TM : ADDING TASKS VIA MAIL LISTS
Tip of the Week
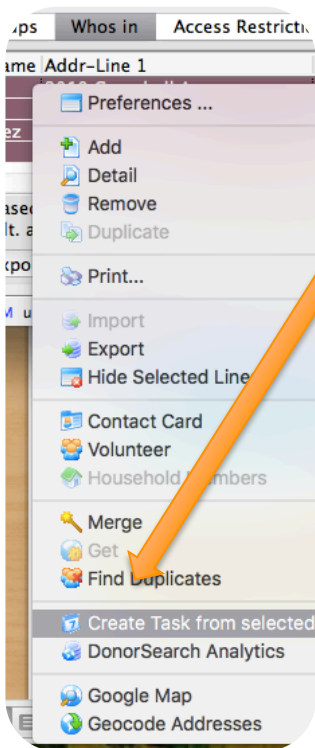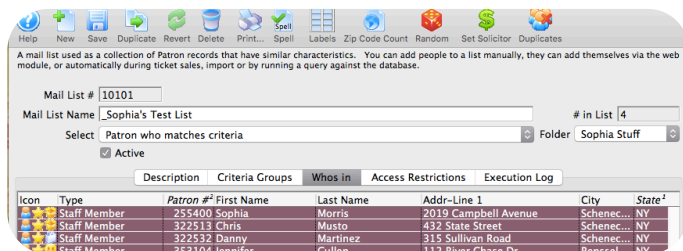
NEED TO ADD THE SAME TASK TO MANY PEOPLE?

1. MAKE A MAIL LIST
(USE CRITERIA TO FIND PATRONS, IMPORT FROM OUTSIDE SOURCE OR MANUALLY ADD PATRONS)
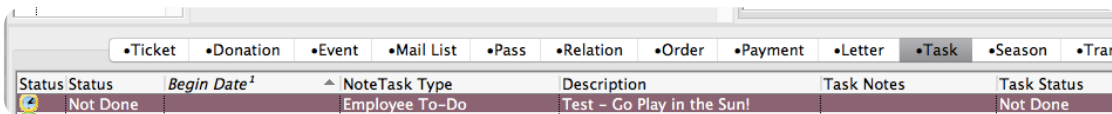
2. HIGHLIGHT PATRONS & CONTROL CLICK

3. CREATE TASK FROM SELECTED PATRONS

4. BUILD TASK AS DESIRED
(PATRONS FROM LIST ARE ADDED AS PARTICIPANTS)

NOW YOU CAN SEE THE TASK FROM EACH INDIVIDUAL PATRON'S ACCT:

SO MANY USES!   HERE'S A COUPLE OF IDEAS...

- ATTACH DONORS TO A SPECIAL EVENT FOLLOWUP
- ADD A TO-DO OR ALL STAFF MEETING TO MULTIPLE EMPLOYEES
- ATTACH VOLUNTEERS TO AN UPCOMING EVENT

Want to Share a TM Tip or Cool Feature? E-Mail Sophia:
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