

## Adding a Task in Advance (Data Update)

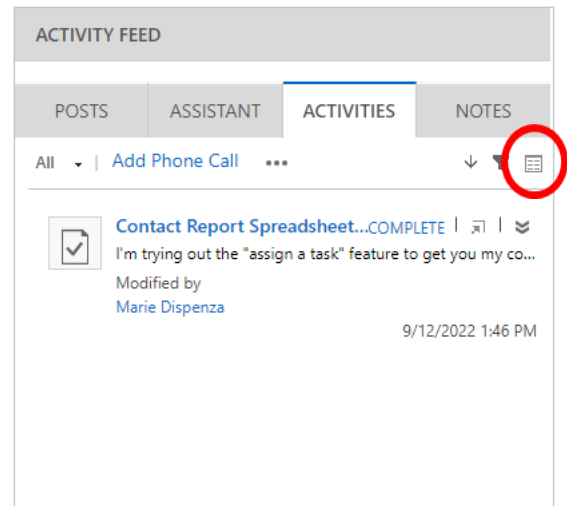
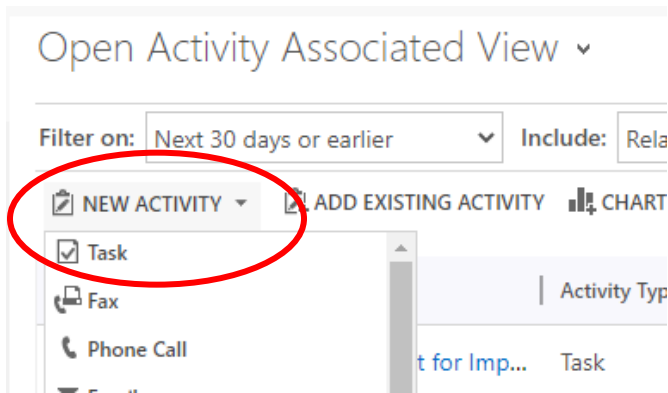
1. On your landing page, search for the constituent who needs to be updated using the magnifying glass. Click into the constituent record that needs to be updated.



**NOTE:** If your request is not in reference to a person, please use the alternate instructions for “List Requests”

2. On the constituent’s summary page, scroll to “Activity Feed” near the middle right of the page. Click on the grid icon to pop out this view.

3. Click on “new activity,” then “task” in the drop-down menu.



4. Fill out the form that pops up. Reference the sections below for assistance.

**Subject:** Title of the request

**Regarding:** This field will be automatically filled when adding a task from the constituent record.

**Purpose:** Select the appropriate option from the drop-down menu. For a detailed list of all options with definitions, refer to the purpose glossary.

**Due date:** 2 weeks from the date the request is submitted.

**Description:** Include details of the request, as specifically as possible.

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5. In the top right of the form, click the magnifying glass next to the owner's name. Click "look up more records."

? HELP SAVE ✓ MARK COMPLETE SAVE & CLOSE SAVE & NEW

TASK ▾ Priority Normal Activity Status\* Open Owner\* Alexis Burns

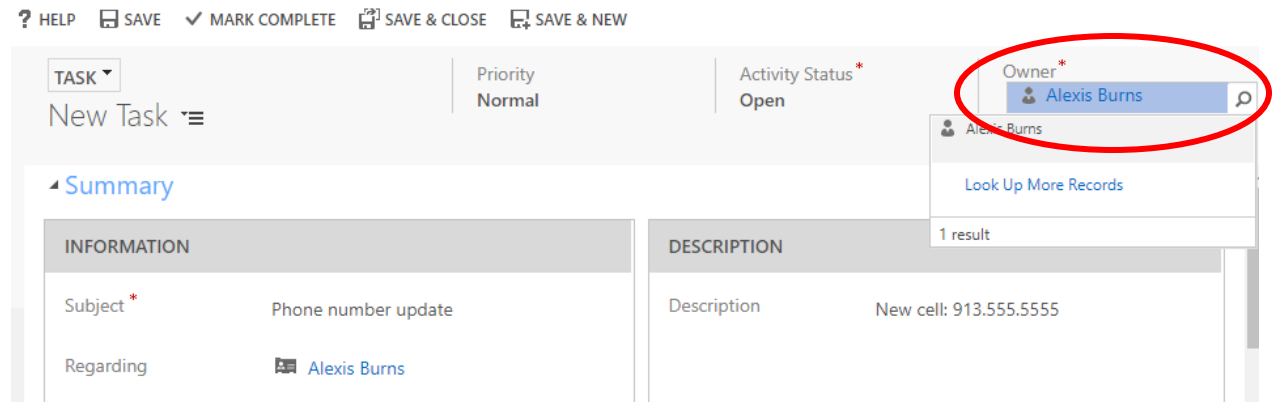
New Task ☰

Summary

INFORMATION		DESCRIPTION	
Subject*	Phone number update	Description	New cell: 913.555.5555
Regarding	Alexis Burns		

Look Up More Records

1 result



6. Type the data specialist's name in the search bar, double click the line, then click "add."

7. Click Save and Close

Look Up Record

Enter your search criteria.

Look for: User

Look in: User Lookup View

Search: Alexis Burns

Full Name ↑	Position
✓ Alexis Burns	

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New Add Cancel Remove Value

