Lightning Component

Astrea Task Creator

Assign Task To Multiple Users

A Product By :-Astrea IT Services

OVERVIEW:-

Astrea Task Creator is Salesforce Lightning Component designed to Assign Multiple Users for a particular task.
This can be used to assign task to standard as well as custom Objects records in lightning.
The Configuration required to setup the assign task functionality in your org is explained below.

You need to follow the steps given below:-

- Login to your Salesforce org.

- Before Installing the package make sure you have created your domain.(For checking this type “my Domain” in “Quick Find Box” if you have already having your domain name then you see fourth step will be highlighted with the white background.)

- After it install the package, Select app launcher icon 

then you will see there is tab name “Create Task” will be appear on screen.

“OR”

- You can also customize this tab to your “Sales” app:-
    - Go to setup > click on “Quick Find Box” > Type “App manager”.
    - Select App manager then click on edit option for sales lightning:

    - Then click on “Edit” from drop-down > Select “Select item” tab from the pop-up.
    - Then select tabs from the left and move it to right.
    - Then click on **“Done”**.

- <u>There are two ways provided for the Assignment of the Users to task:-</u>
    - One is Custom tab for standard or custom object i.e. “Create Tasks”.
    - Another one is Quick Action i.e. “Create Multiple Task”

NOTE:-

For Some Standard objects like Account, Contact or Lead we have already provided this quick action so you just need to drag and drop their respective quick action from pallet to “Salesforce mobile and Lightning experience Action” Section for a particular layout.

“OR”

You may create quick action first for any standard or custom object then drag and drop from pallet to “Salesforce mobile and Lightning experience Action” Section for a particular layout.

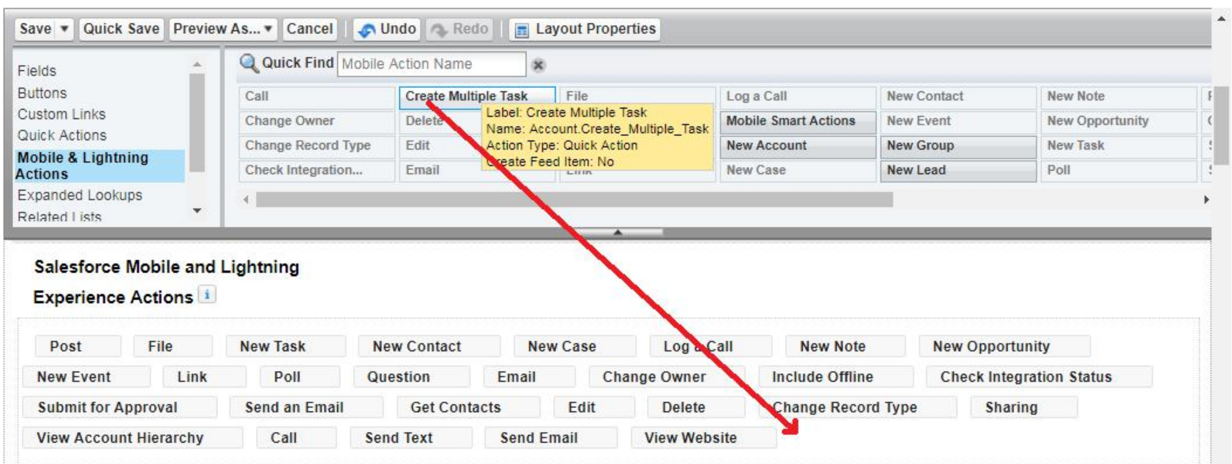

FIG:- Drag and Drop quick action from pallet to the section.

- For creating quick action for a perticuler standard or custom object before drag and drop:-
  - Go to the “Buttons, Links and Actions” under particular standard or custom object.
  - Then click on “New Action” Button >Select Action Type as “Lightning component” > Provide height approx 750px > Provide label as “Create Multiple Task”
  - Save It.

- For drag and drop quick action follow the steps given below:-
  - Go to “Page Layout” under the specific object. > select specific layout i.e. currently in context.
  - Click on “Mobile and Lightning Actions” on the pallet.
  - Then drag the “Create Multiple Task” action from pallet to the “Salesforce Mobile And Lightning Experience Actions” as shown in above screen shot.

- <u>Assign Multiple Users to a particular task Via "Create Tasks" Tab:-</u>
    - For doing the assignment click on the tab.
    - There two mandatory fields provided one "Subjects" and another one is "Assigned To".
    - For assigning multiple users we created custom lookup icon for "Assigned To" field, that will switch us to next screen contains multiselect pick list.
    - You can select users under four pick list value i.e."Public Groups", "Roles", "Roles and Subordinates" and "Users".
    - Click on OK.
    - There are two special lookup fields i.e. "Name" or "Related To", having lookup for different objects.
    - Name field having lookup for "Contact", "Lead" and "Related To" field having lookup for custom object and standard object (except contact and lead)
    - There are two Button One is **"Save"** that will redirects to Task object after creating task for assigned users, and another one is **"Save and New"** that will retain you on the same screen after creating record.

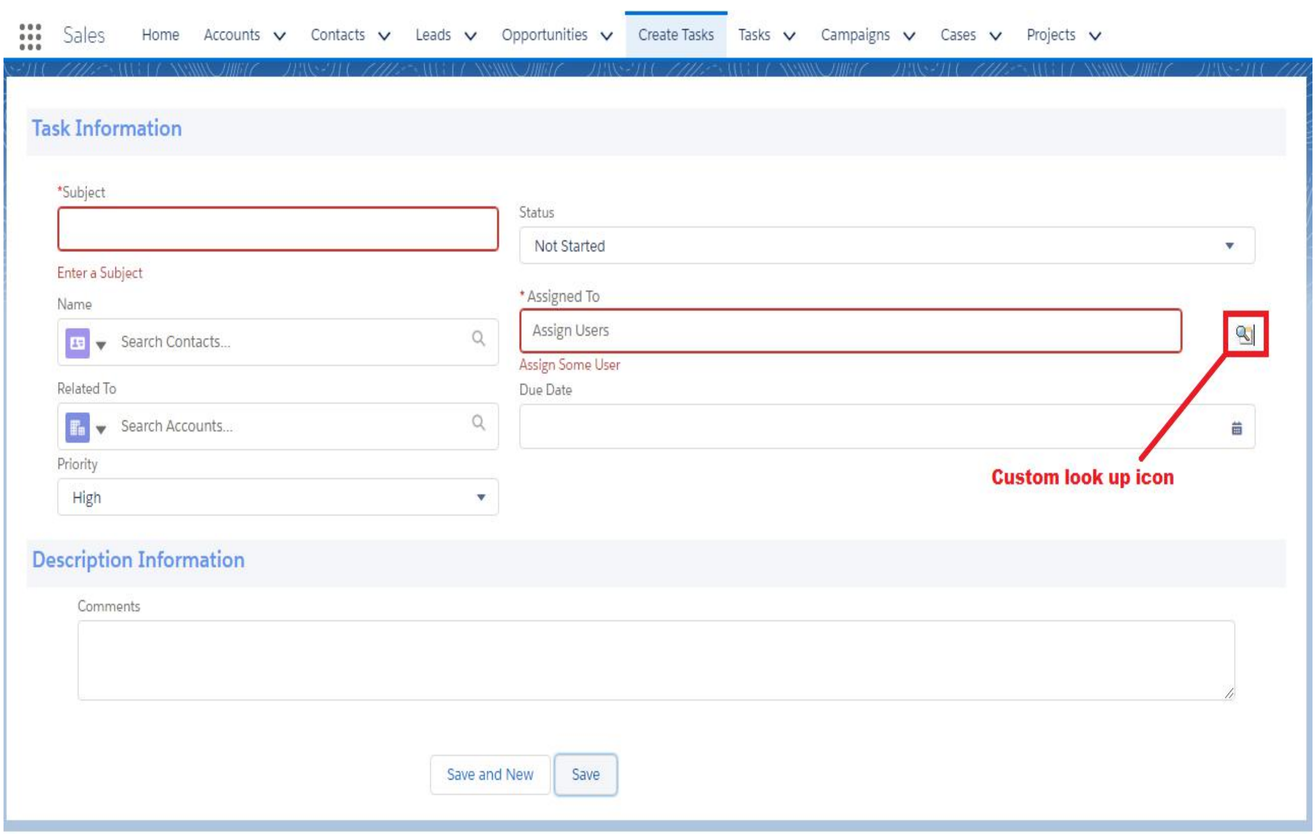

FIG:- Mandatory Fields

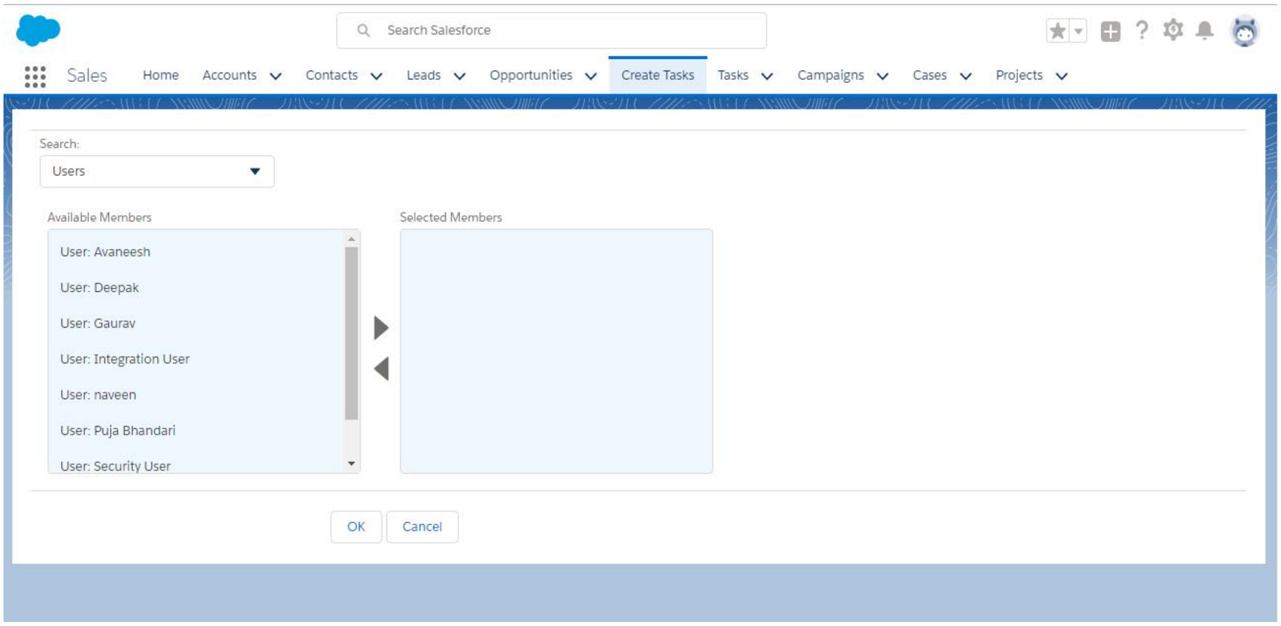

Fig:- Multi Select Pick list for multiple user assignment

NOTE:-

- Above step is same for quick action too but the difference is that record name will automatically popped up in “name” or “Related To” field, for the record i.e. currently in context and their will only save button that will retain you on detail page of record after saving record.

- When ever you created custom object make sure that you must ticked the allow activity checkbox to true.

Fig:- Optional Feature