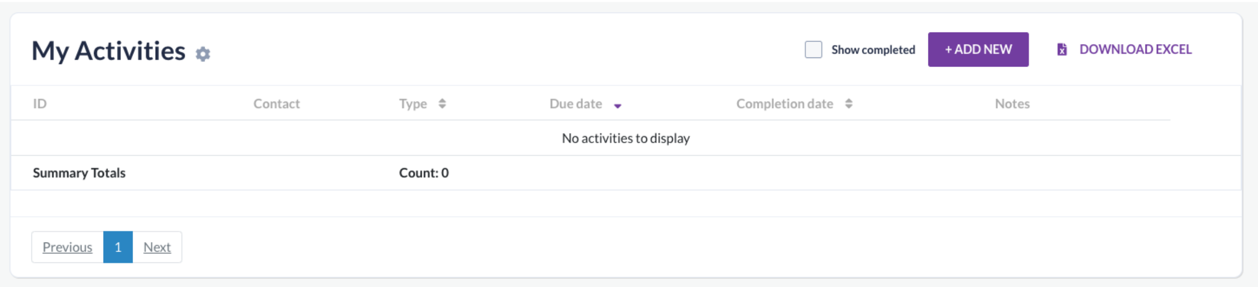
CRM: Activities & Task Management

Last Modified on 08/18/2023 9:57 am PDT

Watch this video to learn about activities and task management capabilities in your GiveSmart Donor CRM account.

View Admin Activities

Personal activities can be viewed from the Dashboard. Scroll to the Activities section to view all activities assigned to you.

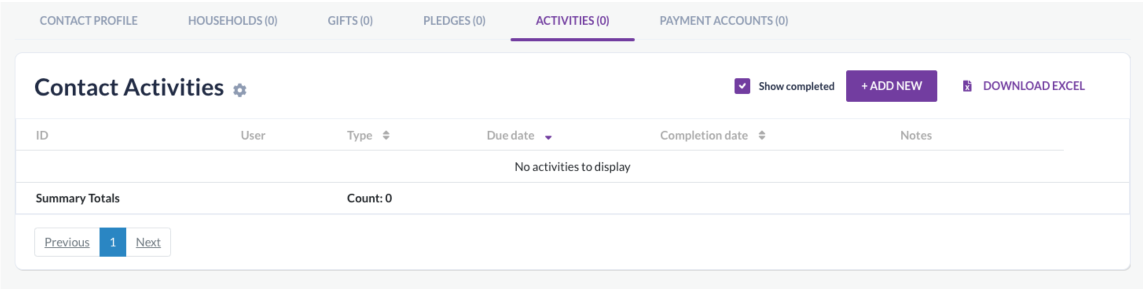


To view a list of all current activities select **Activities** from the left navigation. Activities can be filtered by Activity Type, Due Date, Completion Date or Assignee.

View Donor Activities

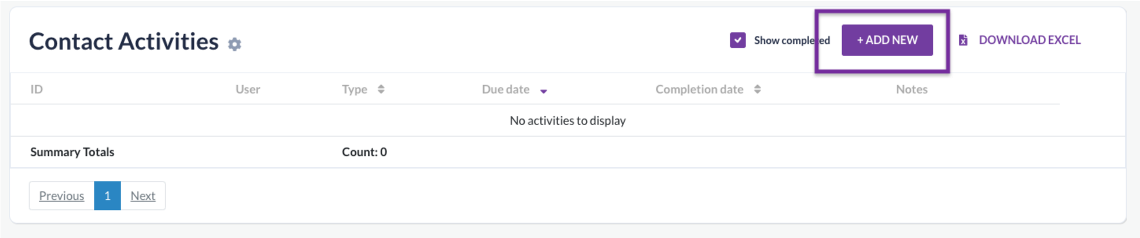
To view a list of activities for a particular donor:

- Select Donors & Contacts from the left navigation
- Choose Contact Listing
- Select the Donor Profile
- Click Activities from the central navigation



Create an Activity

New activities can be created from the Dashboard, Activities tab or from within a Donor's Activity profile.

- Select +Add New
- 

- Enter
    - User
        - The Admin assigned to the activity
    - Contact
        - The Donor who requires the activity
    - Activity Type
        - If no Activity Types created, select **Add New+** to create a new activity type
    - Due Date
    - Due Time
    - Completion Date
        - If there is no completion date, leave blank
    - Add any notes
    - Enter Custom Field information - if applicable
- Click **Save**

Add new activity

× CANCEL

User *required

Kirsten Primozic

Contact *required

New Donor ×

Activity type *required

Select Value

Due date

Pick Date

Due Time

Pick Time

Completion date

Pick Date

Notes