crimson³

About Tasks

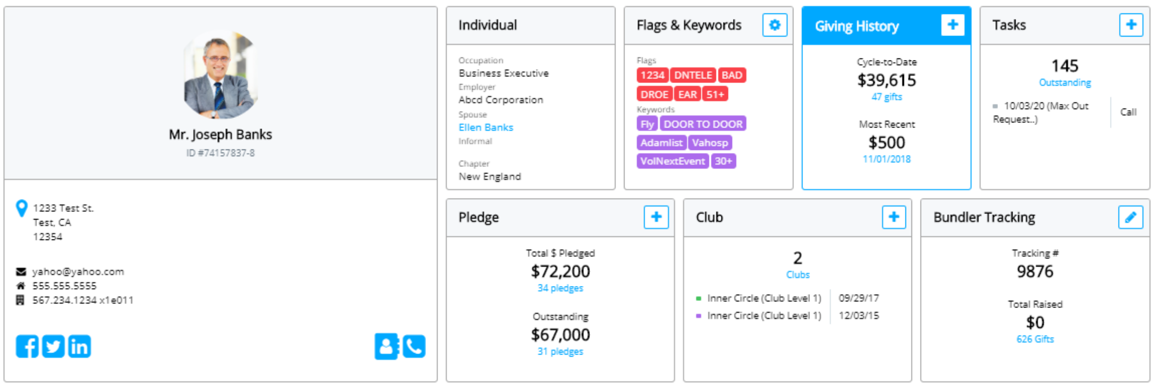
The **Tasks** function in Crimson allows users to assign fundraising calls, correspondence assignments or other related tasks to one another as well as to a candidate.

Creating and Editing Tasks within People Records

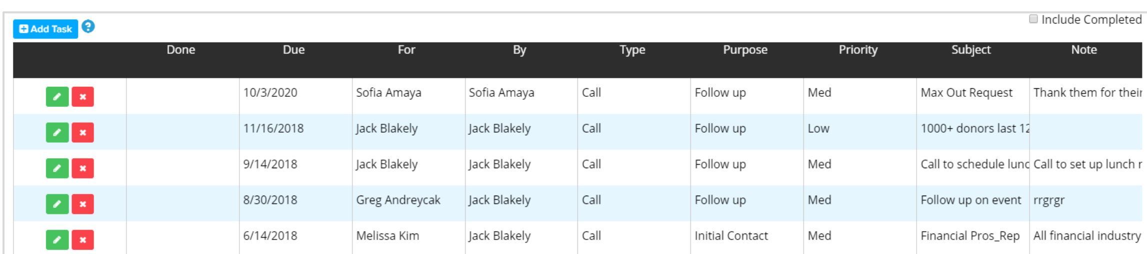
1. To create or edit a task, first open the **People** record the task it is to be assigned to.

   NOTE: For information on how to find and open a People record, please see [Crimson 3: People Search]() on the Helpdesk.

2. Once within a People record, you will see a menu of **panels**. The **Tasks** panel will display the total number of outstanding tasks and tasks with upcoming due dates.



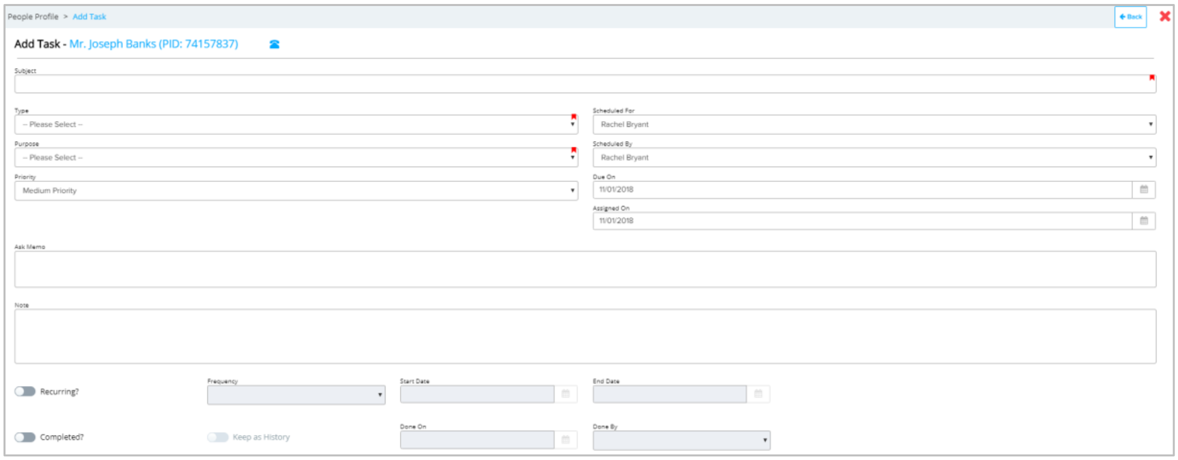
3. Click the **Tasks** panel to view a list of tasks for the record, and options to create or edit tasks.



	Done	Due	For	By	Type	Purpose	Priority	Subject	Note
		10/3/2020	Sofia Amaya	Sofia Amaya	Call	Follow up	Med	Max Out Request	Thank them for their
		11/16/2018	Jack Blakely	Jack Blakely	Call	Follow up	Low	1000+ donors last 12	
		9/14/2018	Jack Blakely	Jack Blakely	Call	Follow up	Med	Call to schedule lunc	Call to set up lunch r
		8/30/2018	Greg Andreycak	Jack Blakely	Call	Follow up	Med	Follow up on event	rrgrgr
		6/14/2018	Melissa Kim	Jack Blakely	Call	Initial Contact	Med	Financial Pros_Rep	All financial industry

   - To see a full list of tasks, including completed tasks, click the checkbox marked **Include Completed**.
   - To edit a task in the list, click the button. The Task window with that task's information will appear. After you have finished editing, click **Save** or **Cancel**.
   - To delete a task in the list, click the button.

4. To create a new task, click the **Add Task** button. In the new window, you can input information about the task.



5. Enter a **Subject** for the task and select the task type from the **Type** drop-down menu, a purpose for the task from the **Purpose** drop-down menu, and a priority level from low to high from the **Priority** drop-down menu.
6. Assign the task to yourself or another Crimson user in the **Scheduled For** drop-down menu. The task will automatically assign you as the **Scheduled By** user, but you can select another user in the drop-down menu to update who assigned the task.
7. Set the due date of the task by entering a date into the **Due On** field or by clicking the calendar icon. The **Assigned On** field will automatically use today's date, but you can update that if needed.
8. You may input additional descriptive or background information in the **Notes** or **Ask Memo** section.
9. To make the task recurring, select the **Recurring** toggle and update the **Frequency**, **Start Date**, and **End Date**.
10. Click the **Save** button to save the task or the **Cancel** button to cancel the entry.
11. To mark the task as completed, open the task for editing and click the **Completed?** toggle. Crimson will automatically fill the **Done On** with the current date and your name for the **Done By** field. You can update the **Done On** date and/or the **Done By** field if needed. Disable the **Keep as History** toggle if you do not wish to save a record of the task in the record's history after it has been completed.

***Please note: You can also use the Mass Append function to assign tasks to multiple records at once. For more information, please see* [Mass Append – Flag, Keyword, Notes, Events and Tasks]() *on the HelpDesk.*

Using My Tasks

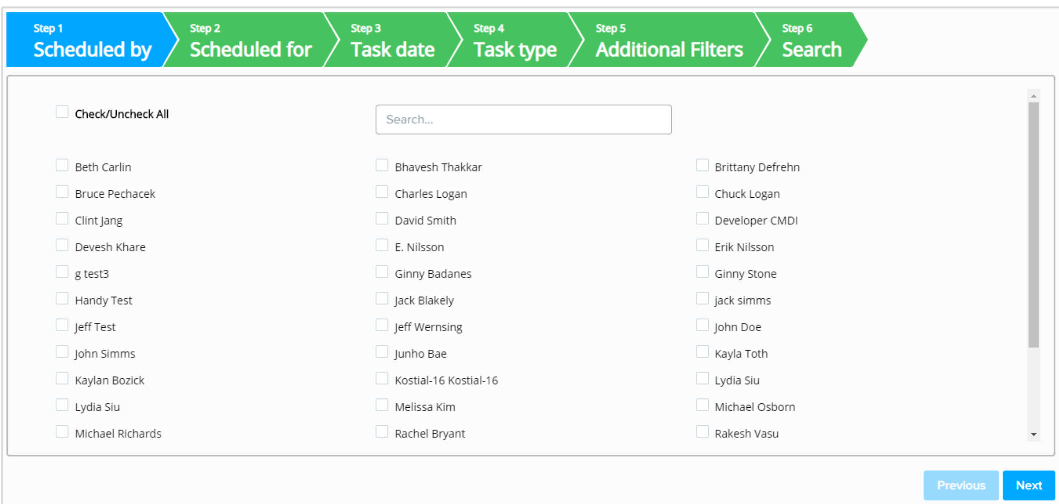
- Under **My Tasks** on the **Home** Dashboard, a **Subject** and **Due Date** will be displayed for all tasks not yet completed that have upcoming due dates.
- Click the  button in the top right corner to show all tasks assigned to you.

- Click on the **Subject** of the task in the list to open the Task window. From there, you can see all the task information, make edits, enter notes, and add information on the completion of the task. See the directions above for instructions on editing a task.
- Marking a task as completed in the Task window will clear it from your **My Tasks** list.

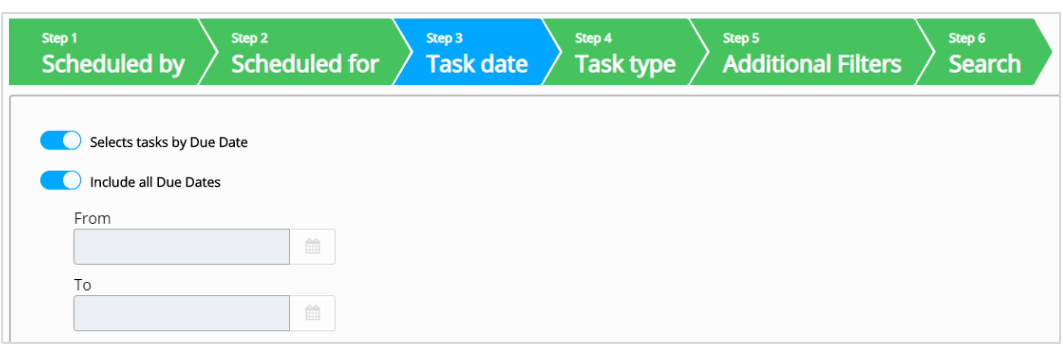
Pulling Lists of Tasks/Creating Call Sheets

On the **People Dashboard**, click on **Tasks/Calls** action button. Here you can generate lists of tasks based on who created them, who they are assigned to, due date, types of tasks, and completion status.

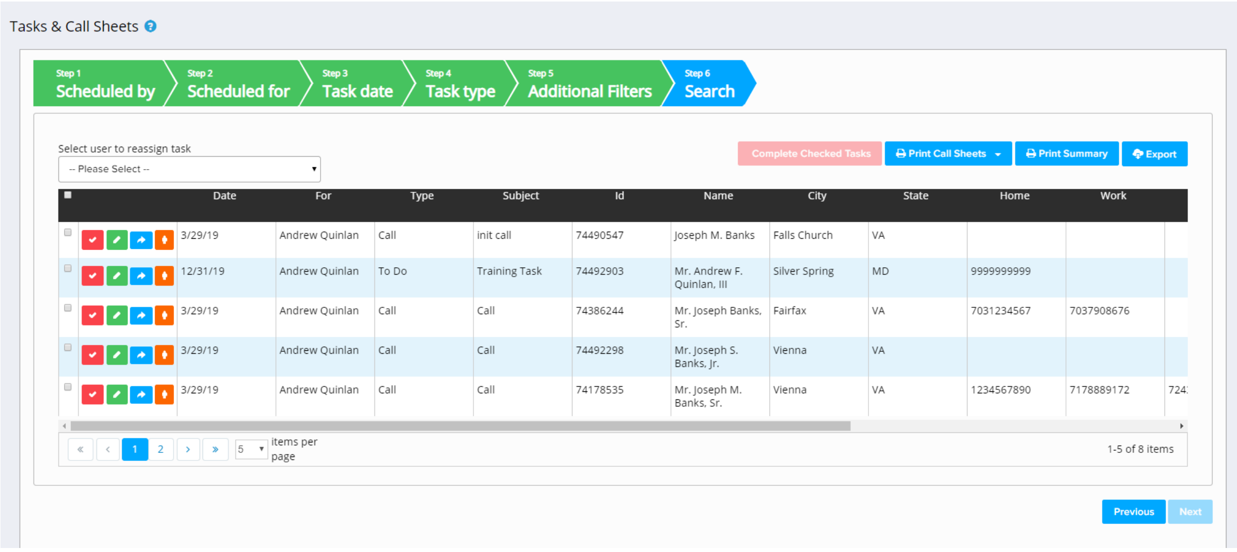
1. Under **Step 1 Scheduled by**, a list of users will display. Select users who assigned tasks by clicking the checkboxes next to their names, or select all users by clicking **Check/Uncheck All**. You can search for users with the **Search** bar.



2. Under **Step 2 Scheduled for**, another list of users will display. To select tasks assigned to certain users, click the checkboxes next to their names, or select all users by clicking **Check/Uncheck All.**
3. In **Step 3 Task Date**, enable the first toggle to **Select tasks by Due Date** then use the **From** and **To** fields to select the time frame. Use the second toggle to search or **Include all Due Dates**.



4. In **Step 4 Task Type**, select to **Include all Open Tasks**, **Include all Completed Tasks**, or both.
5. In **Step 5 Additional Filters**, use flags, keywords, or a state to filter the list further if needed.
6. In **Step 6 Search**, run the search based on the criteria entered in **Steps 1-5** by clicking **Search Now**.



7. The Results will appear on the screen with additional options for review:
   - Click the button to mark a task as completed.
   - Click the button to open the task's details and view/edit the task.
   - Click the button to reassign the task to another user.
   - Click the button to open and edit the **People** record associated to the task.
   - When reassigning a task to another user, you must use the **Select user to reassign task** drop-down menu before pressing the button.
   - Click multiple check boxes on the left to select tasks, then **Complete Checked Tasks** to mark the tasks as completed in mass.
   - Click **Export** to export and view an excel file of the task summary or **Print Summary** to view a printable version of the list of tasks.
   - Click **Print Call Sheets** to create call sheets for each of the tasks. Choose one of the four call sheet style options to open a printable document.
     - **Full Profile** will generate call sheets including comprehensive summary information about each record, including contact information, giving history, previous task assignments, event participation, flags, keywords, and notes.
     - **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.

- **PAC Profile** will generate a call sheet geared for making PAC calls. Contact information from the contacts tab will be included.