

iTools Delegated Tasks Management

Lightning Ready

Pages dynamically style based on the current user interface. Works great in Lightning, Classic, and mixed environments.

100% Native

Built entirely on the Force.com platform. Enhances the native Salesforce records you already use.

Point & Click Admin

Lots of configuration options so the tools work best for your organization - and it's all point & click.

30 Day Free Trial

Try it absolutely free for 30 days with no obligation, no credit card, and no pesky salesperson.



iTools Delegated Tasks Management provides the help you need to stay on top of the tasks you have assigned to others inside and outside your organization. Maybe it's an email letting you know a delegated task has been completed or a section on your home page that lets you quickly see the status of everything you have assigned out. If it's a task you want to track, we can help. And iTools Delegated Tasks Management is built on top of the native Salesforce.com task object so it works with your existing configuration including other 3rd party add-ons and sync products.

Stay Informed

Always know the status of the tasks you have assigned to others

- Dedicated view of all Delegated Tasks
- Email notices when delegated tasks are completed, deleted, re-opened, re-assigned, or have their Due Date changed
- Fully customizable email message templates
- Email alerts when tasks are coming due or are overdue (all tasks, not just the delegated ones)

Due Date	Subject	Assigned To	Status	Name	Related To
9/1/2018	Next Year's Projections	Terry Hamer	In Progress		
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
9/18/2018	Send list of references	Adam Adams	Not Started		Grand Hotels Emergency Generators
9/28/2018	Call re iTools	Adam Adams	Not Started	Lauren Boyle	United Oil & Gas Corp.

Delegate to a Group

Assign a task to a group or business function and let the group decide who will complete it

Action	Due Date	Subject	Assigned To	Status	Name	Related To
Release	9/7/2018	Additional Purchase - \$250K	Adam Adams	Assign to Credit Check		Burlington Textiles Corp of America
Claim	9/14/2018	Additional Purchase - \$1.5 Million	Unclaimed (0 days)	Assign to Credit Check		United Oil & Gas Corp.
Claim	9/28/2018	New Customer Check	Unclaimed (0 days)	Assign to Credit Check		Grand Hotels & Resorts Ltd

- Create just one native task and iTools will make it available to everyone in the group regardless of your Salesforce security settings
- Group members "claim" new tasks so no two people are working on the same task
- Group Tasks are delegated tasks so you can be notified when they are completed
- Group members can be notified of new available tasks by following the group on Chatter or via a workflow based email notice
- Email delivered report on group performance such as average number of days to complete tasks
- Create Group Tasks as part of workflow actions
- Configure inbound emails to automatically create Group Tasks



Flexible Licensing

You only need to license those users that access iTools, not every Salesforce.com user.

Great Support

We pride ourselves on helping you be successful. Just check out our reviews on the AppExchange.

6 Tools, 1 Low Price

One low subscription price gives you access to all 6 tools plus our Configuration Manager. We also offer great discounts for non-profits and NGOs.

For subscription pricing and more information on any of the tools in the iTools suite, please visit us on the Web at: www.insitusoftware.com



Assign Tasks To Contacts

Assign tasks to people inside and outside your organization that don't have Salesforce.com

- Assign a task to any contact in your system
- Contacts can let you know their task is complete via email or a webpage
- Contact Tasks are delegated tasks so both you and the contact can get email notices
- Contact Tasks are real native Salesforce tasks

Status
Not Started

Name
[Tim Barr](#)

Contact Task ⓘ

Contact Task Status
New Task notification sent on 9/5/2018 5:09 PM.
[Re-Send Notification](#) [Send Cancellation](#)

Related To
[United Oil & Gas Corp.](#)

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

Easily Access All Activities

iTools Delegated Tasks Management includes an Activities Tab that can be used to easily access a standard List View of Tasks and Events

Track Performance

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.

Configure to Meet Your Needs

iTools Delegated Tasks Management is easy to configure using our point and click iTools Configuration Manager, included with your subscription. With hundreds of configuration options you can turn on just the features you want and configure the behavior of those features to meet the specific needs of your organization.

Feature	Setting	Value	Description
Activities Tab	ATRowsPerPage	25	Number of rows per page on t
Contact Tasks	CT_Configure	Feature Enabled	Edit this setting to enable/dis
Event Notify Flag	AlwaysSendEventNotify	N	Always send a New Event ema
	AllowSendToSelf	Y	Allow a user to send a New Ev
Group Tasks	GT_Configure	Feature Enabled	Edit this setting to enable/dis
	RunTaskGroupReports	Never	Run the Task Group Summary

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