



# iTools Delegated Tasks Management Quick Start Guide

## About This Guide

This Quick Start guide is designed for Admin users who have prior experience installing and configuring products from AppExchange. An abbreviated set of instructions is provided to quickly get you set up with iTools Delegated Tasks Management. A more complete set of step-by-step instructions and supporting information can be found in the iTools Delegated Tasks Management Configuration Guide available on our website or AppExchange listing.

## About iTools Delegated Tasks Management

iTools Delegated Tasks Management provides the help you need to stay on top of tasks and events assigned to others inside and outside your organization. Use the Delegated Tasks list to view all delegated tasks or filter the view by status and assigned user. Set up the iTool Delegated Task list to display on its own tab and/or configure it as a component on your Home tab.

*Don't want to constantly check status?* Then, let the iTool notify you when a delegated task has been completed, deleted, or re-opened. Just like Salesforce CRM tasks, the iTool can also include a 'Send Notification Email' checkbox on events so the owner is notified when a new event has been assigned to them.

*Need to know when tasks are coming due or are past their due date?* The iTool can be configured to send out email notifications to remind task owners that a task due date is approaching or that a task was not completed by its designated due date. These notices can be sent to task delegators as well as task owners.

*Want to be able to assign tasks to people who don't have a Salesforce license or don't even work for your organization?* The iTools Delegated Tasks Management package now supports delegating the responsibility for a task's completion to the Contact associated with the task. These Contact Tasks can be completed by their designated contact via a simple email message or custom Salesforce Sites page.



## Before You Begin

The iTools Configuration Manager is the prerequisite package used for licensing and settings management of all iTools, including Delegated Tasks Management. The iTools Configuration Manager version 4.0 or greater must be installed for you to install and configure iTools Delegated Tasks Management.

## Installing iTools Delegated Tasks Management

1. Begin the installation of **iTools Delegated Tasks Management** from AppExchange by using the following link:  
<https://sites.secure.force.com/appexchange/apex/listingDetail?listingId=a0N30000001gFJNEA2>
2. Click on **Get It Now**.
3. Follow the standard AppExchange instructions including choosing your environment and verifying the Terms and Conditions of the iTools subscription.
4. When you are prompted to choose the security level, we recommend you select the **Grant access to all users** option, since iTools Delegated Tasks Management is valuable to all users.
5. On Step 3 of the Package Installer, click on **Install** to complete the installation. When you have received confirmation that iTools Delegated Tasks Management has successfully installed, continue with the next section to configure the iTool for your environment.

## Configuring iTools Delegated Tasks Management

1. Add iTools Settings for Delegated Tasks Management.
  - Go to the **iTools Settings** Tab.
  - Click the **Manage iTools** button.
  - In the New iTools section, enter **dtm** into the **iTool Code** field and click the **Add Settings for New iTool** button.
  - Click the **Close** button.
2. Add the Notify When Complete checkbox to Task Detail Page
  - Go to **Setup | Customize | Activities** and click the **Task Page Layouts** link.
  - In the Task Page Layouts list, click the **Edit** link in the Action column.
  - Locate the **Notify When Complete** field in the list of fields and drag it to the location on the Task Page Layout that suits your layout best.
  - Click the **Save** button.



3. Add the Delegated Tasks Tab to you List of Displayed Tabs
  - Go to **Setup | My Personal Information | Change My Display** and click the **Customize My Tabs** button.
  - Locate Delegated Tasks in the Available Tabs list and move it to the Selected Tabs list then move it up to its desired position in the list.
  - Click the **Save** button.

## Congratulations!

You have successfully completed the steps required to install and configure iTTools Delegated Tasks Management for the Task Completion Notification Delegated Tasks List features. Delegated Tasks Management has many other powerful features such as Overdue Notifications, Contact Tasks (the ability to assign tasks to people without a license to Salesforce), and Task Reminders. Additional features such as these require a more in-depth explanation than is possible in a quick start guide. If you wish to use these features in your Salesforce environment you should read the full iTTools Delegated Tasks Management Configuration Guide.

## Tips and Information for a Successful iTTools Deployment

### Licensing iTTools Delegated Tasks Management

In order for other users to view and access all the features of iTTools Delegated Tasks Management, the iTTools Delegated Tasks Management licenses must be allocated. Like all other iTTools, a license to the iTTools Configuration Manager package is required for each user as well. Your organization receives one Configuration Manager license for each iTTools subscription it purchases. Users that have not been assigned a Configuration Manager license may view components of iTTools Delegated Tasks Management but they will not operate correctly. For further detail regarding license allocation and management, refer to the iTTools Delegated Tasks Management Configuration Guide.

### Learn More about iTTools Delegated Tasks Management

- The iTTools Delegated Tasks Management Configuration Guide provides step by step instructions, including screenshots, examples and explanatory text, for a more complete understanding of the features available. Please download and refer to the document to learn how to fully customize the iTTool for your organization.



- Additional information can be found on our website at <http://www.insitusoftware.com> and our Get Satisfaction powered Community forum at <http://getsatisfaction.com/insitusoftware>
- Have a comment, suggestion or question? Email us at [support@insitusoftware.com](mailto:support@insitusoftware.com).