fibre CRM | HEART OF THE PRACTICE

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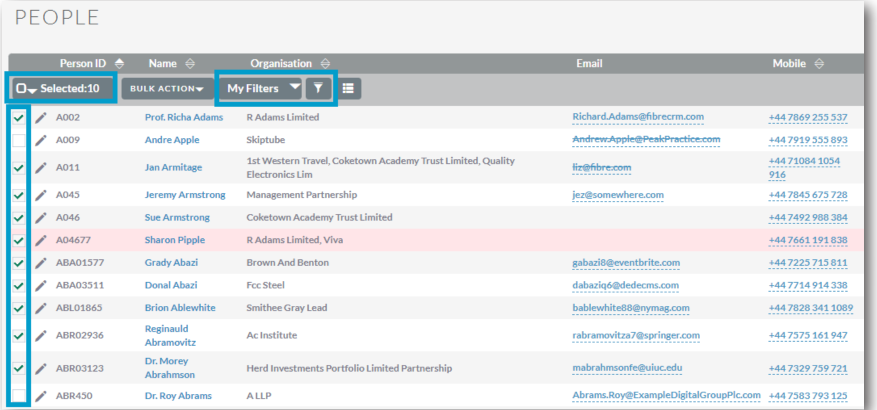
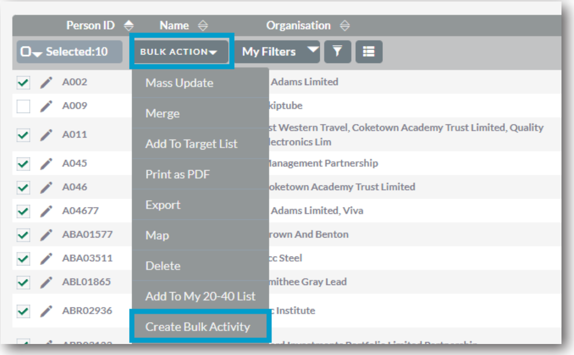
Create Bulk Activities

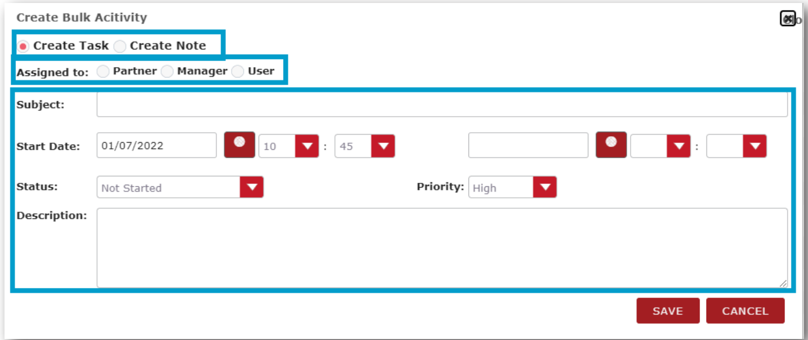
1. The **Bulk Activity Creator** allows you to assign a custom made common **Task** or **Note** to all selected records in either the **People** or **Organisation** modules. To do this first navigate to the Person or Organisation module you wish to apply the bulk action to. In the list view of the module, select the records you with to apply the action to by using the tick box on the left hand side.



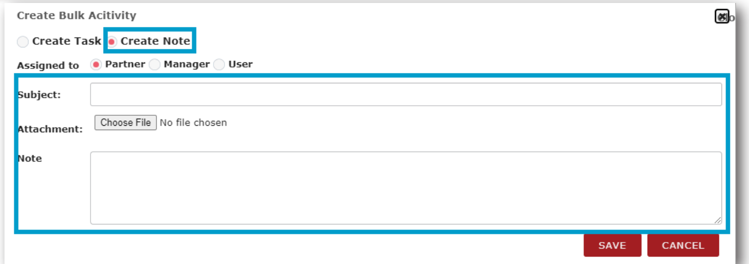
2. Once you have the records selected, navigate to the **Bulk Actions** menu and select **Create Bulk Activity.**



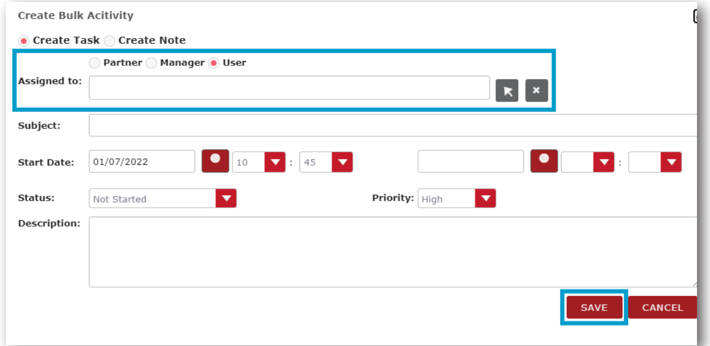
3. This will bring up a pop up window where you can use the toggle at the top to select whether you want to create a Task or Note and assign to the **Partner**, **Manager** or **User**. If you create a Task you will need to enter a **Subject**, **Start/End Date** and **Description**. You can also set the **Priority**.



4. If you select **Create Note** you will need to enter a **Subject** and a **Note** in the note field. You can also add an **Attachment** if needed.



5. If you choose to assign the Note/Task to a **User**, a user field will appear. There you can select the User using the **Select Arrow**. Once you've complete all the information about the Note/Task click **Save**.



6. A pop up will appear asking if you'd like to create the Task/Note click **OK**. Your Tasks/Notes will then be created.