

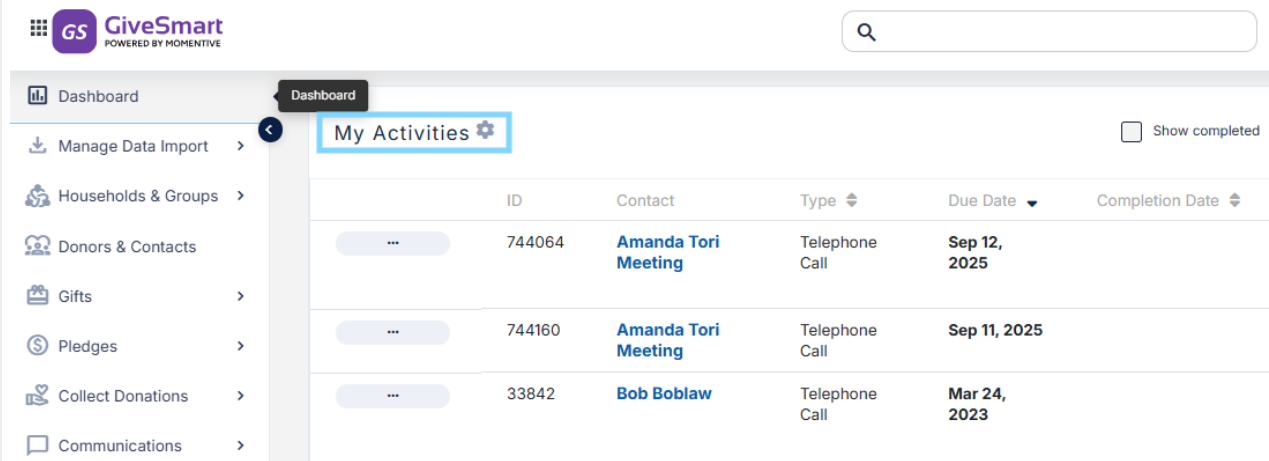
Create and View Activities

Last Modified on 06/03/2026 12:30 pm EDT

Easily manage and track tasks within your GiveSmart Donor CRM using the **Activities** feature. This tool allows you to organize follow-ups, monitor progress, and stay on top of donor engagement. Watch this video to learn about Activities:

View Assigned Activities

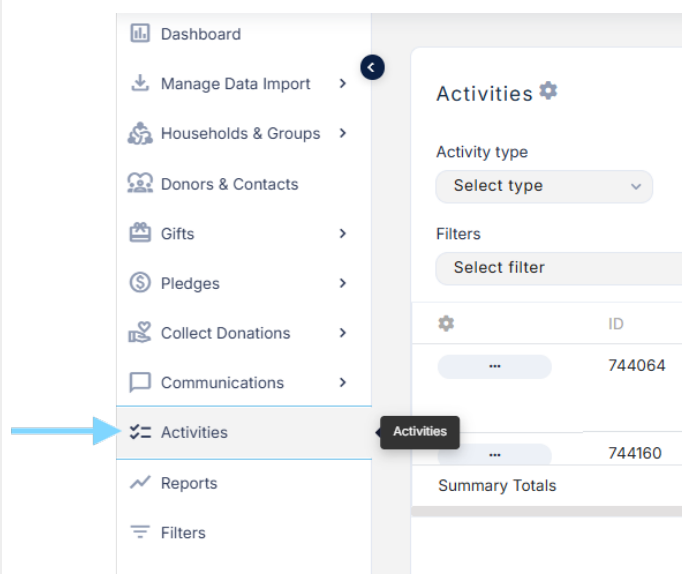
Personal activities can be viewed from the **Dashboard**. Scroll down to the **My Activities** section to view all activities assigned to you.



The screenshot shows the GiveSmart dashboard interface. At the top left is the GiveSmart logo (POWERED BY MOMENTIVE). A search bar is located at the top right. The left navigation menu includes: Dashboard, Manage Data Import, Households & Groups, Donors & Contacts, Gifts, Pledges, Collect Donations, and Communications. The 'My Activities' section is highlighted with a blue box. Below it is a table of activities:

ID	Contact	Type	Due Date	Completion Date
...	Amanda Tori Meeting	Telephone Call	Sep 12, 2025	
...	Amanda Tori Meeting	Telephone Call	Sep 11, 2025	
...	Bob Boblaw	Telephone Call	Mar 24, 2023	

To view a list of all current activities, select **Activities** from the left navigation.



The screenshot shows the GiveSmart dashboard with the 'Activities' menu item highlighted in the left navigation. A blue arrow points to the 'Activities' menu item. The right side of the dashboard shows the 'Activities' page with filters and a table of activities:

Activities

Activity type: Select type

Filters: Select filter

ID
...
744064
...
744160

Summary Totals

Activities can be filtered by:

- Activity Type
- Due Date
- Completion Date
- Assignee


Activities

Show completed

+ ADD NEW

DOWNLOAD EXCEL

Activity type

Select type 


Due date range

Pick Date Range

Completion date range

Pick Date Range

Assignee

Search for the user 

Filters

Select filter 

Invert filter

APPLY

RESET

View Contact Activities

To view a list of activities for a particular contact/donor:





- Select **Donors & Contacts** from the left navigation
- Locate the Contact and select their name
- Click the **Activities** tab above their Contact Profile

Last Gift \$100.00 Mar 04, 2026	Total Gifts 9	Avg. Gift Amount \$131.33	Lifetime Giving \$1,182.00 Since Jul 25, 2024
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CONTACT PROFILE GROUPS (0) GIFTS (9) PLEDGES (0) **ACTIVITIES (20)** PAYMENT ACCOUNTS (0) SOFT CREDITS (0)

Contact Activities

Show completed + ADD NEW DOWNLOAD EXCEL

ID	User	Type 	Due Date 	Completion Date 	Notes	View Message 
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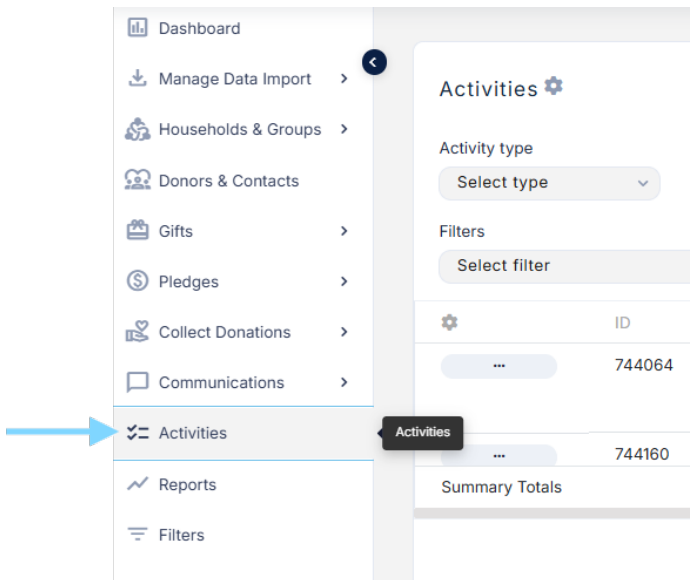
Create a New Activity

New activities can be created from three areas:

- Dashboard view
- Activities navigation
- Activities tab on a Contact

NOTE: Only users with **Admin** privileges will be able to create and assign activities. **Standard users are unable to create or assign activities.** User roles can be adjusted under the **User Settings**.

Select **Activities** from the left navigation.



- Select **+Add New**

Activities ⚙️ Show completed **+ ADD NEW** 📄 DOWNLOAD EXCEL

Activity type Due date range Completion date range Assignee

Filters Invert filter APPLY RESET

- Complete the required fields:
 - **User** – The admin assigned to the activity
 - **Contact** – The donor associated with the task
 - **Activity Type** – Select an existing type or click **Add New +** to create one
- (Optional) Fill in additional details:
 - Due Date and Time
 - Completion Date
 - Notes
 - Custom Fields (if applicable)
- Click **Save** to finalize the activity

Add new activity

✕ CANCEL

User *required

GiveSmart Support


Contact *required

Search for the contact

Activity type *required

Select Value


Due date

 Pick Date

Due Time

Pick Time

Completion date

 Pick Date

Notes

Custom fields