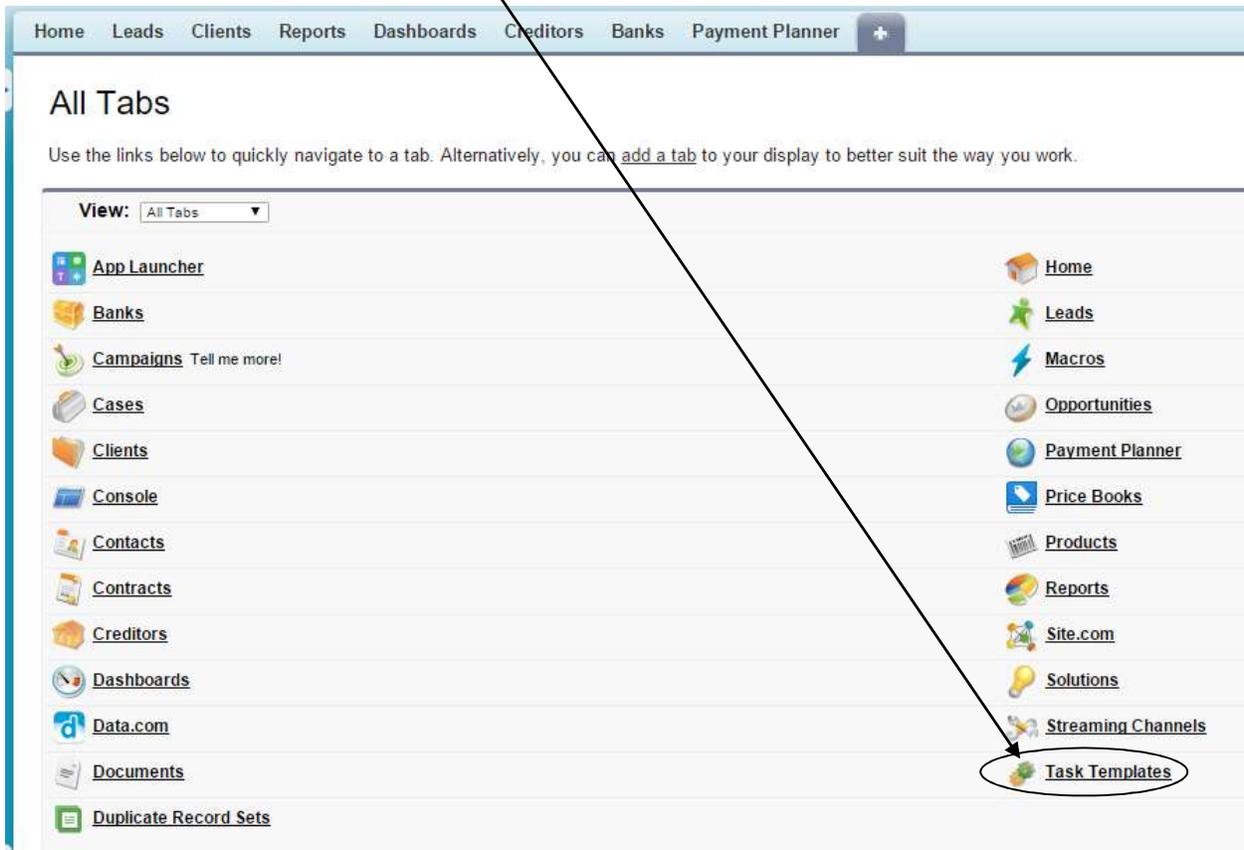


Using akaTask Creator

Using the akaTask Creator is a simple and straight forward process. Because Tasks and Events can exist on many objects the akaTask Creator doesn't restrict itself to a single object. Instead it can be used with linked to any object by passing the Object Record Id.

To use the akaTask Creator first we have to create a collection (or group) of tasks to be created. We do this by opening the Task Template tab which is created by akaTask when it's installed. If the Tab is not visible select "+" in your tabs bar.



Open the Task Template tab and Click “New” to create your first Task in a Group.

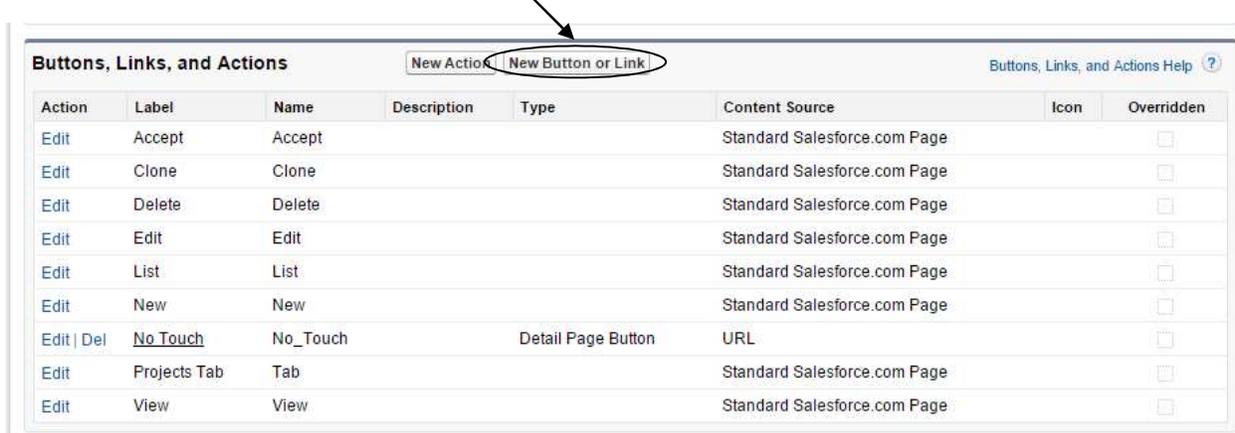
The screenshot shows a web application interface for creating a new task template. At the top, there is a navigation bar with links for Home, Leads, Clients, Reports, Dashboards, Creditors, Banks, and Payment Planner. Below this, the page title is 'Task Template Edit' and 'New Task Template'. The main form area is titled 'Task Template Edit' and contains several input fields: 'Task Name' (text input), 'Task Group' (text input), 'Type' (dropdown menu with '--None--'), 'Status' (dropdown menu with '--None--'), 'Number Of Days' (text input), and 'Order' (text input with '0'). There are 'Save', 'Save & New', and 'Cancel' buttons at the top right and bottom right of the form area.

Fill in the Fields and Click “Save”. Task name and Task Group are two of the key fields. The Task name should be the name you want to appear in the Task related list, and the Task Group is the collection name which will be assigned to all the tasks you want to create. Type corresponds to the Task Type field on Activities. You can edit this Picklist under Custom Objects to define new Task types which correspond to your organization. Status is also a direct copy of the Activity Status field. Number of days defines how many days from the creation date you wish to schedule this activity for. Order allows you to create the order each task should be created in within the Task Group creation.

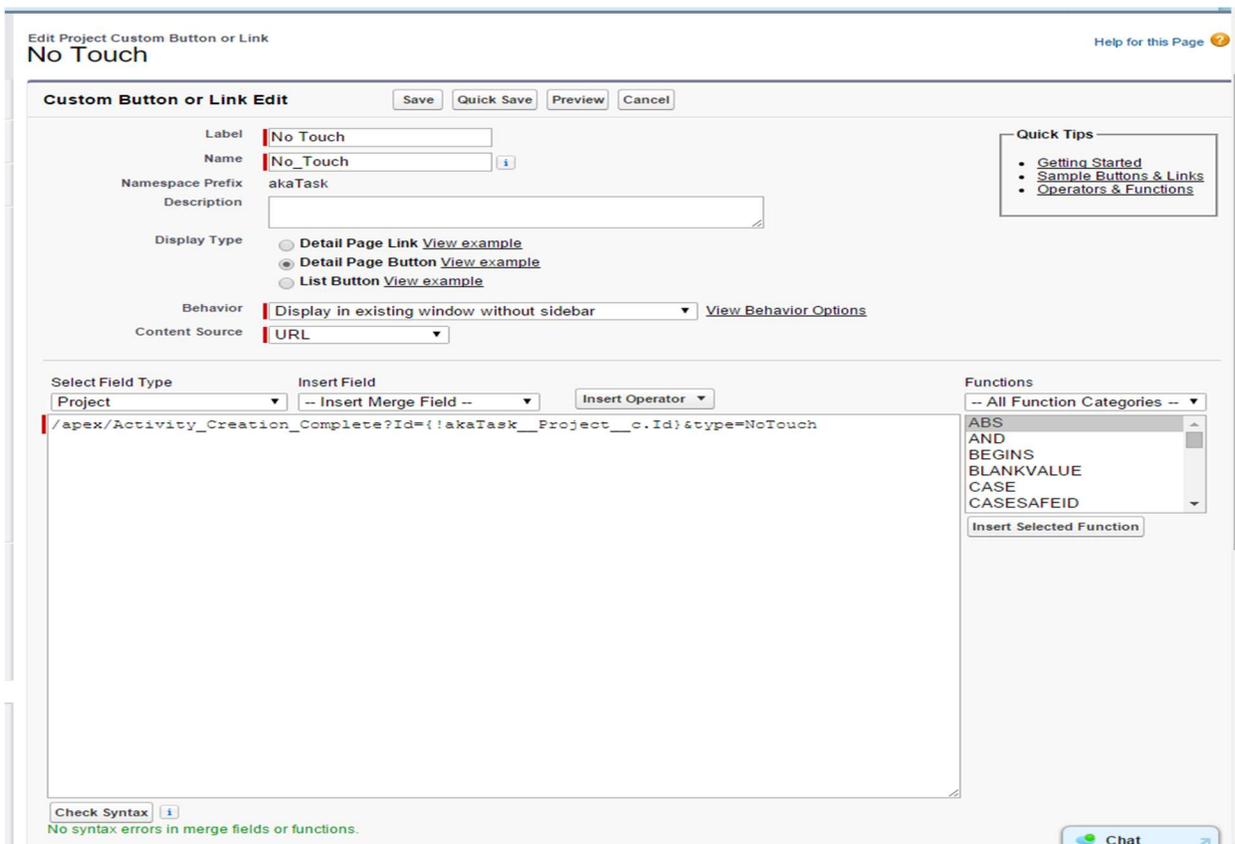
Tip – Do not put spaces in the Task Group field, as you need to URL encode those spaces when creating the custom button...so leave them out or use the underscore (“_”) character.

Creating a Custom Button and Linking it to the akaTask Generator

From the Setup select the Standard Object or Custom Object you wish to link your activity creation to. In the Setup page select the “New Button or Link” option.



This will take you to the new button configuration and setup page.



Give the button a Label and Name, and set it as a “Detail Page Button” (which means you can add it to the top of the Page Layout). Set the button to be a URL and then use `/apex/Activity_Creation_Completion?id=` as the main button URL. Then insert the Record ID for the

object as the first parameter (Id={! Object.RecordId }). Then add the “&” to denote another query string parameter and put “type=”. Follow the equal sign with the Group Name of the Tasks you wish the button to automatically create.

Once you have created the button you must sill manually add the button to the page layout of the desired object.

Once the button has been added to the Pay Layout of the desired Object when you click the button the following form should appear

 Click the Complete Button to Generate the Tasks or click Cancel to Exit.

Clicking Cancel will return you to the calling page with no changes. Clicking Complete will generate the tasks then return you to the page where your new Tasks should be visible in the Activity Related lists.

 **Project Test**

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#) 

[« Back to List: Custom Object Definitions](#)

[Open Activities](#) (2)

Project Detail

Project Name **Test**

Owner [Jon Kilburn](#) [\[Change\]](#)

Created By [Jon Kilburn](#), 11/18/2015 9:32 AM

Last Modified By [Jon Kilburn](#), 11/18/2015 9:32 AM

Open Activities [Open Activities Help](#) 

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
Edit Cls	Order Materials		✓	11/19/2015	Not Started	Normal	Jon Kilburn
Edit Cls	Invoice Project		✓	11/28/2015	Not Started	Normal	Jon Kilburn

[^ Back To Top](#)

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