



Tasks in Unite can be used to track “To-Do” items to be completed within the next 12 months. Tasks can be related to other records in Unite, such as a constituent, an organization, or a plan. Tasks can also be assigned to other Unite users.

Create New Task

From a Constituent

- 1 From the constituent’s record, click the “New Task” button.

The screenshot shows the Unite interface for a constituent record. The top navigation bar includes 'ascend', 'Home', 'Constituents', 'Organizations', 'Opportunities', 'Reports', 'Dashboards', 'Campaigns', 'Cases', 'Tasks', 'Chatter', 'Campaign Report', 'Giving Detail Report', and 'Alternate System IDs'. The main content area shows a profile for 'Ross Spect' with a 'New Task' button highlighted by a red box and an arrow. The right sidebar contains tabs for 'Overview', 'Giving', 'Contact Report', 'Prospect Management', 'Constituent Details', and 'Documents'. The 'Overview' tab is active, displaying fields for Name (Ross Spect), Professional Designation (PHD), Legacy Record Type, Degree Info, Spouse (Hope Spect), Age (44), Constituent ID (0002026250), U of U ID, and Advance System ID. Below this is a 'Prospect Management Info' section with fields for Prospect Manager and Organization Name.

- 2 Complete the “New Task” form. See next page for information about each field.

The 'New Task' form is displayed with the following fields and labels:

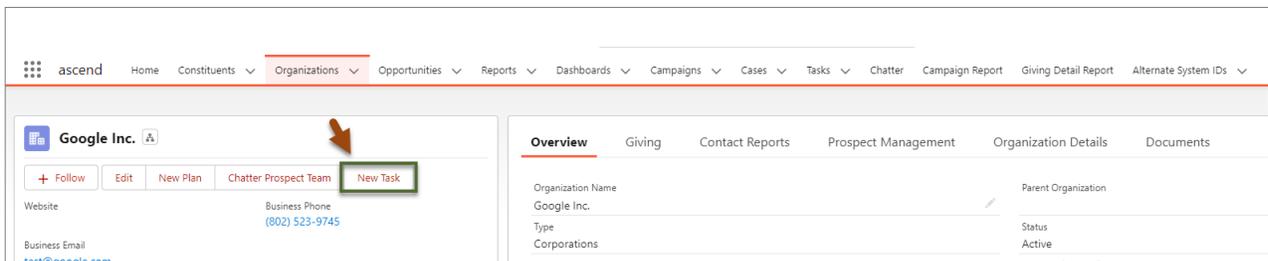
- A** Name: Lindsay Mapes
- B** Status: In Progress
- C** Subject: --Enter Subject--
- D** Priority: Low
- E** Due Date: 4/26/2022
- F** Assigned To: Lindsay Snow
- G** Comments: (empty text area)
- H** Related To: Snow Household

At the bottom right of the form are 'Cancel' and 'Save' buttons.

- A** **Name:** This field will automatically populate with the constituent's name.
 - B** **Status:** Indicate the status of the task (e.g. Not Started, In Progress, etc.). The default status is "Not Started". *This is a required field
 - C** **Subject:** Enter the subject/description of the task.
 - D** **Priority:** Indicate the priority of the task (Low, Normal, or High). The default priority is "Normal". *This is a required field
 - E** **Due Date:** Set a due date for completing the task by clicking the calendar icon and selecting the date.
 - F** **Assigned To:** This field will populate with the person creating the task. To assign the task to another user, click the "X" next to the field and select the appropriate person. *This is a required field
 - G** **Comments:** Enter any notes relevant to the task.
 - H** **Related To:** This field will automatically populate with the constituent's household (i.e. Org Name).
- 3** Click the "Save" button.

From an Organization

- 1** From the organization's record, click the "New Task" button.



- 2** Complete the "New Task" form. **NOTE:** The *Related To* field will populate with the organization name.
- 3** Click the "Save" button.



From a Plan

1 From the plan record, click the *Task* tab.

The screenshot shows the top navigation bar with 'ascend' and various menu items. Below is the plan record for 'New College of Nursing Endowed Scholarship - Spect'. The 'Tasks' tab is highlighted with a green box and an arrow pointing to it. The 'Key Fields' section includes 'Description', 'Expected Ask Date', and 'Expected Ask Amount'. The 'Guidance for Success' section provides instructions for moving to the 'Cultivate' stage and answering prospect relationship-building questions.

2 Click either “Create New” box or “Add” button.

The screenshot shows the 'New Task' form in the 'Tasks' tab. The 'Create new...' input field and the 'Add' button are highlighted with a green box. The form includes fields for 'Subject', 'Due Date', 'Name', 'Status', 'Priority', 'Assigned To', 'Related To', 'Reminder Set', and 'Date'.

3 Complete the “New Task” fields. **NOTE:** The *Name* field will populate with the constituent and the *Related To* field will populate with the plan name.

The screenshot shows the 'New Task' form with fields populated. The 'Name' field contains 'Mark C. Miller' and the 'Related To' field contains 'Miller - Discovery Building'. The 'Status' is 'Not Started', 'Priority' is 'Normal', and 'Assigned To' is 'Lindsay Snow'. The 'Date' is '4/27/2022' and the 'Time' is '11:00 AM'.

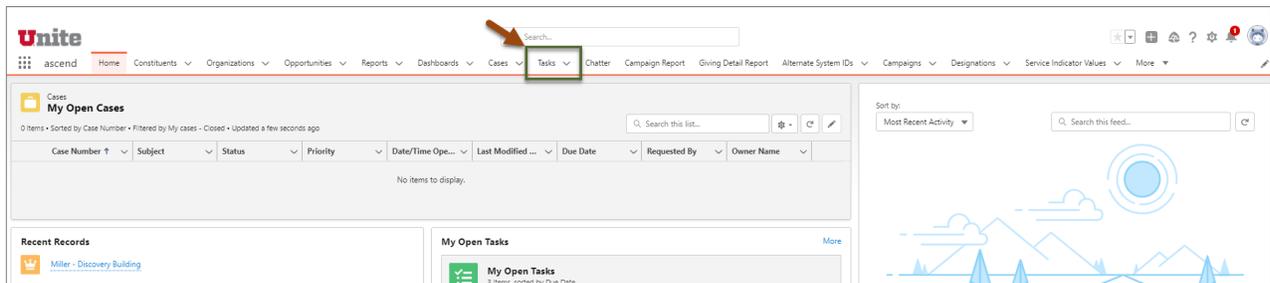
4 Click the “Save” button.

View Open Tasks

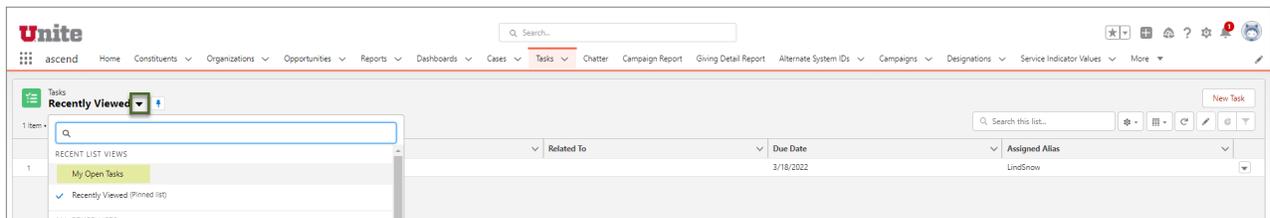
A list of open tasks can be accessed from the Home screen or the “My Open Tasks” list view.

View My Open Tasks List View

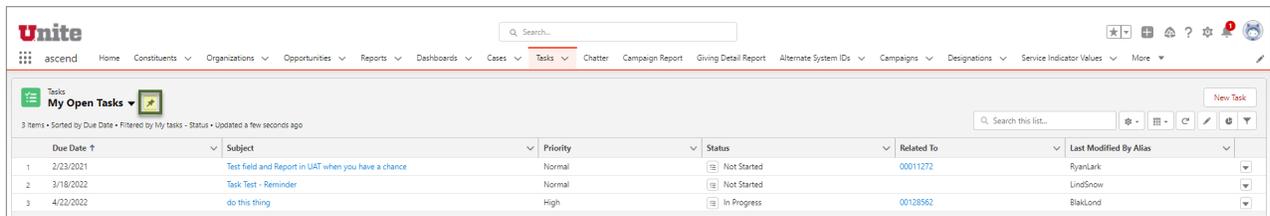
1 Click the “Task” tab on the top navigation bar.



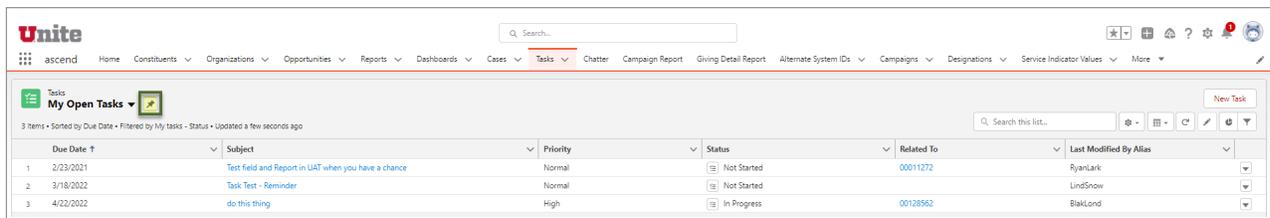
2 Select “My Open Tasks” from the list view drop down.



3 Click the  icon to set “My Open Tasks” as the default.



4 Click the subject field of the task to open the task.



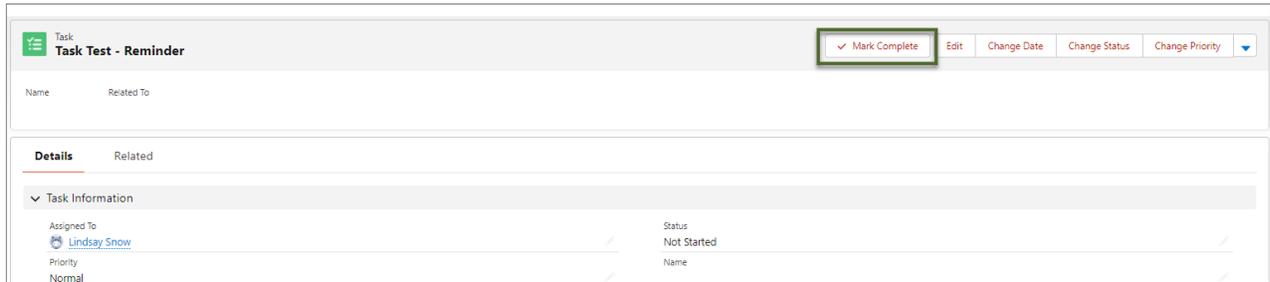
The status of the task can be changed to “Completed” from the list view by clicking the  button next to the status field.



Manage Task

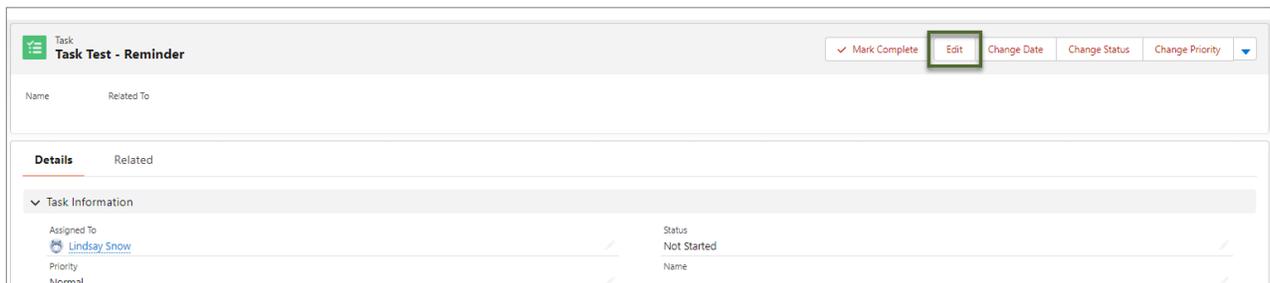
Complete a Task

- 1 From the task, click the “Mark Complete” button.



Edit Task Details

- 1 Click the “Edit” button.

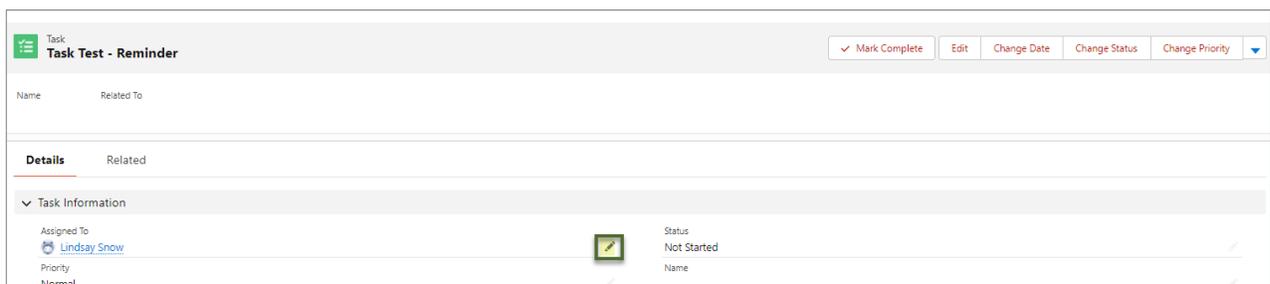


Task details can also be edited by clicking the pencil icon to the right of any of the editable fields. The date, status, and priority can also be changed using the buttons at the top, “Change Date”, “Change Status”, and “Change Priority”.

- 2 Make necessary changes and click the “Save” button.

Assign Task to Another User

- 1 From the task, click either the pencil icon next to the *Assigned To* field or the “Edit” button.





2 Click the “x” to remove the current user assigned.

3 Search and select the new user.

4 Click the “Save” button.