

TRAY.IO FREQUENTLY ASKED QUESTIONS

SALESFORCE

1. How long does it take for new projects or tasks to be created and updated in Asana?

Tasks and projects are created and updated in real-time - immediately after a Salesforce Opportunity is created or updated. Note that it may take a few minutes to fully copy the task over in Asana if you have a lot of tasks and subtasks!

2. Are there any limits on the maximum number of tasks or subtasks that we can copy over?

Tasks can have no more than 100 subtasks. If this is an issue for you, reach out to support@tray.io and they can help you.

3. Are custom fields copied over?

Yes, complete with all values from the template.

4. I'd like to create tasks for a particular Salesforce owner - is this possible?

Yes, through a customized workflow. Please reach out to support@tray.io to get set up.

5. I'd like to only create tasks when an Opportunity reaches a certain stage - is this possible?

Yes, through a customized workflow. Please reach out to support@tray.io to get set up.

6. Who will be the task assignee in Asana?

By default, the Opportunity "Owner" (sales rep) will be marked as the task assignee in Asana. If you have a separate user field attached to Opportunities (e.g., account manager), you can edit the workflow to mark them as the assignee instead.



7. Are attachments synced over to the new tasks created?

Currently no. Let us know if this is important for you and Tray will look into getting it added.

8. Is it possible to only create tasks for Opportunities that were created after a certain date?

Yes, through a customized workflow. Please reach out to support@tray.io to get set up.

9. Can we add a URL to the Asana task to a custom field in Salesforce?

Yes! This is a very common addition to set up. Usually we recommend creating the following fields in Salesforce:

- Asana Task ID (number, external ID)
- Asana Task URL (formula, shows the URL based on the ID field)

You can edit the workflow to automatically pass the task ID to the custom field in Salesforce.

10. Is it possible to also show Asana tasks inside Salesforce, so our reps know what is happening in Asana?

Not currently with this workflow, but let us know and Tray will look into getting this added.

GOOGLE FORMS

1. How do I specify which project the tasks will be created in?

When you install the template, you're provided with a list of all of the projects in your Asana account. Just pick the one where you'd like the tasks to go, and that's it!

2. How long does it take for form submissions to be added into Asana?

New form submissions should take no more than a couple of minutes to be added as tasks in Asana.

3. Are there any limits on the Google Form? Maximum number of questions or sections?

No! Feel free to add as many questions and layout sections as you like - all form field answers will pass straight into Asana.

4. Is it possible to also sync the form attachments into Asana?

Not out of the box, but with the Tray workflow builder, this is 100% possible. Reach out to support@tray.io to learn more!

