

Part 1

Task Sample

Salesforce Mobile and Lightning Experience Actions

Edit New Task Complete Task Clone Move to New Milestone Delete Printable View

Task Detail

Standard Buttons Edit Delete Clone Printable View Get Alerts Custom Buttons Move to New Milestone Complete Task

Information (Header visible on edit only)

Project Task Name Sample Text Milestone Sample Text

Overall Status Sample Text Project Sample Text

Expense & Hours

Estimated Expense	\$123.45	Estimated Hours	918.22
Total Expense	\$123.45	Total Hours	172.98
Expense Balance	\$123.45	Hours Balance	871.36

More

Description Sample Text

Milestone1_Move_Task_Detail

Created By Sample Text Last Modified By Sample Text

Related Lists

Times

Hours	Incurred By	Date Incurred v	Project Name Name
522.42	Sample Text	11/30/2021	Sample Text

Expenses

Amount	Incurred By	Date Incurred v	Project Expense Name
\$123.45	Sarah Sample	11/30/2021	Sample Text

To Dos

Project Todo Name	Complete
Sample Text	✓

Related List Properties - To Dos

Columns

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields

Completed Date

Created By

Created By Alias

Created Date

Description

Last Modified By

Last Modified By Alias

Sort By

--Default--

Ascending

Descending

Buttons

OK Cancel Revert to Defaults

Part 2

B&E Finance-Task-page

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Related Lists

Report Charts

Visualforce Pages

Quick Find Mobile Action Name *

Change Owner	Complete Task	File	Mobile Smart Action	New Contact	New Note	Post
Change Record Type	Delete	Get Alerts	Move to New Miles.	New Event	New Opportunity	Printable View
Clone	Edit	Link	New Account	New Group	New Task	Question
Complete Task	Email	Log a Call	New Case	New Lead	Poll	Submit for Approval

Part 3

Quick Find Related List Name *

Activity History	Files	Open Activities	Task Resources
Approval History	Groups	Related Content	Times
Content Deliveries	Issues	Risks	To Dos
Expenses	Notes & Attachment	Successor Tasks	

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- Search Layouts for Salesforce Classic
- Restriction Rules
- Triggers
- Validation Rules

Task Compact Layouts

New Compact Layout

[Help for this Page](#)

Compact layouts are used in the mobile app and some Chatter feed items to display a record's key fields at a glance. You can select and prioritize up to ten fields for the compact layout, but the number of fields that display may vary based on the device's screen, which record page is being viewed, and the permissions of the user.

Compact Layout Edit

Save

Cancel

Enter Compact Layout Information

Required Information

Label

B&E-Finance-Task-compact

Name

B_E_Finance_Task_compact

Select Compact Layout Fields

Available Fields

Selected Fields

Top

Up

Down

Bottom

Add

Remove

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

Task Compact Layouts

Compact Layout Assignment

[Help for this Page](#)

Primary Compact Layout

Select the compact layout to use when this object's records appear as list items in the mobile app.

Primary Compact Layout:

System Default

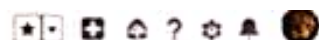
System Default

B&E-Finance-Task-compact

Cancel



All Search Tasks and more



Home Milestones PM+ Home Project Creation Programs Projects Milestones Tasks Issues Resource Allocation More

Task 2. Adjust Your Security Settings

Edit Complete Task Clone Move to New Milestone Delete Printable View

Milestone Milestone 2 - Deploy Your App Project HOWTO: Get Started with Milestones PM Plus Start Date 2/10/2022 Due Date 2/11/2022

Details Chatter

Post Poll Question

Share an update

Share

Sort by

Most Recent Activity

Search this feed

Elle Okami updated this record November 18, 2021 at 4:39 PM

Due Date
2/10/2022 to 2/11/2022

Like Comment

2 views

Write a comment

Elle Okami updated this record November 18, 2021 at 4:25 PM

Due Date
9/11/2021 to 2/10/2022

Like Comment

1 view

Write a comment

Times (1)

1.00
Incurred By
Date Incurred 11/23/2021
Project Time N \$10000

View All

Expenses (1)

\$3.00
Incurred By Elle Okami
Date Incurred 11/8/2021
Project Expense PEXP-0000

View All

To Dos (1)

Outline user permissions
Complete ☐

View All

To Dos

Outline user permissions For jenni

6