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*

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

*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.

Manage the Contact's Activities here

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

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

Wellness Avenue

Dashboard   Contacts   Contributions   Campaigns   Opportunities   Reports   DMS Mail

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   First   Previous   1   2   3   4   Next   Last

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

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*Select **New Activity***