



Mass Reassign Open Task Activities (Flows Template)

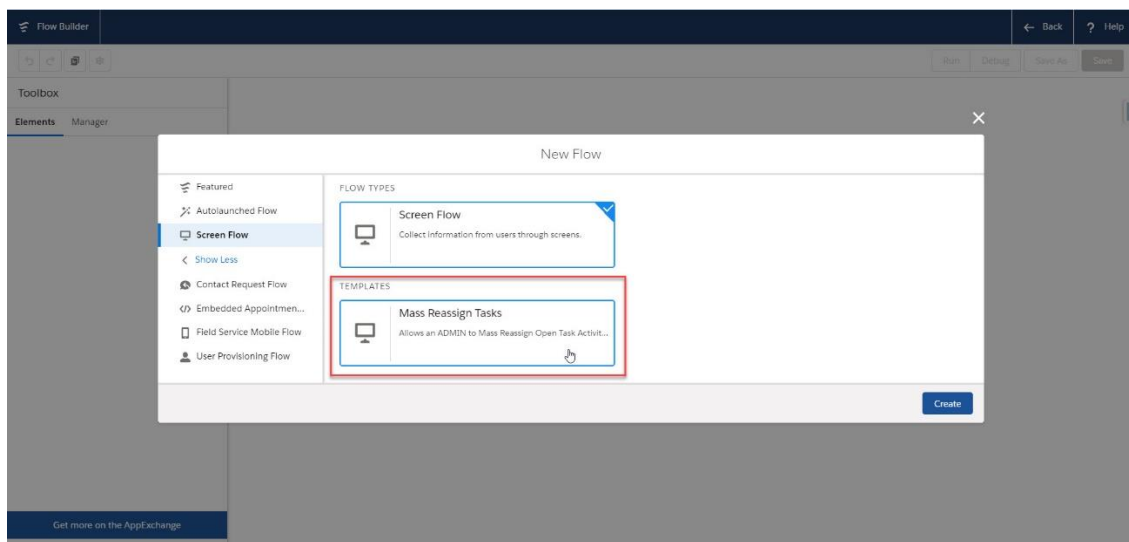
-- Configuration Guide

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Updating the Flow

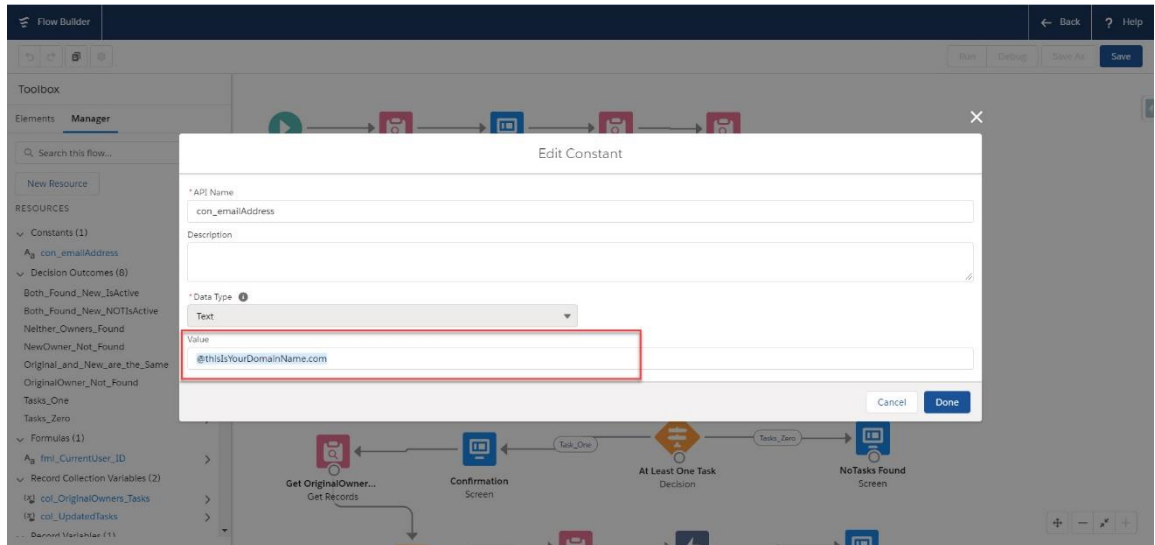
1. Navigate to Setup
2. In the Quick Find box, type in **Flows**, and click on the **Flows** link which is returned
 - a. The **Flows Setup** Page is displayed
3. Click on the **[New Flow]** button
4. Change the Type of flow to **Screen Flow**
5. From the Flow Type screen, select **Mass Reassign Tasks**, and click on the [Create] button



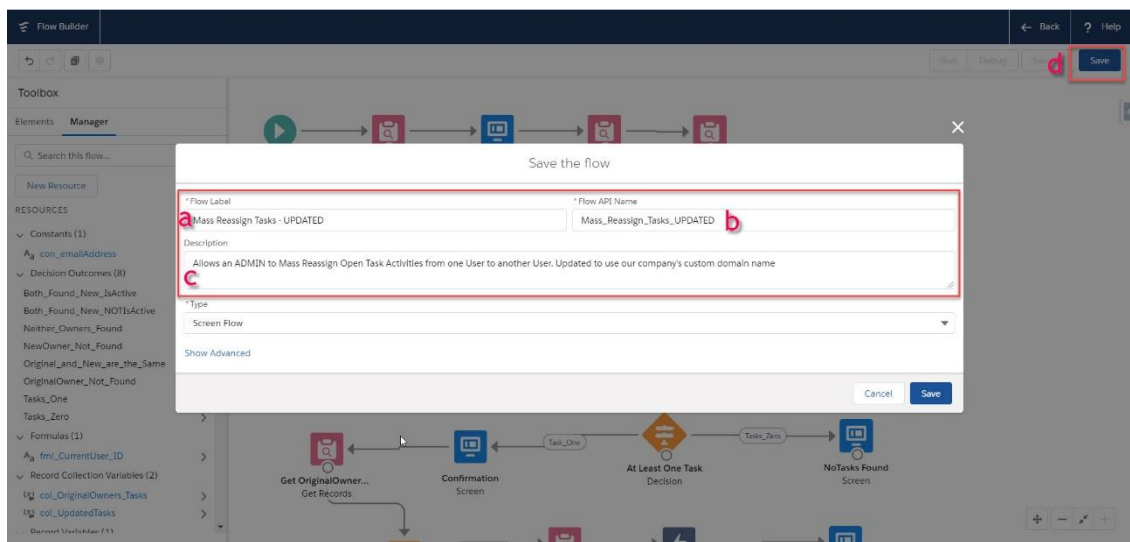
6. From the Toolbox, click on the **Manager** tab
7. Click on the **Constant** named **con_emailAddress**
8. Update the Value field, to your domain name (this is the part of each User's login name after the @)



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9. Once update, click on the **[Done]** button
10. Click on the **[Save]** button
 - a. Rename the **Flow Label**, and click Tab
 - b. The **Flow API Name** is automatically populated
 - c. Update the **Description**, if desired
 - d. Click on the **[Save]** button



NOTE: Ignore any of the Warning messages which pop-up

11. Click on the **[Back]** button
12. Click on the **Flow Label** link of the Flow you just saved
13. Click on the **Activate** link



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Updating the Lightning App Builder Page

1. In the Quick Find box, type in **Tabs**, and click on the **Tabs** link which is returned
 - a. The **Tabs Setup** Page is displayed
2. Scroll all the way down to the **Lightning Page Tabs** section
3. Click on the page called **Mass Reassign Open Task Activities**
4. Click on the Content URL
 - a. The Lightning Page **Mass_Reassign_Open_Task_Activities** is displayed
 - b. Click on the **[Clone]** button
5. The Lightning App Builder page is displayed
 - a. Give the Tab a new name (e.g., add the word **Custom** to the end of it)
 - i. No need to change the Developer Name – this is automatically renamed
 - b. Click on the Flow Component (When you click on it, it will say Invalid Component)
 - c. In the Page section, select the Flow you just created
 - d. Click on **[Save]**
 - e. Click on **[Activate]**
 - f. Keep the defaults, and click on [Save]

Assigning Permission Sets

1. Users who would need to access the Mass Reassign Flow need to have the following permissions:
 - a. User Record – Check the checkbox **Flow User**
 - b. Permission Set – **Mass Reassign Open Task Activities**