Creating Tasks in Salesforce with FormAssembly

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Introduction

Tasks allow you to track activities as a to-do list in Salesforce. You can relate tasks to records for leads, contacts, campaigns, contracts, and more! Tasks are assigned to specific Salesforce users and can be either single or recurring tasks. While single tasks can be used to keep track of your current workload, recurring tasks give you the ability to plan in advance and track your progress.

Tasks are not usually the goal of a form, they're often an additional step. So you might create a new lead with your form and then also create a task so that a member of your sales team reaches out to the new lead. The task would be related to the lead you just created and assigned to the sales team member.

Required Fields

There are 3 fields that are required for every type of task you want to create.

- Status
- Subject
- Priority

Status

The status indicates the different stages of completion for the task. You will generally begin a task with the "Not Started" status.

Status options include:

- In progress
- Completed
- Waiting on someone else
- Deferred

Subject

The subject of the task is generally the goal of the task. There are not predefined subject options, so you can name it whatever you need it to so that the recipient of the task is aware of the goal that needs to be accomplished. The subject will also be a leading identifier in your Salesforce view of the tasks.

Priority

The priority indicates the urgency of the task. You can choose from the following predefined priorities, or a Salesforce admin can customize the selections in the picklist.

- High
- Normal
- Low

Additional Field Requirements

Assigned To

"Assigned To" indicates the assigned owner of a task. This field is not required, however the task will be assigned to the user who created it unless indicated otherwise. There are 2 other options for task assignments.

- Salesforce User ID
  - Assign a task to a user in your org.
- Group ID/Queue
  - To add a task to a queue, you need to first create a group in Salesforce. The group can then have a queue. Queues can contain the tasks so that they are not assigned to any one user until an assignment method is implemented in Salesforce.

Date Formatting

The required format for the date is a 2 digit day, followed by a 3 letter month, followed by a 4 digit year. For example 09 Oct 2021. You can enter the date manually or create a formula, calculation, or validation on the form field that requires this format.
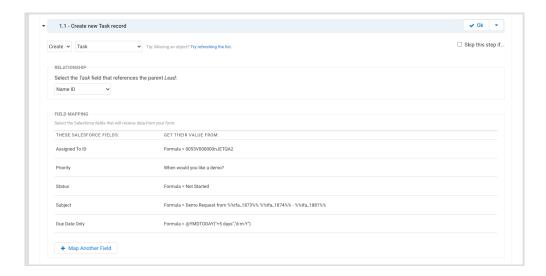
Create Single Tasks

Single tasks occur once and will have a single due date attached to them.

1. Enable your Salesforce connector.

2. Configure the connector to Create/Update/Lookup the record you want to associate the task to.

3. Map the appropriate fields for this step.

4. Create a dependent step which will be used to create a new task.
   We recommend creating the task as a dependent step so if there is an error in the previous step, that task would not be created.

5. Choose a relationship for the task.
   - When relating a task to a contact or lead, use the "Name ID" (who ID)
   - When relating a task to anything else, use the "Related To ID" (what ID)

6. Map the appropriate required fields: Status, Subject, Priority

7. Map any additional fields, such as Assigned To, Due Date, and Description.

8. Save connector configuration.

Create Recurring Tasks

Recurring tasks consist of a "series" of tasks that are created repeatedly until the criteria specified are met.

1. Enable your Salesforce connector.

2. Configure the connector to Create/Update/Lookup the record you want to associate the task to.

3. Map the appropriate fields for this step.

4. Create a dependent step which will be used to create a new task.
   We recommend creating the task as a dependent step so if there is an error in the previous step, that task would not be created.

5. Choose a relationship for the task
   - When relating a task to a contact or lead, use the "Name ID" (who ID)
   - When relating a task to anything else, use the "Related To ID" (what ID)

6. Before mapping any of the following fields, you will need to check a particular checkbox on the Salesforce record, the "Create Recurring Series of Tasks" checkbox. Map this field to "a formula or text" and then enter the number "1". All of the other fields you'll be mapping are dependent on making sure the "recurring" check box is checked.

7. Map the appropriate required fields: Status, Subject, Priority

The remaining fields will be mapped differently depending on the type of recurrence you select for the task.

> **Note**: For all recurring tasks, if the "End Date" is on the same day that a task is meant to occur, then the task will not be created for that day.

Daily Tasks

- Recurrence Type - RecursDaily
- Recurrence Interval - number X, as in every X days, max 30
- Start Date - Required Format = 13 Jul 2021
- End Date - Required Format = 13 Jul 2021

Weekly Tasks

- Recurrence Type - RecursWeekly
- Recurrence Interval - number X, as in every X weeks, max 30
- Recurrence Day of Week Mask - Must be an integer
  - Each day of the week has a set number, and then you can also choose to have the task repeat on multiple weekdays. To set multiple weekdays, you'd add the set numbers for each day together.
    - Sunday = 1
    - Monday = 2
    - Tuesday = 4
    - Wednesday = 8
    - Thursday = 16
    - Friday = 32
    - Saturday = 64
      Example: To set up a recurring task on Monday, Thursday, and Friday every week - your integer would be 50.
- Start Date - Required Format = 13 Jul 2021
- End Date - Required Format = 13 Jul 2021

Monthly Tasks - Specific Days

- Recurrence Type - RecursMonthly
- Recurrence Interval - number X, as in every X months, max 30
- Recurrence Day of Month - integer from 1-31
- Start Date - Required Format = 13 Jul 2021
- End Date - Required Format = 13 Jul 2021

Monthly Tasks - Relative Days

- Recurrence Type - RecursMonthlyNth
- Recurrence Interval - number X, as in every X months, max 30
- Recurrence Instance - First, Second, Third, Fourth, Last
- Recurrence Day of Week Mask - Same as weekly, but now only single day INT
- Start Date - Required Format = 13 Jul 2021
- End Date - Required Format = 13 Jul 2021

Yearly Tasks - Specific Day

- Recurrence Type - RecursYearly
- Recurrence Day of Month - integer from 1-31
- Recurrence Month of Year - January, February, etc...
- Start Date - Required Format = 13 Jul 2021
- End Date - Required Format = 13 Jul 2021

Yearly Tasks - Relative Day

- Recurrence Type - RecursYearlyNth
- Recurrence Instance - First, Second, Third, Fourth, Last
- Recurrence Day of Week Mask - Same as weekly, but now only single day INT
- Recurrence Month of Year - January, February, etc...
- Start Date - Required Format = 13 Jul 2021
- End Date - Required Format = 13 Jul 2021