



# Adding Prospect tasks

Jan 2017

# Search the person



acevedo

Signed in as manuel@helpfulvillage.com. Not you? [Sign out](#)

next  
village  
San Francisco

INFO



MEMBERS



EVENTS



VOLUNTEERS



CONTACT



ADMIN

acevedo

SEARCH

## ALL PEOPLE

Full name

Address

Manuel Acevedo

1900 University Avenue Berkeley

EDIT

# Person profile

**PERSON:**

General

Address

Member

Member add.

Volunteer

**Prospect**

Pay

Notes

Activity

## PROSPECT INTEREST

**RATING**

A+

**STAGE**

Wants to join

**SOURCE**

File

## COMMENTS

Pledged 12/6

**Choose the “Prospect” tab**

**SAVE PROSPECT INFO**

# New task

SAVE PROSPECT INFO

## UPCOMING TASKS

Category	Task	Due date	
Unqualified	volunteer trial new	01-20	EDIT

NEW TASK

## COMPLETED TASKS

Category	Task	Done date	Comments	
Unqualified	no need to contact	01-15	task for training	EDIT

**Hit the “NEW TASK” button**

# Search the donor

## SPECIFIC TASK INFO

### TASK DESCRIPTION

Send volunteer info

### CATEGORY

- ✓ Please choose...
- New Member
- Renew Member
- Donor
- Volunteer**
- Unqualified

**TASK COMPLETED RIGHT NOW ?**

### COMMENTS ABOUT THIS PARTICULAR TASK

# Submit

**TASK COMPLETED RIGHT NOW ?**

COMMENTS ABOUT THIS PARTICULAR TASK

**SUBMIT**

**ADMIN FEATURES**

**[ADMIN] LIST OF PROSPECTS TASKS**

## COMMENTS

Pledged 12/6

SAVE PROSPECT INFO

## UPCOMING TASKS

Category	Task	Due date	
Unqualified	volunteer trial new	01-20	EDIT
Volunteer	Send volunteer info	02-17	EDIT

NEW TASK

**You can find all upcoming tasks on the user profile**

Thank you for  
your interest