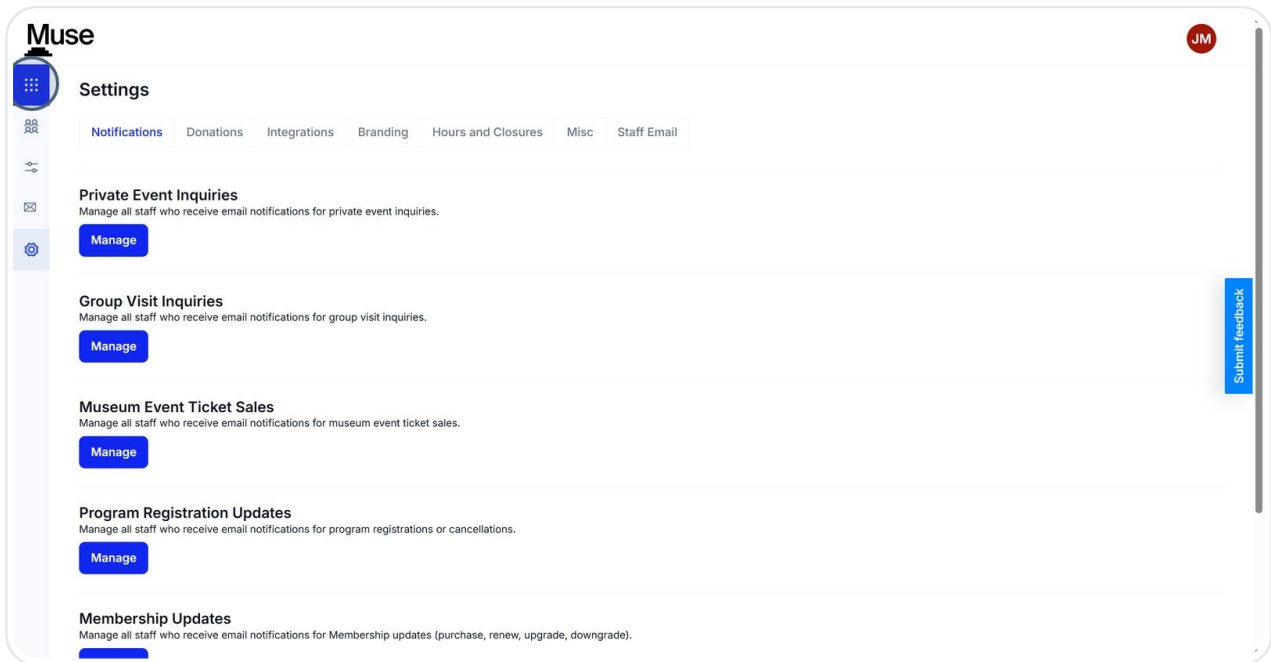


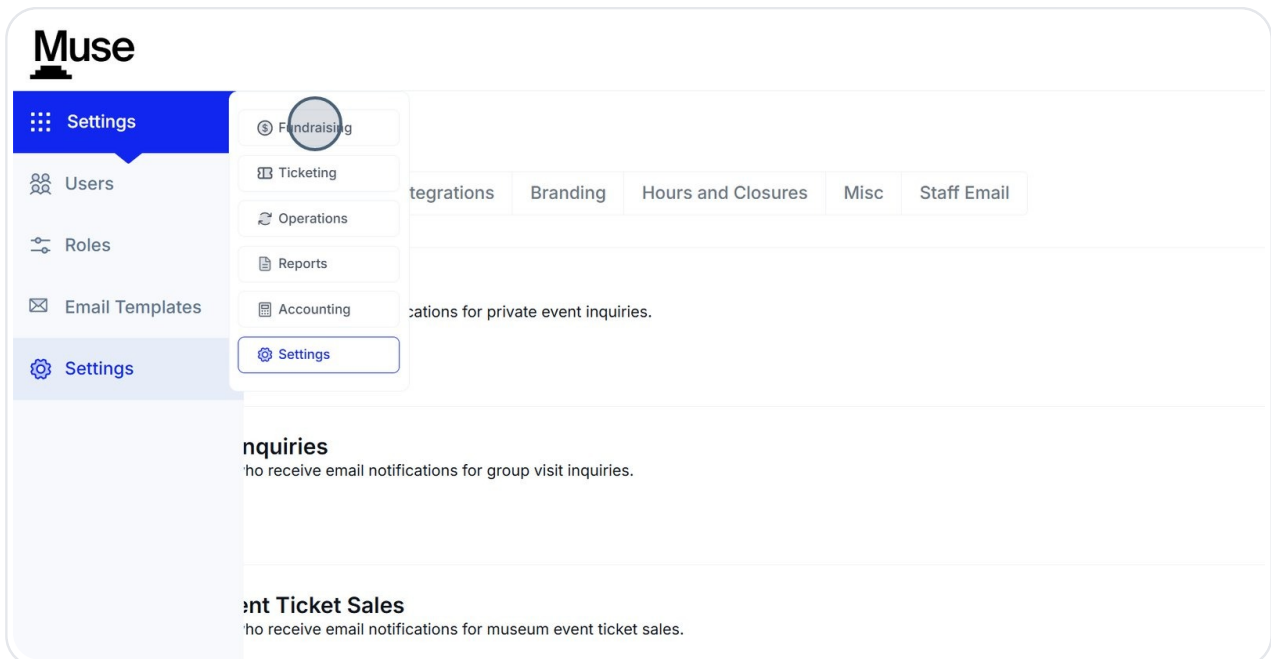


Create and Manage Tasks

1. Click the blue North Star icon.



2. Select 'Fundraising.'



3. Click 'Tasks' to view and manage all fundraising-related tasks in one place.

Muse

Q Search for an individual or organization

JM

Fundraising

g Dashboard

Dashboard

ination

Create a contact

Create a task

Record a pledge

Constituents

Campaigns

Donations

Events

Tasks

Reports

Settings

Name	Campaign	Commitment Type	Payment Type	Frequency	Amount
Aendoza	General Fund	Verbal	Money	One-time	\$2.08
Aendoza	General Fund	Verbal	Money	One-time	\$2.08
Aendoza	General Fund	Verbal	Money	One-time	\$2.08
Aendoza	General Fund	Verbal	Money	One-time	\$2.08
Aendoza	General Fund	Verbal	Money	One-time	\$2.08

Submit feedback

There are no incomplete tasks due today

jns

ersary 27.05%

2026 Capital Campaign 0.38%

4. Filter your tasks to quickly focus on what's most important for your workflow.

Muse

Q Search for an individual or organization

JM

Tasks

Add Task

Q Search by name

Due Date (earliest)

Filter

Task Name	Assigned User	Due Date
☐ Call art and thank him for his donation	Taryn Asta	5/26/26
☐ call ben about membership	Taryn Asta	5/26/26
☐ Follow up with Ben on gala registration	Chris Bilbro	5/27/26
☐ Lunch with Beth regarding capital campaign	Chris Bilbro	5/27/26
☐ Call Beth regarding annual gala	Chris Bilbro	5/27/26
☐ Call Joe regarding wedding rental inquiry	Brandon Gabosch	5/28/26
☐ Reach out to Ryan to personally thank him for his recent donation.	Sales Demo	5/30/26
☐ Call Donor	Amanda Fraser	5/30/26
☐ Call Ben about his membership	Chris Bilbro	6/03/26
☐ Email Samantha - major gift ask	Chris Bilbro	6/03/26
☐ Follow-up on Lunch meeting	Brandon Gabosch	6/04/26
☐ Schedule lunch with Ben to discuss major gift proposal	Chris Bilbro	6/04/26
☐ Call Ben about a Sustaining Patron membership	Chris Bilbro	6/05/26

Submit feedback

5. Choose 'Assigned to me' or 'Created by me' to instantly view a filtered list of tasks.

The screenshot shows a task management interface. At the top, there is a search bar with the placeholder text "Search for an individual or organization". To the right of the search bar is a red circular profile icon with the initials "JM". Below the search bar is a large empty rectangular area. To the right of this area is a blue "Add Task" button. Below the "Add Task" button is a sorting dropdown menu showing "Due Date (earliest)" with an up and down arrow icon. To the right of the sorting menu is a blue "Filter" button with a funnel icon. A dropdown menu is open, showing two options: "Assigned to me" (which is selected and circled in blue) and "Created by me". Below these options are "Clear" and "Update" buttons. The "Update" button is also circled in blue. The main table below has columns for "Assigned User", a date column, and a three-dot menu column. The table contains several rows of data. On the right side of the interface, there is a vertical blue button labeled "Submit feedback".

Assigned User		
Taryn Asta		
Taryn Asta		
Chris Bilbro		
Chris Bilbro	5/27/26	
Chris Bilbro	5/27/26	
Brandon Gabosch	5/28/26	
Sales Demo	5/30/26	

6. Click 'Update' to apply your selected filters and streamline your to-do list.

This screenshot is identical to the previous one, but the "Update" button in the filter dropdown menu is now circled in blue, indicating it should be clicked. The table data remains the same.

Assigned User		
Taryn Asta		
Taryn Asta		
Chris Bilbro		
Chris Bilbro	5/27/26	
Chris Bilbro	5/27/26	
Brandon Gabosch	5/28/26	
Sales Demo	5/30/26	
Amanda Fraser	5/30/26	

7. Open the filters panel anytime to fine-tune your task view and stay organized.

Q Search for an individual or organization

JM

Add Task

↓↑ Due Date (earliest)

Filters (1)

	Assigned User	Due Date	
	Jen Mendoza	8/03/26	⋮

Submit feedback

8. Clear filters with a single click to see all your tasks at a glance.

Q Search for an individual or organization

JM

Add Task

↓↑ Due Date (earliest)

Filters (1)

	Assigned User
	Jen Mendoza

☒ Assigned to me

☐ Created by me

Clear

Update

Submit feedback

9. Click the three vertical dots within the task to 'Edit' the task.

Search for an individual or organization

JM

Add Task

Due Date (earliest)Filter

	Assigned User	Due Date	
	Taryn Asta	5/26/26	⋮
	Taryn Asta	5/26/26	⋮
	Chris Bilbro	5/27/26	⋮
	Chris Bilbro	5/27/26	⋮
	Chris Bilbro	5/27/26	⋮
	Brandon Gabosch	5/28/26	⋮
on.	Sales Demo	5/30/26	⋮

Submit feedback

10. Cancel any changes at any time if you decide not to update a task.

8/04/2026

Status*
Incomplete

Assignee*
Taryn Asta

Campaign
Search by name

Constituent
Search by name

CancelSave

Taryn Asta	5/26/26
Chris Bilbro	5/27/26
Chris Bilbro	5/27/26
Chris Bilbro	5/27/26
Brandon Gabosch	5/28/26
Sales Demo	5/30/26
Amanda Fraser	5/30/26
Chris Bilbro	6/03/26
Chris Bilbro	6/03/26
Brandon Gabosch	6/04/26
Chris Bilbro	6/04/26
Chris Bilbro	6/05/26

11. Select the checkbox to mark a task as completed.

Muse

Tasks

Task Name

☒ Call art and thank him for his donation
 ☐ call ben about membership
 ☐ Follow up with Ben on gala registration
 ☐ Lunch with Beth regarding capital campaign
 ☐ Call Beth regarding annual gala
 ☐ Call Joe regarding wedding rental inquiry
 ☐ Reach out to Ryan to personally thank him for his recent donation.

12.

[illegible]

13. Click 'Add Task' to create a new assignment and keep your fundraising on schedule.

Search for an individual or organization

Success!

The task has been marked as incomplete!

Add Task

Due Date (earliest)Filter

	Assigned User	Due Date	
	Taryn Asta	5/26/26	⋮
	Taryn Asta	5/26/26	⋮
	Chris Bilbro	5/27/26	⋮
	Chris Bilbro	5/27/26	⋮
	Chris Bilbro	5/27/26	⋮
	Brandon Gabosch	5/28/26	⋮
on.	Sales Demo	5/30/26	⋮

Submit feedback

14. Enter a descriptive name to clearly identify your new task.

Search for an individual or organization

Tasks

Search by name

Task Name

Call art and thank him for his donation

call ben about membership

Follow up with Ben on gala registration

Lunch with Beth regarding capital campaign

Call Beth regarding annual gala

Call Joe regarding wedding rental inquiry

Reach out to Ryan to personally thank him for his

New Task

Task name*

Due date*

8/04/2026

Status*

Incomplete

Assignee*

Jen Mendoza

Campaign

Search by name

15. Set a due date to keep your tasks deadline-driven and ensure nothing slips through the cracks.

Tasks

Search by name

Task Name

Call art and thank him for his donation

call ben about membership

Follow up with Ben on gala registration

Lunch with Beth regarding capital campaign

Call Beth regarding annual gala

Call Joe regarding wedding rental inquiry

Reach out to Ryan to personally thank him for his

Call Donor

New Task

Task name*

Close sponsorship with Lowes

Due date*

8/04/2026

Status*

Incomplete

Assignee*

Jen Mendoza

Campaign

Search by name

16. Choose a status to instantly track your task's progress and completion state.

Tasks

Search by name

Task Name

Call art and thank him for his donation

call ben about membership

Follow up with Ben on gala registration

Lunch with Beth regarding capital campaign

Call Beth regarding annual gala

Call Joe regarding wedding rental inquiry

Reach out to Ryan to personally thank him for his

Call Donor

Call Ben about his membership

Email Samantha - major gift ask

New Task

Task name*

Close sponsorship with Lowes

Due date*

9/30/2026

Status*

Incomplete

Assignee*

Jen Mendoza

Campaign

Search by name

Constituent

Search by name

[View online](#)

17. Search for and link your task with a specific campaign to keep everything organized.

The interface shows a list of tasks on the left and a form on the right. The tasks are:

- call ben about membership
- Follow up with Ben on gala registration
- Lunch with Beth regarding capital campaign
- Call Beth regarding annual gala
- Call Joe regarding wedding rental inquiry
- Reach out to Ryan to personally thank him for his
- Call Donor
- Call Ben about his membership
- Email Samantha - major gift ask
- Follow-up on Lunch meeting
- Schedule lunch with Ben to discuss major gift proposal
- Call Ben about a Sustaining Patron membership

The form on the right contains the following fields:

- Date: 9/30/2026
- Status*: Incomplete
- Assignee*: Jen Mendoza
- Campaign: Search by name (highlighted with a blue circle)
- Constituent: Search by name
- Buttons: Cancel, Create

18. Assign your new task to the right campaign for maximum fundraising impact.

The interface is the same as in the previous screenshot, but the 'Campaign' dropdown menu is now open, showing the 'General Fund' option selected. The 'Constituent' field is also visible.

The tasks list remains the same:

- call ben about membership
- Follow up with Ben on gala registration
- Lunch with Beth regarding capital campaign
- Call Beth regarding annual gala
- Call Joe regarding wedding rental inquiry
- Reach out to Ryan to personally thank him for his
- Call Donor
- Call Ben about his membership
- Email Samantha - major gift ask
- Follow-up on Lunch meeting
- Schedule lunch with Ben to discuss major gift proposal
- Call Ben about a Sustaining Patron membership

The form fields are:

- Date: 9/30/2026
- Status*: Incomplete
- Assignee*: Jen Mendoza
- Campaign: General Fund (highlighted with a blue circle)
- Constituent: Search by name
- Buttons: Cancel, Create

19. Find and connect the right constituent to the task for personalized outreach.

call ben about membership

Follow up with Ben on gala registration

Lunch with Beth regarding capital campaign

Call Beth regarding annual gala

Call Joe regarding wedding rental inquiry

Reach out to Ryan to personally thank him for his

Call Donor

Call Ben about his membership

Email Samantha - major gift ask

Follow-up on Lunch meeting

Schedule lunch with Ben to discuss major gift proposal

Call Ben about a Sustaining Patron membership

9/30/2026

Status*

Incomplete

Assignee*

Jen Mendoza

Campaign

General Fund

Constituent

Search by name

Cancel Create

20. Choose a constituent to ensure every task is targeted and meaningful.

call ben about membership

Follow up with Ben on gala registration

Lunch with Beth regarding capital campaign

Call Beth regarding annual gala

Call Joe regarding wedding rental inquiry

Reach out to Ryan to personally thank him for his

Call Donor

Call Ben about his membership

Email Samantha - major gift ask

Follow-up on Lunch meeting

Schedule lunch with Ben to discuss major gift proposal

Call Ben about a Sustaining Patron membership

9/30/2026

Status*

Incomplete

Assignee*

Jen Mendoza

Campaign

General Fund

Constituent

Amanda Fraser

Amanda Fraser

Amandas Fraser

Amanda Jarvis

Amanda Fraser (1)

Amanda Fraser (2)

Amanda Fraser (3)

Fraser Amanda

21. Click 'Create' to add your new task and make progress towards your fundraising goals.

026

plete

endoza

neral Fund

nt

anda Fraser

Cancel

Create

Taryn Asta	5/26/26	...
Chris Bilbro	5/27/26	...
Chris Bilbro	5/27/26	...
Chris Bilbro	5/27/26	...
Brandon Gabosch	5/28/26	...
Sales Demo	5/30/26	...
Amanda Fraser	5/30/26	...
Chris Bilbro	6/03/26	...
Chris Bilbro	6/03/26	...
Brandon Gabosch	6/04/26	...
Chris Bilbro	6/04/26	...
Chris Bilbro	6/05/26	...

Submit feedback