

# Accessing Activity Center

## Activity Center Access

### How do I access Activity Center?

Activity Center is accessed through the drawer on the right hand side of the Console and Relationship Profile screens where it is easily accessible for you to manage your day-to-day activities. You are provided a list of all activities based on:

- Overdue status
- Activities that are due today
- Activities that are scheduled in the future

You may click on any of the items listed and you will be taken directly to the contact report, proposal or task for review and completion.

### How do I change my view to see activities in the future and the types of activities?

You can personalize your view of which activities are visible by clicking on the filter icon in the drawer. You may select and change which activities are presented in the drawer at any time to fit your daily workflow and priorities.

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### Console

The screenshot shows the Western University Console interface. At the top, there are tabs for CONSOLE, ADVANCEMENT, ANNUAL GIVING, MAJOR GIVING, and TARGETING. The main content area is divided into two sections: Contact Reports and Proposals. On the right side, there is a drawer for the Activity Center, which contains a list of items: Overdue Items (1), Draft Proposals (1), Contact Reminder (visit with Catharine, Provide Proposal), and Proposal Due (John-Ruth Scholarship). The Contact Reports section shows a table with columns for Contact Report ID, Contact Title, Entity Name(s), Officer(s), Type, and Date. The Proposals section shows a table with columns for Proposal ID, Proposal Name, Entity Name(s), Officer(s), and Type.

### Relationship Profile

The screenshot shows the Western University Relationship Profile interface for James "Jim" Stockslager - Alumni. The profile includes a photo, title (Project Manager), employer (Best Buy), preferred email (james.stockslager@reheer...), and show more (3). It also displays entity ID (25041), primary relationship type (Alumni), giving society (View Details (4)), known planned gift (Yes), gender (M), age (64 (12/30/1953)), marital status (Married), relationship status (Active), spouse (Mary Stockslager), parents (N/A), and children (N/A). Below the profile information, there are tabs for Detail, Donor Analytics, Donor Discovery, Social Profiles, Timeline, Activities (7), Proposals (6), and Attachments (7). The Activities section is expanded, showing a table with columns for Activity ID, Subject, Staff, Type, Date, Purpose, Measured, Status, and School/Unit. The table lists several activities, including "Check in with James and Mary", "Check in with Mary and James", "Call with James", "Visit with James and Mary", and "Check in with James".

### View of Activities / Filtering

The screenshot shows the Western University Activity Filtering dialog box. It includes a section for Sort By Due Date with a dropdown menu set to Oldest to Newest. There is a section for Show Today's Items Only? (This will not hide overdue items) with radio buttons for Yes and No. Below that, there is a section for Select Visible Activity Center Items: with checkboxes for Contact Reports, Proposals, and Tasks. There is also a section for Select the Assignment Types you would like to display Touch Points on: with checkboxes for Primary, Non-Primary, and Volunteer. Finally, there is a section for Select the Touch Points you would like to display: with checkboxes for Birthday, Milestone, Donation, and Donation Anniversary. At the bottom, there are buttons for Cancel and Save.

### Calendar View

## ***Where do I find a calendar view of my past, current and future activities?***

A calendar view can be accessed in the drawer, where you will see a calendar icon. Click on the icon to view your activities on the calendar. You are able to filter your view by month, week or day.

## ***How do I set up the calendar feed?***

Set up for the calendar feed is found on the calendar view. Set up instructions are provided when you click on the Calendar Feed button.

