



My Task List

Manage your “To Do” list in Salesforce. Get things done.



My Task List Users' Guide v2.10 (July 27, 2014)

Summary

You have a list of things you need to get done as you manage your day. My Task List helps you keep track of this “To Do” list in Salesforce by helping you efficiently create, edit, and close tasks in a modern, responsive user interface. My Task List also goes with you by working across the Salesforce1 mobile apps, Salesforce console, and standard (Aloha) user interface.

Features

- Manage your task list in a modern, card-based interface
 - Create a new task from the task list
 - Sort the task list (due date ascending (*default*) or descending, high priority first)
 - Filter the task list (all open (*default*), overdue, today, today + overdue, tomorrow, next 7 days, next 7 days + overdue, this month)
 - Graphical priority indicators highlight high priority tasks
 - Due dates are highlighted in red if the tasks are due today or past due
 - Expand/collapse task cards for task details and actions
- Take quick actions on your tasks:
 - Refresh task details (tasks also auto-refresh when changed)
 - Toggle the task complete or back to its previous status in one click
 - Close the task with notes (in new tab/window) [*not shown in Salesforce1, use edit task button and mark complete in edit mode instead*]
 - Edit the task (in new tab/screen)
 - Push the due date out by one day in one click
 - Toggle the priority between high and the previous value in one click
 - E-mail yourself a copy of a task in one click
- Your task list stays up to date - the task list dynamically refreshes when tasks have changed or been assigned to you
- Your task list goes with you:
 - On the go in the Salesforce1 mobile apps
 - In the office in the Salesforce console & (standard) Aloha user interfaces
 - Consistent and synchronized interface and task data across devices
- Administration:
 - Add fields to the task card header and details sections via field sets
 - Configuration page with 1-button enable/disable functions for the (auto-refresh) task push topic



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Screen Shots

Salesforce1 – a custom Visualforce tab, selectable from the main navigation and exposed as a custom app in Salesforce1. Tasks open using the Salesforce1 UI and the list is auto-refreshed as changes are made to visible tasks.

Sort the list:
-Due date ascending
-Due date descending
-High priority

Filter the list:
-All open
-Overdue
-Today
-Today + Overdue
-Tomorrow
-Next 7 Days
-Next 7 Days + Overdue
-This Month

Configure My Task List (Admins)

Open tasks and related Records.
-Fields displayed are admin configurable

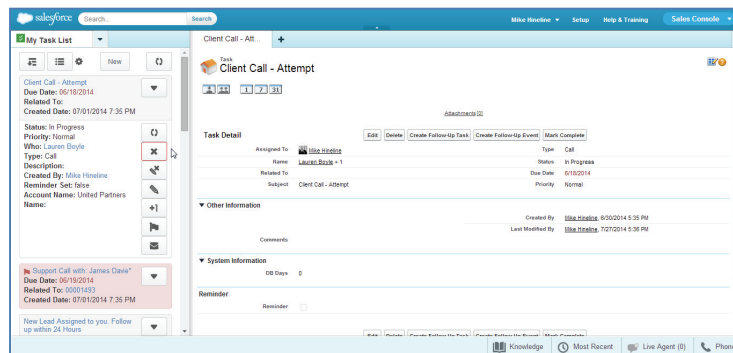
Refresh the task list

Create new tasks

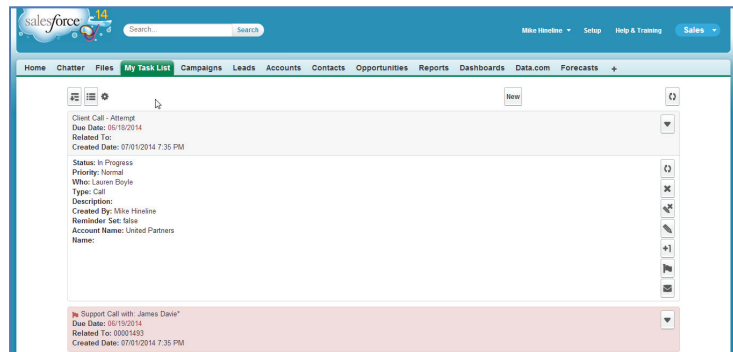
Quick task actions to:
-Refresh details
-Close immediately
-Close with edits (console/aloah)
-Edit
-Push due date +1 day
-Toggle priority
-Email yourself a copy

Responsive, card-based UI for use in Salesforce1, console and Aloha UIs

Sales Console – Pinned List – a custom Visualforce tab, selectable from the main navigation and exposed as a pinned list in the console. Tasks open as tabs and the list is auto-refreshed as changes are made to visible tasks.



Aloha UI – a custom Visualforce page that opens tasks in new browser tabs.





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Installation Instructions

1. This is an unmanaged package, which means it cannot be upgraded. Therefore, if the package was previously installed, uninstall the old version prior to installing the latest version. See the "Uninstall Instructions" section of this document.
2. Install the package from the AppExchange listing.
 - a. Grant access to all users during installation
3. Ensure user profiles have access to the custom tabs and Push Topic object (used for auto-refreshing users' task lists). Setup | Manage Users | Profiles
 - a. Edit your **users'** profiles:
 - i. Tab Settings → Custom Tab Settings: My Task List = Default On
 - ii. Standard Object Permissions: Push Topics → Basic Access = Read
 - *Note: the out of the box "Standard User" profile does not have access to Push Topics and should be cloned and assigned to users to enable this functionality. Users without access to the Push Topics object can still use My Task List; the only limitation is that their task list will not auto-refresh when a task is updated or assigned.*
 - iii. [Repeat for all user profiles which will use My Task List.]
 - b. Edit your **administrators'** profiles:
 - i. Tab Settings → Custom Tab Settings: My Task List = Default On
 - ii. Standard Object Permissions: Push Topics → Basic Access = Read, Create, Edit, Delete
 - *Note: Create access to the Push Topic object will determine whether or not a user is presented with the configuration (gear) icon in My Task List and whether or not they can add or remove the push listener via the configuration page.*
 - iii. [Repeat for all administrator profiles which need access to configure My Task List.]
4. [Optional] Add optional fields to the task card header and details sections via task field sets. Setup | Customize | Activities | Task Field Sets
 - *Note: See the "Known Issues & Limitations" section of this document for information on which fields have special considerations.*
 - *Note: When adding or removing Activity Fields in Salesforce or task fields to one of these Field sets, you should re-add the Streaming API push topic as described below.*
 - a. Edit the field set "My Task List - Card Header" and drag optional task fields down to the "In the Field Set" section to add them to the task card header section. Arrange the fields in the order in which you want them to appear.
 - *Note: any optional header fields will be added to the task card header after the these required fields: Subject, Due Date, Related To*



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- *Note: one optional header field has been added to get you started (Created Date). This can be removed from the field set.*
- b. Edit the field set "My Task List - Card Details" and drag optional task fields down to the "In the Field Set" section to add them to the task card details section. Arrange the fields in the order in which you want them to appear.
 - *Note: any optional details fields will be added to the task card details after the these required fields: Status, Priority, related Contact/Lead Name (Who)*
 - *Note: two optional details fields have been added to get you started (Type and Description). These fields can be removed from the field set.*
- 5. Configure the My Task List package to turn on the Streaming API push notifications for the organization:
 - a. Navigate to the "My Task List" Tab.
 - b. Click the gear icon at the top of the page to navigate to the configuration page.
 - c. Click "Add Task Push Topic" button. You should see a success message.
- 6. Add My Task List to the desired Salesforce user interfaces for users:
 - a. **Salesforce Console – Pinned List** – to use My Task List in the Salesforce console as a pinned list:
 - i. Setup | Create | Apps → Edit your sales console app
 - 1. Choose Navigation Tab Items → add "My Task List"
 - 2. Choose List Placement = "Pinned to left. Lists are always visible." → Percentage: 25 [Recommended]
 - *Note: the width of the page should be 280 pixels or greater for best experience. The associated percentage configured here will vary by screen resolution.*
 - 3. Save your app
 - ii. [Recommended] Close and re-start your browser. At a minimum, close any tabs containing the console app and start a new tab to view the console app.
 - b. **Salesforce1 mobile app** - to use My Task List in the Salesforce1 mobile app:
 - i. Setup | Administer | Mobile Administration | Mobile Navigation
 - 1. Navigation Menu Items → add "My Task List" and move it to the desired vertical order position
 - 2. Click Save
 - c. **Aloha UI** - to use My Task List in Salesforce in a non-console app
 - i. Setup | Create | Apps → Edit your app
 - 1. Choose the Tabs → add "My Task List"



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Uninstall Instructions

1. Remove the Streaming API Push Topic:
 - a. As a user whose profile has Delete access on the Push Topic object, navigate to the "My Task List" tab.
 - b. Click the gear icon at the top of the page to navigate to the configuration page.
 - c. Click the "Remove Task Push Topic" button. You should see a success message.
2. Uninstall the package. Setup | Build | Installed Packages

Known Issues & Limitations

1. There are some limitations in the flexible configuration of optional task fields in the card headers and details sections. The following should be considered when choosing which optional fields to add to the field sets:
 - a. If you use Shared Activities functionality to associate more than one contact/lead with a task, the Who field only lists the first contact associated with a task.
 - b. Relationship fields - field sets also allow you to add Relationship fields that reference fields in related objects (such as Opportunity/Account ID > Name)
 - i. Most relationship fields added for the "Contact/Lead ID" object(s) ("Name" on the Salesforce page layout) via the field sets fields are not currently supported. The required "Who" field in the card details section provides access to the contact/lead name for the users.
 - ii. These relationship fields are not hyperlinked. For hyperlinked relationship fields, use the task reference fields (e.g. 'Account ID', 'Created By ID') in the field set. My Task List provides special handling for these reference fields to perform lookups to the related records and present hyperlinked record names.
 - iii. In the outbound e-mail reminders, relationship fields are not included.
 - c. Localization:
 - i. Dates are currently displayed in US date format only (mm/dd/yyyy).
 - ii. Currency symbols (e.g. \$, £) are not currently displayed and there is no special consideration for multi-currency organizations.
 - d. Checkbox fields - including checkbox Formula fields – display as true/false in My Task List instead of using the checkbox graphic.
 - e. Image formula fields:
 - i. Image formula fields are supported, but must begin with <img. Any other type of HTML is blocked to protect against cross-site scripting (XSS).
 - ii. Image formula fields do not display in reminder e-mails.
 - f. Encrypted fields are not currently output to protect exposure of sensitive data.
2. Only the first 50 tasks for a user are shown in My Task List (according to the chosen sort order and filter.) To adjust this quantity for the organization, edit the Apex class



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`MTL_MyTaskListController` and set `TASK_QUERY_LIMIT` to the desired number of tasks shown on the page. Increasing the number will impact page load time.

3. Auto-refresh:
 - a. Auto-refresh will stop working if: 1) a custom Activity field is added to a field set, then 2) the push topic is enabled, and then 3) the custom Activity field is deleted. To resolve this, simply re-add the task Push Topic via the "Add Task Push Topic" button on My Task List configuration page as described in the installation instructions above.
 - b. When the task list is refreshed, sorted, or filtered, and when a new task is assigned to the user and auto-refresh is enabled, the entire list is reloaded and any expanded cards are reverted their original collapsed state.
 - c. For auto-refresh functionality, the maximum number of concurrent users and maximum number of task updates per day that are pushed to auto-refresh users' task lists are limited by the Streaming API governor limits. For a summary of Streaming API limits for your organization, visit this document: https://www.salesforce.com/us/developer/docs/api_streaming/Content/limits.htm
 - d. If any relationship fields (such as Opportunity/Account ID > Name) are added to the field sets, any changes to those related records (e.g. Opportunity records) do not result in an auto-refresh of the My Task List task card.
4. Salesforce Console usage:
 - a. If you try to open a task that is already open in a tab in the Salesforce Console, nothing will happen. This is intended behavior, but may appear that the link is not working if the user doesn't realize that the task is already open in an existing tab.
 - b. If the task list pane size shrinks below 280 pixels in width, the Sort button will be removed. This is intended behavior to minimize screen crowding.
 - c. Email fields - while hyperlinked - do not initiate a new outbound e-mail via the user's default e-mail client when clicked in the Salesforce Console in many browsers due to same site origin rules. This is the same behavior as e-mail fields that are displayed in the standard page layouts in the Salesforce Console user interface.
5. One click priority toggle: if you change the default Priority picklist values to something other than 'High' and 'Normal', the one-click toggle high priority functionality will not work reliably.
6. Development Mode should be set to its default setting of Off (unchecked) for User records. This will prevent the Visualforce development toolbar from displaying at the bottom of the task list when the list is reloaded during a sort in the Salesforce Console and Aloha UI.



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Change Log

Version	Changes
1.4	Initial release
1.6	New feature: • Sort the task list • Filter the task list Minor improvements & bug fixes: • Performance improvements • Display improvements in Aloha UI
1.7	New feature: • Task quick action: e-mail yourself a copy of the task Minor improvements & bug fixes: • Maintain carriage returns in long text fields on refresh • Add progress spinner to task header during refreshes
2.0	New feature: • Auto-refresh in Salesforce1 mobile apps and Aloha, as well as Console • New tasks assigned to the user by anyone will automatically update the task list • Deleted tasks will update in the task list • New configuration page with 1-button enable/disable functions for the task listener Minor improvements & bug fixes: • Support orgs with MyDomain enabled
2.3	Minor improvements & bug fixes: • Performance improvements • Update due date formatting in JS (to red) if it becomes overdue • Default sort to "Soonest due date first" (date ascending) • Increase adherence to S1 StyleGuide • Page header buttons degrade gracefully under page width of 280px • Correctly calculate org host in sandboxes with MyDomain enabled
2.6	New feature: • Admins can add fields to the task card header and details sections via field sets Minor improvements & bug fixes: • Reduced number of tasks shown (TASK_QUERY_LIMIT) from 1000 to 50 • Add note to config page about header/detail cards and link to Task Field Sets config page • Update logic for Priority sorting based on Summer '14 changes in priority handling
2.10	New feature: • Task quick action: push due date out 1 day Minor improvements & bug fixes: • Support multi-language for field labels • For ID & Reference fields added via field sets, do secondary lookup to user friendly record names rather than IDs • For admins, put 'CONFIG' icon on My Task List to get to config page, removing second (Configuration) tab. This is to help customers with tab quantity constraints.



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- Add TabStyle element to VF pages to ensure correct tab selection throughout Aloha experience
- Check CRUD before presenting user with option to add/remove Push Topic listener on the config page
- Ensure false values for Boolean fields are updated on refresh (e.g. 'IsArchived', 'IsDeleted', 'IsRecurrence', 'IsReminderSet')