

Tasks

Creating and Managing Tasks

Tasks in Unite can be used to track "To-Do" items to be completed within the next 12 months. Tasks can be related to other records in Unite, such as a constituent, an organization, or a plan. Tasks can also be assigned to other Unite users.

Create New Task

From a Constituent



From the constituent's record, click the "New Task" button.





Complete the "New Task" form. See next page for information about each field.

Name	* Status
Lindsay Mapes	B In Progress 🔹
Subject	* Priority
Enter Subject	
Due Date	* Assigned To
4/26/2022	🗰 🕒 Lindsay Snow 🛛 🕹
Comments	Related To
9	I Snow Household ×
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Unite Tasks

	Name: This field will automatically populate with the constituent's name.
B	Status: Indicate the status of the task (e.g. Not Started, In Progress, etc.). The default status is "Not Started". *This is a required field
C	Subject: Enter the subject/description of the task.
D	Priority: Indicate the priority of the task (Low, Normal, or High). The default priority is "Normal". *This is a required field
E	Due Date: Set a due date for completing the task by clicking the calendar icon and selecting the date.
P	Assigned To: This field will populate with the person creating the task. To assign the task to another user, click the "X" next to the field and select the appropriate person. *This is a required field
G	Comments: Enter any notes relevant to the task.
E	Related To: This field will automatically populate with the constituent's household (i.e. Org Name).
3	Click the "Save" button.

From an Organization

From the organization's record, click the "New Task" button.

ascend Home Constituents V Organizations V Opportunities V Rep	orts 🗸 Dashboards 🗸 Campaigns 🗸 Cases 🗸 Tasks 🗸 Chatter Campaign Repo	rt Giving Detail Report Alternate System IDs 🗸
Google Inc. A	Overview Giving Contact Reports Prospect Management	Organization Details Documents
+ Follow Edit New Plan Chatter Prospect Team New Task Website Business Phone	Organization Name Google Inc.	Parent Organization
(802) 523-9745 Business Email testiliogonale.com	Type Corporations	Status Active

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Complete the "New Task" form. **NOTE:** The *Related To* field will populate with the organization name.

3 Click the "Save" button.





From a Plan

🗰 ascend Home Constituents 🗸	Organizations 🗸 Opportunities 🗸	Reports 🗸 Dashboards 🗸	✓ Campaigns ✓ Cases	∨ Tasks ∨ Chatter Campaign	Report Giving Detail Report	Alternate System IDs 🗸 🗸	
Opportunity New College of Nursing Endow	ved Scholarship - Spect				+ 5	ollow Chatter Prospect Team	Edit Change Ow
Constituent Organization Name Ross Spect Ross and Hope Spect House	Opportunity Owner	Academic Organization College Of Nursing	Expected Ask Amount	Expected Ask Date 10/12/2022			
Qualify	Cultivate Do	nor Clearance Review	Negotiate	Document	Steward	Closed	✓ Mark Stag
Key Fields Description			Edit G	uidance for Success o move to the Cultivate stage you should: 1. File a significant Qualify contact report or	n Plan to record the outcome of the	qualification/disqualification	
Expected Ask Date 10/12/2022			- B	able to answer relevant prospect relation What is their story?	nship-building questions:	ad advanta)	
Expected Ask Amount Qualify Contact Report				What other philanthropy are they involved at the What other philanthropy are they involved Who else cares or helps them make deci Are they open to learning more about bei	d in and what makes it meaningful? isions? ing a donor?	eu auvocate)	
			N 0	OTE: If the prospect has been disqualified, cl pportunity" in the Closed Reason field.	hange the stage to "Closed" and sel	ect "Completed – Unsuccessful" in the S	<i>tage</i> field and "Disqua

Click either "Create New" box or "Add" button.

Details	Contact Report	Chatter	Tasks	Naming Opportunities	Beneficiaries	Documents	Related	
New Task								
				Cre	ate new			Add
								Filters: All time • All activities • All types

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Complete the "New Task" fields. **NOTE:** The *Name* field will populate with the constituent and the *Related To* field will populate with the plan name.

Details Con	tact Report	Chatter	Tasks	Nami	ing Opp	ortunities	Ben	ciaries Documents Related	
New Task									
Subject								* Status	
Enter Subject							Q	Not Started	•
Due Date								* Priority	
							苗	Normal	· .
Name								*Assigned To	
Mark C. Miller							×	Lindsay Snow	:
Related To Miller - Discovery B	uilding								
Reminder Set									
~									
Date								re -	
4/27/2022									



Click the "Save" button.



View Open Tasks

A list of open tasks can be accessed from the Home screen or the "My Open Tasks" list view.

View My Open Tasks List View



Click the "Task" tab on the top navigation bar.



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Select "My Open Tasks" from the list view drop down.

Ur	ite	Q, Se	sarch					*• 🖬 💩	? 🌣 🔔 🐻
	iscend Home Constituents \lor Organizations \lor Opportunities \lor Reports	🗸 Dashboards 🗸 Cases 🗸	Tasks 🗸 Chatter	Campaign Report Giving Detail Report	Alternate System IDs \lor Campaigns $$	Designations	 Service Indicator Value 	es 🗸 More 🔻	1
¥=	Recently Viewed 🔻 🕴					0.5	aarek thir liet		New Task
1 item •	٩								
	RECENT LIST VIEWS	×	✓ Related To	~	Due Date	~	Assigned Alias		~
1	My Open Tasks				3/18/2022		LindSnow		T
	Recently Viewed (Pinned list)								
	ALL OTHER LISTS								



Click the *icon to set "My Open Tasks" as the default.*

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a	ascend Home Constituents 🗸 (Irganizations V Opportunities V Repor	orts 🗸 Dashboards 🗸	Cases 🗸 Ta	ïasks ∨ Chatte	er Campaign Report	Giving Detail Report	Alternate System IDs \lor	Campaigns 🗸	Designations \lor	Service Indica	ator Values 🗸 🛛	More 🔻	,	
	Tasks														New Te
tems •	My Open Tasks	Updated a few seconds ago								Q. Search	h this list	\$	• 11	• C'	/ 0
ems •	My Open Tasks	Updated a few seconds ago Updated a few seconds ago Updated a few seconds ago		~	Priority	~	Status		✓ Related To	Q, Search	h this list V	ast Modified By	• III Alias	• C	/ C
tems -	My Open Tasks	Updated a few seconds ago Subject Test field and Report in UAT when you have a	a chance	~	Priority Normal	~	Status		 Related To 00011272 	Q. Search	h this list 🗸	RyanLark	 ■ Alias 	• C	 C C
= tems • 	My Open Tasks	Updated a few seconds ago	a chance	×	Priority Normal Normal	~	Status Not Started Not Started		 Related To 00011272 	Q. Search	h this list 🗸	RyanLark LindSnow	 ■ Alias 	* C'	/ 0



Click the subject field of the task to open the task.

U	nite		Q. Sea	arch				★ 🖬 🗠 ?	* 🔹 🖲
	ascend Home Constituents \lor Or	ganizations \lor Opportunities \lor Reports \lor	Dashboards 🗸 Cases 🗸	Tasks 🗸 Chatter	Campaign Report Giving Detail Report	Alternate System IDs \checkmark Campaigns \vee	Designations 🗸 Service Indicator	Values 🗸 More 🔻	/
3 item	Tasks My Open Tasks s • Sorted by Due Date • Filtered by My tasks - Status •	Updated a few seconds ago					Q. Search this list	\$* III * C	New Task
	Due Date 🕇 🛛 🗸	Subject	~	Priority	✓ Status	✓ Related To	v La	st Modified By Alias	~
1	2/23/2021	Test field and Report in UAT when you have a chance		Normal	Not Started	00011272	Rya	anLark	V
2	3/18/2022	Task Test - Reminder		Normal	🚊 Not Started		Lin	dSnow	V
	4/22/2022	do this thing		High	in Progress	00128562	Bla	kLond	



The status of the task can be changed to "Completed" from the list view by clicking the 🔳 button next to the status field.





Manage Task

Complete a Task



From the task, click the "Mark Complete" button.

별 Task Test - Reminder			V Mark	k Complete	Edit	Change Date	Change Status	Change Priority 🗸	•
Name Related To									
Details Related									
✓ Task Information									
Assigned To 🐱 Lindsay Snow		Status Not Started							
Priority Normal	/	Name						1	

Edit Task Details

Task Test - Reminder			
		Mark Complete Edit Change Date	Change Status Chang
No. 2011			
Name Related To			
Details Related			
✓ Task Information			
Assigned To	Status		
Lindsay Snow	Not Started		



Task details can also be edited by clicking the pencil icon to the right of any of the editable fields. The date, status, and priority can also be changed using the buttons at the top, "Change Date", "Change Status", and "Change Priority".

Make necessary changes and click the "Save" button.

Assign Task to Another User



From the task, click either the pencil icon next to the Assigned To field or the "Edit" button.

Task Test - Reminder			✓ Mark Complete	Edit	Change Date	Change Status	Change Priority	•
Name Related To								
Details Related								
✓ Task Information								
Assigned To		Status Not Started						
Priority Normal	_	Name						





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Click the "x" to remove the current user assigned.

Deta	Is Related		
	ask Information Assigned To	* Status Not Started	•
	Priority Normal	Name 10 ▼ Search Constituents	Q



Search and select the new user.

Related	
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 Search People 	٩
Blake London Training & Support Specialist Test Test	
	Related formation ded To fearch People Blake London Training & Support Specialist Test Test University Test User

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Click the "Save" button.

