

## How to Manage Tasks in Humanitru

Humanitru Help Center kbhelp.humanitru.com | support@humanitru.com

# **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: <u>https://[your-org].humanitru.com</u>
- 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

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*Fip:* 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

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

### **Admin Best Practices**

- 🔽 Include clear notes & due dates in each Action
- Vise 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

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*Imp*: 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+

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## **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

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

### **Team Member Best Practices**

- V Read notes carefully
- Vise 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.