

Managing Tasks on Salesforce

CBMS | Process Manual | Revised: July 2018

OVERVIEW

This document provides a step-by-step process for how to add, edit, delete, and complete a task on the CBMS Home Page. The tasks you add are your own and are not seen by other users in CBMS. Keep in mind that your supervisor may also have the ability to add specific tasks for you to complete.

From the Home Page, you will only be able to see Today's Tasks. To see future or past tasks, you must click on the View All hyperlink to open the full list.

PROCESS TO ADD A TASK

1. From the Home Page, navigate to Today's Tasks by one of the following ways:
 - a. Click on the Tasks tab in the top header.
 - b. Click the View All hyperlink in the Today's Tasks card.
2. On the right hand panel, click the box with a down arrow and click New Task.
3. Complete the mandatory information in the pop-out box.
 - a. Although the Due Date is not a mandatory field, in order to see it from the Home Page, it must be completed.
4. You have two options to save the task:
 - a. Click Save if you have completed the details for this task and are not adding other tasks.
 - b. Click Save and New if you have more tasks to add.
5. A confirmation box appears to confirm the Task was added to your Home Page.

PROCESS TO EDIT OR DELETE A TASK

1. From the Home Page, click on the specific Task link in the Today's Tasks card.
2. In the upper right corner, click on one of the below options as needed:
 - a. **Edit:** a pop-out box will appear where you will be able to edit the details of the Task.
 - b. **Delete:** to remove the Task. A message box will appear asking if you are sure you want to delete the Task. Click Delete.
 - c. **Edit Comments:** to update only the comment details of the Task.
3. A confirmation box appears to confirm the Task was edited or deleted from your list.

PROCESS TO MARK A TASK COMPLETE

1. From the Home Page in the Today's Tasks card, click the checkbox next to the task you have completed.
 - a. A line will strike-through the task indicating it is complete and the task will disappear from the Home Page when you refresh your screen. The status of the Task will also change to 'Completed'.
2. From the Tasks screen, select the Task you want to mark complete.
 - a. Click Edit for a pop-out box to appear.
 - b. Scroll to Additional Information.
 - c. Under Status, select 'Completed' from the drop-down menu.
 - d. Click Save and the status will change to Completed.

To see all of your tasks, you can use the filter drop-down arrow on the Today's Tasks card or click on the Tasks tab in the Top Navigation to open the full view. The filter options are:

1. Today: this is the default view to see all of 'Today's' tasks. If you do not have any tasks due 'today', nothing will be shown in this view.
 2. My Tasks: a list of all your tasks will show here, even completed ones.
 3. All Overdue: any tasks that are not complete and are past the due date will show here.
 4. Complete within last 7 days: all tasks that have been completed in the last 7 days will show in this view.
 5. Delegated: any tasks that you assigned to another user will show here.
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