Overview

This guide is designed to help you and your team use Humanitru's Alpine database to streamline donor outreach and track follow-ups effectively using task management ("Actions").

Whether you're managing a team or completing tasks yourself, this guide covers:

- How to create and assign Actions to team members
- How to set up notifications to stay on top of tasks
- How to use dashboards to track task completion and follow-through
- Best practices for both admin users and staff

Who This Is For

This guide is intended for:

- Operations/Admin roles managing task assignments (COO, Program Ops Manager, Admin Manager)
- Fundraising staff or team members responsible for completing assigned tasks

Section 1: For Admins

1. Create & Assign Future Tasks ("Actions") to Teammates

1. Log into your Alpine database: [https://[your-org].humanitru.com](https://[your-org].humanitru.com)
2. Click the **Action+** button at the top-right of your dashboard.
3. Fill out the Action form:
    - **Constituent:** Select the person the Action is related to
    - **Action Type:** Choose from:

        - Email Sent
        - Called on Phone
        - Text Sent
        - Met in Person
        - Letter Sent
    - **Action Date:** Set the due date
    - **Campaign** *(optional)*: Categorize the Action under a campaign for reporting purposes
    - **Notes:** Add context
        - Example: "Send thank-you email for $3,000 Capital Campaign donation"
    - **Assigned User:** Select the team member responsible
    - **Repeat Interval** *(optional)*: Use for recurring donor engagement
4. Click **Save**

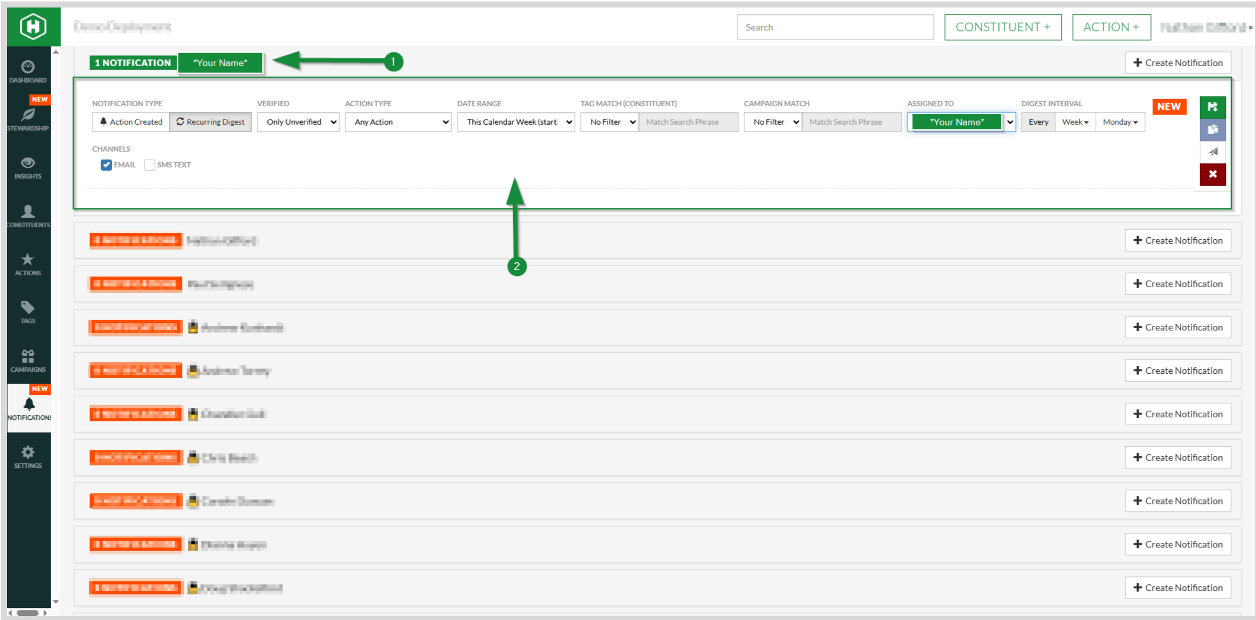
    💡 ***Tip:*** *Add meaningful notes so your teammate knows exactly what to do.*

2. Set Up Task Notifications

You can notify team members about their tasks in real time or in scheduled digests.

Example: Weekly Digest Notification for Director of Development

1. Go to the **Notifications** tab in your dashboard sidebar
2. Find the user and click **Create Notification**
3. Set the fields as follows:
    - **Constituent:** Select the person the Action is related to
    - **Action Type:** Choose from:
        - **Notification Type:** Recurring Digest
        - **Verified:** Only Unverified
        - **Action Type:** Any Action
        - **Date Range:** This Calendar Week
        - **Tag/Campaign Match:** No Filter
        - **Assigned To:** [Team Member's Name]
        - **Digest Interval:** Every > Week > Monday
        - **Channel:** Email
4. Click **Save**



💡 ***Tip:*** *Use Weekly Digests to avoid inbox overload and reinforce accountability.*

3. Track Task Progress with Dashboard Widgets

Use widgets to get visibility into task status across your team.

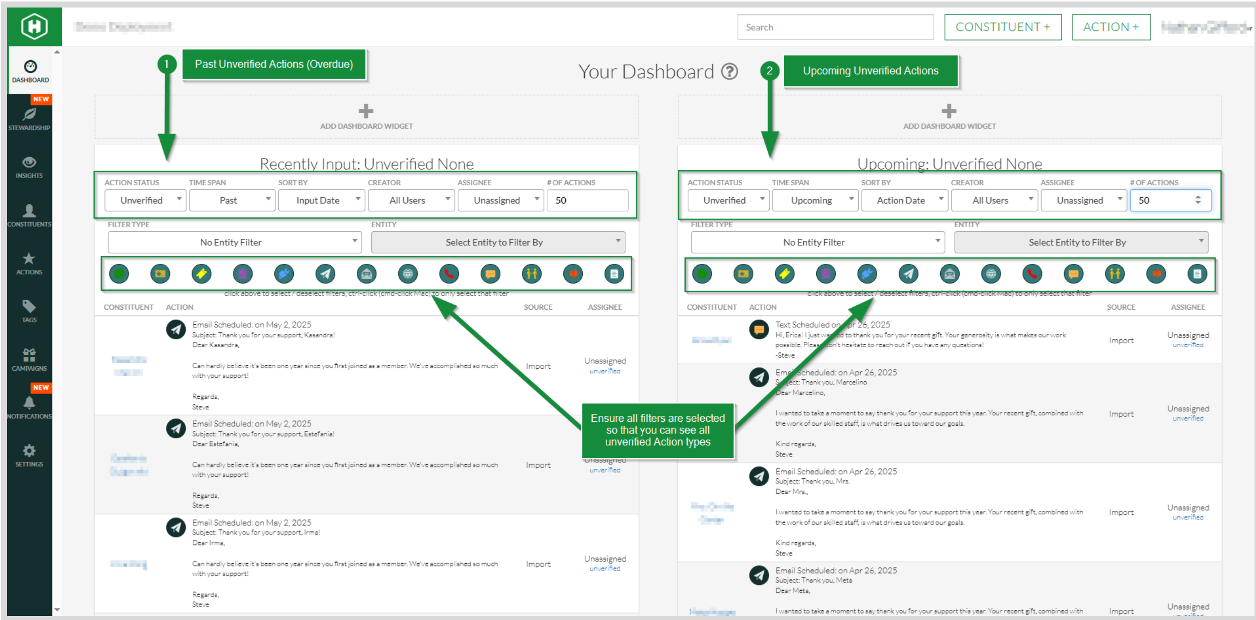
Widget 1: Overdue Tasks

1. Click **Add Dashboard Widget**
2. Select **List Widget**
3. Set filters:
    - **Action Status:** Unverified
    - **Time Span:** Past
    - **Assignee:** Unassigned (to see all team tasks)
    - **# of Actions:** 50+

Widget 2: Upcoming Tasks

Repeat above steps but change:

- **Time Span:** Upcoming



💡 ***Tip**: Create filtered widgets per team member for performance insights.*

Admin Best Practices

- ✅ Include clear notes & due dates in each Action
- ✅ Use recurring digests to reduce manual check-ins
- ✅ Monitor dashboards weekly
- ✅ Reassign or reschedule overdue items as needed

Section 2: For Team Members

1. Receiving Task Notifications

You'll be notified of assigned Actions via email, SMS, or both.

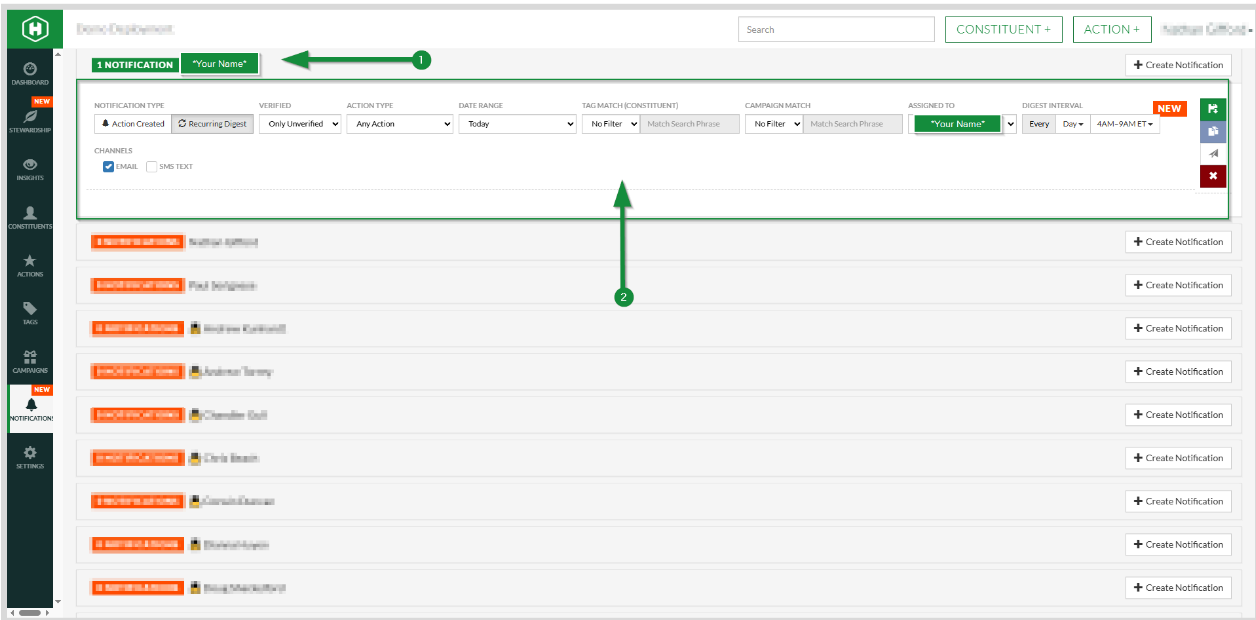
✉️ *Communicate with your manager to pick your preferred method*

Set Up a Daily Digest

1. Go to **Notifications** in your dashboard
2. Find your name and click **Create Notification**
3. Choose:
    - **Recurring Digest**

- **Only Unverified**
- **Any Action**
- **Date Range:** Today
- **Assigned To:** Your name
- **Digest Interval:** Every > Day > 4AM-9AM ET
- **Channel:** Email

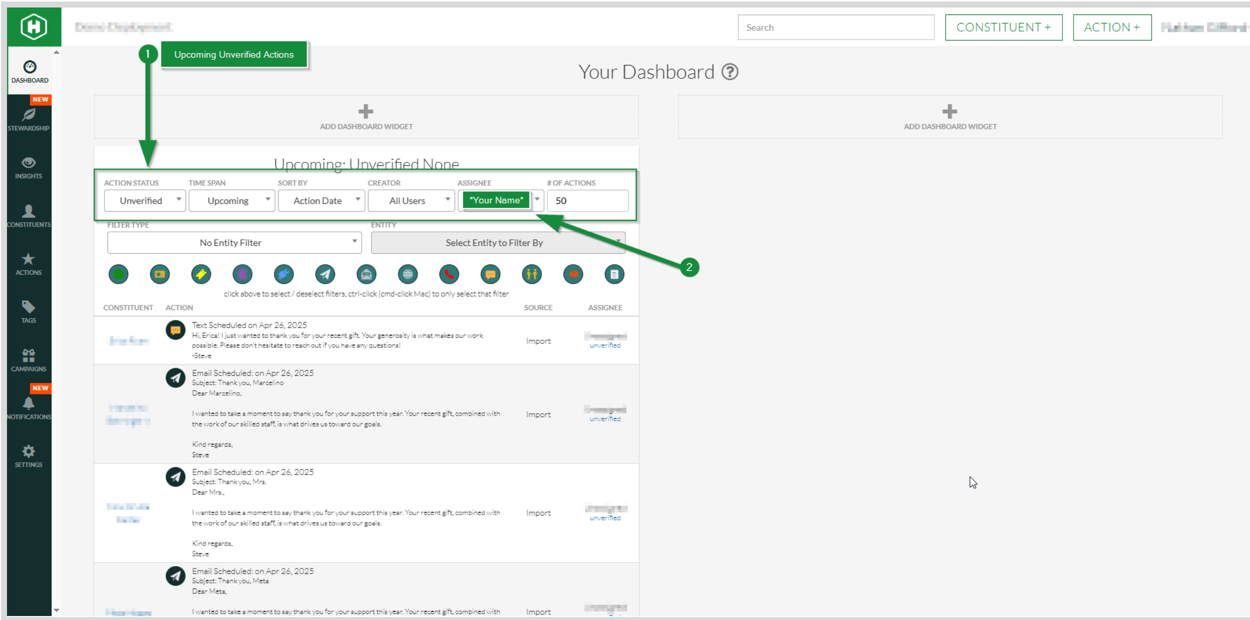
4. Click **Save**



💡 ***Tip**: Read your daily summary first thing to plan your day.*

2. Create a Dashboard for Your Tasks

1. Click **Add Dashboard Widget**
2. Select **List Widget**
3. Filter Settings:
    - **Action Status:** Unverified
    - **Time Span:** Upcoming
    - **Assignee:** Your name
    - **# of Actions:** 50+



3. Completing Actions

1. In your dashboard widget, find the due task
2. Click the "**Unverified**" label to mark it complete
3. It will now show as **Verified**

   💡 ***Tip***: *Check for unverified tasks at the end of the day*

Team Member Best Practices

- ✅ Read notes carefully
- ✅ Use digests to manage your day
- ✅ Mark tasks complete immediately after finishing
- ✅ Ask your manager if you're unsure about a task

Real-World Scenarios

Role	Scenario	Best Tool
Admin	Assign 10 follow-ups	Bulk assign + immediate SMS
Staff	Plan the week	Weekly email digest
Admin	See who's falling behind	Overdue Widget + filters
Staff	Monthly reminders	Monthly recurring digest

🌟 ***Final Tip:*** *Less chaos = better relationships. Use Humanitru's Actions to stay aligned, accountable, and focused on what matters most: your mission.*