

Viewing a Contact's Activities

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Donor Management System

After adding [one](#) or [multiple](#) Activities to a Contact, you can easily view them.

1. Go to the **Contacts Tab**

2. Search for the Contact whose Activities you wish to view and select its **Name**

The screenshot shows the 'Wellness Avenue' dashboard with the 'Contacts' tab selected. A search bar at the top contains the name 'Karolina'. Below the search bar, there are several filters and a table of search results. The table has columns for Name, City, Province, Phone, Email, Date Created, and Last Modified. One result is shown for 'Karolina Maya' in Ottawa, ON, with email 'celinaabernalq@gmail.com'. A red box highlights the search bar and the name 'Karolina Maya' in the table. At the bottom of the screenshot, a grey bar contains the text: 'Search for your desired Contact and select its Name'.

2. Once on the Contact's Profile, navigate to the **Activities** section to see a list of all Activities for this Contact

The screenshot shows the contact profile for 'Karolina Maya'. The 'Activities' section is highlighted with a red box and shows 91 activities. The profile includes sections for Home Address, Billing Address, Home Email, Billing Email, Phone, Website, Summary Fields, Tags, Contact Type, Contact ID, External ID, Gender, Date of Birth, Age, Employer, Job Title, Recognition Name, and Source. A blue question mark icon is visible in the bottom right corner. At the bottom of the screenshot, a grey bar contains the text: 'Under the Contact Profile, select Activities'.

3. On the next page, you'll be able to **View**, **Edit** or **Delete** Activities. The details of the Activities displayed on this page include:

- **Type:** if the Activity is a Meeting, Email, Contribution, etc.
- **Subject:** if the Activity has been given a subject by the User (i.e. "Coffee Meeting") or details about the automatically recorded activity (e.g. "\$20.00" as the amount of the Contribution).
- **Added By:** which User of the DMS added the Activity.
- **With:** the Contact who performed all Activities (in this case, the Contact of the Profile you are currently viewing).
- **Assigned:** if the Activity has been assigned to another Contact or User within the DMS.
- **Date:** the date the Activity took place or will take place in the case of Scheduled Activities.
- **Status:** the Status given to the Activity when it is created.

The screenshot shows the 'Karolina Maya' contact page in the Wellness Avenue DMS. The page features a navigation bar with tabs for Dashboard, Contacts, Contributions, Campaigns, Opportunities, Reports, and DMS Mail. Below the navigation, there are buttons for 'Actions' and 'Edit'. A summary bar shows various metrics like Summary, Contributions (36), Activities (95), Relationships (1), Groups (7), Notes (0), Tags (2), and Opportunities. A 'Filter by Activity' section allows filtering by Include, Exclude, Date, and Status. The main content is a table of activities with the following data:

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

At the bottom of the page, there is a dark grey bar with the text: *Manage the Contact's Activities here*

4. Use the **Filters** at the top of the page to filter Activities by **Type**, **Date** or **Status**

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 Exclude Date Status

- all activity type- - no types exclude- Any Any

Show 25 entries

Type	Subject	Added By	With	Assigned	Date	Status	
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Contribution	\$ 75.00 - DMS Manual	DMSCA DMSCA	Maya Karolina	n/a	Feb 27th, 2023 7:28 AM	Completed	View

Filter by Activity

5. To add a new Activity to this Contact, select **New Activity** at the top of the page.

---> Learn how to [add a new Activity to a Contact](#)

Karolina Maya

Actions Edit

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

+ New Activity

Filter by Activity

Include	Exclude	Date	Status
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Select New Activity