

Proposal Tasks

Creating and populating the Proposal Task Object

The proposal task object is what will hold all tasks associated with a new proposal, including the proposal due date, thus a default task called "Proposal Deadline" will be auto-created when the proposal is created. Tasks can be manually created by the project manager, but additional tasks will get created during the regular workflow of the proposal.

When the proposal is submitted, it will create a new task for follow up two weeks later. For now, make sure you create a one-to-many relationship with the proposals. Additionally, you will need to start formatting your new/edit/view screens for proposals.

Proposal Tasks
Integer id Text name Text Area notes Date dueDate Text name
Attributes
Attribute Dependent Attribute Task
Relationships
Relationship Proposal Relationship User
Permissions
Permission Administrators
Views
View new View edit View view

Object Properties

Define a singular and plural name for this object definition. These names will be used throughout your account to refer to one or more records of this type.

Singular Name: Example: Project

Plural Name: Example: Projects

What are Records of this object called? The Record Name field is used in pages, views, selectors, and search results that reference records of this type. Once this object has been created you can customize the display format of the Record Name field using merge fields.

Record Name: Example: Project

The Integration Name is used to reference this object via merge fields and the Web Services APIs. This name must be unique. Be careful when changing the integration name as it may affect existing templates, formulas and integrations.

Integration Name: Example: Project

Description:

Optional Object Properties

Select the appropriate properties based on how you want records of this object type to behave:

Property	Description
<input type="checkbox"/> Audit Trail	Select this option to enable creation of Audit logs when values of selected fields are changes or by invoking triggers and API. In addition create Audit logs when record is: <input type="checkbox"/> Viewed <input checked="" type="checkbox"/> Created <input checked="" type="checkbox"/> Edited <input checked="" type="checkbox"/> Deleted
<input type="checkbox"/> Flagging	Select this option if you want the ability to flag records for follow-up. Flagging applies uniquely to each user.
<input type="checkbox"/> Viewed Tracking	Select this option if you want to visually differentiate records that have been viewed from those that haven't. Records that have not been viewed will be shown in bold. Viewed/Unviewed tracking applies uniquely to each user.
<input checked="" type="checkbox"/> Reports Enabled	Reports can be created on this object

Object Attributes

Object attributes enable unique features and provide a group of predefined fields for your object definition. The table below explains each attribute and the features and fields they provide. Select all attributes that apply.

Attribute	Description
<input type="checkbox"/> Contact	Objects with the Contact attribute represent people or organizations that have contact information associated with them. Email can be sent to contact records, and each record can be exported in the standard vCard format. The following fields are added when this attribute is enabled: First Name, Middle Name, Last Name, Job Title, Phone, Mobile Phone, Fax, Email Address, Owner.
<input type="checkbox"/> Location	Objects with the Location attribute represent people, places or organizations that have location and street address information associated with them. The following fields are added when this attribute is enabled: Street Address 1, Street Address 2, City/State/Province, ZIP/Postal Code, Country. <input type="checkbox"/> Add Google Maps to View Page
<input type="checkbox"/> Event	Objects with the Event attribute represent scheduled activities or meetings that have a start time, duration and group of participants associated with them. Event records can be displayed, created and managed in the Calendar view, and can be exported in the standard iCalendar format. The following fields are added when this attribute is enabled: Event Subject, Date/Time, Duration, All Day, Private, Description, Location, Assigned To, Pop-up Reminder. <input type="checkbox"/> Synchronize these events with Google calendar for users who have enabled synchronizations.
<input checked="" type="checkbox"/> Task	Objects with the Task attribute represent deadlines, follow-ups or to-do's that have a due date and one or more assigned users associated with them. Task records can be displayed, created and managed in the Calendar view, and can be exported in the standard iCalendar format. The following fields are added when this attribute is enabled: Task Subject, Due Date, Priority, Private, Description, Assigned To.

Fields		New Field	New Formula Field				
Action	Field Label ▲	Data Type	Integration Name	Def. Value	Text Index	Track Changes	
Edit Validation Events Permissions	Assigned To	Lookup (User)	assignedTo5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Events Permissions	Comments	Text Area	comment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Permissions	Created At	Date/Time	createdAt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Permissions	Created By	User Link	createdBy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Clone Validation Events Permissions	Description	Text Area	description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Convert Validation Events Permissions	Due Date	Date	dueDate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Permissions	ID	Integer	id	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Replace Clone Validation Events Permissions	Priority	Picklist	priority	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Clone Validation Events Permissions	Private	Checkbox	isPrivate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Permissions	Proposal Task	Record Name	name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Edit Permissions	Tags	Search Tag	tag	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Convert Clone Validation Events Permissions	Task Subject	Text (100)	taskSubject	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Permissions	Updated At	Date/Time	updatedAt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit Permissions	Updated By	User Link	updatedBy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	