

Mass Close Tasks

Overview

This custom button is intended to be used with a task list view, to allow marking multiple task records as “completed” (closed). The list view task shows multiple task records, each having an action checkbox, which allows rapid, multiple selection(s) without having to actually open the task(s).

Installation

After having located this custom button on AppExchange, click the “Get It Now” red button. At this point there will be prompt dialog boxes to ask if you have a Salesforce account, if you’re an admin and whether to install in sandbox or production.

After collecting the above prompt answers and possibly logging into your org, you will be asked to read and agree to the terms and conditions, then press, “Continue”. At this point, the package will be uploaded to your org and you will be navigated from the AppExchange site to your org’s site, which will then take two steps to finalize the installation.

Step 1. Approve Package API Access

This page on your org will allow you to customize authorizations of the package you are installing.

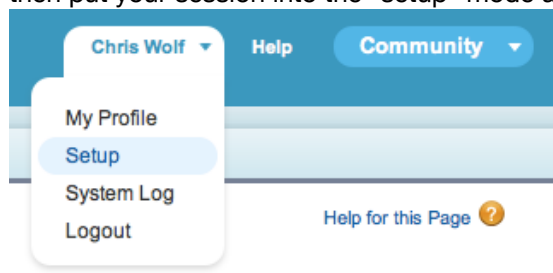
Step 2. Install Package

This page is the final confirmation - press “Install” to complete the installation.

Configuration and Use

Configuration

Since you will be customizing your org, you will need to be logged in as an admin. You will then put your session into the “setup” mode as shown below:



Next, on the left-side navigation pane, under “App Setup”, expand these nodes:
Customize=>Activities
then select “Activity Search Layouts”:

App Setup

Customize

Tab Names and Labels

Home

Activities

Task Fields

Task Validation Rules

Task Triggers

Task Buttons and Links

Task Page Layouts

Task Record Types

Event Fields

Event Validation Rules

Event Triggers

Event Buttons and Links

Event Page Layouts

Event Record Types

Activity Custom Fields

Activity Search Layouts

Activity Buttons

Public Calendars and Resources

Activity Settings

- Search Results for search and tagging.
- List Views for filtering records. [View example](#)

Activity Search Layouts

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
Edit	Search Results	Subject, Name, Related To, Due Date, Assigned Alias		Chris Wolf, 12/23/2010 10:07 AM
Edit	Activities List View	N/A	New Task, New Event	Chris Wolf, 12/23/2010 12:00 PM
Edit	Search Filter Fields		N/A	Chris Wolf, 10/19/2010 6:54 AM

Out-of-the box (default org setup) there should be at least three activity search layouts - select the “Activity List View” layout, this will take you to a page which allow you to configure the buttons on this layout. Under “Custom Buttons”, select and add the “Close Task” custom button, then press “Save”.

Standard Buttons

☒ New Task [NewTask]
 ☒ New Event [NewEvent]

Custom Buttons

Available Buttons

--None--

Add

Remove

Selected Buttons

Close Task

Up

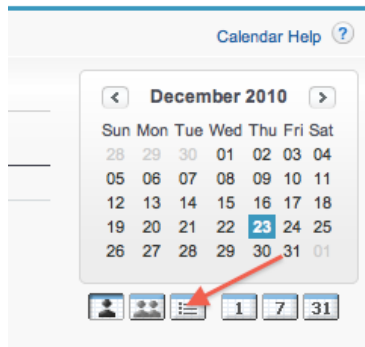
Down

Save

Cancel

Use

Navigate to the “Home” page of your org. In the “Calendar” section of the page, select the “Activity List View” button, underneath the little month calendar, as show by the red arrow, below:



You should now see the “Close Task” button, whose action will apply to any/all selected tasks in this list view:

<input type="checkbox"/>	Action	Subject ↑	Name	Related To
<input type="checkbox"/>	Edit Del	Task one		
<input type="checkbox"/>	Edit Del	Task three		
<input type="checkbox"/>	Edit Del	Task two		

Note that anywhere there is an activity list view, such as the “Contacts” page, this custom button can be used by a customization procedure similar to the procedure described here.