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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 wish to apply the action to by using the tick box on the left hand side.

PEOPLE

Person ID	Name	Organisation	Email	Mobile
<input checked="" type="checkbox"/> A002	Prof. Richa Adams	R Adams Limited	Richard.Adams@fibrecrm.com	+44 7869 253 537
<input checked="" type="checkbox"/> A009	Andre Apple	Skiptube	AndrewApple@PeakPractice.com	+44 7919 553 893
<input checked="" type="checkbox"/> A011	Jan Armitage	1st Western Travel, Coketown Academy Trust Limited, Quality Electronics Lim	jan@fibre.com	+44 71084 1034 916
<input checked="" type="checkbox"/> A045	Jeremy Armstrong	Management Partnership	jez@somewhere.com	+44 7845 675 728
<input checked="" type="checkbox"/> A046	Sue Armstrong	Coketown Academy Trust Limited		+44 7892 988 384
<input checked="" type="checkbox"/> A04677	Sharon Pipple	R Adams Limited, Viva		+44 7661 191 838
<input checked="" type="checkbox"/> ABA01577	Grady Abazi	Brown And Benton	gabazi@eventbrite.com	+44 7225 715 811
<input checked="" type="checkbox"/> ABA03511	Donal Abazi	Fcc Steel	dabazi@dedecms.com	+44 7714 914 338
<input checked="" type="checkbox"/> ABL01865	Brion Ablewhite	Smithes Gray Lead	bablewhite8@nymag.com	+44 7828 341 1089
<input checked="" type="checkbox"/> ABR02936	Rignauld Abramovitz	Ac Institute	rabramovitz7@springer.com	+44 7575 161 947
<input checked="" type="checkbox"/> ABR03123	Dr. Morey Abrahamson	Herd Investments Portfolio Limited Partnership	mabrahmsonfe@uluc.edu	+44 7329 759 721
<input checked="" type="checkbox"/> ABR450	Dr. Roy Abrams	ALLP	Abrams.Roy@ExampleDigitalGroupPlc.com	+44 7383 793 123

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

Person ID	Name	Organisation
<input checked="" type="checkbox"/> A002	Mass Update	Adams Limited
<input type="checkbox"/> A009	Merge	Skiptube
<input checked="" type="checkbox"/> A011	Add To Target List	1st Western Travel, Coketown Academy Trust Limited, Quality Electronics Lim
<input checked="" type="checkbox"/> A045	Print as PDF	Management Partnership
<input checked="" type="checkbox"/> A046	Export	Coketown Academy Trust Limited
<input checked="" type="checkbox"/> A04677		Adams Limited, Viva
<input checked="" type="checkbox"/> ABA01577	Map	Brown And Benton
<input checked="" type="checkbox"/> ABA03511	Delete	Fcc Steel
<input checked="" type="checkbox"/> ABL01865	Add To My 20-40 List	Smithes Gray Lead
<input checked="" type="checkbox"/> ABR02936		Institute
	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**.

Create Bulk Activity

☒ Create Task ☐ Create Note

Assigned to: ☐ Partner ☐ Manager ☒ User

Subject:

Start Date: 01/07/2022 10 : 45

Status: Not Started Priority: High

Description:

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.

Create Bulk Activity

☐ Create Task ☒ Create Note

Assigned to: ☒ Partner ☐ Manager ☐ User

Subject:

Attachment: No file chosen

Note:

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**.

Create Bulk Activity

☒ Create Task ☐ Create Note

Assigned to:

Subject:

Start Date: 01/07/2022 10 : 45

Status: Not Started Priority: High

Description:

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.

Are you sure you want to create activity to 5 selected record(s)?

5 notes created