Activity Center Tasks

How are tasks used in Activity Center?

It takes a whole team to successfully manage a major giving initiative. Activity Center offers a central place where users can request assistance of other team members. Reminders to send out follow-up items, or an invitation to an event, or even sending a birthday wish on a certain date can all be scheduled and assigned to the proper owner for each individual task. Having this follow-up mechanism in the same place as all of your other contact reports and proposal tracking creates a more mainstreamed approach on how you can interact with your prospects.

Where do I create, view and find tasks?

You can **create** tasks from several locations:

- Console Page / Tasks viewport by clicking on the Add Task button
- Drawer (right hand side of the page) by clicking on the + Task button
- Relationship Profile / Activities Viewport by clicking on the Add Task button
- On an existing contact report, related tasks are created by clicking on Create Task
- On an existing Proposal, related tasks are created by clicking on Create Task

You can **search** for a specific task:

- Console Page / Task Viewport
- Relationship Profile / Activities Viewport

You can **view** tasks from several locations:

- Console Page / Task Viewport
- Drawer (right hand side of the page) in the list of activities
- Drawer / Calendar
- Relationship Profile / Activities Viewport

Can a task be edited?

Ability to edit a task is based on the user's profile and permissions.

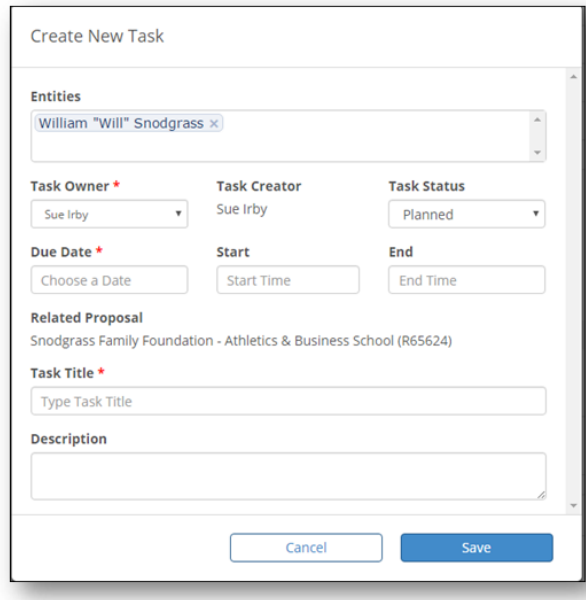
Tasks can be edited by clicking on the Edit Task button on the view of the task with the appropriate permissions.

Why can't I edit a task that wasn't created in Fundraiser Performance Management?

Tasks created in your database (i.e. Banner, Advance, Raiser's Edge) cannot be updated in Fundraiser Performance Management, because the updates would then be out of sync with the data in your database. As a result, Fundraiser Performance Management does not allow those tasks created outside of Fundraiser Performance Management to be edited.

Video
Introduction to Tasks

Create Task



Complete & Edit Task