Moves Management

Updated Jul 19, 2021

As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new Veracross Community. Please update your bookmarks.

Here is the new version of this article in the Veracross Community.

This article pertains to Development 3.

Overview

Moves Management can be controlled almost entirely from the My Opportunities homepage and can by boiled down to two different options — **actions** and **tasks** — for external and internal events, respectively.

Actions

An **action** is an external constituent-related event that is typically used with the goal of making progress on an objective related to that constituent. In Veracross, actions are individual events that differ from those in other areas of the system: actions have the ability to schedule follow-up tasks directly from the record, track the communication channel, and modify and track the action type.

On the action record, track a wide variety of relevant information. Highlights include:

- a direct link to the donor profile
- a notes field that can be used to track additional information
- an input grid for scheduling follow-up tasks
- "Quick Action" links to quickly schedule actions

Below is a brief guide on what the fields on an action record mean and how they interact with the system.

General

Field	Purpose

Field	Purpose
Constituent	required field that defines which constituent this action relates to
Communication Menthod	can be determined by action template; this field's main use is for reporting purposes. Options are None, Email, Phone, One-on-one Meeting, Group Meeting, SMS, or Other
Type	required field that sets the entity event type of the action — options are limited to entity event types with the development event type of Action, which can be configured on the Development: Configuration homepage. To configure these types, click on the Development Event type query and click the "Add Record..." option in the Organize menu.
Action Date	used for setting the date the action takes place

Status

Field	Purpose
Assigned To	sets person assigned to this action — setting this causes the action to appear when they are using the My Opportunities homepage. Note: this will not send them any sort of notification email
System Status	sets the "stage" of the action — sets as Pending on creation and is manually updated after that. Recommended workflow is to change status to In Progress when the action is acknowledged by the assignee and Closed when the action is completed
Closed Date	automatically populates when the System Status is set as Closed; this field cannot be cleared

Logistics

The **Time**, **Location**, and **Attendees** fields in this section are for recording logistical information only — they do not tie into any additional functionality.

Other

The **Classification** field sets an entity event classification for this action.

Notes

This section contains the **Subject** field, which sets the name of the action, and the**Notes** field, which is where you can store any additional information about the action where there is not a field already defining it.

Contact Info

This section contains contact information about the constituent this action is associated with and provides links to send them an email and view the constituent's donor profile.

Quick Actions

This section enables the person assigned to this action to quickly perform follow up duties.

- **Create Related Tasks** allows you to choose a task template to create follow-up tasks for this action. Select the desired task template and click the Update button to generate these tasks in the input grid below. Doing this multiple times does not clear existing tasks in the input grid; it only adds more
- **Add Action (Tomorrow)** pulls up a blank action record with the Constituent and Assigned To fields populated and the Action Date field set to tomorrow's date
- **Add Action (1 Week)** pulls up a blank action record with the Constituent and Assigned To fields populated and the Action Date field set to the date of one week from now

Prospect Management

This section ties the action to existing fundraising activities and objectives.

- **Fundraising Activity** defines what fundraising activity to tie this action to. Once this is defined, it automatically populates the **Opportunity** and **Opportunity Status** field
- **Development Objective** defines what objective to tie this action to

Related Tasks Input Grid

Follow-up tasks from the **Create Related Tasks** field are listed here, and you can add new tasks using the "Add Record..." button.

Files and Notifications Tab

Attach files to this action using the **Attach Files** link on the Files Tab. The maximum upload size for files is 100 MB.

Tasks

A **task** is an internal constituent-related activity that is typically used for tracking follow-up responsibilities after an Action record has been completed, but may also be used on its own, unrelated to an action.

A Task record is similar to an Action record, but is somewhat simpler. Information can be stored in various fields available, but the options are more limited than an Action record. Additionally, there is no way to create additional records from a Task detail screen.

Below is a brief guide on what the fields on a task record mean and how they interact with the system.

General

Field	Purpose
Constituent	required field that defines which contituent this task relates to
Dev Communication Type	this field's main use is for reporting purposes. Options are None, Email, Phone, One-on-one Meeting, Group Meeting, SMS, or Other
Type	this should either be Task or Follow-up Call

Date

The **Due Date** field is the date that the task takes place. Input this using a pop-out calendar — once populated, the long-form date is automatically calculated.

Status

Field	Purpose
Assigned To	sets person assigned to this task — setting this causes the task to appear when they are using the My Opportunities homepage. Note: this will not send them any sort of notification email
Status	sets the stage of the task — sets as "Pending" on creation and is manually updated after that. The Recommended workflow is to change the status to "In Progress" when the task is acknowledged by the assignee and "Closed" when the task is completed
Closed Date	automatically populates when the System Status field is set as "Closed"; this field cannot be cleared

Details

This section contains the **Subject** field, which sets the name of the task, and the **Notes** field, which is where you can store any additional information about the task where there is not a field already defining it.

Prospect Management

This section ties the action to existing fundraising activities and objectives.

- **Fundraising Activity** defines what fundraising activity to tie this action to. Once this is defined, it automatically populates the **Opportunity** and **Opportunity Status** field
- **Development Objective** defines what objective to tie this action to

Files Tab

Click on the **Attach Files** link to attach files to this task. The maximum upload size for files is 100 MB.

Related Tasks

Displays other tasks with the same associated Action as this one.

Action or Task?

Actions and tasks have similar features but are used in different scenarios. Think, "Is this thing I need to do an interaction with a constituent or not?" If it is, you likely are looking for an action. If not, it is likely an internal task.

Remember, tasks are typically follow-ups to actions!

Accessing Actions and Tasks

Both actions and tasks queries, as well as links for creating new action/task records, are available in a variety of locations. Below are some of the most common locations where they are accessed.

- the **My Opportunities homepage** is the main dashboard for Gift Officers. Actions and tasks are very important parts of their jobs, so, they can be accessed from multiple places on this homepage, such as the Moves Management & Recent Activity section for user-specific queries and the Actions/Tasks sub-section in the General section
- the **Constituent record** has tabs for both actions and tasks that allow you to look at both actions and tasks related to that particular constituent. From these tabs, new actions and tasks related to this constituent can also be created
- the **Comprehensive Campaign homepage** and the **Annual Fund homepage** also contain links where you can search for existing actions and tasks, as well as create new ones