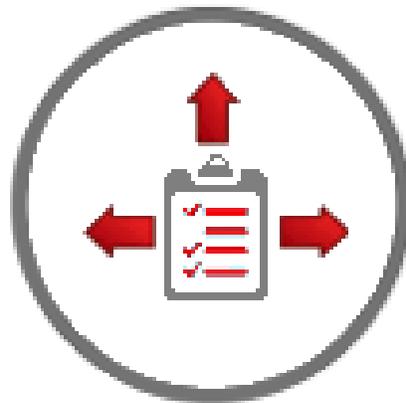


iTools

Delegated Tasks Management



Configuration Guide

Last Revised: July 16, 2019



Welcome

Thank you for choosing iTools for Salesforce by InSitu Software. If you recently purchased iTools, welcome to a robust collection of Salesforce.com tools that will enhance your Salesforce experience. If you are currently evaluating our tools, we hope that you, like a growing number of Salesforce users, find them to be an invaluable addition to Salesforce.com.

This configuration guide assumes that the iTools Configuration Manager has already been installed and will lead you through the installation process and configuration of iTools Delegated Tasks Management.

About iTools Delegated Tasks Management

iTools Delegated Tasks Management provides the help you need to stay on top of tasks and events assigned to others inside and outside your organization. Use the Delegated Tasks list to view all delegated tasks or filter the view by status and assigned user. Set up the iTool Delegated Task list to display on its own tab and/or configure it as a component on your Home tab.

Don't want to constantly check status? Then, let the iTool notify you when a delegated task has been completed, deleted, re-opened, re-assigned, or the Due Date is changed. Just like Salesforce tasks, the iTool can also include a 'Send Notification Email' checkbox on events so the owner is notified when a new event has been assigned to them.

Need to know when tasks are coming due or are past their due date? The iTool can be configured to send out email notifications to remind task owners that a task due date is approaching or that a task was not completed by its designated due date. These notices can be sent to task delegators as well as task owners.

Want to be able to assign a task to a group of users or business function without creating multiple copies of the task? The Group Tasks feature of iTools is what you need. Tasks assigned to a group can be “claimed” and completed by any member of the Task Group. Group members have multiple options for being notified about new unclaimed tasks as well as the group’s overall completion performance.

Want to be able to assign tasks to people who don't have a Salesforce license or don't even work for your organization? The iTools Delegated Tasks Management package now supports delegating the responsibility for a task's completion to the Contact associated with the task. These Contact Tasks can be completed by their designated contact via a simple email message or custom Salesforce Sites page.

Many of the iTool features can be customized for all users, by profile, by Role, or for individual users.



Lightning Support

The iTools Delegated Tasks Management fully supports the Salesforce.com Lightning user interface as well as the Classic user interface. All the user interface components have been designed to style themselves based on the user interface of the current user. This means you can easily use iTools in an all Classic org, an all Lightning org, or one with some users using Classic and some using Lightning. iTools will even support those users that switch between user interfaces depending on their task.

Installation and Configuration Overview

This guide is designed to lead you through the necessary installation and configuration steps for iTools Delegated Tasks Management. It may look lengthy and complex, but its step-by-step instructions, along with its visual format, will ease you through the process. There are three basic parts to the process. To begin, this guide shows how to install the iTools Delegated Tasks Management into your Salesforce environment. Second, it leads you through the process of deploying and configuring iTools Delegated Tasks Management and each of its' feature sets. You do not have to activate and configure every feature of the tool so some sections in this portion of the guide can be skipped. We do encourage you to at least read the introduction to each feature so you become familiar with what iTools Delegated Tasks Management can do to help make managing tasks easier and more efficient in your organization. Finally, this guide explains how to properly apply Delegated Tasks Management licensing. Although every effort has been made to provide complete instructions, if at any time, you encounter issues or have questions, please contact us using any of the methods described in the *Help and Support* section at the end of this document.



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Version Updates

If you are an existing iTools Delegated Tasks Management customer but haven't kept up with each new release, here is a brief review of the enhancements we have added to the product over the last couple of releases. If you would like to upgrade your current version to the latest release simply follow the installation instructions and install the latest version from AppExchange right over top of your current install. iTools knows when it needs to do an upgrade and will update you to the latest version without impacting your configuration or licensing. It's easy and for current subscribers its free!

New In Version 5.7-5.9

Role Specific iTools Setting Support: iTools Settings that could be set specific to a Profile or User can now also be specific to a Role.

Contact Task Enhancements: Now you have the option to bcc a Contact Task creator on the email sent to a contact letting them know a task has been assigned to them. You can also specify that files sent from the contact get associated with the Contact or Related To record rather than the Task record. We also added support for designating a field on the Contact record which dictates whether a Contact can be assigned a task or not.

Redesigned Delegated Task List Filtering: The filtering options on the Delegated Task list have been redesigned to give your users even greater options including the ability to see all delegated tasks assigned to themselves.

Email Notice on New Group Task: Task Group owners and/or members can now get an email notice letting them know a new task has been assigned to their group.

New In Version 5.2

Support for an Alternative Delegator: Up until now a task's delegator has always been the user that created the task but if you have situations where you want someone other than the Created By user to receive the delegator notices for a given task you can specify that user in a custom field.

Support for Additional Notification: Ever wanted to include another user on the list of users that get notifications about a given delegated task, now you can with support for an Additional Notify user custom field.

Mirroring the Related To field: Mirror the record from the task's Related To field into a custom lookup field automatically so you can include fields from the Related To record in your email templates.



New In Version 5.0/5.1

Support for the Salesforce.com Lightning User Interface: All the pages in Delegated Tasks Management now style themselves dynamically depending on the user interface of the current user. iTools has always worked in Lightning but now it supports that fresh look and feel.

New In Version 4.9

Support for Recurring Tasks as Group Tasks: You now have control over whether Recurring tasks can be designated as Group Tasks.

Group Tasks Remembers Selected Filters: The Group Tasks tab now remembers the last selected group and view when you return to the tab.

Group Task Grid Support Enhancement: Group Task Grid can now include Created Date as one of the initial sort keys.

Enhanced Support for Newly Licensed iTools Users: Reminder and Overdue notices now work for tasks created before a user was assigned an iTools license.

Default Email Templates Improved for Display in Gmail: The out-of-the box email templates have been updated to display better when using Gmail as your email client.

Ability to Prevent a User from getting any Delegated Task Emails: You can now mark individual user accounts such that they will not get any task related emails from iTools Delegated Tasks Management.

New In Version 4.8

Support for Org-Wide Email Addresses: Tasks Reminder and Overdue email notices can now be configured to use an Org-Wide email address as the “sender” of the message.

Related To Owner Support for Detail Records: The Related To Owner feature now supports tracking ownership on detail records in a master/detail relationship.

Support for Updating Contact Tasks via Email: Contact Tasks can now be updated without being marked complete via email. This gives sites using the Professional Edition the option to have contacts update tasks assigned to them.

Improved Line Break Support for Description Fields: Text from Description fields used in message templates now properly display line breaks.

Support for Additional Task Group Administrators: A set of group members other than the Task & Group Owner can now be given permission to release claimed Group Tasks.

New In Version 4.4



Inbound Email to Group Task: Email messages sent to specially designated email addresses such as Info@mycompany.com or CreditCheck@mycompany.com can automatically be converted into an iTools Group Task. These emails can be sent by people outside your company, internal personnel that don't have a Salesforce.com account, or even other systems that generate email alerts.

Initial Group Task Grid Sort: The ability to set the initial sort order of the Group Tasks grid on a group by group basis.

Changed In Version 4.4

Existing iTools Delegated Tasks Management customers should note the following changes made because of changes in the Summer 14' release of Salesforce.com.

Visualforce Home Page Component: Added a new Visualforce page designed explicitly to be used as a Visualforce Home Page Component for the Delegated Tasks List. If you are using the HTML Area method of defining a Home Page Component for the Delegated Tasks List as was directed in the configuration guide versions prior to 4.4, you must replace this component with a new Visualforce component before the Summer 15' release. The old method of explicitly defining an iFrame that references the Delegated Tasks page no longer meets the Salesforce standard for system security and must be replaced with a new Visualforce component before Summer 2015.

Due Date Mirror Field is Obsolete: Version 3.9 iTools Delegated Tasks Management added a custom field called Due Date (InSituDtm_Due_Date__c) to the Task object. This field mirrors the value in the standard Due Date (ActivityDate) task field but could be used formulas, validation rules, and workflows. Beginning with the Summer 14' release of Salesforce.com, the standard ActivityDate field is now available in all of those mechanisms rendering the iTools field obsolete. The iTools field will remain in the system and continue to be updated but the label has been changed to indicate it is obsolete and any use of the field should be updated to use the standard Salesforce field.

New In Version 4.0

Group Tasks: Tasks that should be completed by a department or business function rather than a specific individual can now be assigned to an iTools "Task Group". Any user assigned to the group can claim a task as though it were assigned to them directly, complete it, and have notification sent to the delegator. Group owners / members can monitor the group's activity via Chatter and receive periodic performance reports via email.

Changed Task Notification: In addition to being notified when a delegated task is completed, deleted, or re-opened iTools Delegated Tasks Management now sends a



notice if the task's Due Date or Assigned To values are changed by someone other than the task's creator.

Activities Tab: A new tab that makes it quick and easy to access the native Salesforce activities grid. Even users without an iTools licenses get access to this feature.

Faster Delegated Tasks List Loading Option: Sites that have a very large number of task records can use a new option to load the Delegated Tasks grid more quickly. By optionally replacing the list of users known to have been assigned a task by the current user with a user lookup option the load time of the Delegated Tasks list can be cut in half.

Packaged Permission Sets: Easily manage user access to Delegated Tasks objects, custom fields, tabs, and code using Salesforce Permission Sets. Included in this version are packaged Permission Sets designed for the different users and features of Delegated Tasks.

New In Version 3.9

Automatic Tracking of Days to Complete: Tasks completed by licensed iTools users automatically record the number of days required for completion. Both the number of Calendar Days and Workdays (does not include Saturday or Sunday) required to complete the task are recorded in custom fields that can be used for reports, dashboards and workflows.

Option to View All Tasks: A new option is available that, when enabled, will display all delegated tasks in the Delegated Tasks List even if the delegator does not have view rights to the task's parent object. This option will also allow the delegator to see tasks they have been assigned to others in the Delegated Tasks List that were created with no value in the Name and Related To fields.

Important Note: Tasks the delegator created but would normally not be permitted to see will appear in the Delegated Tasks List but if the user clicks on the task summary to view the details, Salesforce will display its standard "Insufficient Privileges" error message.

Delegated Tasks List Improvements: A number of usability enhancements have been added to the Delegated Tasks List including a button to create a New Task, a new scope option to display Open and Recently Completed Tasks, and improved paging controls.

Due Date Mirror Field: Delegated Tasks Management maintains a custom task field whose value mirrors the value in the task's Due Date field. This mirrored field, unlike the standard Salesforce task Due Date field, can be referenced in formulas, validation rules, and workflows.

Improvements to Contact Task Comments: Now Contacts updating or completing a Contact Task can add more than 255 characters of text if the system is configured to add the comments to the task Comments field. You also now have the option of adding the



comments to the top of the Comments field as well as the bottom. In Addition, we have added a configurable Date / Time stamp to the contact added comments.

New In Version 3.8

Profile Specific Overrides: Configuring iTools Delegated Tasks Management has been expanded to allow customizations for users based on their profile. For larger organizations with many different types of users, this additional level of flexibility makes it easy to custom design and maintain the solution to support the varying business needs within an organization.

New In Version 3.7

Task Reminders: The ability to send email notifications to users and contacts to remind them of open tasks that are due to be completed in a few days. You can configure this feature to send reminders on every task or just those for which the user has specifically requested an email reminder. As the system administrator, you can also specify the number of days in advance a reminder is sent as well as who (task owner, delegator, etc.) should receive the reminder notifications.

Reminder Notifications are generated for all tasks, not just delegated tasks, as long as the user who created the task is a licensed iTools user.

Overdue Notifications: The ability to send email notifications to users and contacts to remind them of open tasks that are past their due date. You can configure the message template, the number of days between subsequent messages, and the total number of messages sent regarding any single task.

Overdue Notifications are generated for all tasks, not just delegated tasks, if the user who created the task is a licensed iTools user.

Contact Tasks: There are many reasons and situations that require tasks to be delegated to people who do not have a Salesforce license or who are not even employees of your organization, such as partners, vendors or customers. To help manage tasks assigned to 'external' contacts, iTools Delegated Tasks Management now provides the Contact Tasks feature. Using the Contact Tasks feature, you can assign a task to anyone, as long as there is a Salesforce Contact with their name and email address.



Before You Begin

iTools are designed for use with Salesforce.com Professional, Developer, Enterprise, Unlimited, and Performance editions and their sandboxes. Installation into any other edition, including Team and Group Editions, is not supported.

If you are installing into a Professional Edition, your account Profile must be System Administrator. To install the iTools Delegated Tasks Management into any other supported edition, your user profile must include permission to Download AppExchange Packages and Manage Package Licenses. If your user profile is the standard System Administrator, you will, by default, already have these permissions.

In addition to the proper permissions, the iTools Configuration Manager version 5.6 or higher must be installed and a license assigned to your account.

Periodically Salesforce will change the user interface to improve the usability of the Salesforce application or the AppExchange marketplace. Many times, these changes only take effect when you enable an option in the **User Interface** section of Setup. This guide will attempt to reference navigational steps and screen shots using the latest version of the Salesforce user interface. There will be times, however, when Salesforce releases a new interface before a new version of this guide is released. There will also be cases when this guide references a version of the user interface that you have not enabled in your Salesforce environment. If you encounter a situation where you are unable to translate any of these differences, please contact our support organization and they will be more than happy to assist you.



Installing iTools Configuration Manager

In addition to the proper permissions, the iTools Configuration Manager, version 5.6 or higher, must be installed and a license assigned to your account. The iTools Configuration Manager is a prerequisite package and provides license management and configuration setting functionality for all iTools in the collection. If you have already installed the iTools Configuration Manager you can skip this section and continue with the next section.

To install the iTools Configuration Manager:

1. Go to the AppExchange located at:

<https://appexchange.salesforce.com/>

2. Locate the listing for **iTools Configuration Manager** by searching for “iTools Configuration Manager” or direct your browser to:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000001O7eMEAS>

3. Click the **Get It Now** button and follow the installation prompts. When asked to choose the initial access to package resources be sure to select **Install for Admin Only**.



If you would like more detailed step-by-step instructions for installing the iTools Configuration Manager, please see the iTools Configuration Manager Configuration Guide available on the tool’s AppExchange listing or on our website at <https://www.insitusoftware.com/itools-documentation>



Installing iTools Delegated Tasks Management

iTools Delegated Tasks Management can be installed from the Salesforce AppExchange into your environment by simply following the instructions below:

1. Go to the AppExchange located at:

<https://appexchange.salesforce.com/>

2. Locate the listing for **iTools Delegated Tasks Management** by searching for “iTools Delegated Tasks Management” or direct your browser to:

<https://appexchange.salesforce.com/appxListingDetail?listingId=aON3000001gFJNEA2>

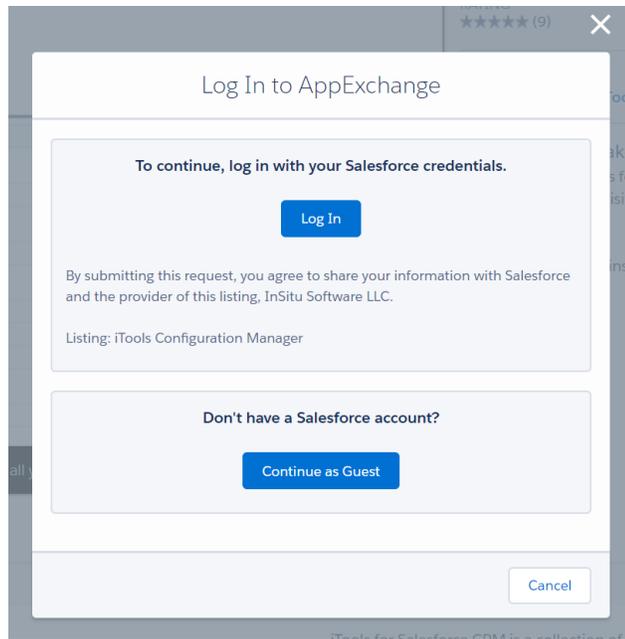


Make sure you are on the AppExchange listing for the **iTools Delegated Tasks Management**. iTools for Salesforce is sold as a single subscription but each individual iTool is installed separately and has its own similar looking AppExchange listing. Using separate listings ensures that you can install only the iTools that you need in your environment.



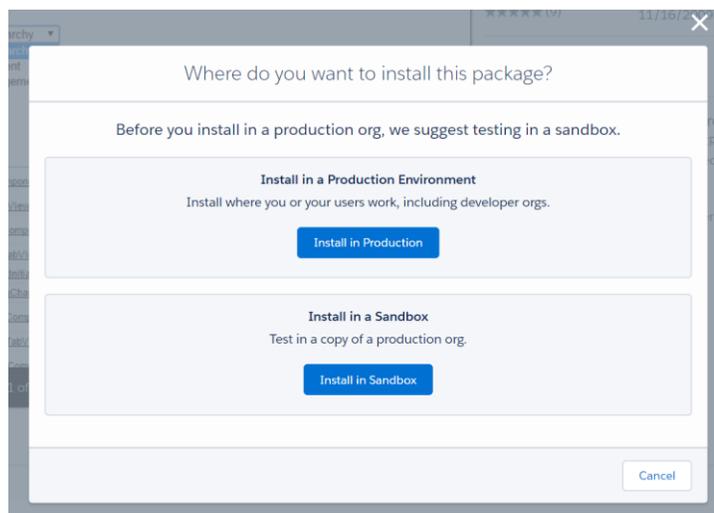
If you accessed the AppExchange from the [AppExchange Marketplace](#) link in the Setup section of Salesforce and are using the Lightning user interface, the next couple of steps may vary slightly in the details but the basic steps for starting the install will be the same.

3. Click the **Get It Now** button.
4. If you have not already logged into the AppExchange you will be asked to do so before you can continue with the install. If prompted, click the Log In button and provide your Salesforce.com credentials as requested.



After logging in you may be returned to the iTools Delegated Tasks Management listing page and will need to click the **Get it Now** button again.

5. Next you must choose whether to install iTools Delegated Tasks Management into a Production or Sandbox Environment. iTools will work properly in either environment.



If you are installing into a sandbox org, Salesforce may request additional login credentials for the specific sandbox org you will be using.



- The next step is to confirm the installation details, ensure that all required user profile information is filled in, collect agreement to the package's terms and conditions, and indicate if InSitu Software is permitted to contact you regarding other products and services. When you have provided the required information and agreed to the terms and conditions by checking the check the box at the bottom of the screen labeled **I have read and agree to the above terms & conditions**, click the **Confirm and Install** button.

Confirm Installation Details

Review the [customization guide](#) for installation and configuration steps.

Package	Version
iTools Delegated Tasks Management (5.1 / 5.1.0)	5.1 / 5.1.0
Subscription	Organization
Free	InSitu Software
Duration	Number of Subscribers
Does Not Expire	10000 Subscribers
Username	
docadmin@insitusoftware.com	

Here are the details we'll share from your profile [Edit Profile](#)

* First Name	Bob	* Company	InSitu Software
* Last Name	Nagy	* Country	United States
* Job Title	Co-Founder	* State/Province	Illinois
* Email	development@insitusoftware.com		
Phone			

I have read and agree to the [terms and conditions](#).

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

Allow the provider to contact me by email, phone, or SMS about other products or services I might like

[Cancel](#) [Confirm and Install](#)

- Choose the initial access to package resources.

For users to be able to use iTools Delegated Tasks Management they must be granted permission to access the tabs, custom objects, custom fields, Apex classes, and Visualforce pages that make up the application. This access can be granted either by updating the user's profile or by assigning the user the appropriate Permission Set. At this step in the installation process you must decide which



approach you are going to take to granting users access to the Delegated Tasks Management resources:

Install for All Users

If you chose this option, the installation routine will update all your custom Salesforce account profiles so that all users will have access to all of the package's resources. This does not necessarily mean every user will be able to use the Delegated Tasks Management tool, they must still be allocated licenses, but you will not have the additional configuration step of assigning Permission Sets to the proper iTool users.

Install for Admins Only

Choose this option if you plan to make iTools Delegated Tasks Management resources visible to the appropriate users through the assignment of Permission Sets. The Permission Sets you will need to assign will be added to your environment by the installation program, but you will have to assign those permissions to each user that you license for iTools.

Install for Specific Profiles...

Choose this option if you plan to make iTools Delegated Tasks Management resources visible only to users you know are assigned to a specific set of User Profiles.



InSitu Software recommends you choose the **Install for All Users**.

Install for Admins Only

Install for All Users

Install for Specific Profiles...



If you currently use the Professional Edition of Salesforce, you will not be given the option to which set of users have access to the package's resources. iTools Delegated Tasks Management is, however, fully functional in the Salesforce Professional Edition.

8. Click **Install** to complete the installation process. The install of the iTools Delegated Tasks Management package generally requires only a minute or two but may take longer if the Salesforce.com services are being heavily utilized. If the install requires more than a minute or so to complete you will be informed on screen of the delay and an email will be sent to you when the install is complete.



If you did not install the iTools Configuration Manager version 5.0 or greater before attempting to install iTools Delegated Tasks Management, you will receive an email from Salesforce indicating the install failed. The problem section of that email will indicate something like:

(iTools Configuration Manager 5.0) A required package is missing Package "iTools Configuration Manager", Version 5.0 or later must be installed first.



Granting Users Access

The Salesforce package installation routine automatically grants you, the administrator, the privileges and licenses needed to access all the features of the Delegated Tasks Management tool. However, for other users to access the iTools Delegated Tasks Management features, you will need to make sure they 1) have access to the proper package resources and 2) have been allocated licenses to the proper iTools packages. You can grant this access now or wait until you have activated and configured the features of the tool you wish to employ at your organization.

Package Resource Access

Before any user can access the tabs, custom objects, custom fields, code, or pages owned by an installed package they must first be granted the proper access to those resources. This access can be granted either by updating each of the account profiles used by your iTools users or by assigning one or more of the package's Permission Sets to the appropriate users. If during the installation wizard you chose the **Install for All Users** or the **Install for Specific Profiles** option or you are using the Professional Edition of Salesforce.com, your editable account profiles were automatically updated to grant full access to all the iTools Delegated Tasks Management resources.

If you chose **Install for Admin Only** during the installation, then you will need to assign one or more Permission Sets to your users. Most of your users who are licensed for iTools Delegated Tasks Management will only need to be assigned one Permission Set – **iTools Delegated Tasks User**. Some features of Delegated Tasks Management will require certain users to be assigned other Permissions Sets installed with the package. These requirements will be identified in the configuration instructions of those features.

When adding one or a few new users to your Salesforce environment the easiest method of granting the required Permission Set(s) is to use the **Permission Set Assignments** section of the User detail page. This section lists the currently applied Permissions Sets and includes an **Edit Assignments** button for accessing the administrative page for applying (or removing) other Permission Sets.

Action	Permission Set Label	Date Assigned
Del	iTools Delegated Tasks User	6/5/2013
Del	iTools Task Group Member	6/5/2013



However, if you are deploying the Delegated Tasks Management tool to a significant number of users, you will find it easier to mass assign the necessary Permission Set(s). To apply, or remove, iTools Delegated Task Management related permission sets to/from your Salesforce user accounts just follow these simple steps:

1. Locate the Permission Sets section in Setup.

Permission Sets

[Help for this Page](#)

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

Action	Permission Set Label	Description
<input type="checkbox"/> Clone	iTools Activities Tab User	Permissions required to use the iTools Activities Tab. Users with iTools Delegated Tasks permission do I
<input type="checkbox"/> Clone	iTools Contact Tasks Sites User	Permissions required of the special guest user account associated with Site used for Contact Task comp
<input type="checkbox"/> Clone	iTools Delegated Tasks User	Permissions required of a user licensed for iTools Delegated Tasks Management
<input type="checkbox"/> Clone	iTools Task Group Administrator	Permissions required to create and manage Task Groups as well as be an active member of one or mor
<input type="checkbox"/> Clone	iTools Task Group Member	Permissions required to be a member of an iTools Task Group.

2. Click on the iTools permission set you wish to assign to users.
3. Click the **Manage Assignments** button at the top of the Permission Set detail page.
4. Click the **Add Assignments** button.
5. Select the users you want to assign by checking the checkbox in the Action column.
6. Click the **Assign** button.
7. Click the **Done** button.

Package Licenses

Each user of iTools Delegated Tasks Management must be assigned a license to **both** the iTools Configuration Manager and iTools Delegated Tasks Management packages. If you are not intending to license iTools for all your Salesforce users, please refer to the *Licensing* section of this guide for more information regarding the impact of non-licensed users on each feature of the Delegated Tasks Management package.

When adding one or a few new users to your Salesforce environment the easiest method of granting the required package licenses is to use the **Managed Packages** section of the User detail page. This section lists the currently applied licenses and includes an **Assign Licenses** button for accessing the administrative page used to apply (or remove) other managed package licenses.



Managed Packages		Assign Licenses
Action	Package Name	
Remove	iTools Configuration Manager	
Remove	iTools Delegated Tasks Management	

However, if you are deploying the Delegated Tasks Management tool to a significant number of users, you will find it easier to mass assign licenses from the license management page of each iTools package. To access this page for any managed package, locate the **Installed Packages** section in Setup and click on the [Manage Licenses](#) link in the Action column next to the package whose licenses you wish to allocate.

Installed Packages				
Action	Package Name	Publisher	Version Number	
Uninstall Manage Licenses	iTools Configuration Manager	InSitu Software LLC	5.1	
	Description			
	Manages the configuration and settings for all of the InSitu Software iTools			
Uninstall Manage Licenses	iTools Delegated Tasks Management	InSitu Software LLC	5.1	
	Description			
	Manage and track the tasks you have delegated to others more efficiently.			

From this page you can see all users already assigned a license to the package as well as add additional users using the **Add Users** button.



If you have installed iTools in a sandbox org, there is no license control and all users are automatically assigned a license to every managed package. If you need to test the impact of iTools on unlicensed users, please contact InSitu Software Technical Support and request that license control be enabled in your sandbox.



iTools Settings

All iTools, including Delegated Tasks Management, include an extensive set of configuration settings used to control the appearance and behavior of the tool. These settings, called iTools Settings, belong to the iTools Configuration Manager package and are viewed and updated via the iTools Settings tab.

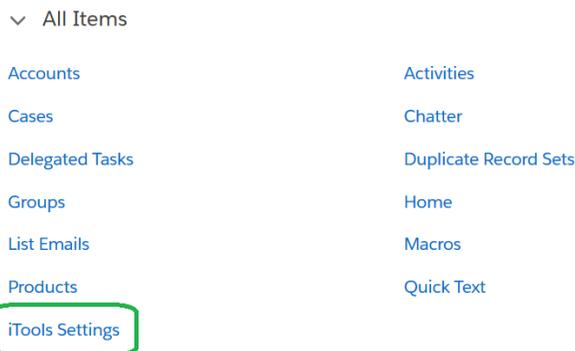
Throughout this guide, specific iTools Settings will be referenced and you may be instructed to set them to a certain value to affect the behavior or appearance of Delegated Tasks Management. All references to individual iTools Settings will appear in this guide as follows:

ExampleSetting

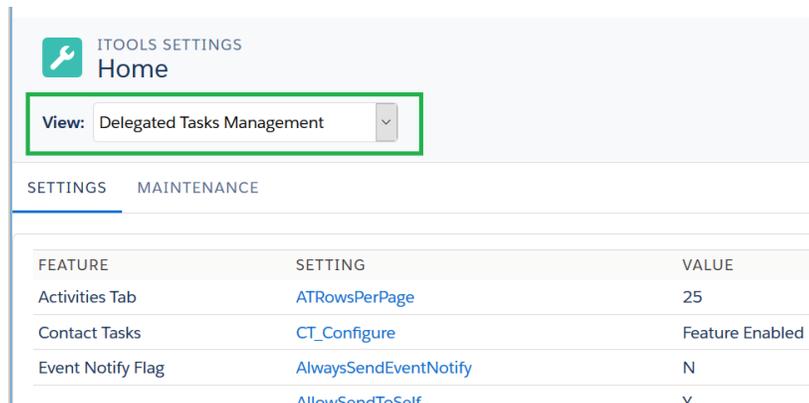
To access a specific setting follow these simple steps:

If you are using the Lightning User Interface

1. Click the “nine dot” icon  in the top left of any page.
2. Click the iTools Settings option in the All Items section



3. Select “Delegated Tasks Management” in the View dropdown list if it is not already selected.



4. Locate the referenced setting in the Setting column and click it.

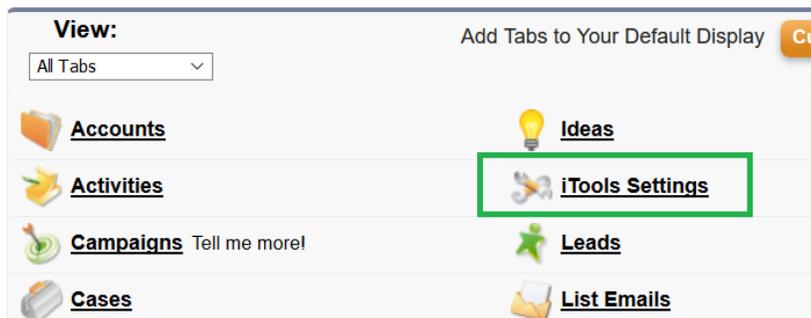


If you are using the Classic User Interface

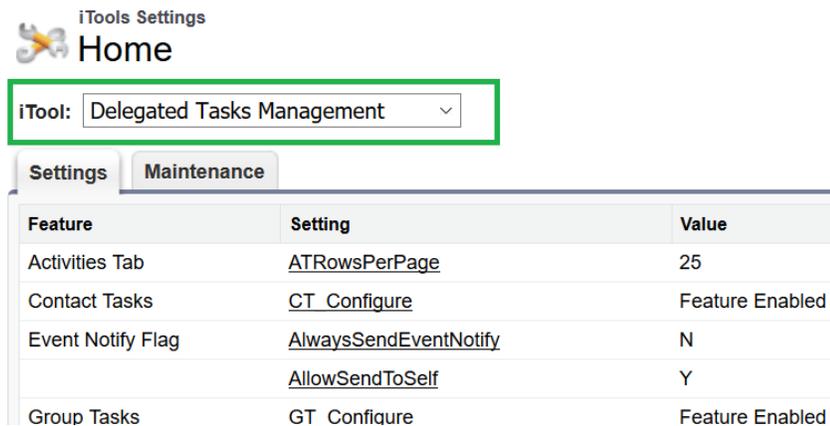
1. Click the “plus” tab  at the far right of the tab bar.
2. Click the iTools Settings option in the list of All Tabs

All Tabs

Use the links below to quickly navigate to a tab. Alternatively, you can [add a tab](#) better suit the way you work.



3. Select “Delegated Tasks Management” in the iTool dropdown list if it is not already selected.



4. Locate the referenced setting in the Setting column and click it.



Where screen shots are needed in this guide to point out additional options within an iTools Setting, the Lightning UI version of the page will be used. The Classic UI version of the page will contain the same fields and buttons and behave in an identical manner, it will simply look a bit different. Either user interface can be used to manage any of the individual iTools Settings.



Feature: Delegated Tasks List

iTools Delegated Tasks Management includes a list of delegated tasks that can be easily accessed as a Salesforce 'Tab' and/or included as a component on the Salesforce Home page. The Delegated Tasks List contains all the tasks the current user has created and assigned to other users including those tasks assigned to an iTools Task Group (Group Task feature) and those assigned to a Contact (Contact Tasks feature).

Delegated Tasks Tab

The Delegated Tasks tab is added to your Salesforce.com environment when the Delegated Tasks Management iTool is installed.

The screenshot shows the Salesforce Lightning interface with the 'Delegated Tasks' tab selected. The view is set to 'Tasks Assigned To Anyone other than Me' by 'Me' that are 'Overdue'. The table below lists the tasks:

DUE DATE +	SUBJECT	ASSIGNED TO	STATUS	NAME	RELATED TO
9/1/2018	Next Year's Projections	Terry Hamer	In Progress		
9/7/2018	Additional Purchase - \$250K	Adam Adams	Assign to Credit Check		Burlington Textiles Corp of America
9/7/2018	Apologize for Shipping Error !	Terry Hamer	Not Started	John Bond	Pyramid Construction Inc.
9/10/2018	Send T-46 Generator Specs	Terry Hamer	In Progress		BTC Plant Generator
9/11/2018	Call Tim	Adam Adams	Not Started	Tim Barr	Grand Hotels & Resorts Ltd
9/14/2018	Golf Outing Invite	Adam Adams	Not Started	Tim Barr	United Oil & Gas Corp.
9/14/2018	Additional Purchase - \$1.5 Million	Adam Adams	Assign to Credit Check		United Oil & Gas Corp.
9/18/2018	Send list of references	Adam Adams	Not Started		Grand Hotels Emergency Generators

Delegated Tasks tab in Lightning

The screenshot shows the Salesforce Classic interface with the 'Delegated Tasks' tab selected. The view is set to 'Tasks Assigned To Anyone other than Me' by 'Me' that are 'Overdue'. The table below lists the tasks:

Due Date +	Subject	Assigned To	Status	Name	Related To
9/1/2018	Next Year's Projections	Terry Hamer	In Progress		
9/7/2018	Additional Purchase - \$250K	Adam Adams	Assign to Credit Check		Burlington Textiles Corp of America
9/7/2018	Apologize for Shipping Error !	Terry Hamer	Not Started	John Bond	Pyramid Construction Inc.
9/10/2018	Send T-46 Generator Specs	Terry Hamer	In Progress		BTC Plant Generator
9/11/2018	Call Tim	Adam Adams	Not Started	Tim Barr	Grand Hotels & Resorts Ltd
9/14/2018	Golf Outing Invite	Adam Adams	Not Started	Tim Barr	United Oil & Gas Corp.
9/14/2018	Additional Purchase - \$1.5 Million	Adam Adams	Assign to Credit Check		United Oil & Gas Corp.
9/18/2018	Send list of references	Adam Adams	Not Started		Grand Hotels Emergency Generators

Delegated Tasks tab in Classic



While the installation routine makes the Delegated Tasks tab available in your Salesforce org, it does not add it to the set of tabs currently visible to your users. Be sure to add the tab to the appropriate Apps and/or instruct your users on adding the tab to their App configuration. If you need assistance you can find instructions regarding adding tabs in the Salesforce help system or contact InSitu Software Support and we will be happy to walk you through it.



The Salesforce package licensing mechanism will hide a tab such as the Delegated Tasks tab from users that do not have a license to the managed package from which it came. Because of this behavior you can add the Delegated Tasks tab to any App in your org even if you are not licensing iTools for every user.



Delegated Tasks Home Page Component

iTools Delegated Task Management can also be configured to display the list of delegated tasks as a component on the Salesforce Home Page.

Tasks I Have Delegated

View: by That are

DUE DATE ↑	SUBJECT	ASSIGNED TO	STATUS	NAME	RELATED TO
9/1/2018	Next Year's Projections	<input checked="" type="checkbox"/> Terry Hamer	In Progress		
9/7/2018	Additional Purchase - \$250K	<input checked="" type="checkbox"/> Adam Adams	Assign to Credit Check		Burlington Textiles Corp of America
9/7/2018	Apologize for Shipping Error !	<input checked="" type="checkbox"/> Terry Hamer	Not Started	John Bond	Pyramid Construction Inc.
9/10/2018	Send T-46 Generator Specs	<input checked="" type="checkbox"/> Terry Hamer	In Progress		BTC Plant Generator
9/11/2018	Call Tim	<input checked="" type="checkbox"/> Adam Adams	Not Started	Tim Barr	Grand Hotels & Resorts Ltd
9/14/2018	Golf Outing Invite	<input checked="" type="checkbox"/> Adam Adams	Not Started	Tim Barr	United Oil & Gas Corp.

1 - 6 of 11 << Previous Next >> Page 1 of 2

Delegated Tasks Home Page Component in Lightning

Tasks I Have Delegated

View: by That are

Due Date ↑	Subject	Assigned To	Status	Name	Related To
9/1/2018	Next Year's Projections	<input checked="" type="checkbox"/> Terry Hamer	In Progress		
9/7/2018	Additional Purchase - \$250K	<input checked="" type="checkbox"/> Adam Adams	Assign to Credit Check		Burlington Textiles Corp of America
9/7/2018	Apologize for Shipping Error !	<input checked="" type="checkbox"/> Terry Hamer	Not Started	John Bond	Pyramid Construction Inc.
9/10/2018	Send T-46 Generator Specs	<input checked="" type="checkbox"/> Terry Hamer	In Progress		BTC Plant Generator
9/11/2018	Call Tim	<input checked="" type="checkbox"/> Adam Adams	Not Started	Tim Barr	Grand Hotels & Resorts Ltd
9/14/2018	Golf Outing Invite	<input checked="" type="checkbox"/> Adam Adams	Not Started	Tim Barr	United Oil & Gas Corp.

1 - 6 of 11 << Previous Next >> Page 1 of 2

Delegated Tasks Home Page Component in Classic

The list functions in the same manner as the list on the Delegated Tasks tab except that it appears as a component on the user’s Home page in Salesforce. Because the component is not automatically added, you can designate the label or heading that is displayed on the component. For example, if you refer to Salesforce tasks as ‘To Dos’ at your organization, you may choose to label the component ‘To Dos I Have Delegated’.

The Home Page in Salesforce is implemented differently depending on the user interface, Classic vs Lightning, and as such the steps necessary to configure the Home Page are also different. If you are using both user interfaces in your organization, you will need to follow the instructions for configuring both types of Home pages. If you are currently using the Classic user interface but plan to go to Lightning, you will also need



to configure both mechanisms as the Classic version of the Home Page does not “convert” to the Lightning Home page. Instructions for configuring both types of Home Pages are as follows:

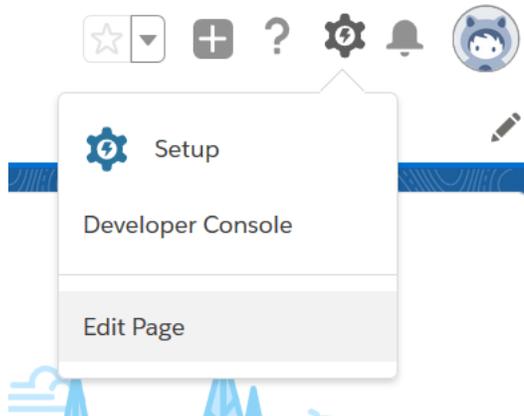


Unlike Tabs, Home Page Components are not automatically hidden if the user is not licensed for the package which renders the home page component. As such, you should only use the Home Page Component if you know that all the users with the profile(s) to which the component is assigned will have an iTools license. If this is not the case, you should not use this feature of the iTools Delegated Tasks Management product.



Configure the Lightning Home Page

1. Navigate to the Home tab while in Lightning and click the “Setup” icon then select the **Edit Page** menu option.



2. Locate the Visualforce component in the list of Lightning Components.



3. Drag the Visualforce component to the desired location the Lightning page. The Delegated Tasks component will only work well on a “Wide” section of a Lightning page.
4. Configure the properties of the Visualforce component:

A screenshot of the configuration panel for a Visualforce component. The panel has a title bar that says 'Page > Visualforce'. Below the title bar, there are several configuration fields:

- Label:** A text input field containing 'Tasks I Have Delegated'.
- * Visualforce Page Name:** A dropdown menu with 'Delegated Tasks' selected.
- Height (in pixels):** A text input field containing '300'.
- Set Component Visibility:** A section with a dropdown arrow and the text 'Set Component Visibility'. Below it, there is a 'Filters' section with a '+ Add Filter' button.



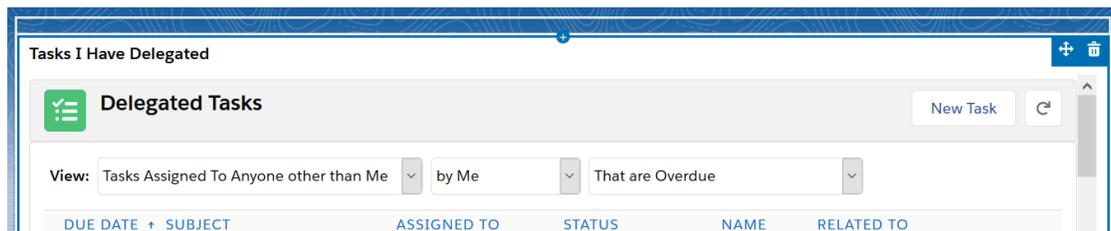
Label = Title you wish to appear on the component such as “Task I Have Delegated”

Visualforce Page Name = Delegated Tasks

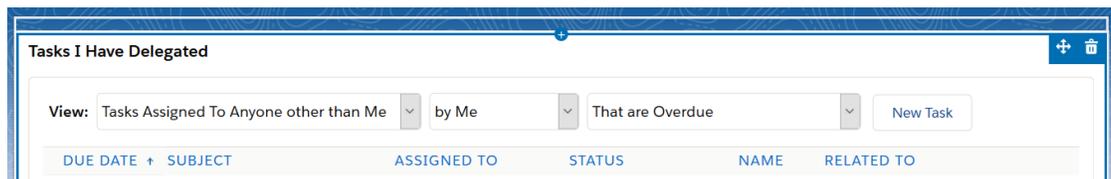
Height = Vertical size of the component in pixels.



When selecting the Visualforce Page Name you will find two pages in the list with the name ‘Delegated Tasks’. One is for the Delegated Tasks Tab and the other is for the Home Page Component. Select one of the options and look at the component displayed in the preview. If the component includes a page header, you need to select the other ‘Delegated Tasks’ option.

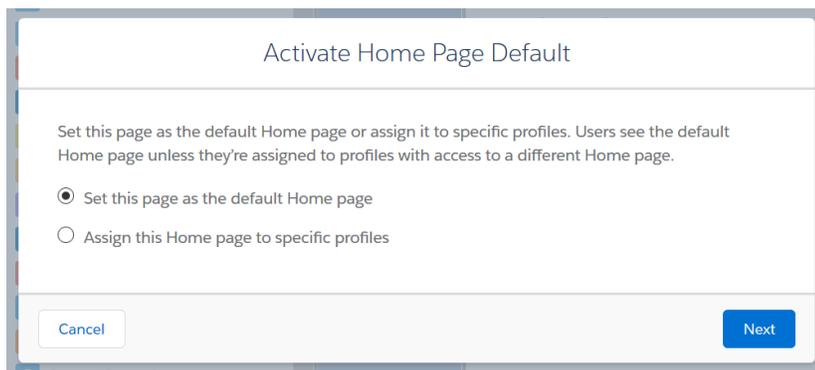


Incorrect Delegated Tasks Visualforce Page Option



Correct Delegated Tasks Visualforce Page Option

5. Click the **Save** button.
6. If you have never “Activated” the Home page you will be prompted to activate the page as either the default for all users or for select user profiles. Chose the appropriate options and click **Next**.





7. Once the page has been saved and activated exit the Lightning App Builder by clicking  Back



If you have multiple Lightning Home Page which you want to include the new component, repeat this process for each page. You can access the other existing Lightning pages from the Pages menu in the Lightning App Builder.



Configure the Classic Home Page

1. Access **Setup**.
2. Access the Home Page Components lists by selecting the **Customize > Home > Home Page Components** link in the App Setup area.
3. At the top of the list labeled Custom Components, click the **New** button to start the process of creating a new custom home page component.
4. Depending on your configuration, you may or may not see a page that lists the different types of home page components. If this page is displayed, just click the **Next** button to continue.
5. In the field labeled **Name**, enter the name you want to use to reference this component. This name will not appear to your users.
6. In the option set labeled **Type**, chose the **Visualforce Area** option.
7. Click **Next**.

New Custom Components

[Help for this Page](#)

Links and image home page components can only be added to the narrow column of the layout. HTML Area and Visualforce Area component types can be added to either the narrow column or the wide column.

Step 1. New Custom Components Step 1 of 2

Name

Type Links
 Image
 HTML Area
 Visualforce Area

Next Cancel

Next Cancel

8. In Step 2 of the New Custom Components configure the component options as follows then click **Save**:
 - **Component Position** = Wide (Right) Column
 - **Visualforce Page** = Delegated Tasks
[InSituDtm__InSitu_DTM_Home_Page_Component]
 - **Height (in pixels)** = Vertical size of the component in pixels
 - **Show scrollbars** = Not Checked
 - **Show label** = Not Checked



New Custom Components

[Help for this Page](#)

Step 2. New Custom Components Step 2 of 2

[Previous](#) [Save](#) [Cancel](#)

Component Position: Wide (Right) Column
 Narrow (Left) Column

Visualforce Page:

Height (in pixels):

Show scrollbars:

Show label:

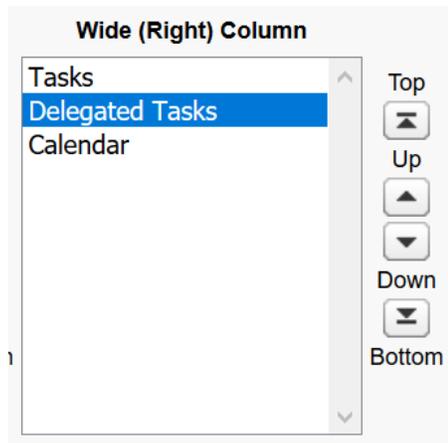
[Previous](#) [Save](#) [Cancel](#)

Now that the home page component is created, it must be added to one or more Home Page Layouts before it will be displayed to users. Follow Steps 9-13 to complete the configuration.

9. Click the **Customize > Home > Home Page Layouts** link in the Setup area.
10. Click the **Edit** link next to the Home Page Layout onto which you would like to add the new Delegated Tasks component.
11. Check the checkbox next to the Delegated Tasks component in the **Wide Components to Show** section. The name next to this checkbox will depend on the name you gave the component in Step #5 earlier. In this guide, the component is named **Delegated Tasks**.

Select Wide Components to Show	
Items to Approve	<input type="checkbox"/>
Tasks	<input checked="" type="checkbox"/>
Delegated Tasks	<input checked="" type="checkbox"/>
Calendar	<input checked="" type="checkbox"/>
Dashboard Snapshot	<input type="checkbox"/>

12. Click the **Next** button at the bottom of the page to continue.
13. Adjust the position of the component using the up and down arrows next to the **Wide (Right) Components** list and click **Save** to finish editing the layout.



If you have multiple Home Page Layouts in which you want to include the new component, repeat steps 9 thru 13. You also have the option of adding a new Home Page Layout and assigning it to the profile(s) used by iTools licensed users.



Configuration Options

There are several iTools Settings which can be used to modify the appearance and behavior of the Delegated Tasks List. Those settings and their impact on the feature are as follows:

ViewAllTasks

Instructs the Delegated Tasks List to use either the native Salesforce security settings for viewing tasks or to use a special “system” context which can see all tasks the current user has delegated. Due to the special security model of the native Salesforce task object and the fact it is not possible to add sharing records to a task record, it can be a common occurrence at many sites for a user to assign a task to someone and then not be able to see that task anywhere within Salesforce. This most commonly happens in the following situations:

- The Sharing Setting for the Activity object is set to Private and the delegator is not above the delegate on the org hierarchy.
- The delegator creates a task for another user and does not specify a value in the Name or Related To fields.

If you want the Delegated Tasks List to respect the native Salesforce task security, leave this setting set to the default value of N(o).

If you want the Delegated Tasks List to display all tasks delegated by the current user regardless of the native Salesforce security settings, set this value to Y(es). Even when this option is set to Y(es), iTools will only show all tasks if the list filter is set to show tasks delegated by the current user (by Me). Any other delegator filter value will ignore this option.

Important Note: The **ViewAllTask** option only applies to the Delegated Tasks tab and home page component, meaning that native Salesforce views of tasks will not include the same tasks. In addition, if the user clicks on a task to go to the details and does not have read privileges, then Salesforce will display the standard error message informing them they do not have appropriate privileges to view the task.

HomePageRows

Specifies the number of rows to display in the Delegated Tasks Home Page component. Because Salesforce Home Page components do not dynamically resize, you must specify the number of rows you want displayed in the grid. This number is based on the Height you specified for the component and whether you want users to vertically scroll the grid to see all rows on a single page. For example, to avoid the vertical scrolling and display 10 rows in Lightning, the Height of the component should be set to about 415 pixels. If you want the Height of the component to be no more than 300 pixels and still not scroll,



this setting should be set to 6. You should experiment with the component Height and the number of rows setting to determine a combination that works best for your home page layouts.

ShowStatusColumn

Indicates whether the task **Status** value should be included as a column in the Delegated Tasks list when it is displayed in a home page component. If many of your users have relatively small screens (e.g. iPad users), you might consider not showing the **Status** column because fewer columns make the list easier to read.

ShowNameColumn

Indicates whether the task **Name** (Contact or Lead) value should be included as a column in the Delegated Tasks list when it is displayed in a home page component. If many of your users have relatively small screens (e.g. iPad users), you might consider not showing the **Name** column because fewer columns make the list easier to read.

ShowRelatedToColumn

Indicates whether the task **Related To** value should be included as a column in the Delegated Tasks list when it is displayed in a home page component. If many of your users have relatively small screens (e.g. netbook users), you might consider not showing the **Related To** column because fewer columns make the list easier to read.

ComponentTitle

Controls the text of the title of the Delegated Tasks List when configured as a Home Page Component in the Classic user interface.

Due Date	Subject	Assigned To
9/1/2018	Next Year's Projections	Terry

TabPageRows

Specifies the maximum number of rows included in a page of tasks when the Delegated Tasks list is displayed on its own tab. When more tasks are displayed on a page, the user will not have to hit the Next button as often to find the desired task. However, with more tasks displayed on a page, it may take slightly longer for the page to display. You should also keep in mind that your users may need to use the scroll bar to get to the



Next page button when the value of the setting is above a certain number of rows per page.

MaxDaysOverdue

Specifies the maximum number of days a task can be overdue and still be shown in the Delegated Tasks list on the Home Page component or Delegated Tasks tab. Typically, tasks that are overdue by many days are those that are probably never going to be completed or should be deleted. These tasks have either become irrelevant or are assigned to a user that has left the organization. If this is the case in your organization, you should consider setting the value such that these extremely overdue tasks will no longer appear in the Delegated Tasks list.

If you want every task included in the list no matter how long it has been overdue, set the value to a very large number such as 10,000.

DefaultScope

Specifies the initial value in the scope filter drop down list on the Delegated Tasks List.

The screenshot shows the 'Delegated Tasks' interface. At the top, there is a green checkmark icon and the title 'Delegated Tasks'. Below this, there are three dropdown menus for filtering: 'Tasks Assigned To Anyone other than Me', 'by Me', and 'That are Overdue'. The 'That are Overdue' dropdown is highlighted with a green box. Below the filters, there is a table with columns: DUE DATE, SUBJECT, ASSIGNED TO, STATUS, and NA. The first row of data shows a due date of 9/1/2018, subject 'Next Year's Projections', assigned to Terry Hamer, and status 'In Progress'.

If you want the list to initially display only overdue tasks, select the **Overdue** option.

If you want the list to initially display all open tasks, select the **Open** option.

If you want the list to initially display tasks that were recently closed, select the **Recently Closed** option.

If you want the list to initially display all open tasks and those recently closed, select the **Open or Recently Closed** option.

RecentlyClosedDays

Specifies the maximum number of days in the past that a closed delegated task was last modified and will be included in the Delegated Tasks list when the user selects the **Recently Closed** or **Open and Recently Closed** filter option.



IncludeDelegatedByAnyone

Indicates whether users can filter the Delegated Tasks list to show tasks created by anyone (**by Anyone** option in the delegator filter). Sites that have many users should not change this option to Y(es) as the query could result in too many tasks and the query will result in an error. If you are not sure if your site will support this option, enable it just your account (define a user specific version of the setting for your account) and test it before making it available to all users.



Feature: Days to Complete Tracking

iTools Delegated Tasks Management automatically tracks the number of days required to complete a task. The completion tracking mechanism creates task level data such as the date the task was closed and the number of days, both calendar and weekdays, required to complete the task. This information can then be used in reports, dashboards, workflows, and formula fields to better monitor and manage task responsiveness.

Implementation Tips

There are no steps required to activate the Days to Complete Tracking feature, however, prior to using the feature, please review the following implementation tips:

- iTools Delegated Tasks Management will automatically set the **Completed Date** custom field (API name `InSituDtm_InSitu_Completed_Date__c`) to the current date on the day the task is marked complete. If you would like to allow your users to set this date to a value other than the current date, include the field on your Task Page Layout(s) and educate your users on its purpose. If the field is left blank when the user saves a completed task, the system will set the field to the current date so users need only set the field when marking tasks complete at least one day past the date it was actually completed.
- Not exposing the Completed Date or making it a Read Only field on the page layout, may help incent your users to update Salesforce in a timelier manner.
- The number of calendar days required to complete the task is stored in the custom field **Days to Complete** (API name `InSituDtm__InSitu_Days_ToComplete__c`).
- The number of days, not including Saturdays or Sundays, required to complete the task is stored in the custom field **Workdays to Complete** (API name `InSituDtm__InSitu_Workdays_ToComplete__c`).
- The calculation of the **Workdays to Complete** field does not consider holidays or other non-business days. It only excludes Saturdays and Sundays from its calculation.
- The days to complete, calendar and workdays, will always have a value of at least 1 if the task is created with a status which is not considered complete. This is true even if the task is completed on the day it was assigned so the best possible value for any reporting or performance indicator would be 1.
- Tasks which are complete at the time they are created such as when logging a call or sending an email will be have their days to complete fields set to zero.



- Tasks completed prior to version 3.9 or higher of iTools Delegated Tasks Management being installed will have days to complete fields which are blank.
- Salesforce users that do not have a license to iTools Delegated Tasks Management and iTools Configuration Manager do not get the Days to Complete Tracking feature and all tasks they complete will have days to complete fields which are blank.
- If you are using the Contact Task feature and wish to get completion tracking on those tasks be sure to allocate an iTools license to the Sites user account (using the Sites Page method of completion) or the admin user that created the Email Handler Process (email method of completion).
- If you include either of the days to complete custom fields on your Task Page Layout(s) be sure to set the Read Only attribute in the layout editor as you don't want your users editing these fields directly.
- Reports, dashboards, and custom code used to calculate metrics such as average response time should be sure to exclude those tasks whose days to complete fields are blank or set to zero.
- If a task which was previously closed is re-opened, the days to complete fields will be set back to blank. When the task is eventually closed, the days to complete will be based on the total time from the task creation date to the close date with no allowance made for the time spent in a completed state.
- Using the standard ActivityDate field and the completion tracking fields you can easily create formula fields for metrics such as number of days an open task is past due or the number of days before or after the due date a task was completed.



Feature: Task Completion Notification

One of the most popular features of iTools Delegated Tasks Management is the option to have iTools send an email message to the creator (delegator) of a delegated task when the task is completed, re-opened (status changed from a closed value to one not marked as closed), deleted, or has the Due Date or Assigned To fields changed by someone other than the creator. This feature is enabled on a per task basis by checking the **Notify When Complete** checkbox on the Task detail page.

The screenshot shows a 'New Task' form with the following details:

- Task Information:**
 - Assigned To: Adam Adams
 - Status: Not Started
 - Subject: Send new product specs
 - Name: Lauren Boyle
 - Due Date: 10/1/2018
 - Priority: Normal
 - Related To: United Oil & Gas Corp.
 - Notify when Complete:** (highlighted with a green box)
- Description Information:** (Empty)
- Comments:** Send the technical spec for the latest version of T-1000's

Buttons at the bottom: Save & New, Cancel, Save

This checkbox was added to your standard Task object when iTools Delegated Tasks Management was installed. However, the checkbox control must be added to your New Task page(s) for users to take advantage of the feature. If you would like to make this feature available to your Salesforce users, follow these instructions:



iTools Delegated Tasks Management includes an option to always send completion notifications or delegated tasks regardless of the value of the **Notify when Complete** checkbox. If you would like notifications always sent, change the **AlwaysSendTaskNotify** iTools Setting to Y(es). When configured to always send notifications, the **Notify when Complete** checkbox is ignored and its presence on the New Task page will only confuse your users so do NOT add the checkbox to any of these pages.

Update Task Page Layout

1. Navigate to the Page Layout editor for the Task page

Lightning:

Setup > Objects and Fields > Object Manager >

Click the **Task** link in the list > **Page Layouts >**

Click the  icon in the last column of the layout to update >

Edit

Classic:

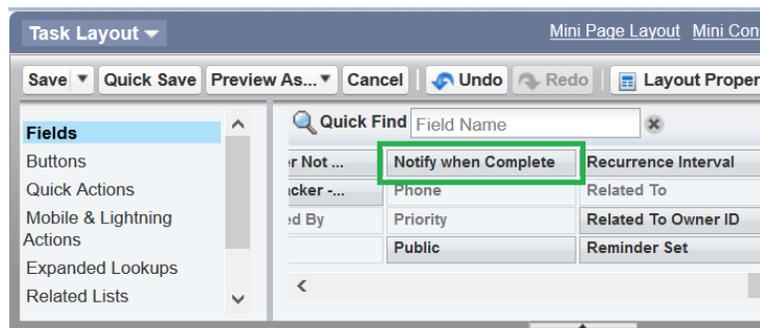
Setup > Customize > Activities > Task Page Layouts >

Click on the **Edit** link next to the layout to update



If you currently use the Professional Edition of Salesforce, you will not see a list of page layouts because the Profession Edition supports only one page layout per object.

2. Locate the **Notify when Complete** field in the list of fields at the top of the page.





3. Drag the field to the location on the Task Page Layout that suits your layout best. The exact location does not impact the operation of the feature.

Task Detail Standard Buttons

Task Information (Header visible on edit only)

- * Assigned To Sample Text
- * Subject Sample Text
- Due Date 9/24/2018 4:25 PM
- Phone 1-415-555-1212
- * Priority Sample Text

Notify when Complete

Other Information (Header visible on edit only)

4. Click on the **Save** button at the top of the page to save your changes.

Field Name	Field Name	Field Name
Notify when Complete	Recurrence Interval	
Phone	Related To	
Priority	Related To Owner ID	
Public	Reminder Set	



If you have more than one Task Page Layout in your organization, you will need to repeat this task for each page layout. If you currently use the Professional Edition of Salesforce.com, you will only have a single Task Page Layout.



Update Global Action Layout

If you are using a New Task global action on your detail pages, home page, or Chatter tab you will want to add the **Notify when Complete** checkbox to that action's page layout.

The screenshot shows the configuration interface for a 'New Task' global action. The 'Notify when Complete' checkbox is highlighted with a green box, indicating it is the field to be added to the layout.

To add the checkbox to the action's layout, follow these simple instructions:

1. Navigate to the New Task action layout

Lightning:

Setup > User Interface > Global Actions > Global Actions

Classic:

Setup > Create > Global Actions > Global Actions

2. Locate the New Task in the list of global actions and click the **Layout** link.
3. Locate the **Notify when Complete** field in the list of fields at the top of the page and drab it to the appropriate location on the layout.



Action: New Task Help for this Page ?

Save Quick Save Preview As... Cancel Undo Redo

Task Fields

Quick Find

Situ EN Flag - ...	Name	Recurrence Interval	Repeat This Task	Subject
SituONTracker - ...	Notify when Complete	Related To	Send Email Reminder	Task Group
Situ Owner Not ...	Priority	Related To Owner ID	Send Notification...	Task Subtype
SituRNTracker - ...	Public	Reminder Set	Status	Type

< >

Subject
Sample Text

Due Date
9/26/2018 1:47 PM

Name
Sample Text

Related To
Sample Text

Assigned To *
Sample Text

Notify when Complete

4. Click the **Save** button.



If you have more than one Global Action that creates a new Task and allows the user to assign that task to another user, you will need to add the **Notify when Complete** checkbox to the layouts of those actions also.



Do NOT add the **Notify when Complete** to Global Actions that that create completed tasks such as Log a Call. These tasks never generate an iTools task notification and the checkbox would simply be a waste of valuable screen space.



Update Message Templates

iTools Delegated Tasks Management uses email notifications to instantly and automatically let you know when delegated tasks have been completed, deleted, re-opened, or had their Due Date or Assigned To values changed. For ultimate flexibility and customization, iTools uses email templates as the basis for the notifications that it sends. This gives organizations the ability to adjust the design of both the content and layout of the messages - for more effective communication or to meet certain company standards set up for internal communications.

To make sure the notifications work well for all types of email applications and web browsers, each template is made up of a Subject field, a message body in HTML form, and a message body in plain Text form. Based on the settings and capabilities of their email reader, the most appropriate version will be used for each user.

iTools Delegated Tasks Management provides a separate template for each of the Task Notification related messages: Task Complete, Task Re-Open, Task Delete, and Task Change. These templates are installed as part of the iTools package and are similar in content and layout to other native Salesforce.com Task and Event notification messages. No modifications to the iTool templates are required, but you are free to customize them just like any other template you may have in Salesforce.

Salesforce.com did not originally support the use of Task or Event fields as merge fields in native email templates. Therefore, the location and way you define the email templates for iTools Delegated Tasks Management is slightly different. The iTools email templates are defined and edited in the same way as other iTools customizations – using the iTools Settings Tab. Each message template has a set of iTools Settings it uses to define the subject and body of the email message.

The iTools message templates support a set of merge fields which serve as placeholders for data that will be replaced with information from the current Task or Event.

Generally, the name of the merge field is the same name as the Task or Event field. The syntax of an iTools merge field consists of an open curly brace and exclamation point, followed by the field API name and a closing curly brace: `{!ActivityDate}`. All standard fields are supported as well as any custom Activity field the organization has defined. In addition, there are a few 'special' merge fields which do not equate directly to fields on a Task or Event object, but are helpful when constructing notification messages.



If you decide to make modifications to the original message templates, please be sure to test your changes before releasing to your users. The smallest typographical error can result in a poorly constructed message and in some cases, an error which prevents the message from being sent.

Also, remember that the emails are not sent to the delegating user if the change or delete is performed by that user. You will need to be able to login to Salesforce using



two different user accounts to properly test this feature of iTools Delegated Tasks Management.

The following table includes the special and most commonly used merge fields which are valid for use in the **TaskComplete**, **TaskChange**, **TaskDelete**, and **TaskReOpen** templates:

Merge Field	Meaning
{!ActivityDate}	Due date of the task.
{!CreatedBy.Email}	Email address of the user that created the task.
{!CreatedBy.Name}	Name of the user that created the task.
{!CreatedBy.Phone}	Phone number of the user that created the task.
{!Description}	Value of the task Comment field.
{!Id}	Unique Salesforce.com record Id of the task. Generally used to build a hyperlink to the task back in Salesforce.
{!LastModifiedBy.Email}	Email address of the user who last edited the task.
{!LastModifiedBy.Name}	Name of the user who last edited the task.
{!LastModifiedBy.Phone}	Phone number of the user who last edited the task.
{!Priority}	Priority of the task.
{!SFDCURL}	Special merge field that renders the URL of the organization's Salesforce.com instance. Generally, this field is used to build a hyperlink to the task back in Salesforce. (see special note below)
{!Status}	Status of the task.
{!Subject}	Subject of the task.
{!TaskChangeDescription}	Special merge code that renders a description of the change to the task. The description is limited to a change in Due Date or Assigned To. Note: This token should only be used in the TaskChange template.
{!What.Name}	Name of the object (Account, Opportunity, etc.) specified in the task Related To field.
{!Who.Name}	Name of the Contact or Lead specified in the task/event Name field.



Organizations using the Contact Tasks feature with the web page completion option should **not** use the `{!SFDCURL}` token in their **TaskComplete** template because it will not work properly. Instead of including `{!SFDCURL}`, you should enter the base URL of your Salesforce instance in your template. For example, to include a reference to the associated task, enter the following in the template body field:

```
https://na1.salesforce.com/{!Id}
```

Also, remember to use the My Domain or server associated with your Salesforce instance if not assigned to **na1**.

The default versions of the Task Completion Notification feature templates are as follows:

Task Complete

Subject: Task Completed: Send proposal for new Generators

Completed Task

John Doe has completed the following task:

Subject: Send proposal for new Generators
Name:
Related To: Grand Hotels Kitchen Generator
Due Date: 12/30/2011
Priority: Normal
Comments: Grand needs the proposal for their new kitchen generators before the end of the year. The proposal should use this years pricing even though the purchase will be in Q1 of next year. Proposal:

For more details, click the following link:

<https://na12.salesforce.com/00TU0000003d1LWMAY>



Task Changed

Subject: Task Changed: Set up lunch meeting

Changed Task

Olivia Smith has made the following change:

Due Date changed from 4/30/2013 to 5/10/2013 AND Assigned To changed from Olivia Smith to Michelle Greene

To the Task:

Subject: Set up lunch meeting
Name: Tim Barr
Related To:
Due Date: 5/10/2013
Priority: Normal
Comments: Met Tim at the conference last week and he suggested we get together over lunch to discuss their growth plan.

For more details, click the following link:

<https://na6.salesforce.com/00T8000002lqCpREAU>



Task Re-Opened

Subject: Task Re-Opened: Send proposal for new Generators

Re-Opened Task

John Doe has re-opened the following task:

Subject: Send proposal for new Generators
Name:
Related To: Grand Hotels Kitchen Generator
Due Date: 12/30/2011
Priority: Normal
Comments: Grand needs the proposal for their new kitchen generators before the end of the year. The proposal should use this years pricing even though the purchase will be in Q1 of next year.

For more details, click the following link:

<https://na12.salesforce.com/00TU0000003d1LWMAY>

Task Deleted

Subject: Task Deleted: Send proposal for new Generators

Deleted Task

John Doe has Deleted the following task:

Subject: Send proposal for new Generators
Name:
Related To: Grand Hotels Kitchen Generator
Due Date: 12/30/2011
Priority: Normal
Comments: Grand needs the proposal for their new kitchen generators before the end of the year. The proposal should use this years pricing even though the purchase will be in Q1 of next year.



Configuration Options

There are several iTools Settings which can be used to modify the appearance and behavior of the Task Notification feature. Those settings and their impact on the feature are as follows:

OnlyCreatorCanEnable

Indicates whether the task creator is the only person who can check the **Notify when Complete** checkbox on a task new/edit page.

Leave this value set to N(o) if it is important for any user who can edit the task to be able to check the **Notify when Complete** checkbox. If checked, an email notification will be sent to the creator of the task when the task is completed or re-opened. By leaving the value set to N(o), you provide the opportunity for the person assigned to the task the option to send the notification when the task creator had chosen otherwise. For example, the assigned user may update the task description while completing the task and would like the task owner to see the updates they entered at the time the task is completed.

Set this value to Y(es) if it is important for the creator of a task to be the only person to specify whether a task completion email notification should be sent.



When the **OnlyCreatorCanEnable** setting is set to Y(es), a user who did not create the task but has access rights to edit the task will be able to check this checkbox, however, the checkbox value will not be saved. Changes made to any other field on the task will be saved, but the change to the checkbox will not be applied.

OnlyCreatorCanDisable

Indicates whether the task creator is the only person who can uncheck the **Notify when Complete** checkbox.

Leave this value set to Y(es) to ensure that the creator of a task is the only person who can cancel the task notification request.

Set this value to N(o) if you want to allow any user who can edit the task to be able to cancel the notification request. This option is generally not recommended.



When the **OnlyCreatorCanDisable** setting value is set to Y(es), a user who did not create the task but has access rights to edit the task will be able to uncheck this checkbox, however, the checkbox value will not be saved. Changes made to any other field on the task will be saved, but the change to the checkbox will not be applied.



AlwaysSendTaskNotify

Indicates whether a task notification is sent regardless of the value of the **Notify when Complete** checkbox.

If you would like the user to check the **Notify when Complete** checkbox to indicate that a task notification should be set, then leave the value set to N(o).

Update the setting value to Y(es), if you prefer the task notification always be sent when a delegated task is completed, deleted while open, re-opened, or had the Due Date or Assigned To changed by someone other than the designated message recipient(s). This setting has no impact on the New Event Notification feature.



When the **AlwaysSendTaskNotify** setting is set to Y(es), the **Notify when Complete** checkbox field should ***not*** be added any New Task page layout(s). Otherwise, the presence of the checkbox will be misleading to your users since its value will be ignored.

NotifyCreator

Indicates whether a task notification should be sent to the task creator when a task is completed, deleted while open, re-opened, or had the Due Date or Assigned To changed by someone other than the designated message recipient(s).

Leave this value set to Y(es) to send notifications to the task creator.

Set this value to N(o) if you do not want task notifications sent to the task creator.

NotifyOnDelete

Indicates whether a task deletion notification should be sent the task's delegator when the task is deleted before it is closed and **Notify when Complete** is checked.

Leave this value set to Y(es) if you want notifications sent when open delegated tasks are deleted.

Set this value to N(o) if you do not want delete notifications sent.



Feature: Reminder Notification

iTools Delegated Tasks Management includes the ability to send email notifications to users and contacts to remind them of open tasks that are due to be completed in a few days. You can configure this feature to send reminders on every task or just those for which the user has specifically requested an email reminder. As the system administrator, you can also specify the number of days in advance a reminder is sent as well as who (task owner, delegator, etc.) should receive the reminder notifications.

Reminder Notifications are generated for all tasks, not just delegated tasks, if the user who created the task had been allocated a license to the iTools Configuration Manager and the iTools Delegated Tasks Management packages.

Enabling and Configuring Reminder Notifications

A single configuration page is provided to enable and configure the Reminder Notification feature. Follow these simple steps to activate and configure the feature.

1. Access the **RN_Configure** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.
2. Click on the **Edit** button.
3. Click the **Enable the Reminder Notification feature** checkbox. You may also want to configure other settings related to this feature while on this page. Click the **Save** button to save your changes. The feature is now enabled.

ITools SETTING EDIT
Reminder Notification Configuration

Cancel Save

Settings

Enable the Reminder Notification feature

General Settings = Required Information

Days In Advance 1

Always Send Reminder (Do not place the "Send Email Reminder" checkbox on the Task page when this option is selected)

Send Reminder Notification To

Task Owner (User specified in the Assigned To field)

Task Delegator (User that created the Task but is not the Owner)

Related To Owner (Owner of the object specified in the Related To field. Only applies if the Related To Owner feature is enabled.)

Task Contact (Contact specified in the Name field. Only applies to Contact Tasks and only when the Contact Tasks feature is enabled.)

Send Reminder Notification From

Organization-Wide Email Address NONE - Use Task Owner

The General configuration settings include:



Days In Advance: This value represents the minimum number of days prior to the task due date that a reminder will be sent. If the setting value is set to 0, reminders will be sent on the due date of the task (or the first time the Task Notifications process is run after the due date).

Always Send Reminder: Check this option if you want a Reminder Notification sent for every open task. If you check this option, there is no need to add the **Send Email Reminder** checkbox to the Task Page Layout(s).

There are also a number of options for specifying who should receive a task reminder notification:

Task Owner: The user specified in the task's Assigned To field.

Task Delegator: User that created the task but is not the current owner.

Related To Owner: The user that owns the object specified in the Related To field for the task. This user will only be notified if the Related To Owner feature has been activated.

Task Contact: The contact specified in the Name field for the task. This person will only be notified if the Contact Tasks feature has been activated **and** the task has been designated as a Contact Task.

You can also control the Display Name of the sender of the notification email:

By default, the "sender" of a Task Reminder email is the user specified in the task's **Assigned To** field. You can change this default by selecting an Organization-Wide email address in the **Organization-Wide Email Address** field. To create or manage an Organization-Wide email address go to:

Lightning: **Setup | Email | Organization-Wide Addresses.**

Classic: **Setup | Email Administration | Organization-Wide Addresses.**



Update Task Page Layout

If you have configured iTools Delegated Tasks Management to send Reminder Notifications only when requested by the task owner or creator, you must add the **Send Email Reminder** checkbox to your Task Page Layout(s). Only tasks with this checkbox checked will be eligible for Reminder Notifications. To update your Task Page Layout(s) follow these simple steps:

1. Navigate to the Page Layout editor for the Task page

Lightning:

Setup > Objects and Fields > Object Manager >

Click the **Task** link in the list > **Page Layouts >**

Click the  icon in the last column of the layout to update >

Edit

Classic:

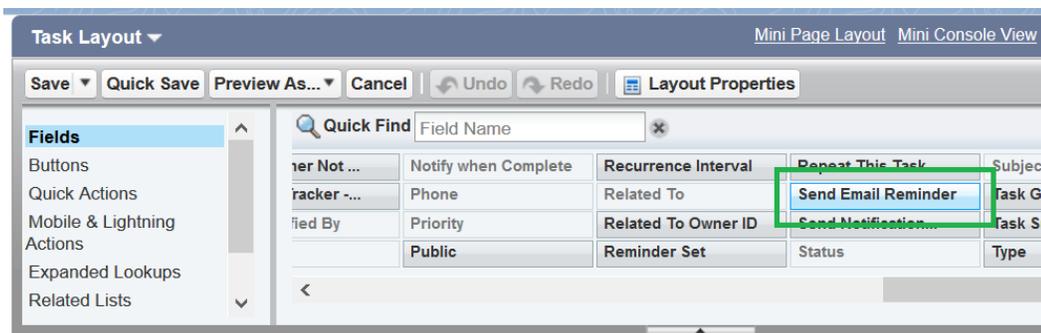
Setup > Customize > Activities > Task Page Layouts >

Click on the **Edit** link next to the layout to update



If you currently use the Professional Edition of Salesforce, you will not see a list of page layouts because the Profession Edition supports only one page layout per object.

2. Locate the **Send Email Reminder** field in the list of fields at the top of the page.





Be sure to select the field labeled **Send Email Reminder**. Delegated Tasks Management also installed Activity fields named *InSitu EN Flag* and *Send Notification Email* - these fields should **not** be added to the Task Page Layout(s).

3. Drag the field to the location on the Task Page Layout that suits your layout best. The exact location does not impact the operation of the feature.

Task Detail

Standard Buttons

Task Information (Header visible on edit only)

- * Assigned To Sample Text
- * Subject Sample Text
- Due Date 9/26/2018 5:55 PM
- Phone 1-415-555-1212
- * Priority Sample Text

Notify when Complete

Send Email Reminder

Other Information (Header visible on edit only)

4. Click on the **Save** button at the top of the page to save your changes.

Task Layout Mini Page Layout Mini Cons

Not ...	Notify when Complete	Recurrence Interval
icker -...	Phone	Related To
ed By	Priority	Related To Owner ID
	Public	Reminder Set



If you have more than one Task Page Layout in your organization, you will need to repeat this task for each page layout. If you currently use the Professional Edition of Salesforce.com, you will only have a single Task Page Layout.



Update Global Action Layout

If you are using a New Task global action on your detail pages, home page, or Chatter tab you may want to add the **Send Email Reminder** checkbox to that action's page layout.

The screenshot shows the 'New Task' configuration form. The 'Notify when Complete' checkbox is checked and highlighted with a green box. The 'Save' button is visible at the bottom right.

To add the checkbox to the action's layout, follow these simple instructions:

1. Navigate to the New Task action layout

Lightning:

Setup > User Interface > Global Actions > Global Actions

Classic:

Setup > Create > Global Actions > Global Actions

2. Locate the New Task in the list of global actions and click the **Layout** link.
3. Locate the **Send Email Reminder** field in the list of fields at the top of the page and drab it to the appropriate location on the layout.



Action: New Task Help for this Page ?

Save Quick Save Preview As... Cancel Undo Redo

Task Fields

Quick Find

	Recurrence Interval	Repeat This Task	Subject	Workdays to Complete
1 Complete	Related To	Send Email Reminder	Task Group	
	Related To Owner ID	Send Notification...	Task Subtype	
	Reminder Set	Status	Type	

Subject
Sample Text

Due Date
9/26/2018 6:05 PM

Name
Sample Text

Related To
Sample Text

Assigned To *
Sample Text

Notify when Complete

Send Email Reminder

4. Click the **Save** button.

 If you have more than one Global Action that allows users to create an open future dated Task, you may want to add the **Send Email Reminder** checkbox to the layouts of those actions also.

 Do NOT add the **Send Email Reminder** to Global Actions that that create completed tasks such as Log a Call. These tasks never generate an iTools task reminders and the checkbox would simply be a waste of valuable screen space.



Update Message Templates

iTools Delegated Tasks Management Reminder Notification messages serve as a reminder to the recipient that a task they have been assigned is due to be completed soon. For ultimate flexibility and customization, iTools uses email templates as the basis for the notifications that it sends. This gives organizations the ability to adjust the design of both the content and layout of the messages - for more effective communication or to meet certain company standards set up for internal communications.

To make sure the notifications work well for all types of email applications and web browsers, each template is made up of a Subject field, a message body in HTML form, and a message body in plain Text form. Based on the settings and capabilities of their email reader, the most appropriate version will be used for each user.

iTools Delegated Tasks Management provides two templates for the Task Reminder feature. The one template, **TaskReminder**, is used when the email recipient is a Salesforce user within your organization, such as a Task Owner, Delegator, or Related To Owner. The other template, **ContactTaskReminder**, is used when the email recipient is a Contact that is most likely not one of your licensed Salesforce users and may not even be a member of your organization.

While the two templates are similar in purpose, they differ in the way they instruct the recipient to take action. The **TaskReminder** template can simply provide a direct link (URL) to the task in your Salesforce system with which they can mark the task as complete. The **ContactTaskReminder** template should not include a direct link (URL) to Salesforce since the recipient will not have proper authority to access it. Furthermore, the 'instruction' portion will vary depending on which mechanism(s) you have enabled or prefer to use for the Contact Task Completion process.

Both templates are installed as part of the iTools package and are similar in content and layout to other native Salesforce.com Task and Event notification messages. No modifications to the iTool templates are required, but you are free to customize them just like any other template you may have in Salesforce.

Salesforce.com did not originally support the use of Task or Event fields as merge fields in native email templates. Therefore, the location and way you define the email templates for iTools Delegated Tasks Management is slightly different. The iTools email templates are defined and edited in the same way as other iTools customizations – using the iTools Settings Tab. Each message template has a set of iTools Settings it uses to define the subject and body of the email message.

The iTools message templates support a set of merge fields which serve as placeholders for data that will be replaced with information from the current Task or Event.

Generally, the name of the merge field is the same name as the Task or Event field. The syntax of an iTools merge field consists of an open curly brace and exclamation point, followed by the field API name and a closing curly brace: `{!ActivityDate}`. All standard fields are supported as well as any custom Activity field your organization has defined.



In addition, there are a few 'special' merge fields which do not equate directly to fields on a Task object, but are helpful when constructing notification messages. The following table includes the special and most commonly used merge fields that are available to include in the **TaskReminder** and **ContactTaskReminder** templates. Merge tokens designed for use in only one of the two templates are noted:

Merge Field	Meaning
{!ActivityDate}	Due date of the task.
{!ContactTaskId}	Special encrypted form of the Contact Task ID. This value is not a Salesforce record ID and will be required in the subject field of any email message sent to indicate task completion. Note: This token should appear between "ref:" and ":ref" in the subject of the Contact Task Completion email message. Note: This token should not be used in the TaskReminder template.
{!CreatedBy.Email}	Email address of the user that created the task.
{!CreatedBy.CompanyName}	Company name associated with the user that created the task. (see note below)
{!CreatedBy.Name}	Name of the user that created the task.
{!CreatedBy.Phone}	Phone number of the user that created the task.
{!Description}	Value of the Comment field.
{!Id}	Unique Salesforce.com record Id of the Task. Generally used to build a hyperlink to the task back in Salesforce. Note: This token should not be used in the ContactTaskReminder template.
{!LastModifiedBy.Email}	Email address of the user who last edited the task.
{!LastModifiedBy.Name}	Name of the user who last edited the task.
{!LastModifiedBy.Phone}	Phone number of the user who last edited the task.
{!Priority}	Priority of the task.
{!SFDCURL}	Special merge field that renders the URL of the organization's Salesforce.com instance. Generally, this field is used to build a hyperlink to the Task back in Salesforce. Note: This token should not be used in the ContactTaskReminder template.
{!Status}	Status of the task.
{!Subject}	Subject of the task.



{!TaskCompleteEmailAddress}	<p>The email address of the Salesforce email handler process set up to handle the Contact Task completion processing via an email message. The value of this token comes directly from the Email Service Address setting on the Contact Task configuration page.</p> <p>Note: This token should only be used if you have configured iTools for the Task Completion Using Email method for Contact Tasks.</p> <p>Note: This token should not be used in the TaskReminder template.</p>
{!TaskCompleteURL}	<p>Special token that resolves to the URL to the Sites page the contact can access to update and complete their assigned task. The value of the token is based on the configuration settings plus special query string parameters added to the address of the Sites page.</p> <p>Note: This token should only be used if you have configured iTools for the Task Completion Using Sites Page method for Contact Tasks.</p> <p>Note: This token has no value in the TaskReminder template.</p>
{!TaskListURL}	<p>Special token that resolves to the URL to the Sites page the contact can access to view a list of all tasks assigned to them. The value of the token is based on the configuration settings plus special query string parameters added to the address of the Sites page.</p> <p>Note: This token should only be used if you have configured iTools for the Task Completion Using Sites Page method for Contact Tasks.</p> <p>Note: This token has no value in the TaskReminder template.</p>
{!What.Name}	<p>Name of the object (Account, Opportunity, etc.) specified in the task Related To field.</p>
{!Who.Name}	<p>Name of the Contact or Lead specified in the task Name field.</p>



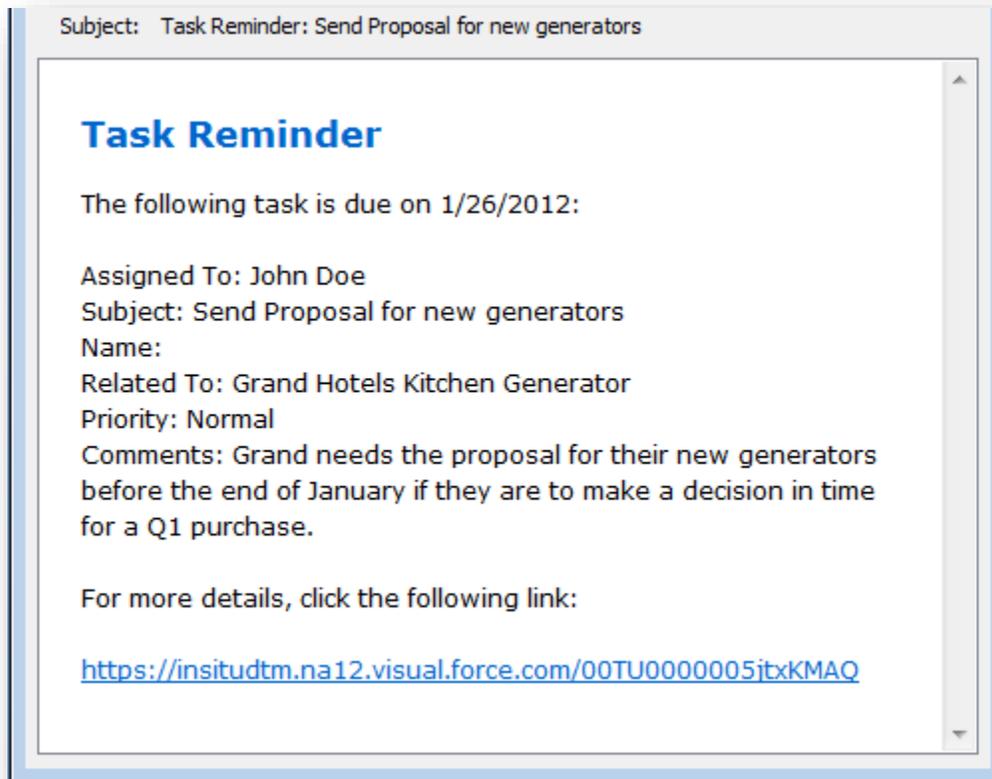
If you are using the Contact Task feature to assign tasks to people outside your organization, it is a best practice to include your organization's name in the notification message since that contact could receive task assignments from multiple organizations who are using iTools Delegated Tasks Management.

The default version of the **ContactTaskReminder** template uses the `{!CreatedBy.CompanyName}` token as the company name value which works well if every user has the proper Company Name value set on their Salesforce User record. If this is not the case for all users, then it may be easier to update the template and replace the `{!CreatedBy.CompanyName}` token with your company's proper name.



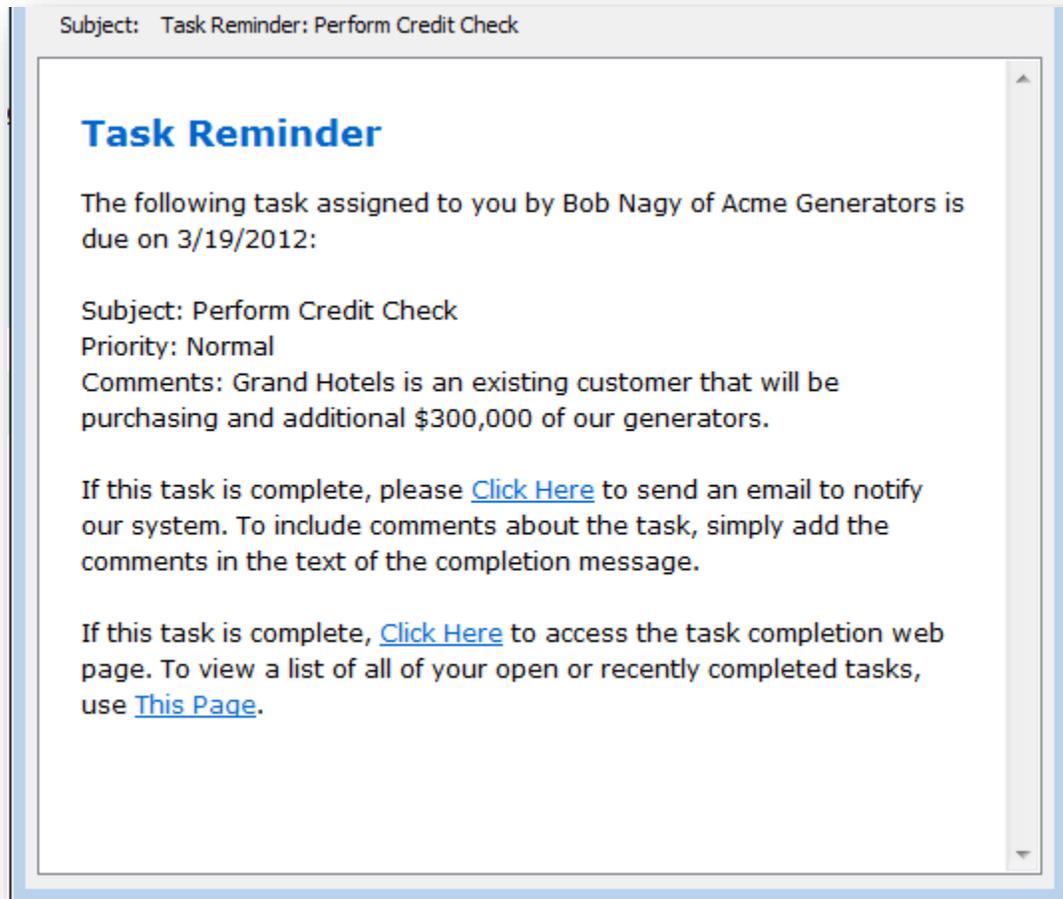
The default versions of the Reminder Notification feature templates are as follows:

Task Reminder (sent to internal Salesforce users)





Contact Task Reminder (sent to Contacts which may be external to your organization)

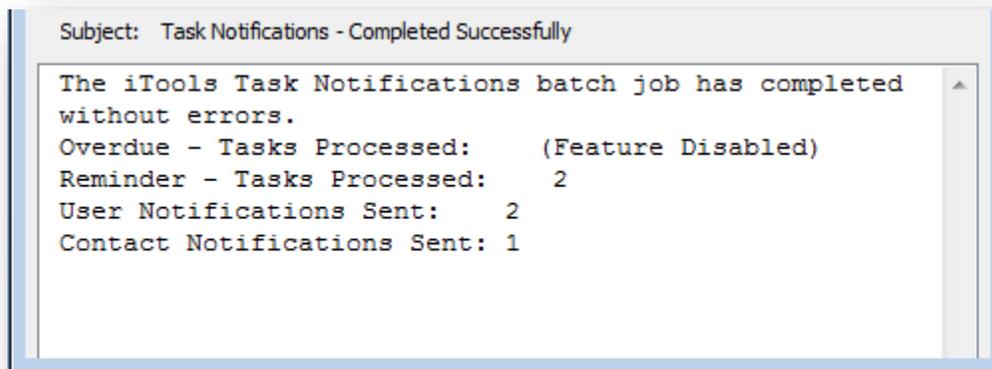




Run Task Notifications

The generation of the Reminder Notifications is performed by an iTools Delegated Tasks Management process call **Task Notifications**. This process runs as a batch Apex Job and is responsible for sending both Reminder and Overdue Notifications. Typically, you schedule the batch job to run at a regular interval, but it can also be manually initiated.

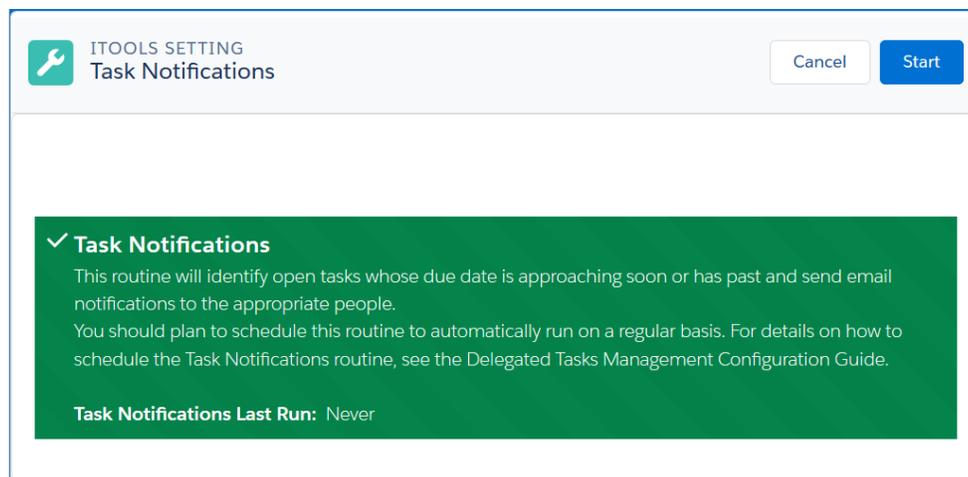
At the end of the Task Notification process, an email message is sent that summarizes the number of tasks processed as well as the number of notices sent to internal users and external contacts. The email will also list the names of any users that should have been sent notifications but were not because they were not licensed for iTools.



If you do not want the system to send the message each time the process is run, set the **SendReport** iTools Setting to N(o).

Follow these simple steps to manually run the Task Notifications process.

1. Access the **RunTaskNotification** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.





2. Click the **Start** button to initiate the Task Notifications batch process.



You can check the status of the batch job by going to:

Lightning:

Setup > Environments > Jobs > Apex Jobs

Classic:

Setup > Jobs > Apex Jobs

Then locate the job with the Apex Class value of **InSitu_BatchTaskNotification**.



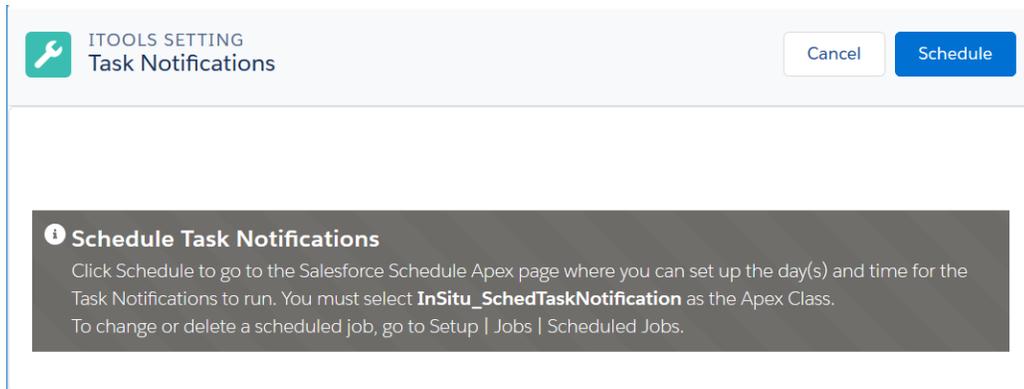
Only those users permitted to view and modify all open tasks should manually run the Task Notifications job. This generally means users assigned the System Administrator profile.



Schedule Task Notifications

To ensure that reminder notifications are generated on a consistent and timely basis, the Task Notifications process should be scheduled to run at least once a day. Follow these steps to schedule the Task Notifications job.

1. Access the **ScheduleTaskNotifications** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.



2. Click the **Schedule** button.
3. Enter a **Job Name**, select the Apex Class `InSitu_SchedTaskNotification`, fill in the execution schedule, and click **Save**.

Schedule Apex

[Help for this Page](#)

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.



A scheduled Apex Job cannot be edited or paused. If you need to change the execution schedule or eliminate it completely, you must delete the scheduled job and create a new one with the desired changes.

You can access the list of schedule jobs by going to:

Lightning:

Setup > Environments > Jobs > Scheduled Jobs

Classic:

Setup > Jobs > Scheduled Jobs



Only those users permitted to view and modify all open tasks should schedule the Task Notification job. This generally means users assigned the System Administrator.



If the account of the user who schedules a job is made inactive, that scheduled job will fail each time it runs. If possible, you should log in using a dedicated system/integration account or the root account (first account given to your organization in Salesforce which cannot be inactivated) when scheduling jobs.



Implementation Tips

Prior to implementing the Reminder Notifications feature, please review the following implementation tips. These tips are provided to help ensure a smooth rollout of this feature to your users.

- Educate your Salesforce users about the Reminder Notifications feature and the messages they may receive. It is especially important to educate task delegators as they could receive messages related to tasks they do not own.
- Inform your users that Reminder Notifications are generated for ***all*** tasks, not just those that have been delegated to someone else.
- Finalize all the feature's options and settings (e.g. days in advance, who should be notified, etc.) before you run the Task Notifications job.
- Carefully plan your rollout if you want the system to generate Overdue as well as Reminder notices. Be sure to finalize the configuration of both features before you run the Task Notification job.
- Manually run the Task Notifications job before you set it up to run on a scheduled basis to make sure it runs correctly. The most common cause of a failure during execution is the existence of tasks that do not currently meet all active validation rules. Because Salesforce does not revalidate existing tasks when new validation rules are added to the system, any existing task that does not meet the current rules will generate an error when the Task Notification process attempts to update the task to send a notification.
- Be sure the user who schedules the Task Notifications job has View All and Modify All permissions for Tasks.
- If possible, schedule the batch job using the initial Salesforce Administrator account as this account can never be inactivated. If a scheduled job is created by any other user and that user leaves your organization and their Salesforce account is deactivated, the batch job will fail.
- Understand that the Task Notifications process will update each task that requires a reminder or overdue notification. The update is made to custom activity fields that were added by iTools and are not visible to your users. When the process updates the value in these task fields, Salesforce will automatically set the **Last Modified By** name and date for the task as the user who manually initiated or scheduled the Task Notification process.
- It is possible that a user may receive a Reminder or Overdue notice regarding a task for which they do not have permission to view in Salesforce. This will occur if the user delegates a task to a user that is 'higher' in the Role Hierarchy and the Sharing Settings for Activities is set to Private. In this situation, the delegating user will not be able to view the task in Salesforce and that task will not be displayed in their Delegated Task List. Despite the Salesforce restriction, the



Task Notifications process will still generate a message for the task and include all merge fields as defined in the message template.

- Recognize that Reminder Notices sent to contacts in regard to upcoming Contact Tasks are subject to the organization's Salesforce outbound email limit. If the outbound email limit has been reached when the Task Notifications job is run, messages will not be sent to external recipients. Email messages sent to Salesforce users within your organization are not subject to the daily email limit.
- Reminder notices are only generated for tasks that were created by a licensed iTools for Salesforce user but may be sent to unlicensed users when iTools is first installed and initialized. The reason for this is because iTools cannot detect the license status of the user who created a task that was created before iTools Delegated Tasks Management was installed or upgraded to version 3.5 or higher. To ensure all licensed users receive the full benefit of iTools, the Task Notification process will generate reminder notices for **all** open tasks created before iTools Delegated Tasks Management version 3.5 was installed. If you have not licensed iTools for all your Salesforce users, unlicensed users will receive reminder notices for their existing open tasks, but not for any newly created ones. Make sure your users are aware of these alerts and remind those unlicensed users that they will not receive such notifications in the future.
- A user must be allocated a license to BOTH the iTools Configuration Manager and the iTools Delegated Tasks Management packages to be considered "iTools Licensed".
- Remember, the Task Notification job generates emails for BOTH this feature and the Overdue Notification feature. If you plan to use both features, you should complete your configuration and implementation planning for both features before you run the Task Notification job for the first time.
- It is possible that a user will receive more than one iTools Task Reminder message for a single task. Beginning with version 5.7, iTools will "reset" the task reminder tracking mechanism if a task that has already generated a reminder (and an overdue notice if configured) has its Due Date changed to a date that is in the future.



Feature: Overdue Notification

An important aspect of managing the tasks delegated to others is monitoring for those tasks that are not completed by their assigned due date. While overdue tasks are highlighted with a red due date in both the My Task and the Delegated Tasks lists, you may also want to get an email message as an additional reminder. The Overdue Notification feature of iTools Delegated Tasks Management makes this possible.

Overdue notifications are generated for all overdue tasks, not just delegated tasks, if the user who created the task has been allocated a license to the iTools Configuration Manager and the iTools Delegated Tasks Management packages.

Enabling and Configuring Overdue Notification

A single configuration page is provided to enable and configure the Overdue Notification feature. Follow these simple steps to activate and configure the feature.

1. Access the **ON_Configure** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.
2. Click on the **Edit** button.
3. Click the **Enable the Overdue Notification feature** checkbox. You may also want to configure other settings related to this feature while on this page. Click the **Save** button to save your changes. The feature is now enabled.

The screenshot shows the 'iTOOLS SETTING EDIT' page for 'Overdue Notification Configuration'. At the top right, there are 'Cancel' and 'Save' buttons. The main content area is titled 'Settings' and includes a checkbox for 'Enable the Overdue Notification feature'. Below this is a 'General Settings' section with three dropdown menus: 'Days Overdue Before Notification' (set to 1), 'Minimum Days Between Notifications' (set to 3), and 'Maximum Number of Notifications' (set to 4). A 'Send Overdue Notification To' section contains four checkboxes: 'Task Owner' (checked), 'Task Delegator' (checked), 'Related To Owner' (unchecked), and 'Task Contact' (checked). Each checkbox has a descriptive text. The 'Send Overdue Notification From' section has a dropdown menu for 'Organization-Wide Email Address' set to 'NONE - Use Task Owner'. A small asterisk and the text '= Required Information' are visible at the bottom right of the settings area.



The configuration options include:

Days Overdue Before Notification: This is the number of days a task must be overdue before the first overdue notification message is sent.

Minimum Days Between Notifications: The overdue notification feature will generate multiple overdue notifications for the same task if that task is not completed or the Due Date has been extended. This setting determines how many days must pass before a subsequent notification is sent.

Maximum Number of Notifications: This setting controls the total number of overdue notifications that will be sent for a given task. The feature can be configured to send up to a maximum of 9 overdue notices per task.

There are also several options for specifying who should receive an overdue task notification:

Task Owner: The user currently specified in the Assigned To field.

Task Delegator: The user that created the task, but is not the current owner.

Related To Owner: The user that owns the object specified in the Related To field for the task. This user will only be notified if the Related To Owner feature has been activated.

Task Contact: The contact specified in the Name field for the task. This person will only be notified if the Contact Tasks feature has been activated ***and*** the task has been designated as a Contact Task.

You can also control the Display Name of the sender of the notification email:

By default, the “sender” of an Overdue Task Notification email is the user specified in the task’s **Assigned To** field. You can change this default by selecting an Organization-Wide email address in the **Organization-Wide Email Address** field. To create or manage an Organization-Wide email address go to:

Lightning: **Setup | Email | Organization-Wide Addresses.**

Classic: **Setup | Email Administration | Organization-Wide Addresses.**



Update Message Templates

iTools Delegated Tasks Management Overdue Notification messages serve as a reminder to the recipient that a task they have been assigned is overdue and action should be taken. For ultimate flexibility and customization, iTools uses email templates as the basis for the notifications that it sends. This gives organizations the ability to adjust the design of both the content and layout of the messages - for more effective communication or to meet certain company standards set up for internal communications.

To make sure the notifications work well for all types of email applications and web browsers, each template is made up of a Subject field, a message body in HTML form, and a message body in plain Text form. Based on the settings and capabilities of their email reader, the most appropriate version will be used for each user.

iTools Delegated Tasks Management provides two templates for the Overdue Notification feature. The one template, **TaskOverdue**, is used when the email recipient is a Salesforce user within your organization, such as a Task Owner, Delegator, or Related To Owner. The other template, **ContactTaskOverdue**, is used when the email recipient is a Contact that is most likely not one of your licensed Salesforce users and may not even be a member of your organization.

While the two templates are similar in purpose, they differ in the way they instruct the recipient to take action. The **TaskOverdue** template can simply provide a direct link (URL) to the task in your Salesforce system with which they can mark the task as complete. The **ContactTaskOverdue** template should not include a direct link (URL) to Salesforce since the recipient will not have proper authority to access it. Furthermore, the 'instruction' portion will vary depending on which mechanism(s) you have enabled or prefer to use for the Contact Task Completion process.

Both templates are installed as part of the iTools package and are similar in content and layout to other native Salesforce.com Task and Event notification messages. No modifications to the iTool templates are required, but you are free to customize them just like any other template you may have in Salesforce.

Salesforce.com did not originally support the use of Task or Event fields as merge fields in native email templates. Therefore, the location and way you define the email templates for iTools Delegated Tasks Management is slightly different. The iTools email templates are defined and edited in the same way as other iTools customizations – using the iTools Settings Tab. Each message template has a set of iTools Settings it uses to define the subject and body of the email message.

The iTools message templates support a set of merge fields which serve as placeholders for data that will be replaced with information from the current Task or Event. Generally, the name of the merge field is the same name as the Task or Event field. The syntax of an iTools merge field consists of an open curly brace and exclamation point, followed by the field API name and a closing curly brace: `{!ActivityDate}`. All standard



fields are supported as well as any custom Activity field your organization has defined. In addition, there are a few 'special' merge fields which do not equate directly to fields on a Task object, but are helpful when constructing notification messages. The following table includes the special and most commonly used merge fields that are available to include in the **TaskOverdue** and **ContactTaskOverdue** templates. Merge tokens designed for use in only one of the two templates are noted:

Merge Field	Meaning
{!ActivityDate}	Due date of the task.
{!ContactTaskId}	Special encrypted form of the Contact Task ID. This value is not a Salesforce record ID and will be required in the subject field of any email message sent to indicate task completion. Note: This token should appear between "ref:" and ":ref" in the subject of the Contact Task Completion email message. Note: This token should not be used in the TaskOverdue template.
{!CreatedBy.Email}	Email address of the user that created the task.
{!CreatedBy.CompanyName}	Company name associated with the user that created the task. (see note below)
{!CreatedBy.Name}	Name of the user that created the task.
{!CreatedBy.Phone}	Phone number of the user that created the task.
{!Description}	Value of the Comment field.
{!Id}	Unique Salesforce.com record Id of the task. Generally used to build a hyperlink to the Task back in Salesforce. Note: This token should not be used in the ContactTaskOverdue template.
{!LastModifiedBy.Email}	Email address of the user who last edited the task.
{!LastModifiedBy.Name}	Name of the user who last edited the task.
{!LastModifiedBy.Phone}	Phone number of the user who last edited the task.
{!Priority}	Priority of the task.
{!SFDCURL}	Special merge field that renders the URL of the organization's Salesforce.com instance. Generally, this field is used to build a hyperlink to the task back in Salesforce. Note: This token should not be used in the ContactTaskOverdue template.
{!Status}	Status of the Task.



{!Subject}	Subject of the Task.
{!TaskCompleteEmailAddress}	<p>The email address of the Salesforce email handler process set up to handle the Contact Task completion processing via an email message. The value of this token comes directly from the Email Service Address setting on the Contact Task configuration page.</p> <p>Note: This token should only be used if you have configured iTools for the Task Completion Using Email method for Contact Tasks.</p> <p>Note: This token should not be used in the TaskOverdue template.</p>
{!TaskCompleteURL}	<p>Special token that resolves to the URL for the Sites page the contact can access to update and complete their assigned task. The value of the token is based on the configuration settings plus special query string parameters added to the address of the Sites page.</p> <p>Note: This token should only be used if you have configured iTools for the Task Completion Using Sites Page method for Contact Tasks.</p> <p>Note: This token has no value in the TaskOverdue template.</p>
{!TaskListURL}	<p>Special token that resolves to the URL for the Sites page the contact can access to view a list of all tasks assigned to them. The value of the token is based on the configuration settings plus special query string parameters added to the address of the Sites page.</p> <p>Note: This token should only be used if you have configured iTools for the Task Completion Using Sites Page method for Contact Tasks.</p> <p>Note: This token has no value in the TaskOverdue template.</p>
{!What.Name}	Name of the object (Account, Opportunity, etc.) specified in the task Related To field.
{!Who.Name}	Name of the Contact or Lead specified in the task Name field.



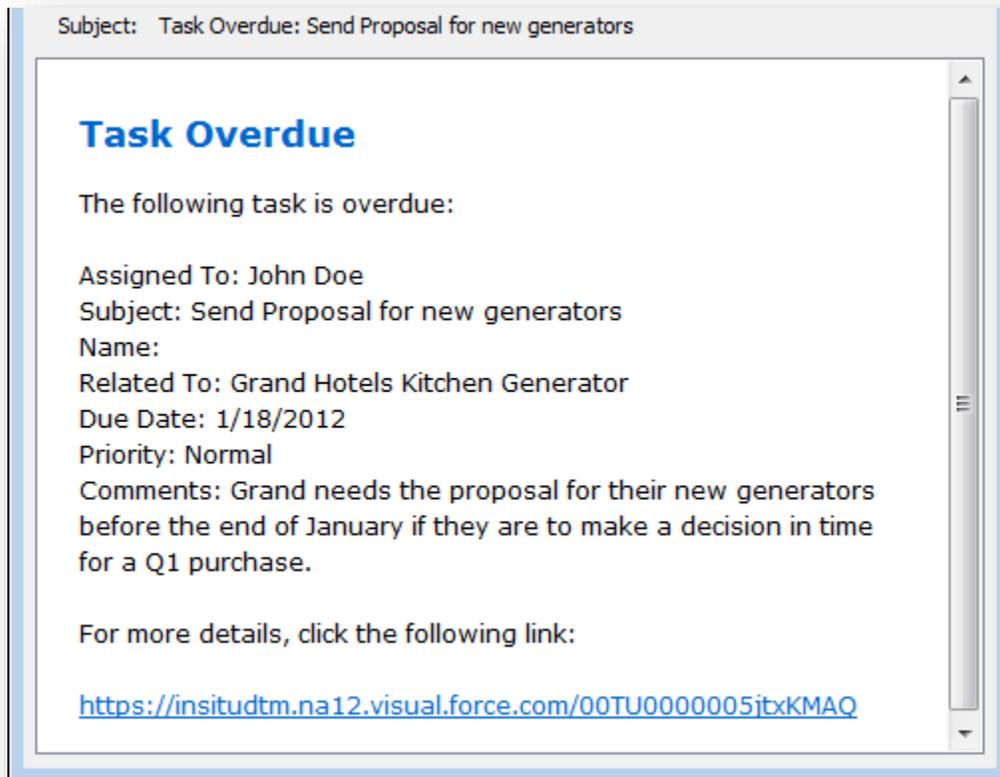
If you are using the Contact Task feature to assign tasks to people outside your organization, it is a best practice to include your organization's name in the notification message since that contact could receive task assignments from multiple organizations who are using iTools Delegated Tasks Management.

The default version of the **ContactTaskOverdue** template uses the `{!CreatedBy.CompanyName}` token as the company name value which works well if every user has the proper Company Name value set on their user record. If this is not the case for all users, then it may be easier to update the template and replace the `{!CreatedBy.CompanyName}` token with your company's proper name.



The default versions of the Overdue Task Notification feature templates are as follows:

Task Overdue (sent to internal Salesforce users)





Contact Task Overdue (sent to Contacts which may be external to your organization)

Subject: Task Overdue: Perform Credit Check

Task Overdue

The following task assigned to you by Bob Nagy of Acme Generators is overdue:

Subject: Perform Credit Check
Due Date: 3/14/2012
Priority: Normal
Comments: Grand Hotels is an existing customer that will be purchasing and additional \$300,000 of our generators.

If this task is complete, please [Click Here](#) to send an email to notify our system. To include comments about the task, simply add the comments in the text of the completion message.

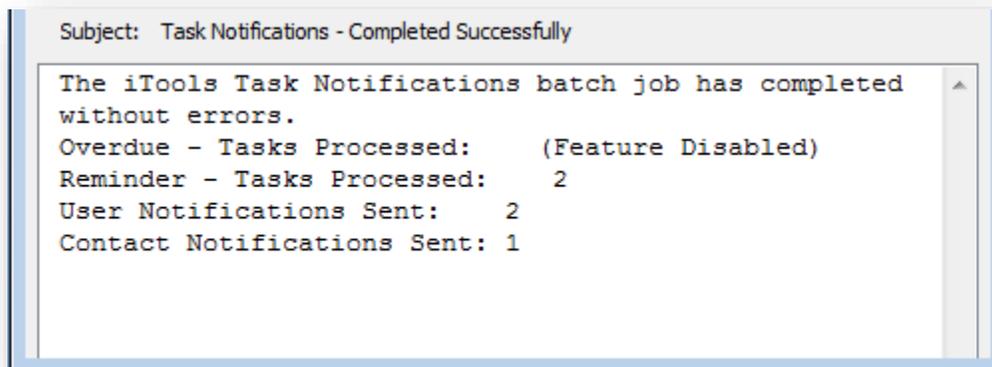
If this task is complete, [Click Here](#) to access the task completion web page. To view a list of all of your open or recently completed tasks, use [This Page](#).



Run Task Notifications

The generation of the Overdue Notifications is performed by an iTools Delegated Tasks Management process call **Task Notifications**. This process runs as a batch Apex Job and is responsible for sending both Reminder and Overdue Notifications. Typically, you schedule the batch job to run at a regular interval, but it can also be manually initiated.

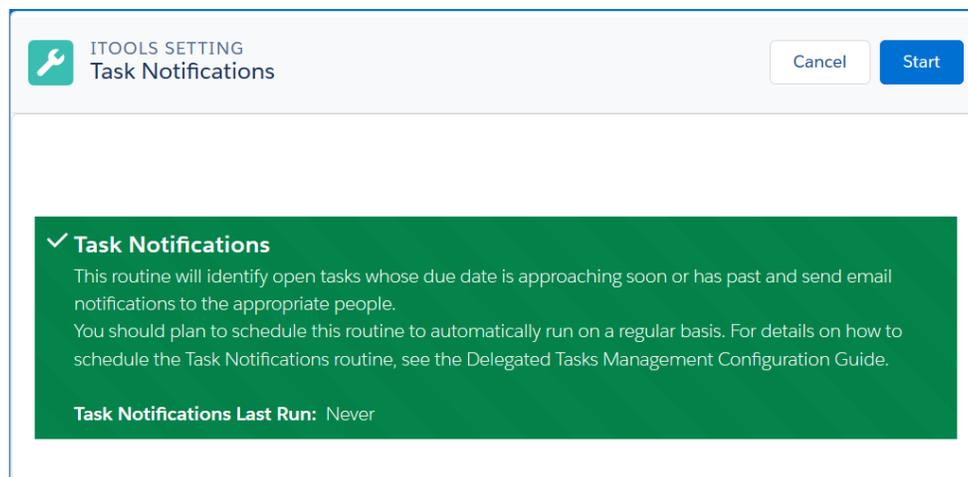
At the end of the Task Notification process, an email message is sent that summarizes the number of tasks processed as well as the number of notices sent to internal users and external contacts. The email will also list the names of any users that should have been sent notifications but were not because they were not licensed for iTools.



If you do not want the system to send the message each time the process is run, set the **SendReport** iTools Setting to N(o).

Follow these simple steps to manually run the Task Notifications process.

1. Access the **RunTaskNotification** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.





2. Click the **Start** button to initiate the Task Notifications batch process.



You can check the status of the batch job by going to:

Lightning:

Setup > Environments > Jobs > Apex Jobs

Classic:

Setup > Jobs > Apex Jobs

Then locate the job with the Apex Class value of **InSitu_BatchTaskNotification**.



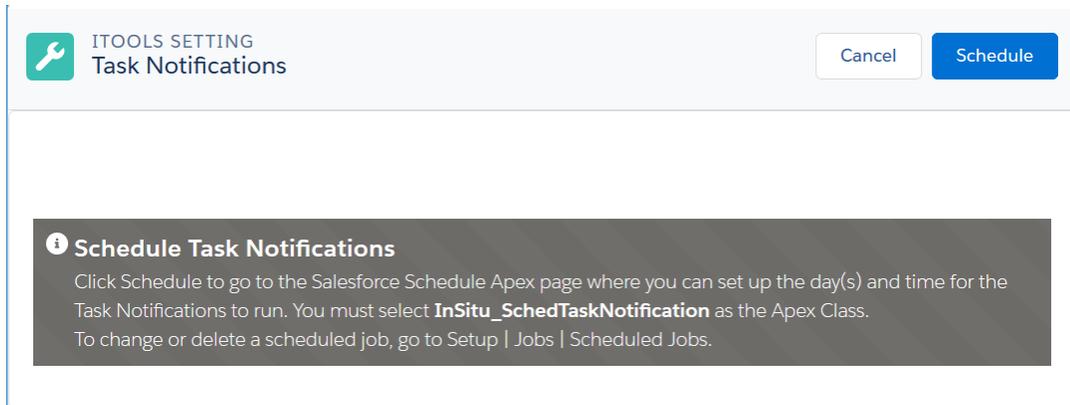
Only those users permitted to view and modify all open tasks should manually run the Task Notifications job. This generally means users assigned the System Administrator profile.



Schedule Task Notifications

To ensure that overdue notifications are generated on a consistent and timely basis, the Task Notifications process should be scheduled to run at least once a day. Follow these steps to schedule the Task Notifications job.

1. Access the **ScheduleTaskNotifications** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.



ITOOLS SETTING
Task Notifications

Cancel Schedule

Schedule Task Notifications

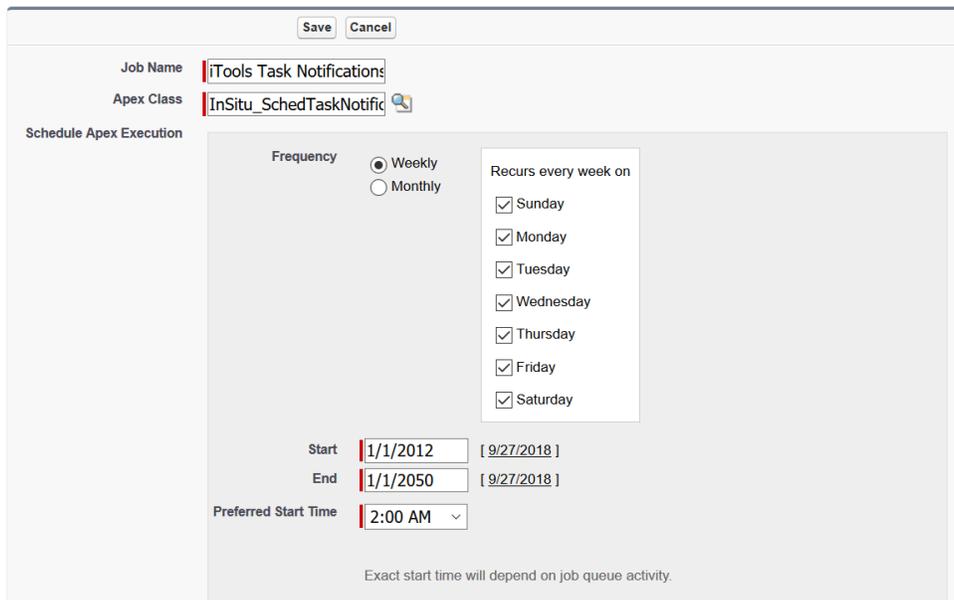
Click Schedule to go to the Salesforce Schedule Apex page where you can set up the day(s) and time for the Task Notifications to run. You must select **InSitu_SchedTaskNotification** as the Apex Class. To change or delete a scheduled job, go to Setup | Jobs | Scheduled Jobs.

2. Click the **Schedule** button.
3. Enter a Job Name, select the Apex Class `InSitu_SchedTaskNotification`, fill in the execution schedule, and click **Save**.

Schedule Apex

[Help for this Page ?](#)

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.



Save Cancel

Job Name

Apex Class

Schedule Apex Execution

Frequency Weekly Monthly

Recurs every week on

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Start [9/27/2018]

End [9/27/2018]

Preferred Start Time

Exact start time will depend on job queue activity.



A scheduled Apex Job cannot be edited or paused. If you need to change the execution schedule or eliminate it completely, you must delete the scheduled job and create a new one with the desired changes.

You can access the list of schedule jobs by going to:

Lightning:

Setup > Environments > Jobs > Scheduled Jobs

Classic:

Setup > Jobs > Scheduled Jobs



Only those users permitted to view and modify all open tasks should schedule the Task Notification job. This generally means users assigned the System Administrator.



If the account of the user who schedules a job is made inactive, that scheduled job will fail each time it runs. If possible, you should log in using a dedicated system/integration account or the root account (first account given to your organization in Salesforce which cannot be inactivated) when scheduling jobs.



Implementation Tips

Prior to activating the Overdue Notifications feature, please review the following implementation tips. These tips are provided to help ensure a smooth implementation of this feature.

- Educate your Salesforce users about the Overdue Notifications feature and the messages they may receive. It is especially important to educate task delegators as they could receive messages related to tasks they do not own.
- Prepare your users for a potentially large number of emails the first time you run the Task Notification job. Normally the overdue notices are generated as task become overdue but the first time the job is run it will process all overdue tasks whose Due Date is greater than the current date minus the number of days specified in the **MaxDaysOverdue** iTools Setting.
- Inform your users that Overdue Notifications are generated for ***all*** tasks, not just those that have been delegated to someone else.
- Finalize all the feature's options and settings (e.g. days between notices, maximum number of notices, etc.) before you run the Task Notifications job.
- Remember that notifications may not be sent for those tasks that are way overdue. Since the **MaxDaysOverdue** iTools Setting is used to determine which tasks require overdue notices, any task older than the **MaxDaysOverdue** specified will ***not*** be processed by the Task Notifications job.
- Carefully plan your rollout if you want the system to generate Overdue as well as Reminder notices. Be sure to finalize the configuration of both features before you run the Task Notifications job.
- Manually run the Task Notifications job before you set it up to run on a scheduled basis to make sure it runs correctly. The most common cause of a failure during execution is the existence of tasks that do not currently meet all active validation rules. Because Salesforce does not revalidate existing tasks when new validation rules are added to the system, any existing task that does not meet the current rules will generate an error when the Task Notifications process attempts to update the task in order to send a notification.
- Be sure the user who schedules the Task Notifications job has View All and Modify All permissions for Tasks.
- If possible, schedule the batch job using the initial Salesforce Administrator account as this account can never be inactivated. If a scheduled job is created by any other user and that user leaves your organization and their Salesforce account deactivated, the batch job will fail.
- Understand that the Task Notifications process will update each task that requires a reminder or overdue notification. The update is made to custom



activity fields that were added by iTools and are not visible to your users. When the process updates the value in these task fields, Salesforce will automatically set the **Last Modified By** name and date to the user who manually initiated or scheduled the Task Notifications process.

- It is possible that a user may receive a Reminder or Overdue notice regarding a task for which they do not have permission to view in Salesforce. This will occur if the user delegates a task to a user that is 'higher' in the Role Hierarchy and the Sharing Settings for Activities is set to Private. In this situation, the delegating user will not be able to view the task in Salesforce and that task will not be displayed in their Delegated Task List. Despite the Salesforce restriction, the Task Notifications process will still generate a message for the task and include all merge fields as defined in the message template.
- Recognize that Overdue Notices sent to contacts in regard to overdue Contact Tasks are subject to the organization's Salesforce outbound email limit. If the outbound email limit has been reached when the Task Notifications job is run, messages will not be sent to external recipients. Email messages sent to Salesforce users within your organization are not subject to the daily email limit.
- Overdue notices are only generated for tasks that were created by a licensed iTools user but may be sent to unlicensed users when iTools is first installed and initialized. The reason for this is because iTools cannot detect the license status of the user who created a task before iTools Delegated Tasks Management was installed or upgraded to version 3.5 or higher. To ensure all licensed users receive the full benefit of iTools, the Task Notifications process will generate overdue notices for ***all*** open tasks created before iTools Delegated Tasks Management version 3.5 was installed. If you have not licensed iTools for all of your Salesforce users, unlicensed users will receive overdue notices for their existing open tasks, but not for any newly created ones. Make sure your users are aware of these alerts and remind those unlicensed users that they will not receive such notifications in the future.
- A user must be allocated a license to BOTH the iTools Configuration Manager and the iTools Delegated Tasks Management packages to be considered "iTools Licensed".
- Remember, the Task Notification job generates emails for BOTH this feature and the Reminder Notification feature. If you plan to use both features, you should complete your configuration and implementation planning for both features before you run the Task Notification job for the first time.



Feature: Group Tasks

Tasks that should be delegated to a department or business function rather than a specific individual can now be assigned to an iTools “Task Group”. Any user assigned to the group can claim a task as though it were assigned to them directly, complete it, and have notification sent to the delegator. Group owners / members can monitor the group’s activity via Chatter and receive periodic performance reports via email.

ACTION	DUE DATE	SUBJECT	ASSIGNED TO	STATUS	NAME	RELATED TO
Release	10/29/2018	Additional Purchase \$250K	Terry Hamer	Assigned to Credit Check		Burlington Textiles Corp of America
Claim	10/31/2018	Additional Purchase - \$1.5 Million	Unclaimed (0 days)	Assigned to Credit Check		United Oil & Gas Corp.
Claim	11/6/2018	New Customer Check	Unclaimed (0 days)	Assigned to Credit Check		Grand Hotels & Resorts Ltd

The Group Tasks feature works by having the Salesforce System Administrator create a record in a custom object added by iTools called a Task Group. A Task Group record is created for each group of users responsible for a certain type of tasks. The group record is assigned an Owner, the person responsible for the group, and associated with a one of the possible values of the standard task object’s Status field (usually a value added to the list specifically for the group such as “Assigned to Credit Check”). When users, or workflow rules, wish to assign a new task to the Task Group, they fill out the New Task form just as they normally would except they choose the special value for the initial Status (e.g. “Assigned to Credit Check”). Users who have been granted special access to the Group Task object can then see the lists of tasks associated to the group, claim any task that is unclaimed, and complete it just as if it were assigned to them directly. Users that create a task assigned to a group will see that task just like any other delegated tasks and can receive notifications via email when the task is completed.

You also have the option to associate a Task Group with an email address and have all emails sent to that address automatically converted to the group task assigned to that group.

The Delegated Tasks Management tool will also track how long it takes for group assigned tasks to be claimed and completed and can periodically send the group owners, and members, and report of how well they are doing.



Enabling and Configuring Group Tasks

As with most of the features in iTools Delegated Tasks Management, you must first enable the Group Tasks feature and choose some basic configuration options. Follow these simple steps to activate and configure the feature.

1. Access the **GT_Configure** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.
2. Click on the **Edit** button.
3. Click the **Enable the Group Tasks feature** checkbox. You may also want to configure other settings related to this feature while on this page. Click the **Save** button to save your changes. The feature is now enabled.

The screenshot shows the 'iTools Setting Edit: Group Tasks Configuration' window. At the top, there is a 'Cancel' button and a 'Save' button. Below the title bar, there is a 'Settings' section with a checked checkbox for 'Enable the Group Tasks feature'. Underneath, there is a 'General Settings' section with a red asterisk indicating required information. The fields in this section are: 'Rows per Page' (25), 'Default Scope' (Unclaimed), 'New Task Email Template' (iTools_New_Group_Task_Notice), 'Maximum Days Overdue' (90), and 'Recently Closed Days' (60). At the bottom, there is an unchecked checkbox for 'Allow Recurring Task to be a Group Task' with a note: '(Recurring tasks are removed from the recurring series when made a Group Task)'.

The General configuration settings include:

Rows per Page: The number of tasks that make up one page on the Group Tasks tab.

New Task email Template: Identifies the classic email template used to construct an email notice to Task Group members when a new task is added to the group. The value specified in this field must be the Template Unique Name of a classic email template located in a folder which is visible to all users.



The default value is the unique name of a classic email template added to your org when iTools was installed/upgraded. You can edit this email template rather than specify a new template we recommend you clone that template and create a new one.



Default Scope: The initial selection in the View dropdown list on the Group Tasks tab the first time the user visits the tab. Subsequent visits to the tab will automatically select that last value in the View dropdown.

Maximum Days Overdue: The maximum number of days a Group Task can be overdue and still appear in the Group Tasks tab. Tasks that are overdue by more than the number of days specified are considered “abandon” and no longer displayed in the group’s list.

Recently Closed Days: Determines how far back in time the system should look for closed group tasks when the user chooses the “Tasks that are Recently Closed” or “Tasks that are Open or Recently Closed” view on the Group Tasks tab.

Allow Recurring Task to be a Group Task: Normally the system will not allow a series of Recurring tasks to be assigned a status which would associate them with a Task Group. This restriction exists because Salesforce prohibits the owner (Assigned To) of one instance of a task series from being changed and the Group Task claiming process requires the owner to be updated to the member claiming the task. If you check this checkbox the system will allow Recurring tasks to be assigned to a group, BUT the task will be removed from the series when it is “claimed” by a group member. This removal process requires deleting the original task and creating a new one that is almost identical but is no longer part of the series. Please keep in mind that this process will change the task such that any updates to the entire series will not be made to the claimed task. Also, the creator of the task will be changed to the user that claimed it, so the original task creator will no longer be notified of task status changes and it will no longer appear in their list of delegated tasks.



Grant Users Permission

Before creating your first Task Group it is important that permissions to the Group Task feature's related resources in Salesforce be set correctly. Failure to allocate permissions correctly can result in lost or "hijacked" task records. How you go about allocating the proper permissions is dictated by the security option you selected when your first installed iTools Delegated Tasks Management.

If you selected the option **Install for Admins Only**, you can proceed directly to the instructions for assigning the proper Permission Sets. If you chose the more common option, **Install for All Users**, you will need to first remove access to certain objects and resources to ensure your users do not access resources they are not permitted to see/use.

If access was granted to all users at install you must update each of your modifiable User Profiles and make the following changes:

Object: Task Group

- Remove all Object Permissions

Custom Tab Settings: Group Tasks

- Set the Tab Setting to "Tab Hidden"

These changes will ensure that unauthorized users do not create new Task Groups or access tasks assigned to a specific group.

iTools Delegated Tasks Management added several Permission Sets to your Salesforce environment when it was installed. Two of these Permission Sets, **iTools Task Group Administrator** and **iTools Task Group Member**, must be assigned to the proper users as part of configuring the Group Tasks feature. You can assign the Permission Sets by either clicking on the **Edit Assignments** button in the Permission Set Assignments section of the User detail page or by going to the list of Permission Sets in Setup, locating each Permission Set, click on its name, then click the **Manage Assignments** button at the top of the Permission Set detail page.

iTools Task Group Administrator

Assign this Permission Set to the user(s) responsible for creating and administering the Group Task feature. Only users with this permission set are permitted to create and delete the Task Group records which define the various groups. The individual owners of each group do NOT need this permission to manage their group. In most organizations, only the Salesforce system administrator will need this permission set applied to their account.



iTools Task Group Member

Assign this Permission Set to all users that will be either owners or members of a Task Group. Any Salesforce user can assign a task to the Task Group but only the group members are permitted to see, claim, and complete tasks assigned to their group. Group members must also be granted READ access to each of the Task Group records associated with the groups they are a member of but that will be covered in the next section – Setting up a Task Group.



Setting up a Task Group

Creating a new Task Group requires four important steps; add a new value to the Task object's Status field, create a new Task Group record, set the Group Owner, and specify group members. Follow these same steps for each Task Group needed by your organization.

Add a New Task Status Option

Tasks are “assigned” to a Task Group by setting the Status of the task to a value associated with the group. It is strongly recommended that you create a new Task Status value for your Task Groups rather than use any of the existing values. Follow these simple steps to add a new value to the Task Status field:

1. Navigate to the list of standard Task fields

Lightning:

Setup > Objects and Fields > Object Manager >

Locate the **Task** object in the list and click on it >

Click on Fields & Relationships

Classic:

Setup > Customize > Activities > Task Fields

2. Click on the field label **Status** in the list of fields.
3. Click on the **New** button in the Task Status Picklist Values section.
4. Enter the name of the new status value that will be associated with the new Task Group and click **Save**.

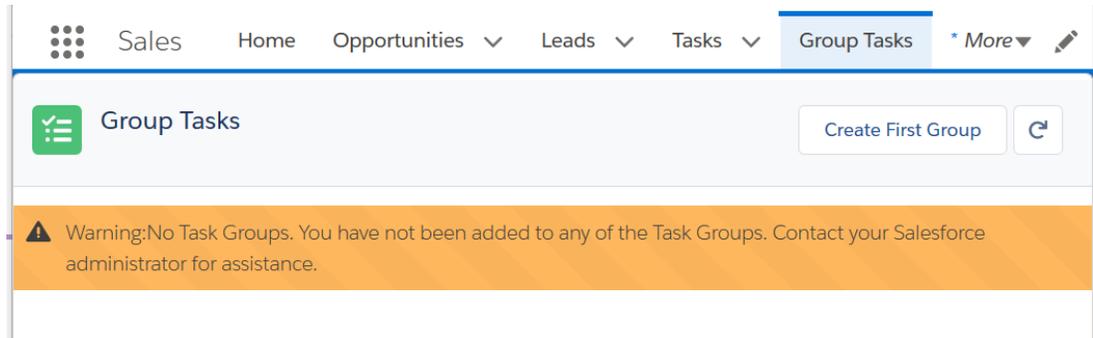


You may want to reorder the picklist values after adding the new value but do NOT make the new value the Default status value or mark it as “Closed”.



Create a Task Group Record

1. Access the **Group Tasks** tab. The method of accessing this tab is like accessing the iTools Settings tab and will vary depending on your user interface, Lightning or Classic.





2. Click on the **Create First Group** button.

New Task Group

Task Group Edit

Cancel Save

Task Group Edit

Task Group Information

* Required Information

Task Group Name *

Initially Assigned To

Associated Task Status * --Select a Task Status--

Additional Administrators Group --None--

Owner * DTM Developer

New Task Email Notice

Send To * No One

Group Specific Instructions

Summary Report

Generate Summary Report * Always

Send Summary Report To * All Group Members

Summary Report Last Run

Initial Grid Sort

Primary Sort Due Date (Oldest to Newest)

Secondary Sort Assigned To (A to Z)

Tertiary Sort Status (A to Z)

Email to Group Task

Email Address Days to Complete

Remove From Subject Accept Attachments

3. Configure the new Task Group fields and click **Save**.

- **Task Group Name:** Enter a name that identifies the group.
- **Initially Assigned To:** Designates the User the task's Assigned To field will be set to when a new task is associated with the group. If you leave this field blank, the Assigned To field will not be changed from its original value until the task is "claimed" by a member of the group. iTools Delegated Tasks Management gives all group members the ability to see and change the Assigned To field of a task associated with a Task Group regardless of the native Salesforce security so it is not necessary to have the system always change the initial Assigned To field. You should set this value to the group owner or a group member if you want tasks assigned to the group to not appear in the task creator's My Tasks list.



- **Associated Task Status:** Select the Task Status field value you created in the first step in the Task Group creation process. Anytime a task is created or edited, and this value is selected as the Status, the task will become associated with the Task Group.
- **Additional Administrators Group:** Members of the Public Group selected in this setting who are also members of the Task Group will be permitted to “release” claimed tasks even though they are neither the Task owner nor the Task Group owner. Selection of a value in this setting is optional.
- **Owner:** The Task Group owner. This user can always release tasks that have already been claimed as well as edit the properties of the Task Group. You should only select a user whose account has been assigned the **iTools Task Group Member** Permission Set.
- **Send To:** Indicates who, if anyone, should be sent an email notice when a new task is added to the group.
- **Group Specific Instructions:** Option text that will appear in the New Group Task notice. You use this field to remind task group member of special actions they should take when a new task is assigned to their group.
- **Generate Summary Report:** Indicates if and when a Group Summary Report will be generated for this group when the Task Group Reports batch job is run. See the section *Monitoring Group Performance* later in this guide for more details on the Group Summary Report.
- **Send Summary Report To:** Indicates who should receive the Group Summary Report when it is generated for this group. You can send the report to just the group’s owner or to all members including the owner.
- **Primary, Secondary, and Tertiary Sort:** Select the column / order for the initial sort of the Group Tasks grid when this group is selected as the current Task Group.
- **Email to Group Task fields:** These fields are used when you want to automatically convert an inbound email messages into a Group Task. Configuring that feature requires more than setting these fields and is covered in detail later in this section.



After the first Task Group has been created you will start the creation of additional Task Groups by clicking on the **New Group** button.

ACTION	DUE DATE +	SUBJECT	ASSIGNED TO	STATUS	NAME	RELATED TO
--------	------------	---------	-------------	--------	------	------------

Specify Task Group Members

1. A user becomes a member of a Task Group by granting them READ access to the Task Group record by adding a manual sharing record. To add, or remove, members click the **Sharing** button.
2. Click the **Add** button to add a new user(s).
3. Search and grant individual users Read Only access then click **Save**.

New Sharing [Save] [Cancel]

Sharing Information ⓘ - Required Information

Search: Users for: [] Find

Available: User: Bob Nagy

Share With: User: Adam Adams, User: Terry Hamer

Add [] Remove []

Access Level: Read Only

[Save] [Cancel]



Members **MUST** be specified as individual users. You should not grant read access to the Task Group via Public Groups, Roles, or Roles and Subordinates.



Managing Tasks Assigned to a Group

Task Group members manage the tasks assigned to their group(s) using the Group Tasks tab. This tab was added to your Salesforce environment by the iTools Delegated Tasks Management install and should only be visible to users assigned the **iTools Task Group Administrator** or **iTools Task Group Member** permission set.

ACTION	DUE DATE	SUBJECT	ASSIGNED TO	STATUS	NAME	RELATED TO
Release	10/29/2018	Additional Purchase \$250K	<input checked="" type="checkbox"/> Terry Hamer	Assigned to Credit Check		Burlington Textiles Corp of America
Claim	10/31/2018	Additional Purchase - \$1.5 Million	Unclaimed (0 days)	Assigned to Credit Check		United Oil & Gas Corp.
Claim	11/6/2018	New Customer Check	Unclaimed (0 days)	Assigned to Credit Check		Grand Hotels & Resorts Ltd

When a new task is created, and the Status field is set to a value associated with a Task Group, the task is marked by iTools as belonging to that group and will appear in the Group Task list as unclaimed. At this time any member of the group can take responsibility for completing the task by clicking on the **Claim** link next to the task. Prior to being claimed, a group member can see a summary of the task in the Group Tasks list but may not have permission to view the details or mark it complete depending on the Task security settings in your Salesforce environment. Once the group member claims a task they become the owner (Assigned To) and will have full read/write access to the task just as if the task was originally assigned directly to them.

If a group member has claimed a task but is not able to complete it in a timely manner, they can return the task ownership back to the group by clicking on the **Release** link. The Task Group owner can release any claimed task even if they are not the owner of that task.

Task members can use the filter options at the top of the Group Tasks page to easily filter the list of task to important subsets such just those they have claimed, any unclaimed, or any that are overdue regardless of which member owns them. Users can also switch which group's tasks are included in the list if they are a member of more than one Task Group.

Tasks associated with a Task Group are treated as delegated tasks even if the creator is still the owner (task is unclaimed and the group is not configured to auto-assign ownership). These tasks will appear in the Delegated Tasks list (tab and home page component) list of the task's creator. If the **Notify when Complete** checkbox on the task is checked or you have configured iTools to always send delegated task completion notices, the task's delegator will also receive email notices when the task is completed.



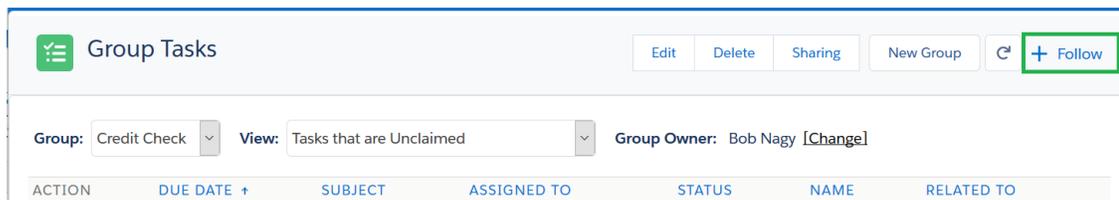
Monitoring for New Group Tasks

One of the most important duties of a Group Task member other than competing tasks assigned to the group is monitoring the group’s task list for new unclaimed tasks. Failure to monitor this list can result in important tasks not being completed by their designated deadline because no one responsible was aware they existed.

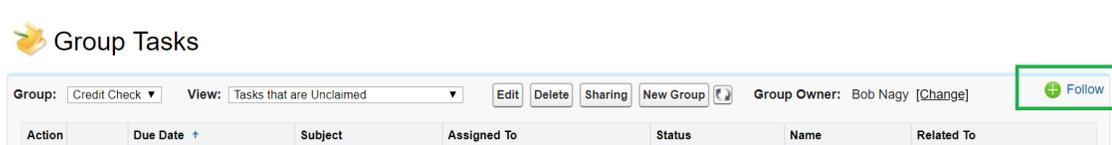
If your Task Group is very active and members are on the Group Tasks tab multiple times a day working tasks assigned to the group, you probably do not need to worry about new tasks going unclaimed for long periods of time. Train your users to use the “Tasks that are Unclaimed” filter option and establish a policy of claiming the oldest tasks first (the number of days unclaimed is included in the Assigned To column) and you should have no problems with missed tasks. However, if you have one or more Task Groups that only get tasks occasionally. You should consider one of the following techniques to supplement periodically visiting the Group Tasks tab within Salesforce.

Follow the Group on Chatter

If your organization is actively using Chatter, group members can “Follow” the Task Group in Chatter. iTools will post a Chatter message on the Task Group record every time a new task is assigned to the group. Posts will also be created when tasks are claimed, released, or completed. Members can add the Task Group to the list of objects they are following by simply clicking on the “Follow” icon at the top of the Group Tasks page.



Chatter Follow icon in Lightning



Chatter Follow icon in Classic



Group Summary Report

The Group Task feature in iTools Delegated Tasks Management includes support for a schedulable batch job that will generate an email message which summarizes the status and performance of a Task Group. While primarily designed to help monitor the group's responsiveness, the report does include the current number of unclaimed tasks. This batch job can be configured to run each day and a Task Group record can be configured such that each group member gets a copy of the message. You even have the option of only having the message sent if there are unclaimed tasks in the group's list.

Subject: Task Group Report: Test Group A

Task Group Summary

Credit Check
As of 4/4/2013 2:50 PM

Open Tasks

- 8** Unclaimed
- 2 Claimed by Nagy, Bob

Completed Tasks

- 2 Total Completed in the Last 60 Days
- 2 Completed by Developer, DTM
- 10 Average Days to Claim
- 7 Average Work Days to Complete
- 11 Average Calendar Days to Complete
- 7 Average Days Completed Before Due

See the section Monitoring Group Performance later in this guide for more details on the Task Group Summary report.



New Group Task Email Notice

Each Task Group record has the option of designating who, if anyone, should receive an email notice when a new task is added to the group. Your options are:

- No One
- Just the Task Group Owner
- Group Members but not the Group Owner
- All Group Members



Currently emails sent to users by iTools do not count against your daily email limits.

Subject: Credit Check: New Group Task

New Group Task

A new task has been assigned to the Credit Check Task Group:

Subject: Standard new customer check, \$2.5 Million

Due Date: 7/18/2019

Requested By: Bob Nagy

Group Specific Instructions: Checks for more than \$10 million must be approved by the CFO before the task is marked complete. Checks for non-profits and NGO should be processed by Betty Smith.

Example of the default email message



Monitoring Group Performance

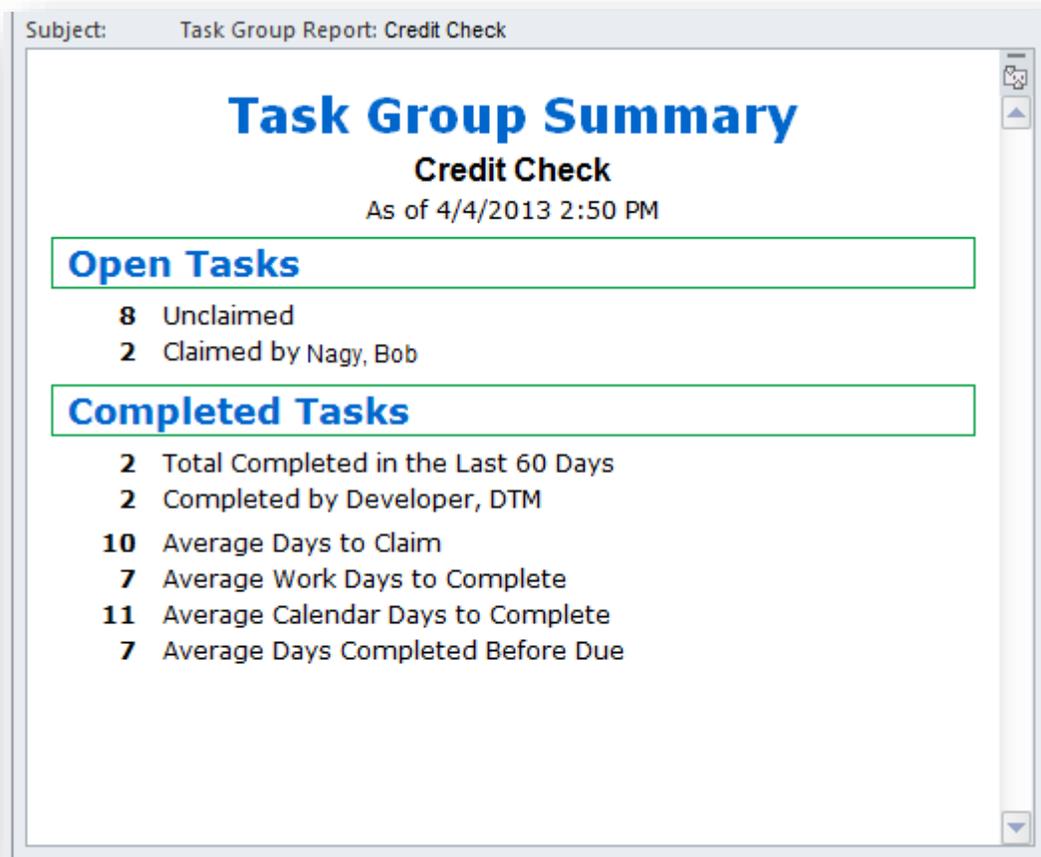
To ensure that the members of a Task Group are being responsive to the needs of the organization the Task Group feature includes two mechanisms to help group owners monitor the work and responsiveness of the group.

Chatter Feed

At organizations that utilize Chatter, group owners can “follow” the Task Group records of the groups for which they are responsible. The system will generate a Chatter post every time a task is created for the group as well as when those tasks are claimed and completed.

Task Group Summary Emails

The Group Tasks feature includes support for group owners, and optionally group members, to receive a periodic email message summarizing how the group is doing.





These reports are generated and sent by an Apex Batch Job called Task Group Reports. When this batch job is run, either manually or on a regularly scheduled basis, a report is created and sent based on the settings in the Summary Report section of each Task Group record. Task Group owners can control under which conditions a report for their group is generated and to whom the report should be sent but the running of the batch job is controlled by the Salesforce Administrator.

Follow these simple steps to manually run the Task Group Reports process.

1. Access **RunTaskGroupReports** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.
2. Click the **Start** button to initiate the Task Group Summary Report batch process.

ITools Setting
Task Group Summary Reports

Cancel Start

✓ **Task Group Summary Reports**
This routine will generate and email Task Group Summary reports based on settings found on each Task Group record. You should plan to schedule this routine to automatically run on a regular basis. For details on how to schedule the Task Group Summary Reports routine, see the Delegated Tasks Management Configuration Guide.

Task Group Summary Reports Last Run: Never



You can check the status of the batch job by going to:

Lightning:

Setup > Environments > Jobs > Apex Jobs

Classic:

Setup > Jobs > Apex Jobs

Then locate the job with the Apex Class value of **InSitu_BatchTaskGroupReport**.

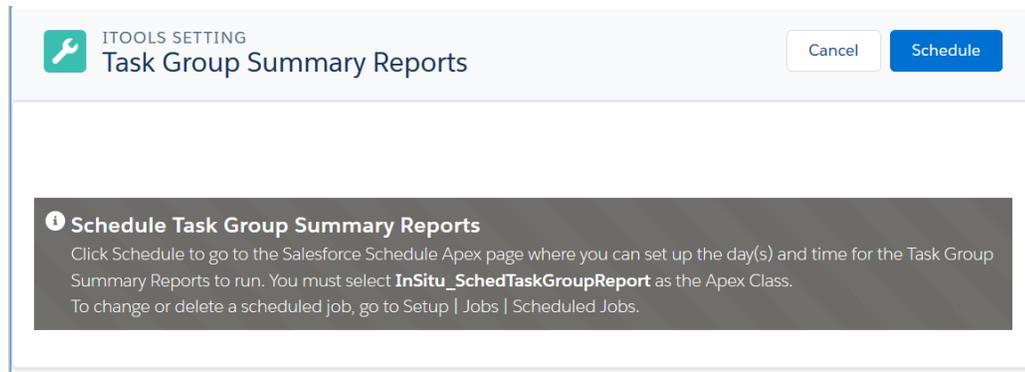


Only those users permitted to view and modify all Task Group records as well as view all Task records tasks should manually run the Task Group Report job. This generally means users assigned the System Administrator profile.



To ensure that Task Group Summary Reports are generated on a consistent and timely basis, the Task Group Reports process should be scheduled to run on a regular basis. Follow these steps to schedule the Task Group Reports job.

1. Access the **ScheduleTaskGroupReports** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.
2. Click the **Schedule** button.



3. Enter a Job Name, select the Apex Class `InSitu_SchedTaskGroupReport`, fill in the execution schedule, and click **Save**.

Schedule Apex

[Help for this Page](#) ?

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.



A scheduled Apex Job cannot be edited or paused. If you need to change the execution schedule or eliminate it completely, you must delete the scheduled job and create a new one with the desired changes.

You can access the list of schedule jobs by going to:

Lightning:

Setup > Environments > Jobs > Scheduled Jobs

Classic:

Setup > Jobs > Scheduled Jobs



Only those users permitted to view and modify all Task Group records as well as view all Task records tasks should schedule the Task Group Report job. This generally means users assigned the System Administrator profile.



If the account of the user who schedules a job is made inactive, that scheduled job will fail each time it runs. If possible, you should log in using a dedicated system/integration account or the root account (first account given to your organization in Salesforce which cannot be inactivated) when scheduling jobs.



Turn Inbound Email into a Group Task

iTools Delegated Tasks Management can be configured to turn an inbound email message into a Group Task. For example, you could have emails sent to an address such as whitepaper@mycompany.com turned into a Group Task that has group members creating Leads and sending out white papers or other requested materials. You could also use this mechanism to have users at your organization that do not have a Salesforce.com license create tasks for business functions that do use Salesforce.

The Email to Group Task feature works by configuring your company's email system to forward all messages sent to a given external address such as info@mycompany.com to a special Salesforce generated email address. This Salesforce address will take each email message forwarded to it and given them to a process installed in your environment by iTools Delegated Tasks Management. That process will create a Group Task based on the original email address (e.g. info@mycompany.com) with the following attributes:

- Subject = Subject of the email.
- Due Date = Date received plus the number days specified in the **Days to Complete** field of the matching Task Group.
- Comments = Body of the email.
- Name = Contact with the same email address as the email sender (may be blank).
- Related To = Account associated with the Contact found by email address (may be blank).
- File/Attachment = Any attachments from the email message if the **Accept Attachments** checkbox on the matching Task Group is checked.
- Assigned To = The user specified in the **Initially Assigned To** field of the matching Task Group. If that field is left blank then the user specified in the Context User field of the Salesforce Email Service Email Address (specified later in the setup process).



Whether a file attachment is saved as a File associated with the task (recommend for Lightning sites) or an Attachment associated with the task (generally used at Classic sites) will depend on the value of the **TaskFileMethod** iTools Setting.



If you would like to enable this feature for one or more of your Task Groups, follow these simple instructions:

1. Navigate to the list of Workflow Rules

Lightning:

Setup > Custom Code > Email Services

Classic:

Setup > Develop > Email Services

2. Click on the **New Email Service** button.
3. Fill in the fields for the new Email Service using the following guidelines:

Email Service

Email services let you use Apex classes to process the contents, headers, and attachments of inbound email. Use the set messages for processing.

The screenshot shows the configuration page for an Email Service in Salesforce. At the top right, there are three buttons: "Save", "Save and New Email Address", and "Cancel". The page is divided into two main sections: "Email Service Information" and "Failure Response Settings".

Email Service Information

- Email Service Name:** Email to Task Group
- Apex Class:** InSitu_GroupTask_Email
- Accept Attachments:** All
- Advanced Email Security Settings:** [i](#)
- Accept Email From:** (Empty text area) [i](#)
- Convert Text Attachments to Binary Attachments:** [i](#)
- Active:**

Failure Response Settings

Configure how salesforce.com responds when an attempt to access this email service fails for the reasons shown below.

- Over Email Rate Limit Action:** Requeue message
- Deactivated Email Address Action:** Discard message
- Deactivated Email Service Action:** Discard message
- Unauthenticated Sender Action:** Discard message
- Unauthorized Sender Action:** Discard message
- Enable Error Routing:** [i](#)
- Route Error Emails to This Email Address:** support@mycompany.c

- **Email Service Name** = A name for the service which enables you to easily identify it as the service that converts email messages into Group Tasks. There is only



one such service no matter how Task Groups are associated with external email addresses.

- **Apex Class** = Must select the class `InSitu_GroupTask_EmailHandler`
 - **Accept Attachments** = Set to the type, if any, attachments you want to convert from the inbound email to an attachment on the Group Task.
 - **Accept Email From** = Be sure to leave this field blank to accept emails from any internal or external users.
 - **Active** = You must check this box for the service to work.
 - **Failure Response Settings** = Set based on how you want different error conditions to be handled.
4. When you have completed filling out the fields for the new Email Service, click the **Save and New Email Address** button.
 5. Fill in the fields of the new Email Service Address using the following guidelines:

Email Service Address

Specify an email address for this email service. The email service processes messages sent to this address. One email service can have multiple email addresses.

Email Service Information

Email Service Name	Email to Task Group
Accept Email From	All email addresses (subject to security settings)

Email Address Information

I = Required Information

Email Address Name

Email address
Specify the local-part of the email address. Salesforce.com assigns the domain name part of the address.

Active

Context User

Accept Email From



- **Email Address Name:** Name of the address used to identify it from other email address associated with this email handler.
 - **Email Address:** Local portion of the email address. This value is only ever seen by system administrators so accepting the default is fine.
 - **Active:** Must be selected for the service to work.
 - **Context User:** The Salesforce user account the service runs under when processing the email. This should be an admin user with View All Data permission. If that permission or user is not available in your organization, this user should be permitted to view all Task Group records (for matching the email to a Task Group) and view all Contacts (for matching sender's email address to a Contact).
 - **Accept Email From:** The default value in this field should be cleared so that emails are accepted from all internal and external users. You can specify values to restrict emails if your configuration and security requirements dictate.
6. Click **Save** to create the new Service Email Address.
 7. When the new email address is saved you will be returned to the Email Service detail page. At the bottom of the page will be a section called Email Addresses with the one email address you created for the service. You will need to select and copy the very long email address created by Salesforce for this email handling process.

Email Addresses			New Email Address
Action	Email Address Name	Email Address	
View Edit	Email_to_Group_Task	email_to_task_group@127vzqi74hy6h55dfs6uc63omfhkxbyemqqr920jdizq9fy0t.5-ixhkeao.na3.apex.salesforce.com	

8. Go to the **Group Tasks** tab and select the group you want associated with inbound email messages in the **Group** dropdown list.
9. Click on the **Edit** button to edit the group. You must be a Task Group administrator for this button to appear.
10. In the **Email to Group Task** section of the Task Group edit page, filling in the appropriate fields using the following guidelines:

Email to Group Task			
Email Address	<input type="text" value="info@mycompany.com"/>	Days to Complete	<input type="text" value="2"/>
Remove From Subject	<input type="text"/>	Accept Attachments	<input checked="" type="checkbox"/>

- **Email Address:** The address of the email account whose inbound messages you want converted to Group Tasks. If you would like emails from multiple email addresses to be converted to tasks in the same group, enter each address



separated by a semi-colon (e.g.
info@mycompany.com;inquiry@mycompany.com)

- **Remove From Subject:** Any text you want removed from the beginning of the email subject before creating the Task subject. You would use this field if the forwarding mechanism of your native email system added text such as “Fwd:” to all messages it is configured to forward. In most cases this field can be left blank.
- **Days to Complete:** The number of days to add to the current date when setting the Due Date on the new task.
- **Accept Attachment:** Indicates if attachments to the inbound email messages will be created as attachments to the task. If you check this box be sure that you indicated that Attachments are accepted on both the Email Service and the Email Service Address created earlier in the configuration process.

11. The final step in the process requires administrative access to your company’s email system. We cannot provide detailed instructions for this step in the setup process as we do not know which email system you have or how email accounts are forwarded. In general, what you will need to do is forward the externally known address (e.g. info@mycompany.com) to the email service address generated by Salesforce (e.g. email_to_group_task@x-bec56huatsmlrvdyt74z38rpsz7.apex.salesforce.com).

Alternative Group Assignment Method

If using the task’s Status field value as the method of associating a Task with a Task Group does not work for your organization, iTools Delegated Tasks Management does support an alternative method using a Task custom field and the Process Builder. This alternative method requires several advanced administrative tasks which are easier to implement with the assistance of InSitu Software support personnel. If you wish to pursue an alternative assignment mechanism, please contact us and we will be happy to explain the alternatives and walk you through the configuration.



Implementation Tips

Prior to completing the implementation of the Group Task feature, we suggest a quick review of our list of important tips. These tips are provided to help ensure a smooth rollout of this feature to your users.

- While this guide covers activating the Group Task feature before setting up Task Groups and allocating permissions, you should make activating the feature the last step in your implementation plan.
- The system was designed to support a limited number of Task Groups. It may not be practical to have a large number of groups because of the large number of required Task Status field values.
- It is important to educate your Salesforce users about the impact of selecting one of the special Task Status values when creating/editing tasks. Even users that would not normally assign a task to a group need to be aware of the feature as there is no way to hide values in the Status picklist.
- Task Status values associated with Task Groups should all use a common format that makes them stand out from the other status values. We recommend a format such as “Assigned To {Group Name}”
- The Group Tasks tab uses special processing to display tasks associated with the group that might not normally be visible to the group members depending on your organization’s security model. If group members are not able to locate the group’s tasks outside this page or if they get the “Insufficient Privileges” message when they click on the Task subject to access the native Task Detail page or an unclaimed task, this is a normal condition. iTools Delegated Tasks Management is able to bypass the native Salesforce security when populating the Group Tasks list but normal security measures are enforced in all other locations. Once a group member claims a task they become the task owner and using native security are able to view and edit the task.
- In addition to granting the proper permission set, all Task Group members must be allocated a license to BOTH the iTools Configuration Manager and the iTools Delegated Tasks Management packages.
- If the Task Group is not configured to change the Assigned To field when the task is created, the task creator will appear as the user responsible for the task until the task is claimed. Your Salesforce users should be made aware of this behavior.



Feature: Contact Tasks

There are many reasons and situations that require tasks to be assigned to people who do not have a Salesforce license or who are not even employees of your organization, such as partners, vendors or customers. To help manage tasks assigned to 'external' contacts, iTools Delegated Tasks Management provides the Contact Tasks feature. Using the Contact Tasks feature, you can assign a task to anyone, as long as there is a Salesforce Contact with their name and email address.

Tasks that have been assigned to a contact are referred to as 'Contact Tasks'. iTools provides a custom checkbox field that you add to your Task page layout(s) which is used to designate a contact task. When a task is created or updated, and the **Contact Task** checkbox is checked, an email is sent to the Contact specified in the **Name** field of the task to let them know they have been assigned a task. The email also provides the contact with the information they need to execute the task as well as how to notify your Salesforce system that the task has been completed. Because Contact Tasks are implemented using the native Salesforce Task object, all existing task related functionality continues to work as expected.

After the contact receives notice of a task assigned to them and has finished the associated work, they need a way to communicate back to your Salesforce system that the task has been completed. The Contact Tasks feature offers you two options in which the 'completion' feedback can be communicated – **Email** and **Salesforce Sites** pages. These two options are not mutually exclusive, but you must activate and configure at least one of them before you make the Contact Tasks feature available to your users.



Task Completion Using Email

The easiest Contact Task completion option to implement is Email. With this option, contacts simply send an email to a special email address with a special task reference token in the subject. When the Salesforce email service receives the message, it will use the information in the email to update the associated task in Salesforce. While the email address and special token may seem difficult for a person to remember, the New Contact Task notification message can be configured with a simple link that, when clicked, will create an email message in the person's native email client with the proper email address filled in and the special token already in the subject field. This special 'mailto:' link also works on mobile devices. By default, the New Contact Task message template is already set up to provide this link.

When the special email address is used to communicate that a Contact Task has been completed, or updated, the body of the email message is assumed to contain any comments the contact would like to add to the task. The feature also provides the option to accept attachments from the completion message and add them to the task as files or attachments.

If you want to configure the Contact Task feature to use the Email completion option, follow these steps:

1. Navigate to the list of Workflow Rules

Lightning:

Setup > Custom Code > Email Services

Classic:

Setup > Develop > Email Services

2. Click on the **New Email Service** button.



3. Fill in the fields for the new Email Service using the following guidelines:

Email Service

Email services let you use Apex classes to process the contents, headers, and attachments of inbound email. Use the : receive messages for processing.

Email Service Information

Email Service Name:

Apex Class:

Accept Attachments:

Advanced Email Security Settings:

Accept Email From:

Convert Text Attachments to Binary Attachments:

Active:

Failure Response Settings

Configure how salesforce.com responds when an attempt to access this email service fails for the reasons shown below.

Over Email Rate Limit Action:

Deactivated Email Address Action:

Deactivated Email Service Action:

Unauthenticated Sender Action:

Unauthorized Sender Action:

Enable Error Routing:

Route Error Emails to This Email Address:

- **Email Service Name:** Enter a name that identifies the service as the handler of Contact Tasks Completion messages.
- **Apex Class:** Click on the lookup icon and choose the class named `InSitu_ContactTaskCompletionEmailHandler`. All Apex classes are listed, so please carefully choose the correct class.



If you are using the Professional Edition of Salesforce, the Apex Class field will be a dropdown list with only those Apex Classes designed to be email handlers. Select the option named `InSituDtm.InSitu_ContactTaskCompletionEmailHandler`

- **Accept Attachment:** Select the option based on your organization's requirements and use of Task attachments.



If you choose to accept all attachments, you should make sure that any contact that is assigned a task knows they should attach files related to the task to the completion messages. This is especially important if you will be using Contact Tasks to assign tasks to people outside your organization as these people may also receive Contact Tasks from other organizations that don't support attachments. A reminder note added to the bottom of the new contact task message template can be an effective way to communicate this information.



In addition to the Email Service setting, the **CT_Configure** iTools Setting, which is used to configure the Contact Tasks feature, also includes an option to designate whether the system should accept file attachments from Contacts. For files to be accepted and attached to tasks, both settings must be enabled. See the *Enabling and Configuring Contact Tasks* section for more information.



Contact Task Completion messages are subject to the Salesforce limits for inbound email messages. You should check the Salesforce help system or contact your Salesforce representative for the current limits in your environment. In general, you should be aware that the total message size (body + attachments) cannot exceed 10 MB and a single attachment cannot exceed 5 MB.

- **Accept Email From:** Be sure to leave this field blank to accept emails from any internal or external users.
 - **Active:** Check this box to activate the Email service and enable it to receive incoming messages.
 - **Failure Response Settings:** These settings allow you to control the behavior of the email service when certain failure conditions are encountered. During the configuration and testing process, it is strongly recommended that you check **Enable Error Routing** and set the **Route Error Emails to This Email Address** field to your email address.
4. When you have completed filling out the fields for the new Email Service, click the **Save and New Email Address** button.



5. Fill in the fields of the new Email Service Address using the following guidelines:

Email Service Address

Specify an email address for this email service. The email service processes messages sent to this address.

Email Service Information

Email Service Name	Contact Task Completion
Accept Email From	All email addresses (subject to security settings)

Email Address Information

Email Address Name

Email address
Specify the local-part of the email address. Salesforce.com assigns the domain.

Active

Context User 

Accept Email From

- **Email Address Name:** Name of the address used to identify it from other email address associated with this email handler.
- **Email Address:** Enter the local part of the system generated email address, that portion which appears before the @ symbol. Salesforce.com assigns the domain name, that which occurs after the @ symbol, portion of the address.
- **Active:** Must be selected for the service to work.
- **Context User:** Enter the user for which all actions taken by the email service will be performed.



Only a user permitted to view and modify all Task and Contact Task records should be set as the Context User. This generally means a user assigned the System Administrator profile.



All tasks completed via the email process will have the Last Modified By information set to the user specified in the **Context User** field. If your organization has created a Salesforce user account for performing automated or system level processes, then it is recommended you specify that user as the Context User. If you cannot allocate a Salesforce user



account for this purpose, then you should make sure your task delegators understand that actions taken on their Contact Tasks by the contact themselves will appear to have been performed by the user specified in Context User field.



Normally, the Task owner does not receive a task completion notification if they are the user to close, re-open, or delete a task they delegated. However, when the Email method for Contact Task completion is used, the owner of the Contact Task will receive a task completion notification, regardless of whether they were the one to update the task.

- **Accept Email From:** The default value in this field should be cleared so that emails are accepted from all internal and external users. You can specify values to restrict emails if your configuration and security requirements dictate.
6. Click the **Save** button to create the email service address. A page will display that contains the special email address Salesforce created for your Contact Task Completion process. iTools refers to this email address as the **Email Service Address**. When enabling and configuring the Contact Tasks feature using the **CT_Configure** iTools Setting, you will be required to enter this value into the **Email Service Address** field. You may want to copy this address and paste it in an easy to access location.

Email Addresses			New Email Address
Action	Email Address Name	Email Address	
View Edit	Contact_Task_Completion	taskcompletion@2rw761enixsflb38p2832zkbq62s4vfk6g2e6vgxancf551oq.5-ixhkeao.na3.apex.salesforce.com	



Task Completion Using Sites Page

Salesforce Sites web pages can be used to indicate that a Contact Task has been completed. Simple, custom developed web pages hosted using Force.com Sites can be accessed by contacts and considered the place for them to go to manage and complete tasks to which they have been assigned. With Sites pages, you can make actions available such as marking a task as complete, sending status updates to task owners, and viewing a list of open and recently closed Contact Tasks.

Mark Task Complete

Task Information

Subject	Perform Credit Check
Due Date	4/5/2012
Priority	Normal
Status	Not Started
Assigned To	Olivia Nagy
Assigned By	Bob Nagy
	bnagy@insitusoftware.com

Attach File

File Name	<input type="text"/>	<input type="button" value="Browse..."/>
-----------	----------------------	--

Comments

Task Comments	Grand Hotels is an existing customer that will be purchasing and additional \$300,000 of our generators.
Contact Comments	<input type="text"/>

Task Completion page



My Tasks

Open Closed

Due Date	Subject	Assigned By	Action
4/5/2012	Perform Credit Check	Bob Nagy	Mark Complete

1 - 1 of 1 < Previous Next > Page 1 of 1

Task List page

The Sites feature of Salesforce.com is not available in the Professional Edition. If your organization is using the PE version of Salesforce.com you must use the Email Method for task completion.

This next section provides all the steps necessary to enable and create the Contact Tasks site. If Sites has already been enabled in your Salesforce environment, you can skip the first 3 steps and begin at Step #4. If your organization wants to add the Contact Tasks page to an existing site, you can skip ahead to step #6.

1. Navigate to the list of Sites

Lightning:

Setup > User Interface > Sites and Domains > Sites

Classic:

Setup > Develop > Sites

2. Register your Sites domain. Instructions on the top of the page provide a detailed explanation about the sites domain and how it relates to individual sites. The name you choose for your domain is the only one you get for your entire Salesforce environment and cannot be changed, so please choose your name carefully. Once you have chosen a name and checked to make sure it is available, click the **Register My Salesforce Site Domain** button.



Sites

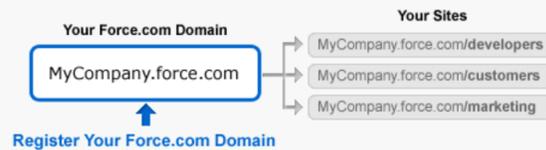
[Help for this Page](#)

What is a Site?

Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.

Because sites are hosted on Salesforce servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your unique Salesforce domain and URL, or you can register your own branded domain or subdomain to redirect to your site.

Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.



To get started, first register your company's Salesforce site domain. Your Salesforce site domain must be unique and must consist of only alphanumeric characters. Salesforce.com recommends using your company's name or a variation of your company's name, such as 'mycompanyportal.'

Warning: You cannot modify your Salesforce site domain name after the registration process.

http:// -developer-edition.na3.force.com

I have read and accepted the Salesforce [Sites Terms of Use](#)

3. A Sites domain has been created. Now, you will have to create an individual 'site' on that domain for Contact Tasks. Click the **New** button located on the middle of the Sites page to create a new site.



4. Enter the necessary information to define the new site. Click the **Save** button when you are done.

Site Edit

New Site

Site Label

Site Name

Site Description

Site Contact

Default Web Address

Active

Active Site Home Page

Inactive Site Home Page [\[Preview\]](#)

Site Template

Site Robots.txt

Site Favorite Icon

Analytics Tracking Code

URL Rewriter Class

Enable Feeds

Clickjack Protection Level

Require Secure Connections (HTTPS)

Upgrade all requests to HTTPS

Enable Content Sniffing Protection

Enable Browser Cross Site Scripting Protection

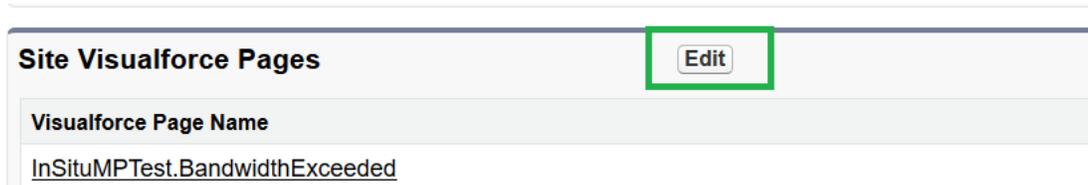
Referrer URL Protection

Guest Access to the Support API

- **Site Label, Name, and Description:** Your internal use only.
- **Site Contact:** Does not require any special access or permission within your Salesforce environment. Salesforce.com will send Sites related communications to the user designated as the Site Contact.
- **Default Web Address:** Value should be a simple identifying name for the page, such as 'contacttasks' or 'tasks'.
- **Active:** Checkbox must be checked.
- **Active Site Home Page:** Can be set to a default Sites page such as UnderConstruction or InMaintenance.



- The other fields are not required and should be left in their default state unless you have a deep understanding of Sites and how the values in these fields are used.
5. After the new site is created go to the Site Details page for the site you just created. Salesforce may direct you to this page when you clicked Save on the New Site page or you may have to click on the site name on the list of Sites page.
 6. There are two key iTools Delegated Tasks Management Visualforce pages that must be added to the site. To add these pages, click the **Edit** button located at the top of the Sites Visualforce pages section of the page.

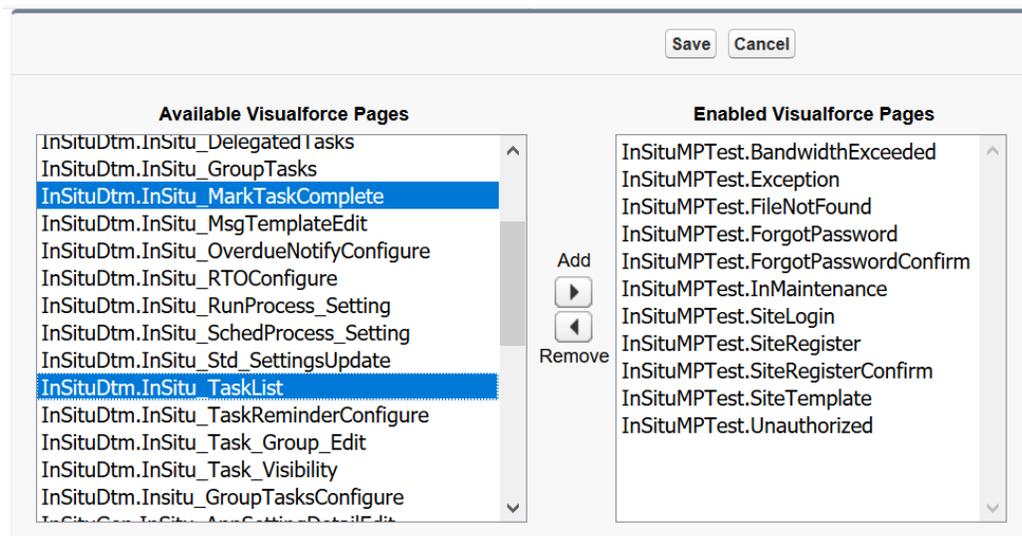


7. Locate the following pages in the Available Visualforce Pages list and click **Add** to add them to the Enabled Visualforce Pages list:

`InSituDtm.InSitu_MarkTaskComplete`

`InSituDtm.InSitu_TaskList`

Click the **Save** button.



8. While access to a Site does not require a paid Salesforce account license, each Site is accessed in the context of a special “guest” user account given to you by Salesforce for that site. The guest account also comes with its own Profile which controls access to your Salesforce objects, Visualforce pages, Apex classes, and other profile-controlled permissions. For Contacts to be able to access their assigned tasks via the Site you have just created, the special user associated with the site must be assigned



a special Permission Set that was installed with the Delegated Tasks Management package. This user must also be allocated a license to the iTools Configuration Manager and iTools Delegated Tasks Management packages.



Salesforce supports two different user interfaces for updating a Profile. Which interface you see when accessing the special user account assigned to your site will depend on whether you have enabled the Enhanced Profile User Interface. This document assumes the use of the newer 'enhanced' user interface but will try and point out any major differences for those using the older style interface.

9. Click the **Public Access Settings** button located at the top of the Site Details page to go to the Site Profile detail page.
10. Click the **Assigned Users** button at the top of the Profile page

Profile
Contact Tasks Profile

Find Settings... | Edit Properties

Profile Overview | **Assigned Users**

Description	
User License	Guest
Created By	Bob Newy 10/4/2018 4:39 PM



If you are using not using the Enhanced Profile user interface the button you need to click on at the top of the Profile page is labeled **View Users**.

11. Click on the Full Name of the Site Guest User in the list of users. There should be only one user in this list.
12. Locate the Permission Set Assignments section on the page and click the **Edit Assignments** button.



13. Locate the **iTools Contact Tasks Sites User** option in the Available Permission Sets list, select it and click on the Add icon to add it to the Enabled Permission Sets list. Then click **Save**.

Permission Set Assignments Help for this Page ?

Contact Tasks Site Guest User

Save Cancel

Available Permission Sets		Enabled Permission Sets
<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> iTools Activities Tab User iTools Delegated Tasks User iTools Task Group Administrator iTools Task Group Member </div>	Add <input type="button" value="▶"/> Remove <input type="button" value="◀"/>	<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> <div style="background-color: #007bff; color: white; padding: 2px;">iTools Contact Tasks Sites User</div> </div>

Save Cancel

14. You should be returned to the User detail page for the special Sites user. Scroll down the page and locate the Managed Package section and click on the **Assign Licenses** button.
15. Locate the following Unassigned Packages and check the checkbox in the Action column:

iTools Configuration Manager
iTools Delegated Tasks Management

Click **Add** to assign the proper iTools licenses to the special user account.

Assign Licenses

Select the checkbox next to each package you want to assign to this user. If the package does not have sufficient licenses available or the package status is expired, the checkbox will be disabled.

A | B | C | D | E | F | G | H | I | J | K | L |

Unassigned Packages Select Shown Deselect Shown

Action	Package Name ↑	Status	All
<input checked="" type="checkbox"/>	iTools Configuration Manager	Trial	
<input checked="" type="checkbox"/>	iTools Delegated Tasks Management	Active	

Selected Packages

Action	Package Name
<input checked="" type="checkbox"/>	iTools Configuration Manager
<input checked="" type="checkbox"/>	iTools Delegated Tasks Management

Add Cancel



Enabling and Configuring Contact Tasks

After configuring one or both Contact Task completion methods, you must now update the iTools Settings related to the Contact Tasks feature. A single configuration page is provided to enable and configure the Contact Tasks feature. Follow these simple steps to activate and configure the feature.

1. Access the **CT_Configure** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.
2. Click the **Edit** button.
3. Click the **Enable the Contact Tasks feature** checkbox. You must also specify the settings associated with at least one of the completion methods - Email or Sites Page. Click **Save** to save your changes. The feature is now enabled.

iTools Setting Edit: Contact Tasks Configuration

Value for All Users

Cancel Save

Settings

Enable the Contact Tasks feature

General Settings

= Required Information

Set Task Status To: Completed

Contact Comments Placement: Append to Comments field

Comments Date/Time Stamp Format: MMMM d, yyyy (e.g. MMMM d, yyyy hh:mm z = July 16, 2019 10:16PM CDT)

Completion Receipt: Send the contact an email acknowledgement after they mark a Task as complete.

Send Update Notice: Send the Task owner an email when the contact updates, but does not complete, the Task.

Send Attachments: Include all Attachments and Files associated with the Task in the New Task notification email message.

Accept Attachments: Allow contacts to add Salesforce Files when completing or updating a Task.

Associate attachments with the Task record

Prevent Repeat: Do not allow a Task with "Repeat This Task" set to be a Contact Task.

Task Completion Using Email

Email Service Address: taskcomplete@2kljasdjfksdjfasioutrijf8s;ldvjasdghf8rgjjvjojrpu

Task Completion Using Sites Page

Task Complete URL: https://spacelysprockets-developer-edition-na3.force.com/coi

Task List URL: https://spacelysprockets-developer-edition-na3.force.com/coi

Contact Assignment Restrictions

Email Domain: Only Send To: Leave blank for all domains

Email Domain: Never Send To: Leave blank for all domains

Assignment Permission Field: Feature Not Used Contact checkbox that must be checked for a Task to be assigned to the Contact.



The configuration settings include:

General Settings

Set Task Status To: When the Contact completes the task using Email or the Sites page, the status of the task is set to the value specified in this setting. The options in the list are the same values used by the status field for the standard Task object. Only those status values designated as representing a 'Closed' state will be included.



Consider creating a Task Status specifically for Contact Task completion like 'Completed by Contact'. Then, choose that status for the Set Task Status To setting.

Contact Comment Placement: When the Contact completes the task using Email or the Sites page, they can include comments. If the task was completed using the Email option, then the user adds their comments to the body of the email message. If the task was completed using the Sites page, then the user adds their comments to a dedicated field on the completion page. The value in this setting designates how the Contact's comments are added to the task in Salesforce. The options for this setting are:

- Append to Comments Field
 - Contact's comments are added on to the end of the existing task comments.
- Prepend to Comments Field
 - Contact's comments are added at the beginning of the existing task comments.
- Set Custom Field
 - Contact's Comments are placed in the custom Text Area specified in the **Task Custom Field** dropdown list that will automatically appear on this configuration page when this option is selected.
 - NOTE: If this option is selected and the contact is adding comments via the Sites page, only comments added when the task is marked complete will go into the specified field. Comments added during a task update will be appended to the existing Comments field.

Comments Date/Time Stamp Format: When the contact adds a comment to a task and that comment is either appended or prepended to the existing task comments, iTools Delegated Task Management will add a "marker" with the Contact's Name and the Date/Time the comments were added. This setting allows you to control the format of the Date/Time stamp portion of the text marker.

- The field must be formatted using the following set of valid tokens:



Letter	Date or Time Component	Examples
G	Era designator	AD
y	Year	1996; 96
M	Month in year	July; Jul; 07
w	Week in year	27
W	Week in month	2
D	Day in year	189
d	Day in month	10
F	Day of week in month	2
E	Day in week	Tuesday; Tue
a	Am/pm marker	PM
H	Hour in day (0-23)	0
k	Hour in day (1-24)	24
K	Hour in am/pm (0-11)	0
h	Hour in am/pm (1-12)	12
m	Minute in hour	30
s	Second in minute	55
S	Millisecond	978
z	Time zone	EST;CST;PST
Z	Time zone	-0800

- The value of any time related tokens will be based on the locale specified for the special guest user account associated with the Site if the comments are added via the Sites page. If the comments come via the Email method, the time values are based on the locale of the system administrator's account that created the Email Handler process.
- If you leave this configuration option blank, no date/time stamp will be added.

Completion Receipt: When the contact completes the task using Email or the Sites page, an email message can be sent to the contact as an acknowledgement of their action. Check this option if you have configured the iTool for the Email task completion option, since the contact will have no other way of knowing that their completion email was delivered and properly processed. If you have configured the iTool for the Sites page task completion option, the page will acknowledge the action in real-time and an acknowledgement email may not be necessary.



When this option is checked, the **ContactTaskReceipt** setting is used as the message template. Remember to review the setting definition for any modifications you may want to make to the template for branding or personalization purposes.

Send Attachments: Indicates whether the files/attachments associated with a Task should be attached to the New Task notification email message.

Accept Attachments: Indicates whether the contact is permitted to add attachments when they complete a task. If you have configured the iTool for the Email completion



option, then any file attached to the completion message will be added to in Salesforce. If you have configured the iTool for the Sites page completion option, then the Sites completion page will provide the means to upload the file to Salesforce.

(Associate Attachments with): Indicates which object to associate contact provided files. By default, files will be associated with the Task record, but you can change this to associate the files with the Contact record specified in the task's Name field or the record specified in the task's Related To field. A Contact record will always be specified in the Name field of a contact task but the Related To can be blank. If the "Associate attachments with the record specified in the Related To field" option is selected and the task has no value in it's Related To field, any file added by the contact will be associated with the Task record instead.

Prevent Repeat: When checked, task that have a value selected in the Salesforce standard Repeat This Task field cannot be designated as a Contact Task. Customers using the Sites method for task completion may want to select this option if they do not want the Sites Guest User account creating new tasks.

Task Completion Using Email

Email Service Address: In step 7 of the *Task Completion Using Email* section above, an email address was created for the Task Completion Email Service which is used to accept and process the Task Completion emails sent from a Contact. Enter the Email Address for the Task Completion Email Service in this field.

Task Completion Using Sites Page

Task Complete URL: Enter the URL for the Salesforce Sites Web Page that will be used by contacts to complete a task. Format the URL as follows:

- Start with the Site URL. To get this value, return to the list of Sites in Setup and click the Site URL value for the Contact Tasks site. A browser window will open and display a default sites page. Select the address of the site from your browser's address bar. For example:

```
https://acme.force.com/contacttasks
```

- Add a forward-slash (/) character.
- Add the name of your contact completion page. If you did not create your own custom Visualforce page, then use the following standard contact task completion page:

```
insitudtm__insitu_marktaskcomplete
```

- To ensure you have the proper Task Completion URL, paste the complete URL address in a new browser tab. You should see the Mark Task Complete page with an error indicating a Missing Task Identifier:



Mark Task Complete



Missing Task Identifier

The parameter used to identify the task being marked complete was missing from the URL you used to access this page.

Please alert the person who assigned you the task so the situation can be addressed as soon as possible.

Thank you for your patience and assistance.

Task List URL: Enter the URL for the Salesforce Sites Web Page that will be used by contacts to view their list of assigned tasks. The URL should be formatted the same way as the Task Complete URL except use the following name for the standard page:

```
insitudtm__insitu_tasklist
```

Contact Assignment Restrictions

Email Domain: Only Send To: If tasks should only be assigned to contacts from certain companies based on the domain portion of their email address, enter those domain names in a comma separated list. For example:

```
insitusoftware.com,insitusoftware.com.uk,insitusoftware.com.au
```

If you do not want to limit which email domains are valid, leave this setting blank.

Email Domain: Never Send To: If tasks should never be assigned to contacts from certain companies based on the domain portion of their email address, enter those domain names in a comma separated list. For example:

```
bigclient.com,irs.gov
```

If you do not want to block any email domains, leave this setting blank.

Assignment Permission Field: If you want to restrict which Contact records can be assigned a task using something other than the contact's email domain you can create a checkbox custom field on the Contact object which must be checked before a Contact can be assigned an iTools Contact Task. That field, which can be directly editable or be a formula field, is then designated in this attribute.



Other Configuration Options

Most of the configuration options for the Contact Task feature are specified on the **CT_Configure** setting. These settings apply to every user and a change to any setting impacts every user of the feature. There are, however, some options that can be specified at the User, Role, or Profile level in addition to a Global default value for all users. These options are listed separately from the **CT_Configure** setting but are also located under the Contact Task feature in the list of iTools Settings.

CT_bccSender

Instructs iTools to bcc the task creator on the email sent to the contact letting them know a task has been assigned to them. Since emails sent from Salesforce do not appear in a user's "sent messages" folder some user may want a record of the new task notice stored in the email system. Since not all users will want this behavior this setting can be specified all the way down to the individual user level. The default behavior is to NOT blind copy the task creator (a setting value of **N(o)**). To bcc the sender of a New Contact Task notice change this setting to **Y(es)**.



Edit Page Layouts

To assign a task to a contact, a user simply clicks the **Contact Task** checkbox. This checkbox field was added to your Salesforce environment when you installed iTools Delegated Tasks Management, but it needs to be added to your Task edit page(s) before users can assign Tasks to contacts.



Inform your users that a reoccurring Task cannot be set as a Contact Task. A validation error will occur if a user attempts to check BOTH the **Create Recurring Series of Tasks** and the **Contact Task** checkboxes on the Task edit page.

The iTool also includes a custom control called **Contact Task Status** which should be added to your Task page layout(s) as well. This control displays the status information related to the Contact Task and provides links that can be used to re-send a New Task notification or send a Task Cancellation notification to the associated contact.

Status	Not Started
Name	Tim Barr
Contact Task	<input checked="" type="checkbox"/>
Contact Task Status	New Task notification sent on 10/3/2018 4:51 PM. Re-Send Notification Send Cancellation
Related To	United Oil & Gas Corp.

To add these controls to Task page layout(s) follow these simple steps:

1. Navigate to the Page Layout editor for the Task page

Lightning:

Setup > Objects and Fields > Object Manager >

Click the **Task** link in the list > **Page Layouts >**

Click the  icon in the last column of the layout to update >

Edit

Classic:

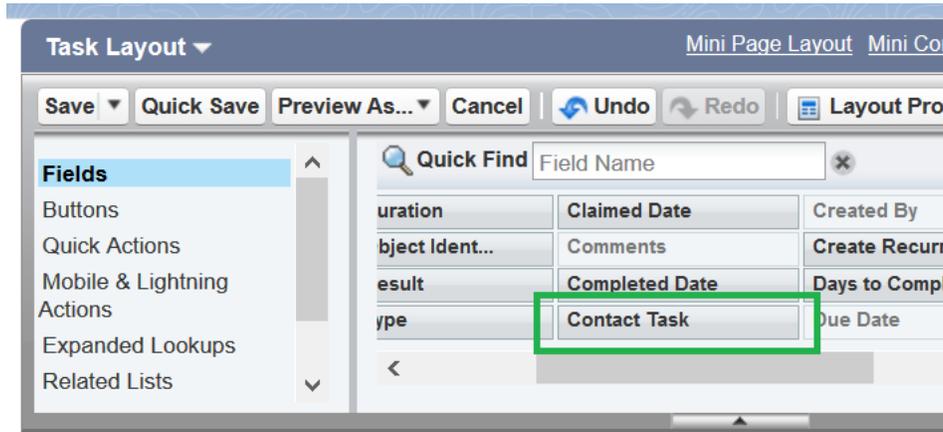
Setup > Customize > Activities > Task Page Layouts >

Click on the **Edit** link next to the layout to update

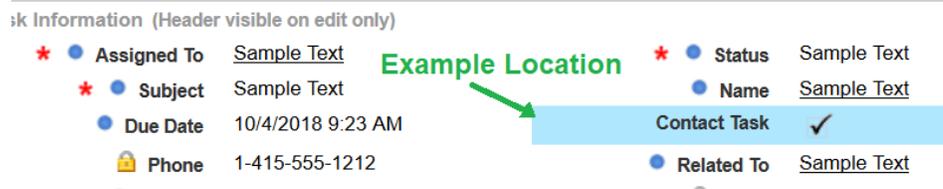


If you currently use the Professional Edition of Salesforce, you will not see a list of page layouts because the Profession Edition supports only one page layout per object.

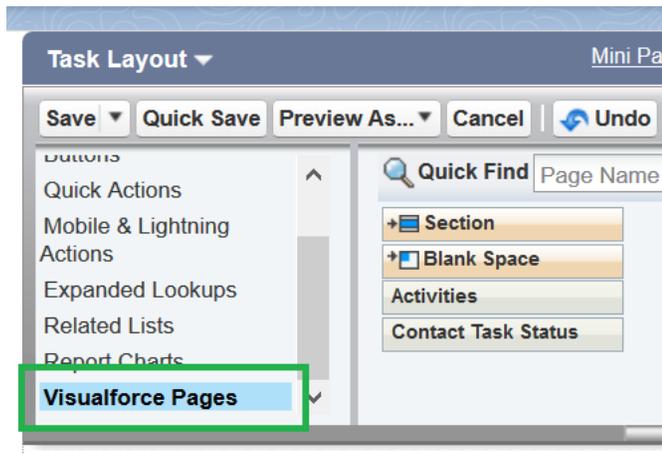
2. Locate the **Contact Tasks** field in the list of fields at the top of the page.



3. Drag the field to the location on the Task Page Layout that suits your layout best. The exact location does not impact the operation of the feature.

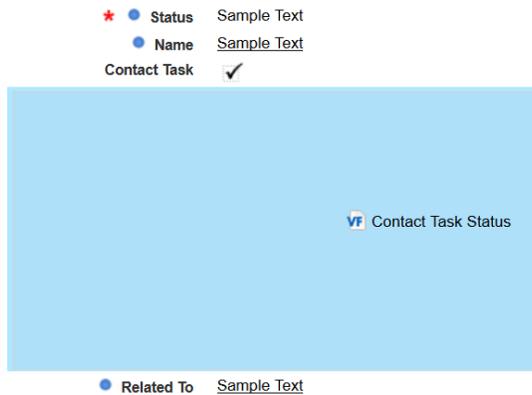


4. In the upper left area of the page, select the **Visualforce Pages** option.

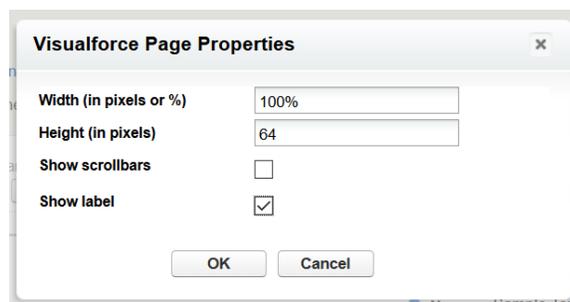




5. Drag the **Contact Task Status** page to the location on the Task Page Layout that suits your layout best. The exact location does not impact the operation of the feature.



6. After placing the Contact Task Status control on the layout, a couple of the properties must be updated. To access the control's Property page, double-click the Visualforce control or select the control and click on the configuration “wrench” icon in the upper right-hand corner.
7. In the Visualforce Page Properties popup window, make the following changes:
 - Set the **Height (in pixels)** to 64
 - Check the **Show Label** checkbox.



8. Click **OK** to save the changes.
9. Click the **Save** button at the top of the layout editor to save your changes.



If you have more than one Task Page Layout in your organization, you will need to repeat this task for each page layout. If you currently use the Professional Edition of Salesforce.com, you will only have a single Task Page Layout.



Update Message Templates

iTools Delegated Tasks Management uses email notifications to communicate task assignments and other task related information to contacts associated with Contact Tasks. For ultimate flexibility and customization, iTools uses email templates as the basis for the notifications that it sends. This gives organizations the ability to adjust the design of both the content and layout of the messages - for branding, alternative methods of contact task completion, and compliance with company standards set up for external communications.

To make sure the notifications work well for all types of email applications and web browsers, each template is comprised of a Subject field, a message body in HTML form, and a message body in plain Text form. Based on the settings and capabilities of the recipient's email reader, the most appropriate version of the message body will be used.

iTools Delegated Tasks Management provides special templates which are used when a message is sent to a contact that is **not** one of your licensed Salesforce users. These Contact Task related templates include:

ContactTaskNew – The message sent to notify a contact that a new task has been assigned to them. The message must include a link that can be used by the contact to set the task as completed. The format of the link will differ based on whether you have configured the iTool for Task Completion using Email or Site Pages.

ContactTaskReceipt – The acknowledgement message sent to a contact after they set their assigned task as completed. This message is only used if the **Completion Receipt** checkbox is checked in the Contact Tasks **CT_Configure** iTools Setting.

ContactTaskCancel – The message sent to a contact if a task they have been assigned is canceled or completed by someone else. This message is sent when a user clicks the **Send Cancellation** link in the Contact Task Status control on the task page.

ContactTaskReminder – The message sent to a contact if a task they have been assigned is coming due soon. For this message to be sent, all three of the following configuration options must be set:

- The **Reminder Notification** feature is enabled.
- The **Send Reminders To | Task Contact** checkbox is checked.
- The **Always Send Reminder** checkbox is checked or the **Send Email Reminder** checkbox on a task is checked.

ContactTaskOverdue – The message sent to a contact if a task they have been assigned is overdue. For this message to be sent, all three of the following configuration options must be set:

- The **Overdue Notification** feature is enabled.
- The **Send Overdue Notification To | Task Contact** checkbox is checked.



ContactTaskUpdate – The message sent to the contact task owner when the assigned contact updates the task information but does not mark the task as complete.

Customizing Contact Task Message Templates

Salesforce.com did not originally support the use of Task fields as merge fields in native email templates. Therefore, the location and way you define the email templates for iTools Delegated Tasks Management is slightly different. The iTools email templates are defined and edited in the same way as other iTools customizations – using the iTools Settings Tab. Each message template has a set of iTools Settings it uses to define the subject and body of the email message.

1. **Update completion instructions** - the default versions of the contact task related message templates include completion instructions for both the Task Completion Using Email and Task Completion Using Sites Page methods.

IMPORTANT: You must edit these templates and remove the text related to the method you are not using or reword the text to indicate either method can be used.

Both the HTML and Text version of the message body must be updated on the following templates:

- **ContactTaskNew**
 - **ContactTaskReminder**
 - **ContactTaskOverdue**
2. **Update reference to Salesforce task** – since the `{!SFDCURL}` merge field does not format the reference to the Salesforce task properly when in the context of the Force.com Site, it cannot be used. Instead, a direct reference containing the explicit Salesforce server value must be used. For example:

```
https://insitusoftware.lightning.force.com/{!Id}
```

This change is only required in the **TaskComplete** template as it is the only message that can be generated from either the Salesforce.com server (internal user completes a delegated task) or the Force.com Sites server (Contact completes a delegated task). If you are only using the email method for contact task completion you do not need to make this change.



When you make modifications to the original message templates, please be sure to test your changes before releasing to your users. The smallest typographical error can result in a poorly constructed message and in some cases, an error will be generated which will prevent the message from being sent.



Version 4.8 of iTools Delegated Tasks Management added support in the email handling process to update a task without marking it complete. If the Subject of the email sent from the contact contains the word “Update” the body of the message will be added to the appropriate task field but the task will not be marked as updated. The default New Contact Task email template includes support for an update link but if you installed an earlier version of Delegated Tasks Management your template may not include the task update link. You can add this support by adding the following to the **ContactTaskNew** template:

```
<br>
```

```
If this task is not complete but you would like to update the task, please <a  
HREF="mailto: {!TaskCompleteEmailAddress}?subject=Task Update  
ref: {!ContactTaskId}:ref">Click Here<a/> to send an email to update the task. The body  
of the message you send will be added to the comments field of the task.
```

```
<br>
```



Version 4.14 of iTools Delegated Tasks Management added support in the email handling process to set a task’s status to a specific value other than the one specified on the **CT_Configure** page. If the Subject of the email sent from the contact contains the a value between bracket characters (“[“ and “]”) and that values matches the name of a task Status field value, the task’s status will be set to that value. The value can be set in a completion or update message but in the case of a task completion (“Update” does NOT appear in the Subject), the specified status value must equate to a task status that is marked as “Completed”. You can add this support by adding the following to the **ContactTaskNew** template:

```
<br>
```

```
If this task is not complete but you would like to update the task, please <a  
HREF="mailto: {!TaskCompleteEmailAddress}?subject=Task Update [In Process]  
ref: {!ContactTaskId}:ref">Click Here<a/> to send an email to update the task. The body  
of the message you send will be added to the comments field of the task.
```

```
<br>
```

Contact Task Merge Fields

The iTools message templates support a set of merge fields which serve as placeholders for data that will be replaced with information from the current Task. Generally, the name of the merge field is the same name as the Task field. The syntax of an iTools merge field consists of an open curly brace and exclamation point, followed by the field API name and a closing curly brace: `{!ActivityDate}`. All standard fields are supported as well as any custom Activity field your organization has defined. In addition, there are a few ‘special’ merge fields which do not equate directly to fields on a Task object, but are helpful when constructing Contact Task notification messages.



Merge Field	Meaning
{!ActivityDate}	Due date of the Task.
{!ContactTaskId}	Special encrypted form of the Contact Task ID. This value is not a Salesforce record ID and will be required in the subject field of any email message sent to indicate task completion. Note: This token should appear between “ref:” and “:ref” in the subject of the Contact Task Completion email message.
{!CreatedBy.Email}	Email address of the user that created the Task.
{!CreatedBy.CompanyName}	Company name associated with the user that created the Task. (see note below)
{!CreatedBy.Name}	Name of the user that created the Task.
{!CreatedBy.Phone}	Phone number of the user that created the Task.
{!Description}	Value of the Comment field.
{!Id}	Unique Salesforce.com record Id of the Task. Generally used to build a hyperlink to the Task back in Salesforce. Note: This token should only be used in the ContactTaskUpdate template.
{!LastModifiedBy.Email}	Email address of the user who last edited the Task.
{!LastModifiedBy.Name}	Name of the user who last edited the Task.
{!LastModifiedBy.Phone}	Phone number of the user who last edited the Task.
{!Priority}	Priority of the Task.
{!ReceiptType}	Special merge token that indicates if the receipt is for a contact task completion or an update. If the task was completed the token resolves to “completed”. If the task was updated but not completed the token resolves to “updated”. This token is only valid in the ContactTaskReceipt template.
{!SFDCURL}	Special merge field that renders the URL of the organization's Salesforce.com instance. Generally used to build a hyperlink to the Task back in Salesforce. Note: This token should only be used in the ContactTaskUpdate template. Note: When used in the ContactTaskUpdate template this token gets its value from the General Settings iTools Setting SFDCURL .
{!Status}	Status of the Task.
{!Subject}	Subject of the Task.
{!TaskCompleteEmailAddress}	The email address of the Salesforce email handler process set up to handle the Contact Task completion processing via



	<p>an email message. The value of this token comes directly from the Email Service Address setting on the Contact Task configuration page.</p> <p>Note: This token should only be used if you have configured iTools for the Task Completion Using Email method for Contact Tasks.</p>
{!TaskCompleteURL}	<p>Special token that resolves to the URL to the Sites page the contact can access to update and complete their assigned task. The value of the token is based on the configuration settings plus special query string parameters added to the address of the Sites page.</p> <p>Note: This token should only be used if you have configured iTools for the Task Completion Using Sites Page method for Contact Tasks.</p>
{!TaskListURL}	<p>Special token that resolves to the URL to the Sites page the contact can access to view a list of all tasks assigned to them. The value of the token is based on the configuration settings plus special query string parameters added to the address of the Sites page.</p> <p>Note: This token should only be used if you have configured iTools for the Task Completion Using Sites Page method for Contact Tasks.</p>
{!What.Name}	<p>Name of the object (Account, Opportunity, etc.) specified in the Task Related To field.</p>
{!Who.Name}	<p>Name of the Contact or Lead specified in the Task Name field.</p>



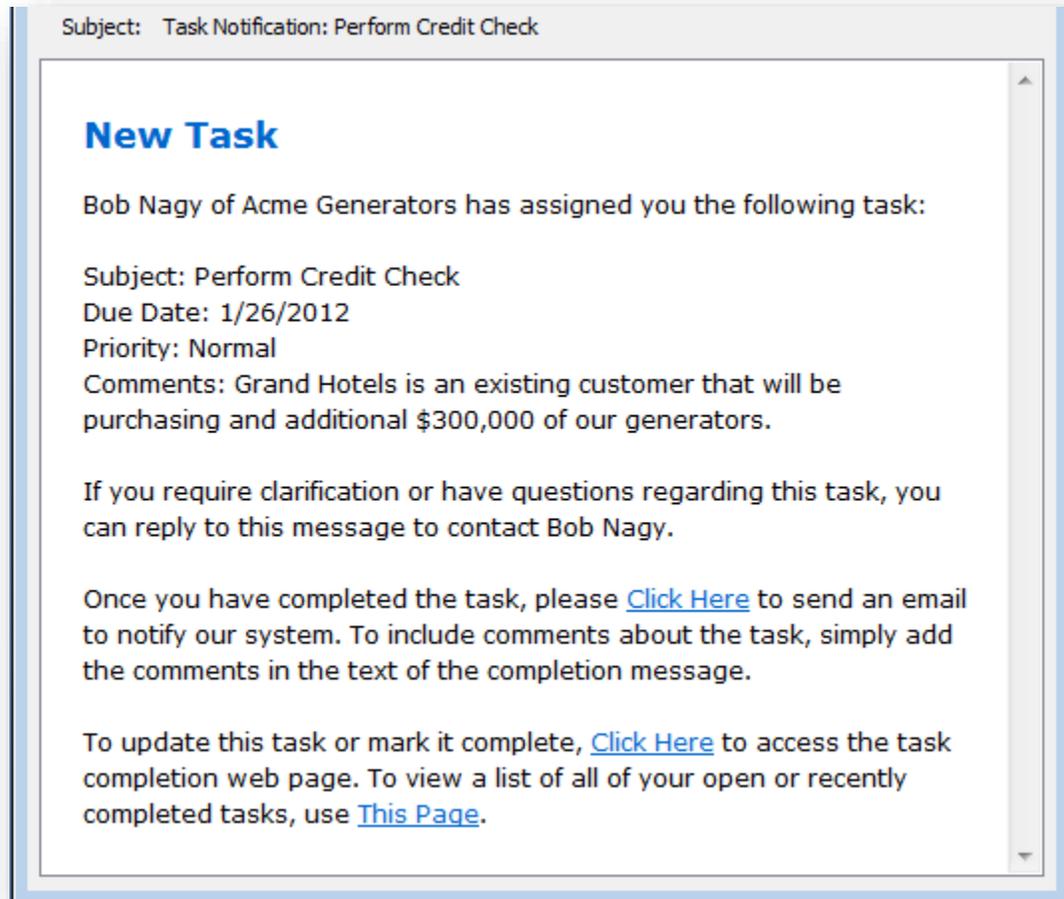
If you are using the Contact Task feature to assign tasks to people outside your organization, it is a best practice to include your organization's name in the notification message since that contact could receive task assignments from multiple organizations who are using iTools Delegated Tasks Management.

The default version of the **ContactTaskNew**, **ContactTaskReceipt**, **ContactTaskCancel**, **ContactTaskReminder**, and **ContactTaskOverdue** templates use the `{!CreatedBy.CompanyName}` token as the company name value which works well if every user has the proper Company Name value set on their user record. If this is not the case for all users, then it may be easier to update the templates and replace the `{!CreatedBy.CompanyName}` token with your company's proper name.



The default versions of the Contact Task feature templates are as follows:

New Task





Task Reminder

Subject: Task Reminder: Perform Credit Check

Task Reminder

The following task assigned to you by Bob Nagy of Acme Generators is due on 3/19/2012:

Subject: Perform Credit Check
Priority: Normal
Comments: Grand Hotels is an existing customer that will be purchasing and additional \$300,000 of our generators.

If this task is complete, please [Click Here](#) to send an email to notify our system. To include comments about the task, simply add the comments in the text of the completion message.

If this task is complete, [Click Here](#) to access the task completion web page. To view a list of all of your open or recently completed tasks, use [This Page](#).



Task Overdue

Subject: Task Overdue: Perform Credit Check

Task Overdue

The following task assigned to you by Bob Nagy of Acme Generators is overdue:

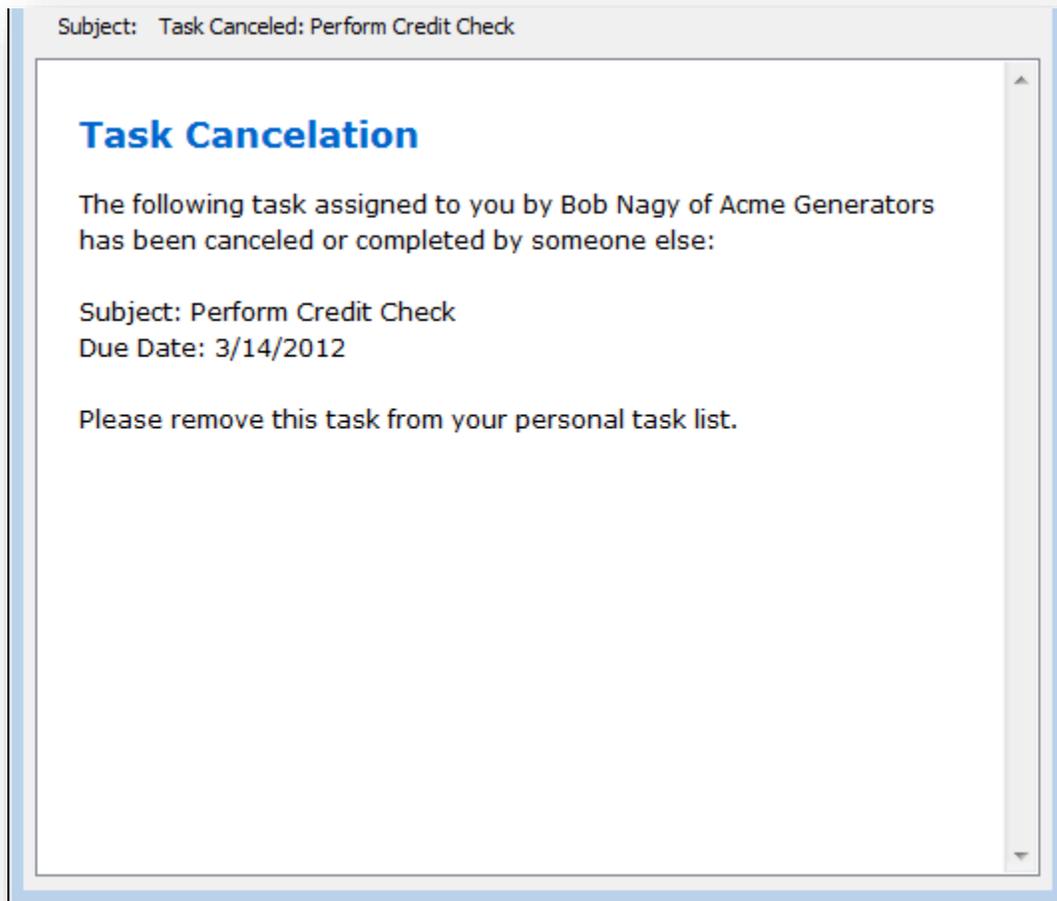
Subject: Perform Credit Check
Due Date: 3/14/2012
Priority: Normal
Comments: Grand Hotels is an existing customer that will be purchasing and additional \$300,000 of our generators.

If this task is complete, please [Click Here](#) to send an email to notify our system. To include comments about the task, simply add the comments in the text of the completion message.

If this task is complete, [Click Here](#) to access the task completion web page. To view a list of all of your open or recently completed tasks, use [This Page](#).

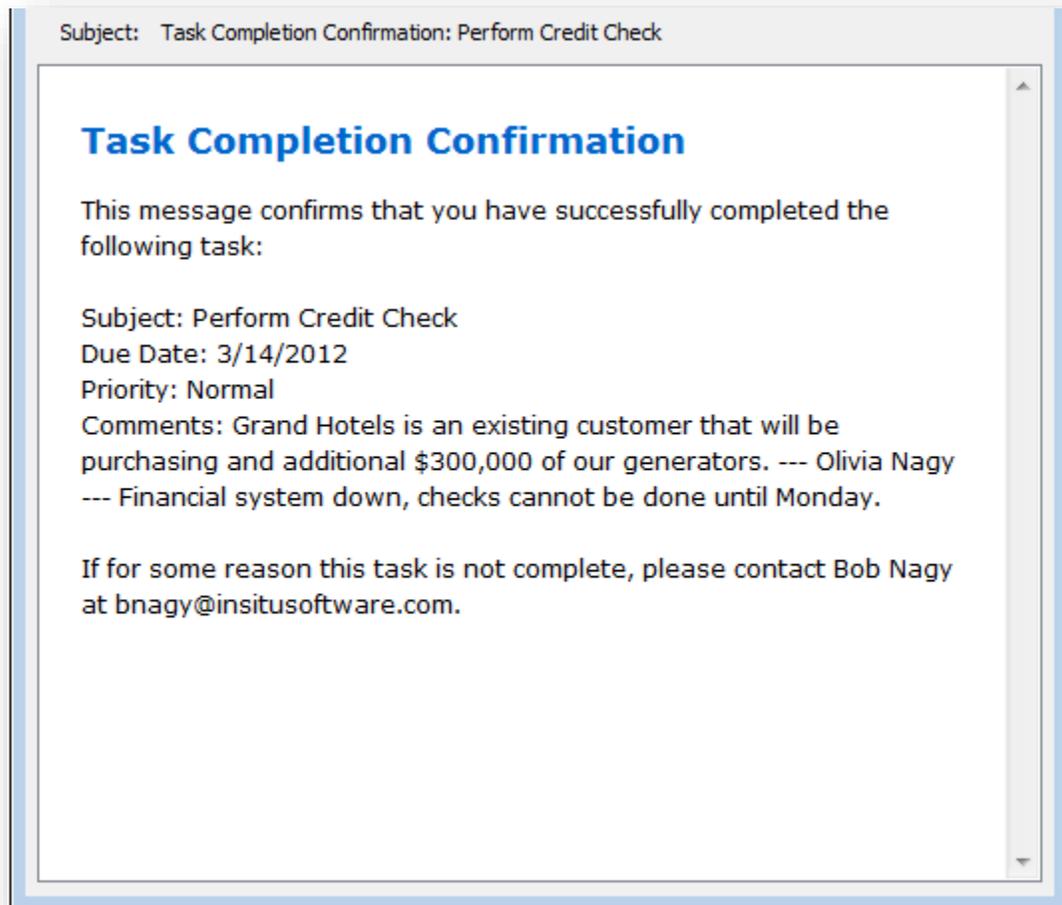


Task Canceled





Task Completion Receipt





Task Updated (sent to Task Owner)

Subject: Task Updated: Perform Credit Check

Updated Task

The following Contact Task has been updated by the contact:

Subject: Perform Credit Check
Name: Olivia Nagy
Related To: Grand Hotels Kitchen Generator
Due Date: 3/14/2012
Priority: Normal
Comments: Grand Hotels is an existing customer that will be purchasing and additional \$300,000 of our generators. --- Olivia Nagy
--- Financial system down, checks cannot be done until Monday.

For more details, click the following link:

<https://na1.salesforce.com/00TU00000005jtrCMAQ>



Contact Task Lightning Action

Because a Contact Task must have the Name field set to a Contact, a popular approach to creating Contact Tasks in the Lightning UI is to create a Contact Action and include that action on the Lightning Activities component. This approach can simplify the Contact Task creation process for your users and eliminate the need to include the Contact Task checkbox on other task related global actions.

The screenshot shows the Lightning Activity configuration interface. At the top, the 'ACTIVITY' section is highlighted. Below it, there are three buttons: 'New Task', 'Contact...' (which is highlighted in blue), and 'Log a Call'. Underneath these buttons are three input fields: 'Subject' with a search icon, 'Due Date' with a calendar icon, and 'Comments' with a text area. At the bottom left, there is a 'Notify when Complete' checkbox with an information icon. At the bottom right, there is a blue 'Save' button. Below the form, there is a filter bar showing 'Filter: All time - All activities - All types'.

To create a Contact Action that generates a Contact Task, follow these simple steps:

1. Navigate to **Setup > Objects and Fields > Object Manager**
2. Click on the **Task** link
3. Click on the **Buttons, Links, and Actions** option



4. Click the **New Action** button

Contact Actions New Action

The screenshot shows a dialog box titled "Enter Action Information" with "Save" and "Cancel" buttons. The form contains the following fields:

- Object Name:** Contact
- Action Type:** Create a Record
- Target Object:** Task
- Standard Label Type:** --None--
- Label:** Contact Task
- Name:** Contact_Task
- Description:** Creates and assigns a task to the current Contact
- Success Message:** The contact was sent an email letting them know
- Icon:** Change Icon

5. Enter values for the new action. The Label, Name, Description, and Success Message can be any value you like. Click **Save** when complete.
6. After creating the action, you will be directed to the Page Layout for the action. Include the fields you want your users to be able to specify when creating a new Tasks to be assigned to the current contact. Remove the default fields you do not need. You do NOT need to include the Name field or the Contact Task checkbox. Remember, screen space on task actions is limited so only add the fields you really need. When you are done click the Save button.

The screenshot shows a page layout with the following fields:

- Subject:** Sample Text
- Due Date:** 10/4/2018 10:44 AM
- Comments:** Sample Text
- Related To:** Sample Text
- Notify when Complete:**

7. You may be prompted with a warning message indicating that some required fields such as Assigned To, Status, and Priority and not included and must have default values. It is Ok to choose **Yes** as these fields have system default values and other fields specific to your environment can be specified with defaults in the next step.



- Once you are returned to the Action detail page, click the **New** button in the Predefined Field Values section.

New Predefined Field Value for Contact Task

[Help for this Page](#)

Predefined Field Value Edit

Field Information ! = Required Information

Target Object Task

Field Name

Field Type Checkbox

Specify New Field Value

Formula Value [Show Formula Editor](#)

Use **formula syntax**: Enclose text and picklist value API names in double quotes: ("the_text"), include numbers without quotes: (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7)

- Select "Contact Task" for the Field Name and set the Formula Value to `True`. Click **Save** when you are done.
- Click the **Page Layouts** option to access the list of page layouts for the Contact object.
- Click on the Contact Page Layout you wish the Contact Task action to appear on.



If you currently use the Professional Edition of Salesforce, you will not see a list of page layouts because the Profession Edition supports only one page layout per object.

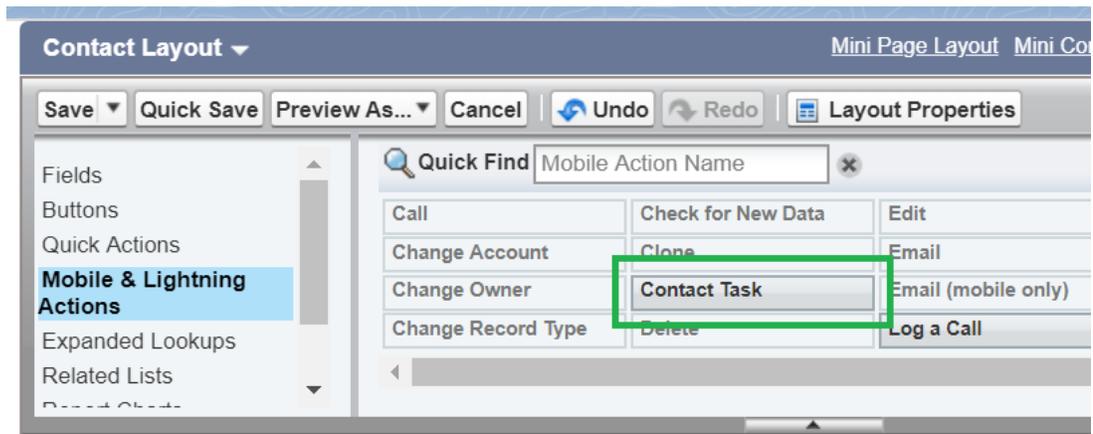
- Salesforce has a predefined set of Lightning Actions for each object. If you have never overridden the actions for the Contact object, the **Salesforce Mobile and Lightning Experience Actions** section of the page layout will display a message with a link to override the default actions. If this message appears, click the "override the predefined actions" link.

Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

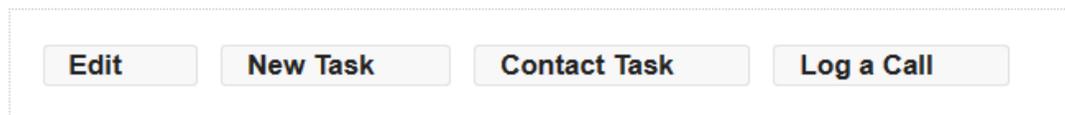


- Click the **Mobile & Lightning Actions** section at the top of the page and locate the Contact Task action you created earlier.



- Drag the Contact Task action into the **Salesforce Mobile and Lightning Experience Actions** section of the page layout then click Save.

Salesforce Mobile and Lightning Experience Actions



Custom Web Pages for Task Completion

Custom web pages are a great way to enhance the overall user experience for people outside your organization to whom you may assign Contact Tasks. Customized versions of the standard Task Completion and Task List pages can be beneficial in helping support your corporate branding initiatives, provide additional instructions or serve to link your contacts to other areas of your website. If your organization has the resources to create custom Apex code and Visualforce pages and would like to implement custom versions of these two pages, the team at InSitu Software can help step you through the process. Please contact InSitu technical support at support@insitusoftware.com for more details.



Implementation Tips

Prior to completing the implementation of the Contact Task feature, we suggest a quick review of our list of important tips. These tips are provided to help ensure a smooth rollout of this feature to your users and associated contacts.

- Users who are permitted to create Contact Tasks must have the **Send Email** System Permission checked for their Salesforce account profile.
- Inform your users that tasks they have assigned to contacts will appear in their Delegated Tasks list with ***their*** name, not the assigned contact's name, in the Assigned To column. This is because the user is technically still the owner of the task. However, remind them that when they see tasks in the list for which they are designated as the owner, those tasks are most likely Contact Tasks that have been assigned to people who do not have a Salesforce license. To help readily identify these tasks a small icon is displayed next to the Assigned To name

Assigned To	Status
 Bob Nagy 	Not Started

- Users that frequently assign tasks to Contacts may want to add filters to their native Salesforce Task views to exclude those tasks. Views with filters that include the Owner set to "My Tasks" may want to add "Contact Tasks equals False" so the tasks they have assigned to a Contact does not get included in the list.
- Online guidance can be easily incorporated into the Contact Task completion process and can be a great benefit to those contacts within or outside your organization that may be assigned a task to complete. Simply create a web page on your external web site or the Force.com site that explains the Contact Task completion process from the contact's perspective and include a link to that page in your New Contact Task notification message.
- New Contact Task messages are constructed with the Reply To address set to the email address of the user that created or last edited the task. This is done so that contacts can reply to a New Contact Task message if further clarification is needed. It is also helpful because any automatic 'out of office' message responses that are generated if the contact is not available will be sent to that task delegator which makes them aware that the contact may not be able to complete the task in a timely manner.
- If you have configured iTools for the Task Completion Using Email method for Contact Tasks, it is important that the assigned contacts know that they should



not reply to the any of the New Task notifications they may receive in order to indicate that a task has been completed. Instead, instruct them to use the links in the email message to designate that a task has been completed. These links will pre-configure the appropriate email response using a special email address created for the email service and the special Contact Task token subject (placed between the “ref:” and “:ref” text).

- Be sure to keep the email address up to date for any contact that may be assigned a task to complete. Often when a person leaves an organization, their email address is not immediately inactivated, so the email will be delivered but not necessarily acted upon. Therefore, make it a best practice to verify that the email address on the Salesforce contact record is correct before assigning a task to that contact.
- If a Contact Task must be reassigned to a different contact, make it a best practice to first send a Contact Task Cancellation notice to the currently assigned contact before updating the contact assigned to the Contact Task. To send a cancellation notice, click the **Send Cancellation** link in the Contact Tasks Status component. Then, update the contact name assigned to the task. When the new contact name has been saved, a New Contact Task notification will be sent to the newly assigned contact.
- If you have configured the iTool to use the Task Completion Using Email method when assigning Tasks to people outside your organization, you should ***not*** choose “Bounce Message” for any of the Failure Response Settings. If the messages from those contacts are bounced, then your team will not be aware that an issue may exist. Instead, you will want to route the error back to your team so that you can address the situation as soon as possible and limit the impact it may have on your customers, partners, and other outside participants.
- There are many different reasons that the delivery of an email notification may fail, so it is important for a delegator to make sure to keep an eye out for any responses from the email servers that indicate a notification was not successfully sent. Most times, the delegator who assigns a Contact Task will receive immediate notification of a delivery failure. However, there are other circumstances for which the failed delivery notification may take hours or even days to receive. Examples include a contact is no longer at their company, their inbox is full, or their company’s email system is experiencing problems. Make it a best practice for your delegators to respond quickly to these delivery notification failures so that too much time does not pass before an assigned task can be appropriately communicated and completed.



Feature: Activities Tab

Included with iTools Delegated Tasks Management is a “tab” which allows users to easily access the standard Salesforce activity list view. While this view is part of the native Salesforce application, access to it is often difficult for users to locate and impossible if the user does not have the My Calendar home page component.

Sites using Lightning will have the new native Salesforce “Tasks” tab available to them and not likely to need the iTools provided Activities tab.

Action	Subject ↑	Name	Related To	Due Date	Status
Edit Del	Bakersfield proposal		Grand Hotels Kitch...	1/31/2014	Not Started
Edit Del	File TPS report			4/19/2013	Completed
Edit Del	Research company...	Nagy, Michelle		4/23/2012	Completed
Edit Del	Send Proposal for...		Grand Hotels Kitch...	3/19/2012	Not Started
Edit Del	Set up demo with...	Nagy, Michelle		5/1/2013	Not Started

The Activity List View displayed on the iTools provided Activities tab is a standard list view which allows users to create and customize named views in the same manner as all other Salesforce list views. The only control iTools has over this native page is the number of rows included in a page of data. If you wish to increase this number from the initial value of 25 for some or all your users, update the **ATRowsPerPage** iTools Setting.

The Activities Tab feature is one of the few features in iTools Delegated Tasks Management that can be accessed by users that do not have an iTools license. To grant access to this special tab you must assign a user the **iTools Activities Tab User** permission set and grant them a license to the iTools Delegated Tasks Management package. The way iTools licensing works, your organization receives as many iTools Delegated Tasks Management licenses as it wants but only one iTools Configuration Manager License for each paid subscription. Most of the functionality associated with the iTools Delegated Tasks Management package will NOT work unless the user has a license to BOTH iTools packages but the Activities tab is an exception.



Feature: Prevent User Emails

If you have certain user accounts that you do not want any task related emails sent to them but cannot prevent them from being a task delegator (e.g. account used for integration or that creates tasks as part of a workflow), you can configure an individual user account so that they will no longer receive emails.

▼ Additional Information

Send No iTools Delegated Tasks Emails

The installation of iTools Delegated Tasks Management added a checkbox custom field to your User object called **Send No iTools Delegated Tasks Emails**. Simply add this custom field to your User Page Layout(s) and update the field to “checked” for those users that should not receive email messages. Also, depending on how you assigned security to iTools Delegated Tasks Management resources you may also need to make sure all your user Profiles have read access to this field.



Feature: Enhanced Task Visibility

The native Salesforce Task object does not have its own security model so the visibility of a task a user does not own (is the Assigned To user) is generally determined by a user's ability to view Contact, Lead, or object referenced in the Related To field or the creator's position in the Role hierarchy relative to the task owner. This behavior can create task visibility issues for task delegators. It is possible, and in some organizations common, that a user delegating a task to another user will not be able to find or view the task they created. This can lead to user confusion and make it challenging to monitor a delegated task's status. To help address this issue iTools has two mechanisms which you can activate to enhance task visibility for task creators.

View All Tasks

iTools can ignore the native Salesforce task security when generating the list of tasks for its Delegated Task List. By changing the iTools Setting **ViewAllTasks** from N(o) to Y(es), you give iTools permission to populate the Delegated Tasks List with all tasks the current user delegated, even if the user is not permitted to view the task record.

The **ViewAllTask** option only applies to the Delegated Tasks tab and home page component, meaning that native Salesforce views of tasks will not include the same tasks. In addition, if the user clicks on a task to go to the details and does not have read privileges, then Salesforce will display the standard error message informing them they do not have appropriate privileges to view the task.

No Context Visibility

Because Salesforce tasks commonly determine their visibility to non-owners based on the visibility of the record referenced in the Name and/or Related To field, delegated tasks that have no context (Name and Related To are blank) are visible to no one other than the task owner. This can be a real issue for managers that delegated tasks that have nothing to do with other records in Salesforce. For example, tasks such as "Complete Next Year's Forecast" or "Get last month's expense report to Accounting" simply disappear from the perspective of the delegator.

To address this problem iTools Delegated Tasks Management includes a feature we call No Context Visibility. By changing the iTools Setting **NoContextVisibility** from N(o) to Y(es), iTools will automatically set the Related To field on a delegated task with no context to a special record that represents the task's creator and is visible only to that user. These special records are InSitu Task Visibility records and are created by iTools as



needed. You will never have more than one record per user and the records are only visible by the user they represent.



Feature: Related To Mirrored Fields

When modifying the iTools message templates you may find the need to include fields from the record specified in the Related To field. For example, if you were sending a Group Task to a finance group to perform a credit check in advance of a new deal, you might want to include the Amount field for the Opportunity referenced in the Related To field of that request task. Ideally you would be able to include a formula field on the task object that “pulled” in the Amount field via a reference to the associated Opportunity and then include that custom formula field in the iTools email template. Unfortunately, Salesforce.com does not support formula reference via the Related To field like it does other reference fields. iTools understands this problem and includes support for a solution that will solve your problem. We call this feature Related To Mirrored Fields.

The way the feature works is you create a custom lookup field to the object whose field(s) you wish to include in the email template. For example, to get the opportunity amount field you first create a custom lookup field to the Opportunity object. You also create custom formula fields that “pull” in information from that referenced record. In our example that would be a custom formula field that referenced the Amount field via a reference to the Opportunity lookup field. Then, you simply tell iTools which field(s) are your special lookup fields by updating the **RelatedToMirroredFields** iTools Setting. Now when the Related To field is set to a record of the same type as one of your special lookup fields, in our example an Opportunity record, iTools will populate that lookup field with the same record reference as is in the Related To field. We essentially “mirror” your lookup custom field with the value in the Related To field. These special mirrored fields don’t even need to be on your page layouts so your users don’t even need to know they exist.

Once you have the mirrored fields being populated by iTools, and formula custom fields you created that “pull” values from the mirrored record can easily be included in your email templates.

To activate this feature in your Salesforce org, follow these simple steps:

1. Create a new Activity custom field(s) that is a lookup to the type of object whose fields you want to include in the email template(s). You can mirror more than one object type if the requirements call for it.
2. Create Activity custom formula field(s) that are simply references to fields on the object used in the lookup custom fields.
3. Access the **RelatedToMirroredFields** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.



ITools Setting Edit
RelatedToMirroredFields

Add Remove Close

Settings

iTools Setting Edit = Required Information

Mirrored Fields

3. Click the **Add** button.
4. Select the custom lookup field you want mirrored. The list of fields is limited to custom lookup fields that reference object that can have Activities.

RELATEDTOMIRROREDFIELDS
Add Field

Cancel Add

Settings

iTools Setting Edit = Required Information

Field to Mirror

Opportunity
Account

5. Click the **Add** button.
6. Repeat steps 3 through 5 if you want more than one field mirrored. Remember, only one record can be referenced in the Related To field so only one mirrored field will ever be set.
7. Click the **Close** button and the feature is activated. If you wish to deactivate the feature, simply Remove all the mirrored fields from the **RelatedToMirroredFields** iTools Setting.



The fields referenced in the **RelatedToMirroredFields** setting and not updated by Salesforce should you change their API name or delete them from your org. If you want to change a mirrored field's API name or delete it you must remove it from the **RelatedToMirroredFields** setting to avoid task creation errors.



Feature: Delegator Override

iTools Delegated Tasks Management helps you manage tasks you create but assign to others to complete. iTools always defines the delegator of a task as the user that created the task. There are situations, however, when you also delegate the creation of the task to someone else, such as an assistant or automated process. In this case, you are neither the creator nor the owner of the task but are clearly still responsible for the task and need to track its status.

If your organization has a frequent need to designate a user other than the task creator as the task's delegator, you should consider using the Delegator Override feature. To use this feature, you simply create a User lookup custom field on your Task object and tell iTools about the field. If this User field is populated on a task, and iTools knows about the field, the user in that field will be treated as the delegator rather than the user in the Created By field. If the field is left blank, iTools will continue to use the task's creator as the delegator. You can even use the new Process Builder to set the delegator override field if you have tasks where the delegator can be determined by "rule". This "delegator override" will impact both the Delegated Tasks List and any notifications iTools sends to a task's delegator.

To enable the Delegator Override feature, follow these simple steps:

1. Navigate to the list of Activity custom fields

Lightning:

Setup > Objects and Fields > Object Manager >

Click the **Activity** link in the list > **Fields and Relationships**

Classic:

Setup > Customize > Activities > Activity Custom Fields

2. Click the **New** button.
3. Create a Lookup Relationship field to the User object. You can name the field anything you like and include it on the task page layouts if you want users to be able to specify a delegator override. Be sure to grant read and write access to this field for all profiles that will be able to specify an alternative task delegator.



As of the Winter '19 version of Salesforce.com you can only create one User lookup custom field on the Activity object. If you already have a User lookup custom field on the Activity object in your org you will not be able to use the iTools Delegator Override feature.



4. Access the **DelegatorOverrideField** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.
5. Click the **Edit** button.
6. Select the User lookup custom field that you have designated as the Delegator Override and click **Save**.

ITools Setting Edit
DelegatorOverrideField Cancel Save

Settings

iTools Setting Edit = Required Information

Delegator Override Field

Feature Not Used
Delegator Override



To disable the Delegator Override feature simply access the **DelegatorOverrideField** iTools Setting and change the value to “Feature Not Used”.



Feature: Additional Notify

There are times when you need someone other than the task owner and the task delegator to receive the iTools Delegated Tasks Management notifications for a given task. If this is a need in your organization, you should consider using the Additional Notify feature. To use this feature, you simply create a User lookup custom field on your Task object and tell iTools about the field. If this User field is populated on a task, and iTools knows about the field, the user in that field will receive the same iTools generated email notifications as the task's delegator.

To enable the Additional Notify feature, follow these simple steps:

7. Navigate to the list of Activity custom fields

Lightning:

Setup > Objects and Fields > Object Manager >

Click the **Activity** link in the list > **Fields and Relationships**

Classic:

Setup > Customize > Activities > Activity Custom Fields

8. Click the **New** button.
9. Create a Lookup Relationship field to the User object. You can name the field anything you like and include it on the task page layouts if you want users to be able to specify an additional user for notifications. Be sure to grant read and write access to this field for all profiles you want to use this feature.



As of the Winter '19 version of Salesforce.com you can only create one User lookup custom field on the Activity object. If you already have a User lookup custom field on the Activity object in your org you will not be able to use the iTools Additional Notify feature.

10. Access the **AdditionalNotifyField** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.
11. Click the **Edit** button.
12. Select the User lookup custom field that you have designated as the Additional Notify and click **Save**.



ITools Setting Edit AdditionalNotifyField Cancel Save

Settings

iTools Setting Edit = Required Information

Additional Notify Field

Feature Not Used
Also Notify



To disable the Additional Notify feature simply access the **AdditionalNotifyField** iTools Setting and change the value to “Feature Not Used”.



Feature: Advanced Message Template Management

Each email notice generated by iTools Delegated Tasks Management is based on an email template found in the iTools Settings. These templates can be edited to modify the content and style of each type of email notice. The templates support “tokens” which are replaced with task specific values when the message is generated but the structure, style, and non-tokenized text in an action’s template is the same for every task. We do include separate templates for the same action depending on whether the messages are being sent to other Salesforce users in your organization or contacts assigned to Contact Tasks. For most organizations and business processes this is all the flexibility that is needed but there are situations where a different message is required for the same action based on some condition or attribute of the individual task that generates the message. If this the case in your organization, iTools Delegated Tasks Management has a feature we call Advanced Message Template Management which will enable you to use different message templates for the same action on different tasks.

The feature works by associating the value in an Activity custom field to a record in an iTools custom object called Task Message Templates. To enable the feature, you will need to create an Activity custom field, determine how it will be populated when a template other than the default is needed (user set, process automation, formula, etc.), create new versions of the iTools templates as Task Message Template records, and configure you Salesforce environment to let iTools know you are using Advanced Message Template Management. While this configuration process does not require any programming or special technical skills, it does require several advanced administrative tasks which are easier to implement with the assistance of InSitu Software support personnel. If you wish to pursue this dynamic template assignment mechanism, please contact us and we will be happy to explain the feature in greater detail and walk you through the configuration.



Feature: New Event Notification

Unlike Tasks, Salesforce does not have a notification mechanism for letting users know an Event was created for which they are responsible (are the Assigned To user). iTools Delegated Tasks Management includes the ability to check a checkbox when creating a delegated Event and have the Assigned To user notified via email that the new event was assigned to them.

New Event

Calendar Details

* Assigned To
Adam Adams

Send Notification Email

* Start
Date: 10/4/2018 Time: 3:00 PM

* End
Date: 10/4/2018 Time: 4:00 PM

* Subject
Client call re technical specs

Name
Lauren Boyle

Related To
United Oil & Gas Corp.

Description Information

Description
Lauren need about an hour to go through the specs of the new T-1000.

Cancel Save & New Save

This checkbox was added to your standard Activity object when iTools Delegated Tasks Management was installed. However, the checkbox control must be added to your Event Page Layout(s) for users to take advantage of the feature. If you would like to make this feature available to your Salesforce users, follow these instructions:



Update Task Page Layout

1. Navigate to the Page Layout editor for the Event page

Lightning:

Setup > Objects and Fields > Object Manager >

Click the **Event** link in the list > **Page Layouts >**

Click the  icon in the last column of the layout to update >

Edit

Classic:

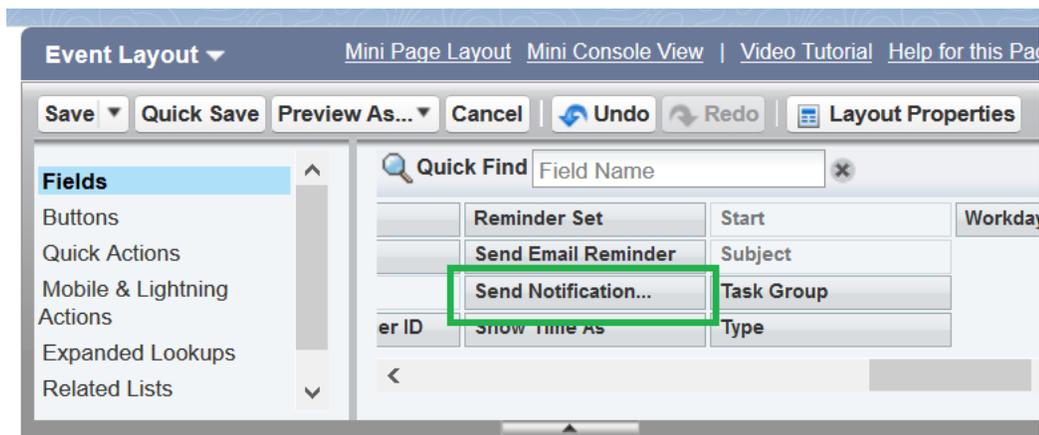
Setup > Customize > Activities > Event Page Layouts >

Click on the **Edit** link next to the layout to update



If you currently use the Professional Edition of Salesforce, you will not see a list of page layouts because the Profession Edition supports only one page layout per object.

2. Locate the **Send Notification Email** field in the list of fields at the top of the page.



Be sure to select the iTools field labeled **Send Notification Email**. If you hover over the field with your mouse the pop-up info will show a Name of InSituDtm__EN_Visible_Flag.



3. Drag the field to the location on the Event Page Layout that suits your layout best. The exact location does not impact the operation of the feature.

Event Detail

Calendar Details (Header visible on edit only)

* ● Assigned To	Sample Text
Send Notification Email	✓
* ● Subject	Sample Text
● Name	Sample Text
🔒 Phone	1-415-555-1212
🔒 Email	sarah.sample@company.com
● Related To	Sample Text

Other Information (Header visible on edit only)

4. Click on the **Save** button at the top of the page to save your changes.



If you have more than one Event Page Layout in your organization, you will need to repeat this task for each page layout. If you currently use the Professional Edition of Salesforce, you will only have a single Event Page Layout.

Update Message Template

iTools Delegated Tasks Management New Event Notification message lets a user know a new event exists in Salesforce for which they are responsible. For ultimate flexibility and customization, iTools uses an email template as the basis for the notification that it sends. This gives your organization the ability to adjust the design of both the content and layout of the messages - for more effective communication or to meet certain company standards set up for internal communications.

To make sure the notification works well for all types of email applications and web browsers, each template is made up of a Subject field, a message body in HTML form, and a message body in plain Text form. Based on the settings and capabilities of their email reader, the most appropriate version will be used for each user.

iTools Delegated Tasks Management setting for the new event notification template is **NewEvent**.



Salesforce.com did not originally support the use of Event fields as merge fields in native email templates. Therefore, the location and way you define the email templates for iTools Delegated Tasks Management is slightly different. The iTools email templates are defined and edited in the same way as other iTools customizations – using the iTools Settings Tab. The setting for the new event notification template is **NewEvent**.

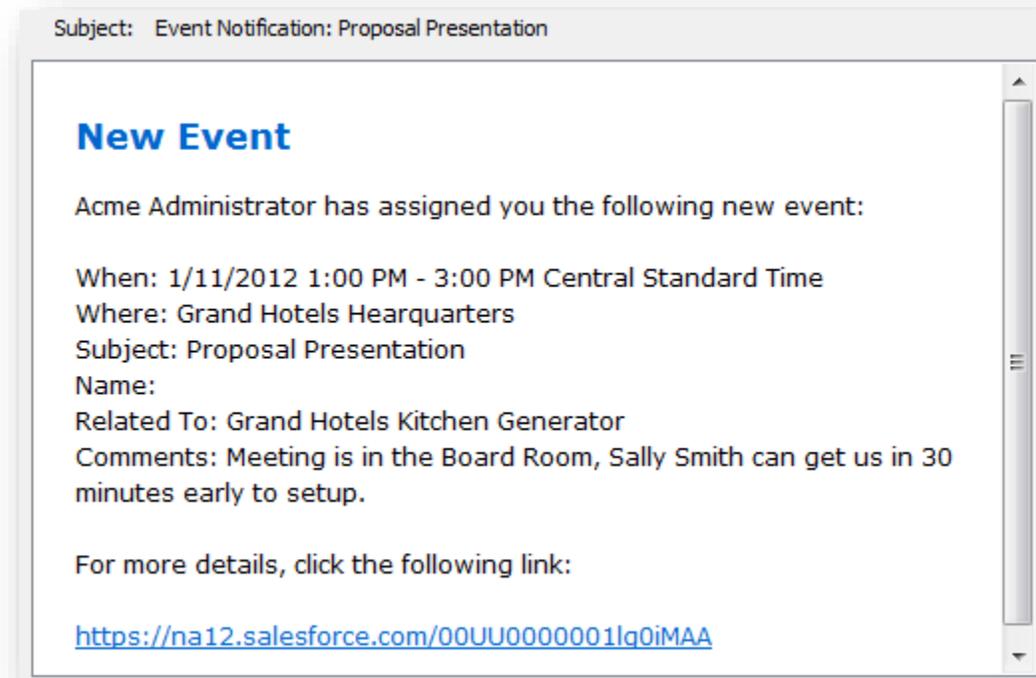
The iTools message templates support a set of merge fields which serve as placeholders for data that will be replaced with information from the current Event. Generally, the name of the merge field is the same name as the Event field. The syntax of an iTools merge field consists of an open curly brace and exclamation point, followed by the field API name and a closing curly brace: `{!ActivityDate}`. All standard fields are supported as well as any custom Activity field your organization has defined. In addition, there are a few ‘special’ merge fields which do not equate directly to fields on an event object, but are helpful when constructing notification messages. The following table includes the special and most commonly used merge fields that are available to include in the **NewEvent** template.

Merge Field	Meaning
<code>{!CreatedBy.Email}</code>	Email address of the user that created the Event.
<code>{!CreatedBy.Name}</code>	Name of the user that created the Event.
<code>{!CreatedBy.Phone}</code>	Phone number of the user that created the Event.
<code>{!Description}</code>	Value of the Description field.
<code>{!Id}</code>	Unique Salesforce.com record Id of the Event. Generally used to build a hyperlink to the Event back in Salesforce.
<code>{!Location}</code>	Location of the Event.
<code>{!SFDCURL}</code>	Special merge field that renders the URL of the organization's Salesforce.com instance. Generally, this field is used to build a hyperlink to the Event back in Salesforce.
<code>{!Subject}</code>	Subject of the Event.
<code>{!What.Name}</code>	Name of the object (Account, Opportunity, etc.) specified in the Event Related To field.
<code>{!When}</code>	Special merge field that renders the Start and Stop information of an Event. The time values are rendered in the time zone of the user assigned to the Event.
<code>{!Who.Name}</code>	Name of the Contact or Lead specified in the Event Name field.



The default version of the New Event Notification feature template is as follows:

New Event





Configuration Options

There are several iTools Settings which can be used to modify the behavior of the New Event Notification feature. Those settings and their impact on the feature are as follows:

AlwaysSendEventNotify

Indicates whether the iTools New Event messages should be sent to the Event owner regardless of the state of the **Send Notification Email** checkbox.

If you would like the user to check the **Send Notification Email** checkbox to indicate that a new event notification should be set, then leave the value set to N(o).

Update the setting value to Y(es), if you prefer the new event notifications always be sent when a new event is created.



When the **AlwaysSendEventNotify** setting is set to Y(es), the **Send Notification Email** checkbox field should ***not*** be added any New Event page layout(s). Otherwise, the presence of the checkbox will be misleading to your users since its value will be ignored.

AllowSendToSelf

Indicates whether the iTools New Event messages should be sent to the Event owner if the Event owner is the Event creator. If the setting is set to N(o), and the creator of the event is the Assigned To user AND the **Send Notification Email** checkbox is checked, no email notice will be sent. If you would like event creators to be able to send themselves notices set this value to Y(es).



Feature: Related To Owner

iTools Delegated Tasks Management helps you manage tasks you create but assign to others to complete. There are situations, however, when you also delegate the creation of the task to someone else, such as an assistant. In this case, you are neither the creator nor the owner of the task but are clearly still responsible for the task and need to track its status.

Similarly, monitoring tasks for which you are neither the creator nor owner often occurs when you are managing a team of people on an account, project or opportunity. In this situation, there will be many times in which you may ask individual team members to create and complete their own tasks. So, even though you are the owner of the Account, Project or Opportunity, you may not be the creator or owner of tasks related to it. As the person responsible for overall success, you will want to see all the related tasks in your Delegated Tasks list as well as be notified when each of them is completed.

The **Related To Owner** feature is available for just this purpose – it allows you to monitor open tasks related to objects you own, regardless of who created those tasks and to whom they are assigned.

This feature of iTools only works at organizations that closely control the record ownership of EVERY object that can be associated with an Activity. The Related To Owner mechanism cannot be selectively used on a record by record or object by object basis. As such, this feature is not appropriate for most organizations. If you have selective cases where the task creator is not the user that should be considered the actual delegator, you should look at the Alternative Delegator / Notify feature.

Enabling Related To Owner

A single configuration page is provided to enable and configure the Related To Owner feature. Follow these simple steps to activate and configure the feature.

1. Access the **RTO_Configure** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.
2. Click the **Edit** button.
3. Click the **Enable the Related To Owner feature** checkbox. You may also want to configure other settings related to this feature while on this page. Click the **Save** button to save your changes. The feature is now enabled.



ITOOLS SETTING EDIT
Related To Owner Configuration

Cancel Save

Settings

Enable the Related To Owner feature

General Settings = Required Information

Filter Default: Tasks I created

Notify Related To Owner (Send a Task completion notification email to the owner of the Task's Related To object)

NOTE: The Related To Owner Recalculation routine will be run automatically when the Related To Owner feature is enabled.

Custom Objects

Object API Name Owner Field API Name Add

ACTION	OBJECT NAME	OWNER FIELD
--------	-------------	-------------



When you enable the Related To Owner feature and click **Save**, the special Related To Owner Recalculation batch process will automatically run. This process will access and update iTools fields on every open task. For this process to complete successfully the user that activates this feature must have View All Data and Edit All Data permission.



Run the Related To Owner Recalculation Process

In Salesforce, tasks can be related to many different types of objects such as Opportunities, Accounts, Leads, Cases, and Contracts. Tasks can also be related to custom objects unique to each organization. This tremendous flexibility provided by the platform, also comes at a cost, as Salesforce does not provide direct access to the owner of the related object like it does for other similarly related objects. This capability is needed to quickly generate the Delegated Task list with tasks that are related to objects a user owns. To address the situation, iTools Delegated Tasks Management provides a custom field on the task object to track and maintain the owner of the object to which the task is related. The Related To Owner tracking field is automatically updated every time an open task is created or edited.

There are a few situations in which the Related To Owner tracking field must be calculated and set on many tasks at once. These include:

1. When the Related To Owner feature is enabled.
2. When ownership is reassigned on multiple Salesforce objects at once. This usually occurs when a user leaves an organization or new territory assignments are made.

To efficiently update the tracking field value for all the tasks impacted by these events, iTools Delegated Tasks Management provides a batch process that can be automatically scheduled and run. The Related To Owner Recalculation batch process is automatically run when the Related To Owner feature is enabled. For times when ownership is reassigned on multiple Salesforce objects at once, it is recommended that the routine be run after the reassignment is complete. Also, if object ownership frequently changes in your organization, it is a best practice to schedule the batch process to automatically run on a regular basis (e.g. once a week) to ensure the tracking field remains current.

Follow these simple steps to manually run the recalculation process.

1. Access the **RunRTORecal** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.
2. Click the **Start** button to initiate the recalculation batch process.



 ITOOLS SETTING
Related To Owner Recalculation

Cancel Start

✓ Related To Owner Recalculation

This routine will update the owner tracking field on a task in the event the owner of the related object (Opportunity, Account, Case, etc.) has changed. The owner tracking field value is calculated for your organization's open tasks when you enabled the Related To Owner feature and is kept up to date as each individual task is edited. If, however, the owner of the related object is changed, the owner tracking field on the associated tasks is not updated. To ensure the owner tracking field always has the proper value, the Related To Owner Recalculation routine should be run.

There are several instances for which an organization will reassign ownership of Salesforce objects en masse - the most common of these is when a user leaves your organization. It is recommended that this routine be run after such a reassignment of object ownership. Also, if you frequently change object ownership, you should plan to schedule this routine to automatically run on a regular basis. For details on how to schedule the Related To Owner Recalculation routine, see the Delegated Tasks Management Configuration Guide.

Recalculation Last Run: 10/4/2018 3:30 PM



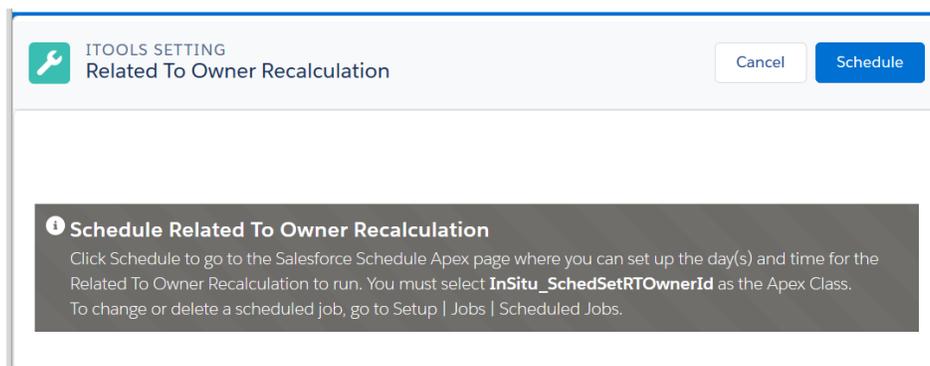
You should only manually run the Related To Owner Recalculation process if your Salesforce account is permitted to view and modify all open tasks. This generally means user accounts assigned the System Administrator profile.



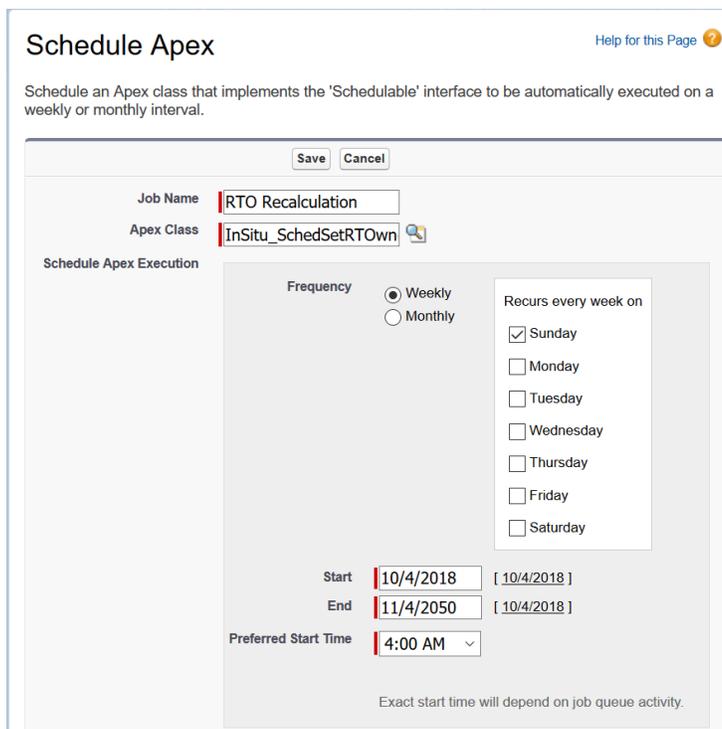
Scheduling the Related To Owner Recalculation Process

If object ownership frequently changes in your organization or you simply wish to ensure that all open tasks have the Related To Owner value recalculated on a regular basis, you can schedule the special batch process to run on a regular basis. Follow these steps to schedule the Related To Owner Recalculation process.

1. Access the **ScheduleRTORecal** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.
2. Click the **Schedule** button.



3. Enter a Job Name, select the Apex Class `InSitu_SchedSetRTOwnerId`, fill in the execution schedule, and click **Save**.





A scheduled Apex Job cannot be edited or paused. If you need to change the execution schedule or eliminate it completely, you must delete the scheduled job and create a new one with the desired changes.

You can access the list of schedule jobs by going to:

Lightning:

Setup > Environments > Jobs > Scheduled Jobs

Classic:

Setup > Jobs > Scheduled Jobs



You should only schedule the Related To Owner Recalculation process if your Salesforce account is permitted to view and modify all open tasks. This generally means user accounts assigned the System Administrator profile.

Support for Custom Object Tasks

The Related To Owner feature works with all of the standard Salesforce objects that support activities. However, if you have added custom objects to your environment and indicated that these objects Allow Activities, then you need to perform an additional configuration step for each object before it can be used by the Related To Owner feature. Follow these simple steps for each custom object you want supported:

1. Access the **RTO_Configure** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.
2. Click the **Edit** button.
3. In the Custom Objects section of the page, enter the **Object API Name** and the **Owner Field API Name** and click the **Add** button.



ITOOLS SETTING EDIT
Related To Owner Configuration

Cancel Save

Settings

Enable the Related To Owner feature

General Settings = Required Information

Filter Default: Tasks I created OR are Related To objects I own

Notify Related To Owner (Send a Task completion notification email to the owner of the Task's Related To object)

Custom Objects

ACTION	OBJECT NAME	OWNER FIELD
	Widget__c	OwnerId

Add

4. Repeat step #3 for each custom object that allows activities and you want included in the Related To Owner feature.
5. Click the **Save** button in the Settings section to save the custom fields you have added (or deleted).



The API name of all custom objects end in the character sequence “underscore” “underscore” “c”.

The API Name for the owner field will almost always be OwnerId.



Implementation Tips

Prior to implementing the Related To Owner feature, please review the following implementation tips. These tips are provided to help ensure a smooth rollout of this feature to your users.

- When the feature is first activated the Related To Owner Recalculation batch process will update a special task custom field added by iTools on EVERY open task. This updated will also update the **Last Edited** date and user on every open task to the current date and user that activated the feature.
- When adding custom objects that support activities to the configuration, the API name of the owner field will almost ALWAYS be "OwnerId" even though the Field Name displayed in setup is "Owner".
- The special Owner Id tracking field on a task is only updated if the user creating or editing the task has been allocated a license to BOTH the iTools Configuration Manager and iTools Delegated Tasks Management packages.
- If tasks are created from the Convert Lead page the special Owner Id field of those tasks will be set to the Owner of the Lead being converted, NOT the owner specified for the Account & Contact. The only way to correct this situation is to schedule the Related To Owner Recalculation batch job to run on a regular basis.
- Educate your Salesforce users that they may be receiving task related notifications for tasks they do not even know exist in the system if those tasks were associated with objects they own. It is important for users to look closely at the notification message for information such as Assigned To and Created By to determine if the notice is for a task they own, delegated, or is related to an object they own.



Licensing

iTools Delegated Tasks Management uses the Salesforce.com package licensing mechanism to control which users have access to its functionality. A user will have proper access to all the Delegated Tasks Management features only if they have been assigned a license to **both** iTools Delegated Tasks Management **and** the iTools Configuration Manager.

Assignment of the Delegated Tasks Management licenses determines which users will see features such as the notification checkboxes and the Delegated Tasks tab. Users who do not have a Delegated Tasks Management license assigned to their account simply do not see most of the features. The Delegated Tasks list home page component is an exception and will be visible to all users whose home page has been updated to include the component. Your organization was given a large number of Delegated Tasks Management licenses when the package was installed. This number is not necessarily the number of users that can be granted full Delegated Tasks Management functionality because the tool also requires the assignment of an iTools Configuration Manager license.

A license to the iTools Configuration Manager package is required for a user to have access to the iTools Delegated Tasks Management features as well as all other iTools. Your organization receives one Configuration Manager license for every iTools subscription it purchases. **A user should never be assigned a license to the iTools Delegated Tasks Management package without also being assigned a license to the iTools Configuration Manager package.** Without an iTools Configuration Manager license, a user will be able to see many of the features associated with Delegated Tasks but accessing them will generate errors and/or result in unexpected system behavior that will only cause confusion.

InSitu Software uses the multiple package license approach to make it possible for customers to purchase iTools subscriptions for many, but not all their users. While we believe an iTools subscription for all Salesforce users is a valuable investment, we understand that such a decision is best left to the organization itself.

It is important for you, the System Administrator, to understand the impact license allocation and management will have on your users and their overall experience with iTools Delegated Tasks Management. The information in the following sections should help with that understanding.



Delegated Tasks List (Tab)

Users that do not have a Delegated Tasks Management license

- Will not be able to see the Delegated Tasks tab.

Users that have a Delegated Tasks Management licenses but do not have a Configuration Manager license

- Will see a “You are Not Licensed” message when they access the tab.

Delegated Tasks List (Home Page Component)

Users that do not have a Delegated Tasks Management license

- Will be able to see a Delegated Tasks home page component, but the contents will display the entire Salesforce application with the native “Licensed Required” page displayed.

Users that have a Delegated Tasks Management licenses but do not have a Configuration Manager license

- Will be able to see a Delegated Tasks home page component but the contents will display the message: ‘You are not Licensed’. If you would like to provide the home page component, but not all your Salesforce users are licensed for iTools, you should create two different home page layouts – one for those users with an iTools license and one for those users without.

Days to Complete Tracking

Users that do not have an iTools Delegated Tasks Management license

- The completion tracking fields are NOT updated if the user editing the tasks does not have an iTools Delegated Tasks Management license.

Users that have a Delegated Tasks Management licenses but do not have a Configuration Manager license

- The completion tracking fields are NOT updated if the user editing the tasks does not have an iTools Configuration Manager license.

Task Completion Notification

Users that do not have an iTools Delegated Tasks Management license

- Will not be able to see the **Notify when Complete** checkbox on the task detail page and therefore cannot request notification on delegated tasks.



- Will not send any iTools task notifications, including complete, re-open, change, and delete when they make a notification evoking change to a task that has been delegated to them, even if the delegator is fully iTools licensed.

Users that have a Delegated Tasks Management licenses but do not have a Configuration Manager license

- Will be able to see the **Notify when Complete** checkbox on the Task edit page but if they check the box their check will not be saved. This license configuration results in system behavior that is generally confusing to your users and should be avoided.
- Will not send any iTools task notifications, including complete, re-open, change, and delete when they make a notification evoking change to a task that has been delegated to them even if the delegator is fully iTools licensed.

Reminder Notification

Users that do not have a Delegated Tasks Management license

- Will not be able to see the **Send Email Reminder** checkbox on the Task edit page and therefore will not be able to request an email reminder for any task they create.

Users that have a Delegated Tasks Management licenses but do not have a Configuration Manager license

- Will be able to see the **Send Email Reminder** checkbox on the Task edit page but if they check the box their check will not be saved. This license configuration results in system behavior that is generally confusing to your users and should be avoided.

Overdue Notification

Users that do not have a Delegated Tasks Management license

- An email notification that a Task is overdue will not be generated if the task was created by a user that is not licensed for Delegated Tasks Management.

Users that have a Delegated Tasks Management licenses but do not have a Configuration Manager license

- An email notification that a Task is overdue will not be generated if the task was created by a user that is not licensed for Configuration Manager.

Related To Owner Tracking

Users that do not have a Delegated Tasks Management license



- Tasks created or edited by the unlicensed user will **not** update the Related To Owner tracking field. Tasks that do not have this tracking field set will not appear in the Delegated Tasks list of the Related To object's owner.

Users that have a Delegated Tasks Management licenses but do not have a Configuration Manager license

- Tasks created or edited by the unlicensed user will **not** update the Related To Owner tracking field. Tasks that do not have this tracking field set will not appear in the Delegated Tasks list of the Related To object's owner.

New Event Notification

Users that do not have a Delegated Tasks Management license

- Will not be able to see the **Send Email Notification** checkbox on the Event edit page and therefore cannot generate a New Event notification message when creating a delegated event.

Users that have a Delegated Tasks Management licenses but do not have a Configuration Manager license

- Will see the Send Notification checkbox on the edit Event page but no email notification will be sent to the Event owner when the user saves the event. This license configuration results in system behavior that is generally misleading to your users and should be avoided.

Contact Tasks

Users that do not have a Delegated Tasks Management license

- Will not be able to see the **Contact Task** checkbox and therefore cannot create a task and assign it to a contact.
- Will not be able to see the **Contact Task Status** custom control on the Task detail page. Without this control, the user cannot see any of the status information related to a Contact Task and cannot tell the completion of the task is the responsibility of the Contact and not the user identified in the Assigned To field.

Activities Tab

Users that do not have a Delegated Tasks Management license

- Will not be able to see and use the Activities tab.

Users that have a Delegated Tasks Management licenses but do not have a Configuration Manager license



- Will see and be able to see and use the Activities tab, however, this combination of licensing can create confusing and misleading behavior in other parts of the system depending on which features you are using and how you granted access to package resources (using the recommended Permission Sets approach reduces the impact).

Group Tasks

Users that do not have a Delegated Tasks Management license

- Will not be able to see the Group Tasks tab and thus would not be able to claim and complete tasks assigned to the group.
- Are not permitted to assign tasks to a group. If a user without a Delegated Tasks Management license does select a Task Status value that is linked to a Task Group, the status will be changed to the default status if the task is new or returned to the previous status value if the task is being updated.

Users that have a Delegated Tasks Management licenses but do not have a Configuration Manager license

- Will see a “No License” message when they access the Group Tasks tab and will not be able to claim and complete tasks assigned to the group.
- Are not permitted to assign tasks to a group. If a user without a Configuration Manager license does select a Task Status value that is linked to a Task Group, the status will be changed to the default status if the task is new or returned to the previous status value if the task is being updated.



Help and Support

Customer Focus is not just a phrase we toss around lightly at InSitu Software – it is the cornerstone of everything we do. Your success is vitally important to us. Whether you are a long-standing customer or just trying iTools for the first time with our no obligation free trial, if you are having trouble or just have a simple question we want to hear from you.



Email

This is our preferred method of providing support. It's not that we don't want to talk to you it's just that email is a much more efficient way to route your question/issue to the person who can best respond. We can also respond with more detailed instructions and screenshots.

Support@InSituSoftware.com

We are checking email all the time



Phone

If your question is easier to explain over the phone than in an email or you just want to hear a friendly voice, you can also call technical support at:

+1 (630) 557-9109

Monday thru Friday 9:00AM - 5:00PM CST