

Projects/Tasks Initial Setup



Agenda

Setup Project Types

Setup Task Types

Setup Project Result Types

Setup Project Templates

- *Create Template*
- *Add Tasks to Template*

Overview

The Project Management module will help you to organize and manage projects from beginning to end. The module can be used to manage your member acquisition, member on-boarding, events, and more

If you have projects that are repeatable (such as member on-boarding) you can create a project template to be re-used, saving you time. Additionally, the project management module allows you to create and monitor individual tasks that you may need outside of an actual project

Initial Setup

Project Types -> How do you wish to categorize your projects (events, membership, fundraising)

Project Tasks -> How do you wish to categorize your tasks (administrative, financial, communications, marketing, exhibitor management, etc.)

Project Templates -> Do you have repeatable events (annual banquet, annual trade show, golf tournament)

Set up Project Types

Project types allow you to group together projects with similar characteristics. Examples of project types include: Event, Membership, Store Merchandising, etc.


The screenshot displays the 'Project Types' management interface. On the left, a list of project types is shown: 'Member Onboarding', 'Member Recruitment', and 'Event Planning'. An 'Add' button is located in the top right corner of this list. Overlaid on the right is the 'Edit Project Type' modal, which is currently editing 'Member Onboarding'. The modal has a title bar with navigation controls and a close button. Inside, there is a 'Name' field containing 'Member Onboarding'. Below this is a 'Custom Fields' section with a table that has columns for 'Object Type', 'Display Name', 'Field Data Type', 'Group Name', 'Archived', and 'Actions'. The table currently shows 'None to display'. At the bottom of the modal are 'Delete', 'Cancel', and 'Done' buttons.

Edit Project Type					
1 of 3					
Name					
Member Onboarding					
Custom Fields					
Object Type	Display Name	Field Data Type	Group Name	Archived	Actions
None to display					
Delete		Cancel		Done	

Set up Project Task Types

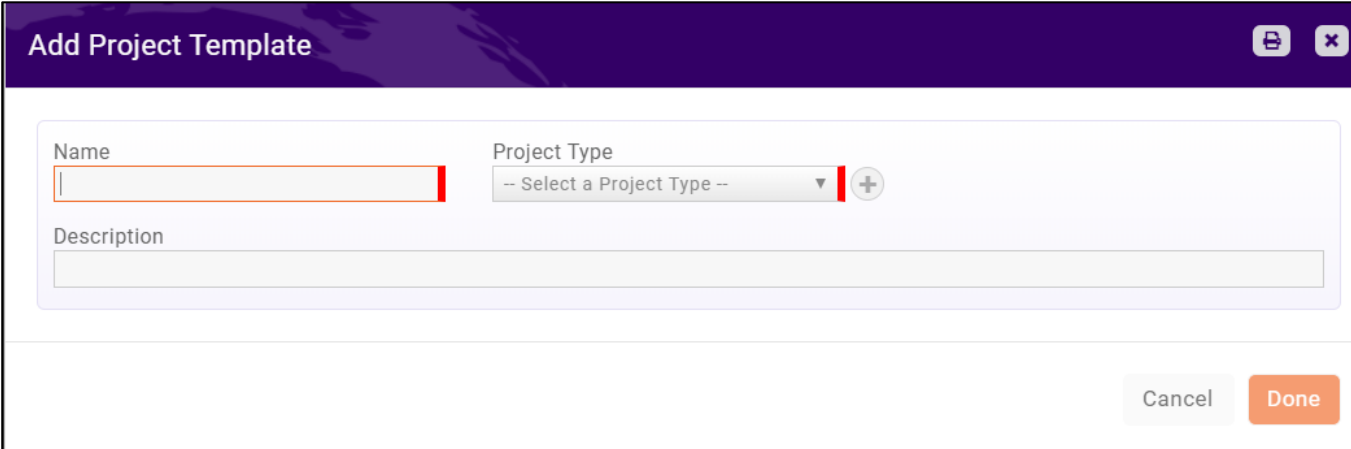
Task Types allow you to identify common tasks that you will use in your projects. The task types are the selectable, and available for filtering and reporting purposes.

KB: [Task Types](#)

Task Types				
Name	Description	Css Color	Is Active	
Pre-Conversion			Yes	
Conversion			Yes	

Set up Project Templates

- Before getting started with setting up a template identify all the steps to get from the idea of an event to the actual event. Break those steps into smaller, bite-sized tasks and assign due dates to them.
- *Project templates can be created for projects that are repeatable, such as New Member On-boarding, Member Acquisition, Events, etc.*



The screenshot shows a dialog box titled "Add Project Template" with a dark purple header bar containing a save icon and a close icon. The main content area is white and contains three input fields: "Name" (a text box with a red border), "Project Type" (a dropdown menu with the text "-- Select a Project Type --" and a plus icon), and "Description" (a text area). At the bottom right, there are two buttons: "Cancel" and "Done".

Setup Project Templates

For Example: Energy Show

Task – Prep for Exhibitors

Sub Items

- Make contact with exhibitors and send them information
- Setup exhibitor registration
- Invoice Exhibitors
- Validate that deposits have been received
- Validate that full payment is received by due date
- Build exhibitor packages
- Manage the drink ticket orders
- Manage the invoicing and receiving of payments for Exhibitor golf

Setup Project Templates

- *Creating a template is a two step process:*
 1. Create the template

Edit Project Template

Name: New Member On-boarding

Project Type: Member Onboarding

Description:

Template Tasks

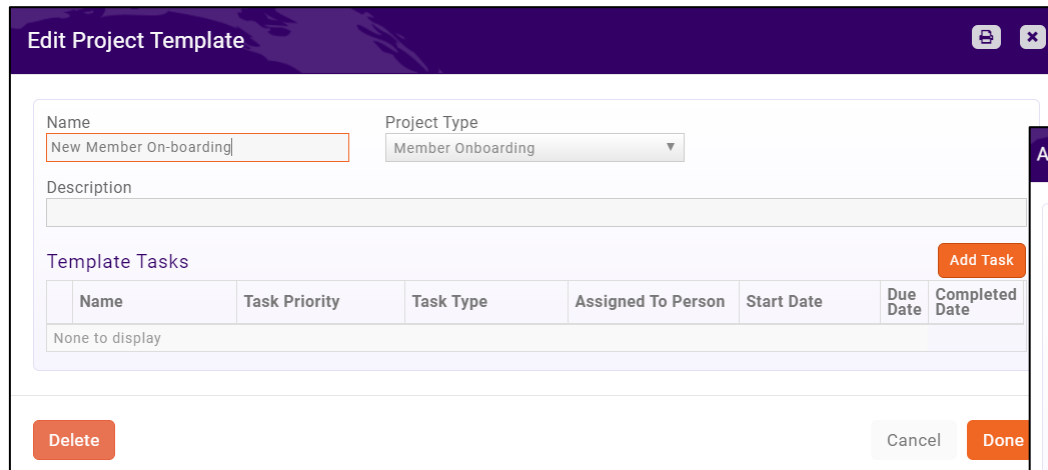
Name	Task Priority	Task Type	Assigned To Person	Start Date	Due Date	Completed Date
None to display						

Buttons: Delete, Cancel, Done, Add Task

KB: Set up Project Templates

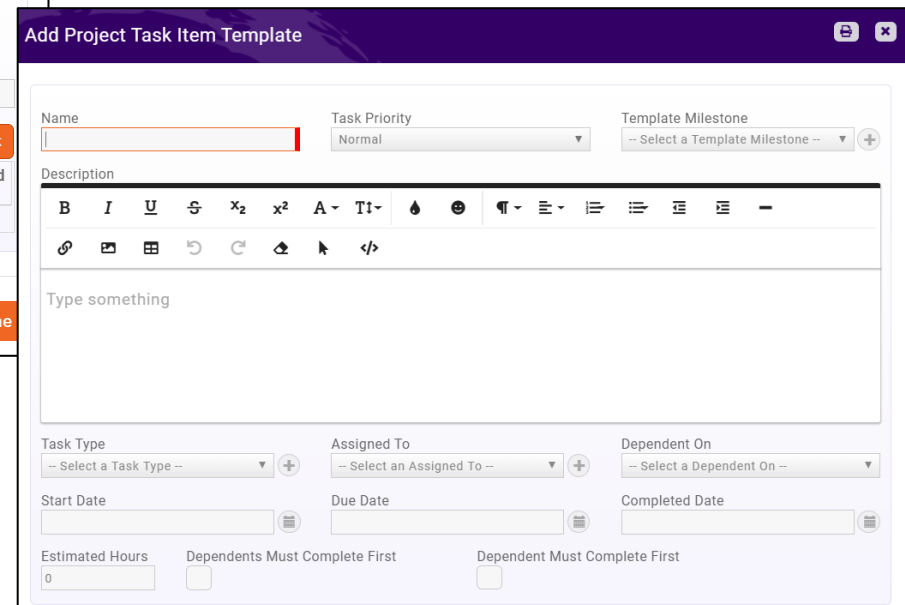
Set up Project Templates

2. Add tasks to the template. Adding tasks to a template is optional, however, if your project will contain standard repeatable tasks, you can save time by entering them into the template.



The 'Edit Project Template' dialog box features a dark purple header with a title bar and window controls. The main content area is white and contains the following elements:

- Name:** A text input field containing 'New Member On-boarding'.
- Project Type:** A dropdown menu currently set to 'Member Onboarding'.
- Description:** A large, empty text area for additional details.
- Template Tasks:** A section containing a table with the following headers: Name, Task Priority, Task Type, Assigned To Person, Start Date, Due Date, and Completed Date. The table currently shows 'None to display'.
- Buttons:** An orange 'Add Task' button is positioned to the right of the table. At the bottom of the dialog are three buttons: 'Delete' (orange), 'Cancel' (light gray), and 'Done' (orange).



The 'Add Project Task Item Template' dialog box has a dark purple header with a title bar and window controls. The main content area is white and includes:

- Name:** An empty text input field.
- Task Priority:** A dropdown menu set to 'Normal'.
- Template Milestone:** A dropdown menu with the text '-- Select a Template Milestone --' and a plus icon.
- Description:** A rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, subscript, superscript, text color, background color, bulleted list, numbered list, link, unlink, table, undo, redo, and code. Below the toolbar is a large text area with the placeholder text 'Type something'.
- Task Type:** A dropdown menu with the text '-- Select a Task Type --' and a plus icon.
- Assigned To:** A dropdown menu with the text '-- Select an Assigned To --' and a plus icon.
- Dependent On:** A dropdown menu with the text '-- Select a Dependent On --' and a plus icon.
- Start Date:** A date picker field.
- Due Date:** A date picker field.
- Completed Date:** A date picker field.
- Estimated Hours:** A text input field with the value '0'.
- Dependents Must Complete First:** A checkbox.
- Dependent Must Complete First:** A checkbox.

Questions?