

How to edit the fundraiser task list

To encourage fundraisers to take steps to make their campaign more successful, the fundraiser dashboard features a list of tasks employed by successful fundraisers. Administrators can edit which tasks are displayed, as well as the order in which they are displayed. To edit the fundraiser task list, log into the admin panel, and in the left sidebar, click "Settings", then "HQ Tasks". The steps are listed in the "HQ Tasks". Select the tasks you want to include, and drag them into the order they should appear. The tasks include:

- Upload profile image
- Update fundraising goal
- Custom URL for fundraising page
- [RSVP](#) (registration to attend) — not applicable on [Role Registration](#) campaigns
- [Team builder](#) (join, switch, or create team)
- Connect social networks
- Personalize fundraising page
- [Import contacts](#)
- [Send a fundraising email](#)
- Send message to friend on a social network
- Donate to own goal
- Update account details

The screenshot shows the admin panel interface. On the left is a sidebar with navigation options: Home, Donations, People, Admin Users, Email, Settings (with sub-items: Campaign Settings, Campaign Dictionary, Donation Options, Integration Options, HQ Tasks, Social Shares), Registration Fields, Discount Codes, Site Content, Ticket Builder (Beta), Form Fields (Beta), Reports, and On-Site. The main content area displays instructions: "1. Check tasks you'd wish to display." and "2. Drag and drop task to re-order them." Below these instructions are two sections: "HQ Tasks" and "HQ Startup Guide". Each section contains a list of tasks with checkboxes. In the "HQ Tasks" section, all tasks are checked. In the "HQ Startup Guide" section, the first four tasks are checked, while "Donate to Own Goal" and "Update Account Details" are unchecked.

1. Check tasks you'd wish to display.
2. Drag and drop task to re-order them.

HQ Tasks

- RSVP
- Team Builder
- Upload Photo
- Connect to Your Social Networks
- Update Goal
- Create Custom URL
- Personalize MyPage
- Import Your Contacts
- Send a Fundraising Email
- Post a Message to a Social Friend
- Update Account Details
- Donate to Own Goal

HQ Startup Guide

- RSVP
- Team Builder
- Upload Photo
- Update Goal
- Create Custom URL
- Donate to Own Goal
- Update Account Details

Complete these tasks to jump-start your campaign!

70% complete

- Create Custom URL
- Create or Join a Team
- Upload Photo
- Personalize My Page
- Donate to Your team
- Import Your Contacts
- Send a Fundraising Email
- Post a Message to a Social Network
- Update Goal Amount
- Update Account Details