

Adding Activities to Contacts

Last Modified on 02/28/2023 3:09 pm EST

Donor Management System

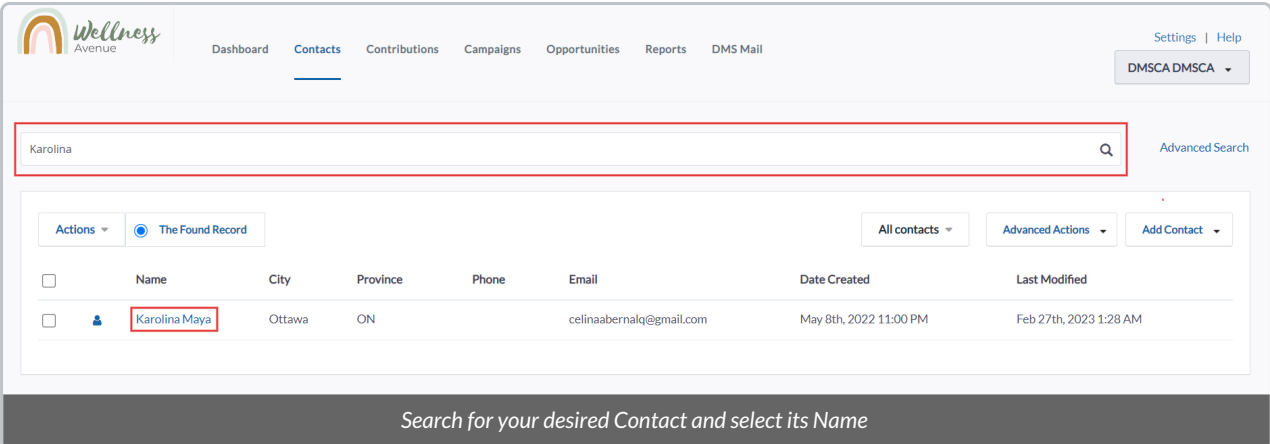
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After learning all about [Activities](#), you can manually log them against your Contacts in the DMS to keep track of crucial donor interactions.

Adding a Single Activity

1. Visit the **Contacts Tab**
2. **Search for the Contact** you want to add an Activity to



The screenshot shows the 'Wellness Avenue' Donor Management System interface. The 'Contacts' tab is selected. A search bar contains 'Karolina'. Below the search bar, there is a table of contacts. The first contact is 'Karolina Maya' with details: City: Ottawa, Province: ON, Email: celinaabernalq@gmail.com, Date Created: May 8th, 2022 11:00 PM, Last Modified: Feb 27th, 2023 1:28 AM. The name 'Karolina Maya' is highlighted with a red box. At the bottom of the interface, there is a footer text: 'Search for your desired Contact and select its Name'.

	Name	City	Province	Phone	Email	Date Created	Last Modified
<input type="checkbox"/>	 Karolina Maya	Ottawa	ON		celinaabernalq@gmail.com	May 8th, 2022 11:00 PM	Feb 27th, 2023 1:28 AM

3. Once on the Contact's Profile, navigate to the **Activities** section to see a list of all Activities for this Contact (if they have any)

Wellness Avenue | Dashboard | **Contacts** | Contributions | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Karolina Maya | Actions | Edit

Summary | Contributions 34 | **Activities 91** | Relationships 1 | Groups 7 | Notes 0 | Tags 2 | Opportunities

Home Address: 45 Sweetland St, Ottawa, ON K1N 6G1, Canada

Billing Address: Karolina Maya, 45 Sweetland St, Ottawa, ON K1N 6G1, Canada

Home Email: celinaabernalq@gmail.com

Billing Email: celinaabernalq@gmail.com

Phone:

Website:

Summary Fields:

- Total Lifetime Contributions: 638.44
- Amount of last contribution: 1.23
- Date of Last Contribution: 02/27/2023 1:28AM
- Date of First Contribution: 05/09/2022 3:40PM
- Largest Contribution: 400.00
- Count of Contributions: 34

Tags: Event Attendees, Gold Donor

Contact Type: Individual

Contact ID: 333

External ID:

Gender: She/Her

Date of Birth:

Age:

Employer:

Job Title:

Recognition Name:

Source: CanadaHelps

On their Contact Profile, select Activities

4. Select **New Activity** and choose from a list of available **Activity Types**. You can also [add new Activities Types](#).

Wellness Avenue | Dashboard | **Contacts** | Contributions | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Karolina Maya | Actions | Edit

Summary | Contributions 36 | **Activities 95** | Relationships 1 | Groups 7 | Notes 0 | Tags 2 | Opportunities

+ New Activity

Filter by Activity

Include: - all activity type | Exclude: - no types exclude | Date: Any | Status: Any

Show 25 entries

Type	Subject	Added By	With	Assigned	Date	Status	
Monthly Contribution Follow-Up		DMSCA DMSCA	Maya Karolina	n/a	Mar 30th, 2023 2:28 PM	Scheduled	View Edit Delete
Call	Spring Call Campaign	DMSCA DMSCA	Maya Karolina	n/a	Mar 6th, 2023 2:25 PM	Left Message	View Edit Delete
Contribution	\$ 150.00 - DMS Manual	DMSCA DMSCA	Maya Karolina	n/a	Feb 28th, 2023 2:27 PM	Completed	View
Contribution	\$ 75.00 - DMS Manual	DMSCA DMSCA	Maya Karolina	n/a	Feb 27th, 2023 7:28 AM	Completed	View

Select New Activity

Note: By selecting *Send an Email* or *Export Printable Documents*, you will be sending a Single Email or Printing a

Letter, respectively.

5. On the next page, fill out the relevant details about the Activity:

Wellness Avenue

Dashboard | Contacts | Contributions | Campaigns | Opportunities | Reports | DMS Mail

Settings | Help

DMSCA DMSCA

Karolina Maya

Summary | Contributions

+ New Activity

Filter by Activity

Include: - all activity type(-)

Show: 25 entries

Type: \$ Monthly Contribution Follow-Up

Call

Spring Call Campaign

DMSCA DMSCA

Maya Karolina

04/03/2023 2:25 PM

Left Message

View Edit Delete

View Edit Delete

View Edit Delete

Contribution: \$ 150.00 - DMS Manual | DMSCA DMSCA | Maya | n/a | Feb 28th, 2023 | Completed

Fill out the necessary fields

Karolina Maya - Meeting

Added by * DMSCA DMSCA

With Contact Maya Karolina

Assigned to Jacob O'Connor

Subject Major Gift Initial Chat

Campaign Group -select Campaign Group-

Engagement Index 2

Location Wellness Ave Head Office

Date * 04/03/2023 02:56PM

Duration Minutes

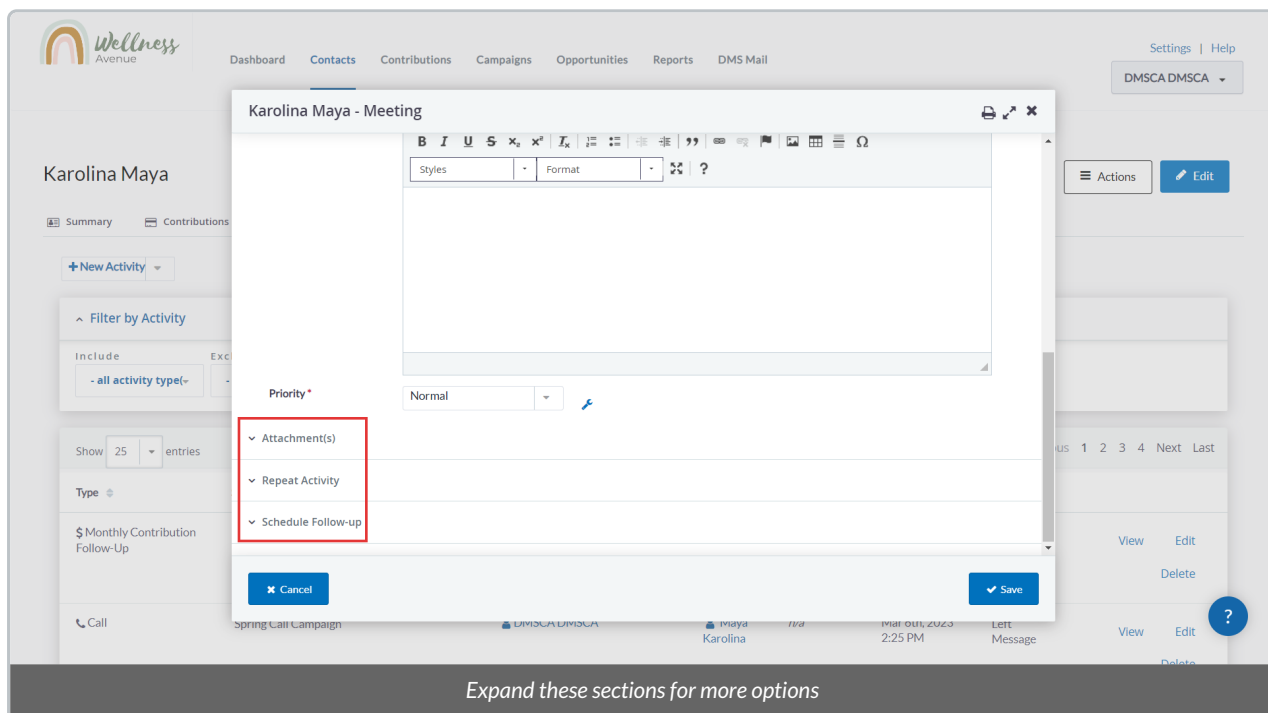
Activity Status * Scheduled

Cancel Save

- **Added by:** which User in the DMS adding this Activity.
- **With Contact:** the Contact who is set to perform the Activity.
- **Assigned to:** assign this Activity to another member in your organization. Once the Activity is created, this will notify the Contact by Email.
- **Subject:** the subject of the Activity. (e.g. "Thank you calls").
- **Campaign Group:** legacy field that is currently not being used. **Please leave it blank.**
- **Engagement Index:** legacy field that is currently not being used. **Please leave it blank.**
- **Location:** the location the Activity is set to take place.
- **Date:** the date the Activity is set to take place.
- **Duration:** the approximate scheduled time.
- **Activity Status:** whether the Activity has been completed, is scheduled for the future, did not take place, etc. **You can also add new Statuses** by selecting the "gear icon".
- **Details:** optional details of the Activity.
- **Priority:** if the Activity is Urgent, Normal or Low Priority. If marked **Urgent**, the Activity will appear in red. **You can also add new Priorities** by selecting the "gear icon".

6. You can also attach a document, repeat the Activity and/or schedule a follow-up Activity by selecting the

sections at the bottom of the page



7. When ready, select **Save** to add the new Activity to the Contact.

Adding Activities to Multiple Contacts at Once

1. Visit the **Contacts** Tab

2. To select the specific Contacts you wish to add an Activity to, select either:

- (1) **The specific Contacts** from your list,
- (2) Every listed Contact **on the page**, or
- (3) All **Contacts** in your search criteria

Wellness Avenue | Dashboard | **Contacts** | Contributions | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Search by contact name or email [Advanced Search](#)

Actions ▾ 4 Selected Records Only All 174 Records ³

<input type="checkbox"/>	Name	City	Province	Phone	Email	Date Created	Last Modified
<input checked="" type="checkbox"/>	A Amadu	Toronto	ON		amadua@canadahelps.org	Jul 13th, 2022 5:12 PM	Feb 24th, 2023 2:57 PM
<input checked="" type="checkbox"/>	A. L. Kostenko	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	Feb 23rd, 2023 1:21 PM
<input type="checkbox"/>	Accessibility Foundation					Nov 24th, 2022 6:05 PM	Feb 14th, 2023 11:17 AM
<input type="checkbox"/>	aine@ainemcglynn.com				aine@ainemcglynn.com	Jun 24th, 2022 10:09 AM	Oct 26th, 2022 2:17 PM
<input checked="" type="checkbox"/>	Alex Fergie	London	ON	5145216699	jubino+woodcoaster@canadahelps.org	Apr 20th, 2022 12:46 PM	Feb 24th, 2023 11:27 AM
<input type="checkbox"/>	Alex Fergie					Oct 6th, 2022 12:48 PM	Jan 26th, 2023 2:12 PM
<input checked="" type="checkbox"/>	Alicia Mitre	Mississauga	ON		amitreetwell@outlook.com	Oct 19th, 2022 2:01 PM	Feb 24th, 2023 2:39 PM

Search and select your desired Contacts

3. From the **Actions** menu, select the **Add activity** option

Wellness Avenue | Dashboard | **Contacts** | Contributions | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Search by contact name or email [Advanced Search](#)

Actions ▾ 7 Selected Records Only All 175 Records

- Add Activity
- Add Contacts to Group
- Add Contacts to Smart Group
- Add Tag
- Create Mail Merge

<input type="checkbox"/>	Name	City	Province	Phone	Email	Date Created	Last Modified
<input type="checkbox"/>	A Amadu	Toronto	ON		amadua@canadahelps.org	Jul 13th, 2022 5:12 PM	Feb 27th, 2023 3:59 PM
<input type="checkbox"/>	A. L. Kostenko	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	Feb 23rd, 2023 1:21 PM
<input type="checkbox"/>	Accessibility Foundation					Nov 24th, 2022 6:05 PM	Feb 14th, 2023 11:17 AM
<input type="checkbox"/>	aine@ainemcglynn.com				aine@ainemcglynn.com	Jun 24th, 2022 10:09 AM	Oct 26th, 2022 2:17 PM
<input checked="" type="checkbox"/>	Alex Fergie	London	ON	5145216699	jubino+woodcoaster@canadahelps.org	Apr 20th, 2022 12:46 PM	Feb 27th, 2023 1:23 PM
<input checked="" type="checkbox"/>	Alicia Mitre	Mississauga	ON		amitreetwell@outlook.com	Oct 19th, 2022 2:01 PM	Feb 24th, 2023 2:39 PM
<input checked="" type="checkbox"/>	Anderson Ada	Burlington	ON	333-555-8888	anderson.a@test.com	Oct 21st, 2021 11:52 AM	Feb 24th, 2023 1:40 PM
<input checked="" type="checkbox"/>	Andy Duplicate	Test Town	ON	6475556666	andy1+testduplicate@canadahelps.org	Jan 9th, 2023 2:26 PM	Jan 9th, 2023 2:33 PM

Select Actions > Add activity

4. On the next page, you will see the following information:

Wellness Avenue

Dashboard **Contacts** Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Activity Type: Monthly Contribution Follow-Up

Added by: DMSCA DMSCA

With Contact: A Amadu, A Amadu, A. L. Kostenko, Alex Fergie, Alicia Mitre, Anderson Ada, Andy Duplicate

Activity Separation: Create separate activities for each contact Create one activity with all contacts together

Assigned to: Angela Kostenko

Subject: Call donors to thank for latest monthly gift

Campaign Group: -select Campaign Group-

Engagement Index: -select option-

Location:

Date: 02/28/2023 01:07PM

Duration: Minutes

Activity Status: Scheduled

Details:
 Source | X | Copy | Paste | Undo | Redo | Bold | Italic | Underline | Text Color | Background Color | Bulleted List | Numbered List | Indent Left | Indent Right | Decrease Indent | Increase Indent | Link | Unlink | Image | Video | Table | Table of Contents | Help

Priority: Normal

Schedule Follow-up

Save Cancel

Fill out the necessary information

- **Activity Type:** if the Activity is a Meeting or a Call. If you wish to add new Activity types, please contact your Onboarding Specialist.
- **Added by:** which User in the DMS adding this Activity.
- **With Contact:** the Contact who is set to perform the Activity.
- **Activity Separation:** create separate Activities for each Contact or if they should all be linked through this Activity.
- **Assigned to:** assign this Activity to another member in your organization. Once the Activity is created, this will notify the Contact by Email.
- **Subject:** the subject of the Activity. (e.g. "Thank you calls").
- **Campaign Group:** legacy field that is currently not being used. **Please leave it blank.**
- **Engagement Index:** legacy field that is currently not being used. **Please leave it blank.**
- **Location:** the location the Activity is set to take place.
- **Date:** the date the Activity is set to take place.

- **Duration:** the approximate scheduled time.
- **Activity Status:** whether the Activity has been completed, is scheduled for the future, did not take place, etc. **You can also add new Statuses** by selecting the “gear icon”.
- **Details:** optional details of the Activity.
- **Priority:** if the Activity is Urgent, Normal or Low Priority. If marked *Urgent*, the Activity will appear in red. **You can also add new Priorities** by selecting the “gear icon”.

5. Once all details have been filled out, select **Save** and the Activity will be added to each Contact's Profile.