Understanding Activities

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Donor Management System

What are Activities?

Activities are a way to track key interactions that take place between your organization and Contacts within the DMS.

How do Activities work in the DMS?

Activities always relate to at least one Contact and can be used as a task management tool to track **Calls** or **Meetings**. They are also used to record a history of interactions between a Contact and the Actions performed within your DMS.

For example, an Activity will be recorded on a Contact's Profile if they have **made a Contribution**, **have been sent an email through the DMS** or **have been merged with another Contact**.

Additional Details

- Activities can be applied to more than one Contact at a time.
- They can also be assigned to Users of the DMS; the Assignee will receive an email notification of the Activity.
- The Activity will also appear on that DMS User's Activities Dashlet on the Home Tab.

Learn More

• Adding & Viewing Activities