Stanley Elevator Company, Inc. Salesforce User Guide

Activity: Task, Log a Call, Email

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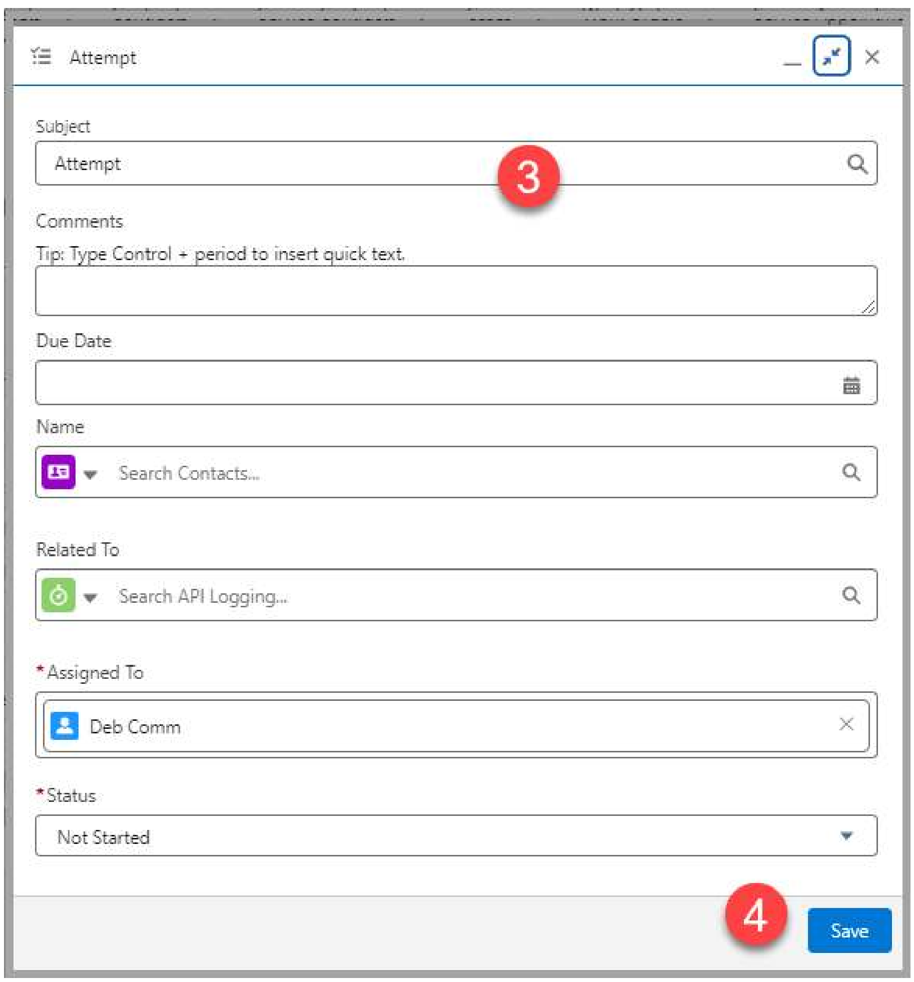
How to Create a Task from the Home Page

1. Click the **+** Sign
   (upper right)
2. Choose **New Task**

3. Complete the Task Form
   - **Subject** *Select or key your own*
   - **Comments** *Include details for yourself or Team Member*
   - **Due Date**
   - **Assigned To** *Defaults to you; click X, then select Name to assign the Task to someone else*
4. Click **Save**

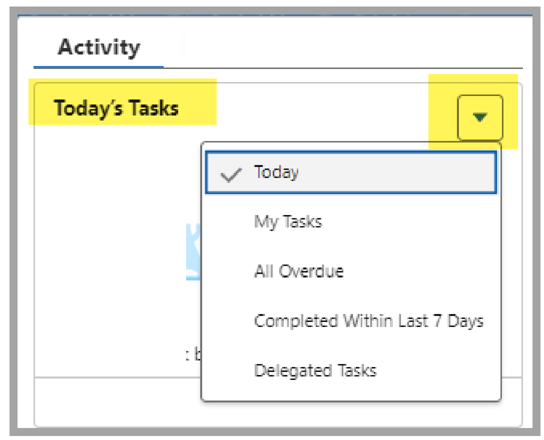


How to See Tasks (Activity)

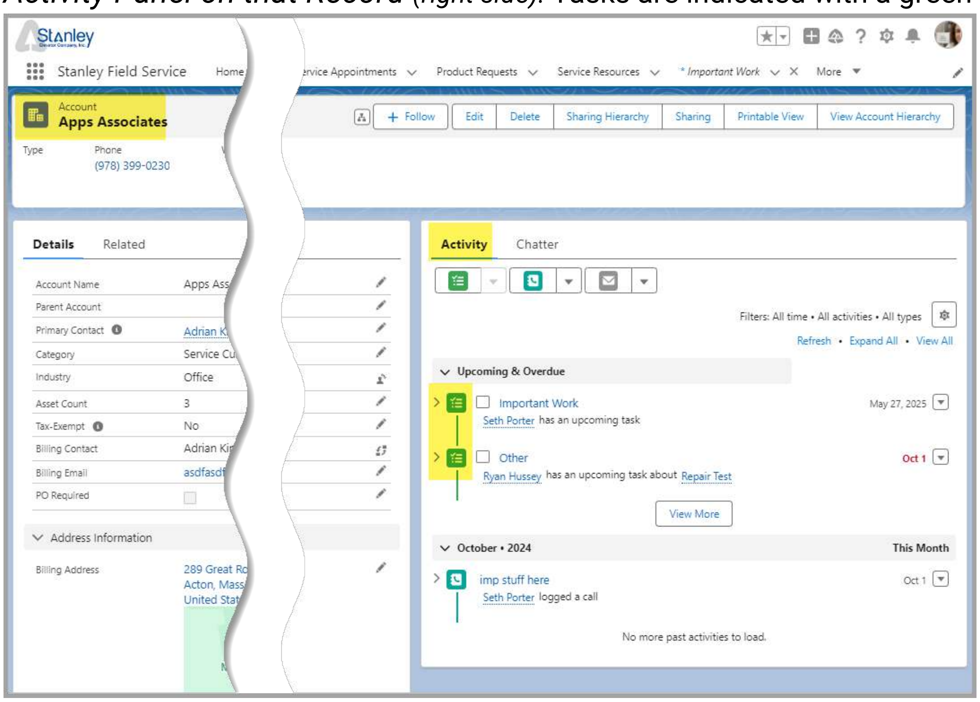
From the Home Page *When Activity is created from the Home Page or from any record by you or assigned to you by a Team Member, those Tasks land in the* **Today's Tasks** *section*

Click the down arrow to view:

- **My Tasks** *Displays all tasks you own regardless of Due Date*
- **All Overdue** *Displays Tasks you own that are past the Due Date*
- **Completed within Last 7 Days** *Displays Tasks you own and have done in the last 7 days*
- **Delegated Tasks** *Displays Tasks you have assigned out to Team Members*



From Any Record *When Activity is created on a Record, you can view the Activity from the Activity Panel on that Record (right side).* Tasks are indicated with a green checkmark/list icon



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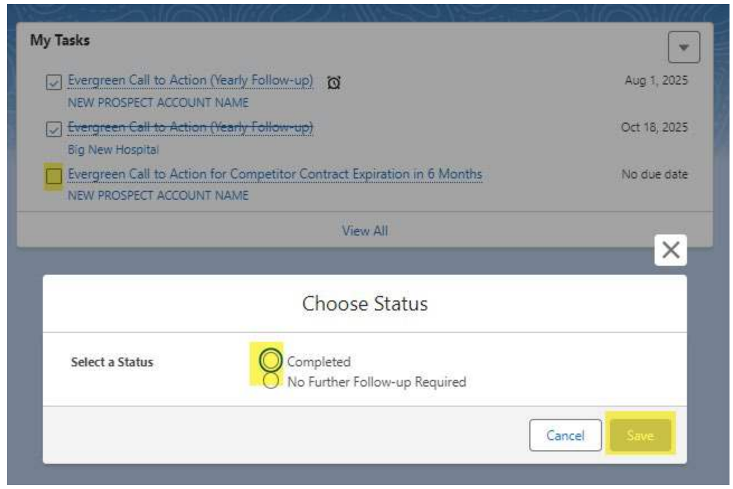
How to Complete or Update a Task

Quick Action

1. Click the **Checkbox** next to the Subject of the Task
2. Click **Completed** or **No Further Follow-up Required**
3. Click **Save** *(Note: Task will automatically be crossed out)*

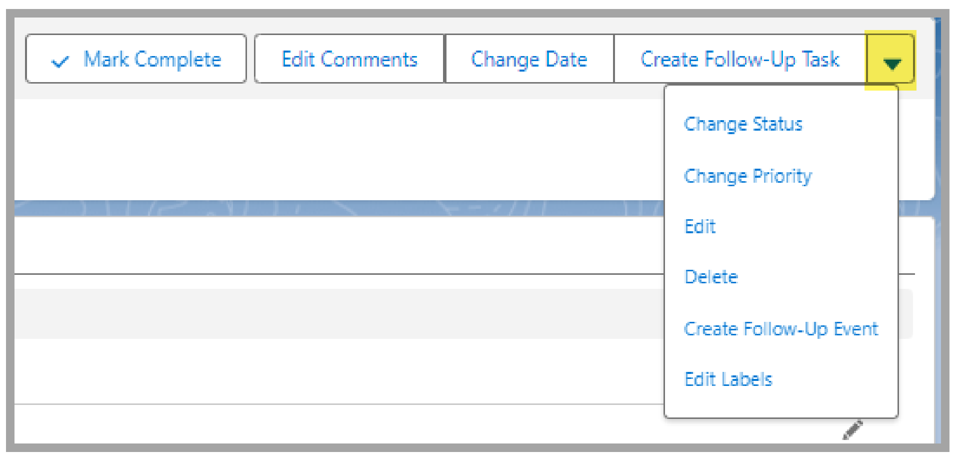


Mark Complete, Add Comments, Make Updates

(Note: Based upon permissions, you may not see all options listed below)

Click the Subject of the Task to open, then:

- **Mark Complete**
- **Edit Comments**
- **Change Date**
- **Create Follow-Up Task**
- More Options (click arrow to reveal)
  - **Change Status**
  - **Change Priority**
  - **Edit Delete**
  - **Create Follow Up Event**
  - **Edit Labels**



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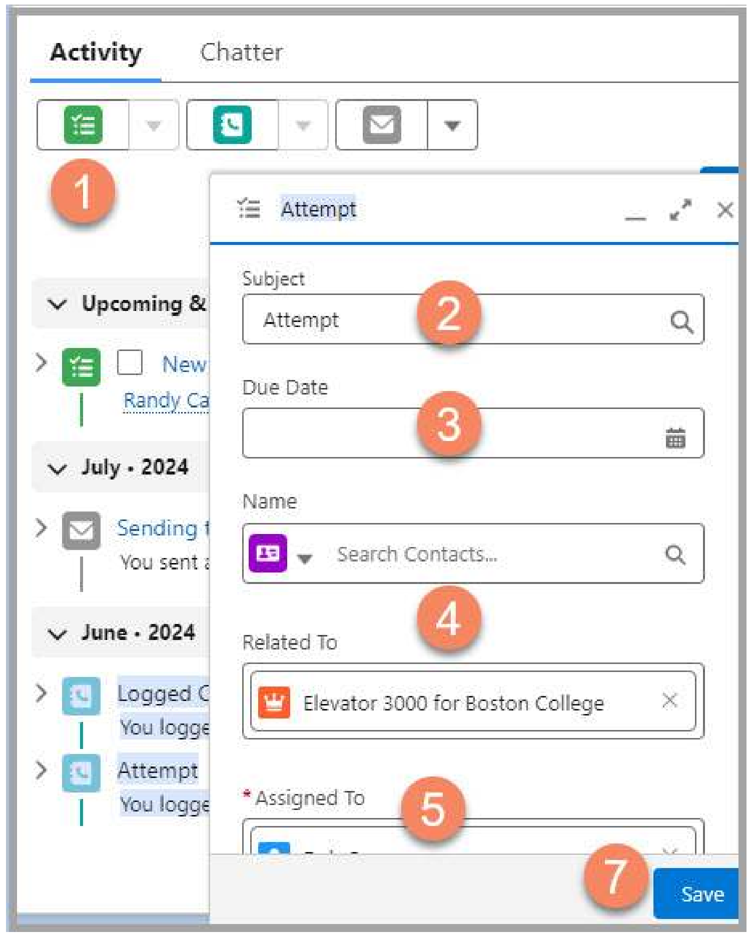
How to Create a Task:
From an Account, Opportunity, or Contact

1. Click **Task** icon
2. Select or key in **Subject**
3. Use calendar to select **Due Date**
4. *Optional:* Associate with an **Account**, **Opportunity**, or **Contact**
5. *Optional*: Change **Assigned To** to another Team Member instead of yourself
6. Keep Status at *Not Started*
7. Click **Save**



Activity Notes:

- Open Tasks will appear on your Home page in the *Today's Tasks* area when the due date is Today.
- Tasks you create for yourself or others will appear on the Activity panel of the Account, Opportunity, or Contact. When the Task originates on the Opportunity or Contact, it will also appear on the Account record associated with the Opportunity or Contact.
- Salesforce automatically notifies the Account or Sales Representative and creates a Task on the Contract record 30 days prior to the Contract End Date.

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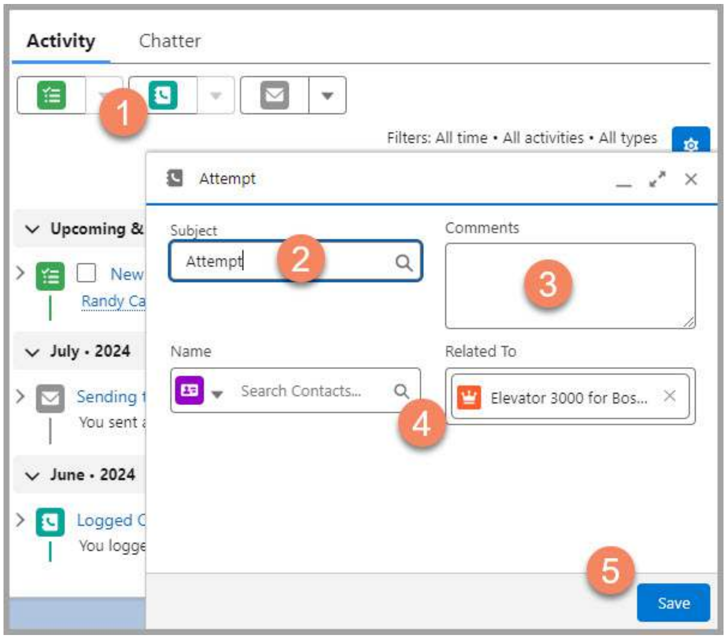
How to Log a Call:
From an Account, Opportunity, or Contact

1. Click the **Log a Call** icon
2. Select or key in **Subject**
3. Update **Comments** Field
4. *Optional*: Associate with an **Account**, **Opportunity**, or **Contact**
5. Click **Save**



How to Email:
From an Account, Opportunity, or Contact

1. Click **Email** icon
2. Key in or add additional **Contact(s)**
3. Key in **Subject**
4. Write **Email**
5. *Optional*: Relate Email to an additional record.
6. Click **Send**