dropdown menu.

- Find the task you want to edit in the **Task Title** column and click the link to that task.
- To edit the task scroll down to the **Tasks** section and click the name of the task in the **Subject** column.

Created Tasks Detail

Edit

Delete

Clone

Task Title	Quarterly T7 Report	Assignment Type	Account
Priority	Normal	Period	Quarterly
Task Body	Verify the quarterly T7 report was automatically sent to the account by phone.	Recurrence	On day 3 of the 1st month of each quarter
Created By	Aaron Quist, 1/15/2013 2:30 PM	Last Modified By	Aaron Quist, 1/16/2013 1:50 PM

▼ Tasks

Subject	Related To	Start Date	End Date	Priority	Assigned To
Quarterly T7 Report	Burlington Textiles Corp of America	04/03/2013	01/10/2014	Normal	Eric He
Quarterly T7 Report	Express Logistics and Transport	04/03/2013	01/10/2014	Normal	Eric He
Quarterly T7 Report	Dickenson plc	04/03/2013	01/10/2014	Normal	Eric He
Quarterly T7 Report	University of Arizona	04/03/2013	12/04/2014	Normal	Eric He
Quarterly T7 Report	Edge Communications	04/04/2013	01/10/2014	Normal	Eric He

- On the **Task Detail** page click the **Delete Series** button to delete the task assignment or click the **Edit Series** button to make changes to the task and assignment.

Task Detail

Edit Series

Delete Series

Create Follow Up Task

Create Follow Up Event

Assigned To	Eric He	Status	Not Started
Subject	Quarterly T7 Report	Name	
Due Date	Rekurs	Related To	Burlington Textiles Corp of America
Phone		Email	
Priority	Normal		
Created By	Aaron Quist, 1/15/2013 3:00 PM	Last Modified By	Aaron Quist, 1/15/2013 3:00 PM
Comments	Verify the quarterly T7 report was automatically sent to the account by phone.		

- On the **Task Edit** page you can edit the assignment details, the recurrence of the task assignment, and the reminders.

Recurrence



Changes made in this section will delete all open occurrences and will create new occurrences based on the revised recurrence pattern.

Frequency

☐ Daily
 ☒ On day of every month(s)
 ☐ Weekly
 ☐ On the day of every month(s)
 ☒ Monthly
 ☐ Yearly

Start Date

[1/16/2013]

End Date

[[Calculate max end date](#)] 

Reminder

Reminder ☒ On occurrence date at for each occurrence

Save

Save & New Task

Save & New Event

Cancel