How to create and assign tasks or follow-ups

Last Modified on 08/15/2026 10:19 pm EDT

Tasks and follow-ups help make sure important actions do not get forgotten.

Creating a task

1. From a contact, donation, organization, or other record, look for a **Tasks**, **Follow-ups**, or **Activities** section.
2. Click **Add Task** or **Add Follow-up**.
3. Enter:
    - Due date
    - Description of what needs to be done
    - Person responsible
    - Priority if available
4. Save.

Managing tasks

- Mark tasks complete when finished.
- Overdue tasks usually appear on the dashboard or in a task list.
- You can often filter tasks by assignee, due date, or related record.

Using tasks consistently improves follow-through across the team.