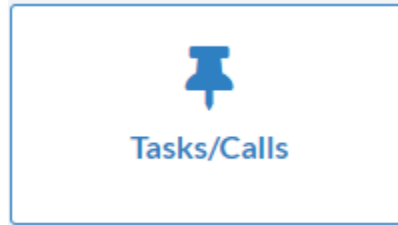


To access the Tasks/Calls Manager, select the **People Dashboard**, and click on the **Tasks/Calls** button.



This tool allows you to create lists of tasks based on who created them, to whom they are assigned, task due dates, and completion status.

**Please note, in order for specific users to be displayed under Step 1 and/or 2, those users need to have logged into Crimson at least once and either scheduled a task for someone else or had a task scheduled to them to complete.

Creating a Call Sheet from a Task

1. Under **Step 1: Scheduled by** of the tasks manager, a list of users will display. To select tasks scheduled by certain users, click the checkboxes next to their names, or check/uncheck all users.
2. Under **Step 2: Scheduled for**, another list of users will be displayed. To select tasks assigned to certain users, click the checkboxes next to their names, or check/uncheck all users.
3. In **Step 3: Task date**, you may select tasks for all dates or specify a range of **Due Dates** or **Completed Dates**. Select **Select tasks by Due Date** or **Include all Due Dates by** using their corresponding toggle buttons. Enter the dates using the text boxes or calendar icons.

The screenshot shows a navigation bar with four steps: Step 1 (Scheduled by), Step 2 (Scheduled for), Step 3 (Task date), and Step 6 (Search). Below the navigation bar, there are two toggle buttons: "Selects tasks by Due Date" (which is currently selected) and "Include all Due Dates". Below these are two date selection fields, "From" and "To", each with a text input box and a calendar icon.

4. In **Step 4: Task Type**, you may select whether to include only open tasks, completed tasks, or both. The checkbox next to **Include all Open Tasks** will automatically be selected. You may click the checkbox by **Include all Completed Tasks** to also see completed tasks, or choose to see only completed tasks by clicking the **Include all Open Tasks** checkbox once to deselect it.
5. In **Step 5: Additional Filters**, you can filter your tasks/calls further by selecting flags, keywords, and/or a state.

6. In **Step 6: Search**, you can run your search based on the criteria you have entered in Steps 1-5 by clicking **Search Now**. You will be presented with a list of tasks, with which you may then take several actions such as:
- Print Call Sheets for all of these tasks
 - Print the Summary list
 - Open a donor's record or a specific task
 - Download the summary list as an Excel file
 - Select multiple tasks using the check boxes, then mark the tasks as completed with the **Complete Checked Tasks** button.

The screenshot shows a search results interface. At the top, a navigation bar indicates the current step is Step 6: Search. Below the navigation bar, there is a dropdown menu for 'Select user to reassign task' and a row of action buttons: 'Reassign Checked Tasks', 'Complete Checked Tasks', 'Delete Checked Tasks', 'Print Call Sheets', 'Print Summary', and 'Export'. The main content is a table with columns: Date, For, Type, Subject, Id, Name, City, and State. The table contains five rows of task data. At the bottom right, there are 'Previous' and 'Next' buttons.

	Date	For	Type	Subject	Id	Name	City	State
<input checked="" type="checkbox"/>	6/8/23	Sofia Amaya	To Do	Invite to Online event	76004070	Frankrpm Borden		
<input type="checkbox"/>	3/21/23	Renjie Mei	Meeting	test	76000001	Mr. HYUNG W. Rhoe		
<input type="checkbox"/>	4/11/22	Junho Bae	Call	Follow-up for Major Donor event	76002209	Mr. Joseph Banks, Sr.	Falls Church	VA
<input type="checkbox"/>	6/8/23	Sofia Amaya	To Do	Invite to Event	76002209	Mr. Joseph Banks, Sr.	Falls Church	VA
<input type="checkbox"/>	6/8/23	Sofia Amaya	To Do	Invite to Host Fundraiser	76002209	Mr. Joseph Banks, Sr.	Falls Church	VA

7. Click **Print Call Sheets** to create call sheet with information about each task. Choose one of the 4 call sheet styles to open a printable document.

The screenshot shows a dropdown menu for 'Print Call Sheets'. The menu is open, displaying six options: 'Full Profile', 'Brief Profile', 'Pocket Profile', 'Extended Profile', 'PAC Profile', and 'Extended PAC Profile'.

- **Full Profile** will generate call sheets including comprehensive summary information about each record, including contact information, giving history, previous task assignments and event participation.
- **Brief Profile** will generate call sheets emphasizing the task note and including summary information about the record, such as contact information and giving history.

- **Pocket Profile** will generate short call sheets with basic information on each task and the associated contact in a convenient pocket sized page (generally used for events).
- **PAC Profile** will generate call sheets similar to the Brief Profile, but will also include basic information for any additional contacts that have been added to the record. This type of profile is useful for PAC's and organizations who want to see the main record's information as well as any contact info for individuals they may work directly with.