

ACTIVITY COMPONENTS (myTASKS & myEVENTS)

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How to Install Activity Components App

- Visit “[Activity \(Tasks & Events\) Components for Salesforce](#)” on the AppExchange.
- Click “Get It Now” to install the free trial. (Already installed? Skip to the next step)
- Return to the “[Activity \(Tasks & Events\) Components for Salesforce](#)” page and log in using the link in the upper right-hand corner.
- The “Get It Now” button will turn into a “Buy Now” button.
- Click Buy Now, enter your credit card details, and the number of licenses you need.
- Done. It's as simple as that!

User License Management

Navigate to Managing User Licenses:

- Navigate to Your Name | Setup | App Setup | Installed Packages
- Click on Activity Components
- Click on Manage Licenses
- Assign to user

How to Add myTasks/myEvents Component to a Page

To add myTasks/myEvents to a page, please follow these steps:

- Navigate to the Page Where You Want to add the Component
- Navigate to the Setup | Edit Page
- Search the component or Scroll Down to Custom-Managed Packages
- Drag & Drop the Component to Your Page
- At the Right Side, Manage the Properties of the Component
- Click Save on the Top Right Corner.

How to Add myTasks/myEvents Component to Utility Bar

- From the Home tab in Setup, enter App in the Quick Find box, then select App Manager.
- Click Edit in the dropdown menu next to the app where you want to add the Utility bar.
- Click the Utility Items tab and then click Add Utility Item.
- Select the myTasks/myEvents Component from the List.
- Specify component and utility properties, like the height and width of the utility panel, and Component properties.
- Then Click Save

myTasks Component Properties

The myTasks component provides many value-added new features to help you manage your day-to-day activities in Salesforce. Its UI/UX will make you feel like you are using an out-of-the-box standard Task component but with lots more features and Point-and-Click configurations.

This Tasks component is fully compatible with Salesforce Communities and is the component of choice by our customers. Some of the notable features included the number of additional filters, the ability to configure different layouts based on component configuration, Date Filter, Restricted to host, Multi Add, and so on...

Page > myTasks

Header Label ⓘ

myTasks

☐ Hide Related ⓘ

☐ Hide Label ⓘ

☐ Hide Status ⓘ

☐ Hide Priority ⓘ

☐ Show Priority Flag ⓘ

☐ Show Null First ⓘ

Sort By ⓘ

Due Date Only

Sort Type ⓘ

ASC

Task per page ⓘ

5

Show Comments ⓘ

No

Additional Field 1 ⓘ

--None--

Additional Field 2 ⓘ

--None--

☐ Lock Filter Picklist ⓘ

☐ Hide New Button ⓘ

☐ Hide Add Multiple Tasks ⓘ

☐ Hide Filter Boxes ⓘ

☐ Hide Email/Phone action icons ⓘ

☐ Hide Mass Actions - Multi Checkbox ⓘ

☐ Hide List Views ⓘ

Restrict Visibility to Host Object ⓘ

NO

Hyperlink Open Behavior ⓘ

All Open in Modal Window

Select Default Filter View ⓘ

All Open

1st Filter Box View ⓘ

All Overdue

2nd Filter Box View ⓘ

Today's Tasks

3rd Filter Box View ⓘ

This Month

4th Filter Box View ⓘ

All Open

> [Set Component Visibility](#)

- **Header Label:**
A Custom label for a component
- **Sort by:**
Define the sort order for the list based on any column
- **Sort Type:**
Define ascending or descending order on the sort by the selected field
- **Tasks per Page:**
Define how many tasks to show in the component list – now a picklist
- **Show Comments:**
Define either don't show comments in the list, show one-line truncated, or show full comments.
- **Hide Related:**
Hide the links to related objects to the tasks
- **Hide Label:**
Hide the top component label
- **Hide Filter Boxes:**
Hide Blue Filter boxes for quick actions
- **Hide Status:**
Hide the Status of a task
- **Hide Priority:**
Hide the Priority Status for tasks
- **Show Priority Flag:**
Show the Priority Flag at the end of the task subject
- **Restrict Visibility to Host Object:**
Restricts the list of tasks to the related object where the component is placed e.g. Account page will only show tasks related to the account being viewed
 - o It has the option to select one of the three values. i.e.
 - o **NO** = It will show all of your tasks regardless of whether they are related to the current object record or not
 - o **YES - Show Only My Tasks** = It will show only your Tasks that are related to the current object record. All the filters in the picklist respect this property and will show related tasks accordingly. To see all of your tasks you would need to select My Tasks from the picklist on the component

- **YES - Show all Related Tasks** = It will show all the tasks related to the current object record regardless of who owns it. All the filters in the picklist respect this property and will show related tasks accordingly. To see all of your tasks you would need to select My Tasks from the picklist on the component
- **Show Null First:**

Shows tasks with no due date first in the list
- **Additional Field 1:**

Select any additional field 1 to display in the list
- **Additional Field 2:**

Select any additional field 2 to display in the list
- **Hyperlink Open Behavior:**
 - It has the option to select one of the four values. i.e.
 - **All in a Modal Popup window** = It will open all records in a modal popup window
 - **All Navigate to Record page** = It will take you to the record detailed page for all records.
 - **Task in a Modal Popup window** = It will open only the task record in the modal popup window.
 - **Task Navigate to Record page** = It will take you to the record detailed page for task record only.
- **Select Default Filter View:**

This allows you to change the default picklist filter to one of your choices
- **Lock Filter Picklist:**

This allows you to lock the filter picklist so that a user can't change the filter picklist value
- **Hide New Button:**

Allows you to Hide the "New" action button
- **Hide Add Multiple Tasks:**

Allows you to Hide the "Add Multiple Tasks" button
- **Hide Mass Actions - Multi checkbox:**

Hide the Mass actions & Multi Checkbox in the myTasks component
- **Hide Task List Views:**

Hide Task List Views / Custom List Views to which you have access

- **1st Filter Box View:**

Allows you to change the default Filter that appears on Filter Box 1 (Default = All Overdue).

- **2nd Filter Box View:**

Allows you to change the default Filter that appears on Filter Box 2 (Default = Today)

- **3rd Filter Box View:**

Allows you to change the default Filter that appears on Filter Box 3 (Default = This Month)

- **4th Filter Box View:**

Allows you to change the default Filter that appears on Filter Box 4 (Default = All Open)

- **Hide Email/Phone Action Icons:**

Allows you to hide the email and phone icon from the contact/lead from the list

myEvents Component Properties

The myEvents component provides many value-added new features to help you manage your day-to-day event activities in Salesforce. Its UI/UX will make you feel like you are using an out-of-the-box standard Events component but with lots more features and Point-and-Click configurations.

This Events component is fully compatible with Salesforce Communities and is the component of choice by our customers. Some of the notable features included the number of additional filters, the ability to configure different layouts based on component configuration, Date Filter, Restricted to host, Multi Add, and so on...

Page > myEvents

Header Label ⓘ
myEvents

☐ Hide Related ⓘ

☐ Hide Label ⓘ

☐ Hide Location ⓘ

Sort By ⓘ
Start Date Time

Sort Type ⓘ
ASC

Events per page ⓘ
5

Additional Field 1 ⓘ
--None--

Additional Field 2 ⓘ
--None--

☐ Lock Filter Picklist ⓘ

☐ Hide New Button ⓘ

☐ Hide Add Multiple Events ⓘ

☐ Hide Filter Boxes ⓘ

☐ Hide Email/Phone action icons ⓘ

☐ Hide Mass Actions - Multi Checkbox ⓘ

Restrict Visibility to Host Object ⓘ
NO

Hyperlink Open Behavior ⓘ
All Open in Modal Window

Select Default Filter View ⓘ
This Month

1st Filter Box View ⓘ
Today's All

2nd Filter Box View ⓘ
This Week

3rd Filter Box View ⓘ
This Month

4th Filter Box View ⓘ
Upcoming

> [Set Component Visibility](#)

-
- **Header Label:**
A Custom label for a component
 - **Sort by:**
Define the sort order for the list based on any column
 - **Sort Type:**
Define ascending or descending order on the sort by the selected field
 - **Events per Page:**
Define how many Events to show in the component list – now a picklist
 - **Hide Related:**
Hide the links to related objects to the events
 - **Hide Label:**
Hide the top component label
 - **Hide Filter Boxes:**
Hide Blue Filter boxes for quick actions
 - **Restrict Visibility to Host Object:**
Restricts the list of events to the related object where the component is placed e.g. Accounts page will only show events related to the account being viewed
 - **Hide Location:**
Hides the location of the events from the list
 - **Additional Field 1:**
Select any additional field 1 to display in the list
 - **Additional Field 2:**
Select any additional field 2 to display in the list
 - **Hyperlink Open Behavior:**
 - o It has the option to select one of the four values. i.e.
 - o **All in a Modal Popup window** = It will open all records in a modal popup window
 - o **All Navigate to Record page** = It will take you to the record detailed page for all records.
 - o **Event in a Modal Popup window** = It will open only the event record in the modal popup window.
 - o **Event Navigate to Record page** = It will take you to the record detailed page for event records only.

- **Select Default Filter View:**

This allows you to change the default picklist filter to one of your choices

- **Lock Filter Picklist:**

This allows you to lock the filter picklist so that a user can't change the filter picklist value

- **Hide New Button:**

Allows you to Hide the “New” action button

- **Hide Add Multiple Events:**

Allows you to Hide the “Add Multiple Events” button

- **Hide Mass Actions - Multi Checkbox:**

Hide the Mass actions & Multi Checkbox in the myEvents component

- **1st Filter Box View:**

Allows you to change the default Filter that appears on Filter Box 1 (Default = Today).

- **2nd Filter Box View:**

Allows you to change the default Filter that appears on Filter Box 2 (Default = This Week)

- **3rd Filter Box View:**

Allows you to change the default Filter that appears on Filter Box 3 (Default = This Month)

- **4th Filter Box View:**

Allows you to change the default Filter that appears on Filter Box 4 (Default = Upcoming)

- **Hide Email/Phone Action Icons:**

Allows you to hide the email and phone icon from the contact/lead from the list

please contact us if you need any help.
Email us at contact@webider.com to get the quote.

Thanks

