

Client Data System

Volume 90: Mass Activity Creation

Use the **Mass Activity Creation Tool** to generate follow-up activities for a group of contacts. Mass activities can be created from a number of different **contact summary screens** in CDS. For example, Mass Activities can be created from the results of a Dynamic Report, from an individual contact summary screen, or from a set.

To generate un-timed Mass Activities from a set:

- Click on the **Sets** button.
- To validate a set, highlight the **set** and click on **Record** in the main menu bar.
- Then select Validate from the Record menu.
- With the set validated, double-click on the set.
- Click the Tag All button, or select the contacts you'd like to include in your mass activities.
- Click on the Activities button.
- When you have more than one contact selected, the Activities button will launch the Mass Activities Creation window.

Note: When one contact is highlighted, the Activities button launches an Activity Detail window for the individual contact.

- In the **Assign Activities To** section, select the users the activities will be assigned to.
- In the Create Calendar Activity section, select the Activity Type from the Activity Type drop-down list.
- Select the Activity Sub-Type from the **Activity Sub-Type** drop-down list.
- Check the Add As ToDo Activity option. This will create a series of untimed activities that will appear on your ToDo List in the calendar.

Note: The Mass Activities Creation tool allows you to create a series of timed or untimed activities. By default, the timed fields are available. The Start Date and Start Time fields will determine when the follow-up activities will begin in the calendar. The End Time will determine the length of the activity. If you schedule a series of timed activities and schedule more than one activity a day, all of the activities scheduled together on one day will be scheduled at the same time.

- The Group Size field allows you to determine how many activities to schedule in a day. For example, if you're scheduling activities for 14 contacts and the Group Size field is set at five, five contacts will appear on the first day's ToDo list, five on the second day, and four on the third day.
- With the Every (Days) field default set at one, activities will be scheduled one day after another, excluding the weekend.
- Check the Skip Saturday and Skip Sunday options to exclude activities from being scheduled on the weekend.
- If you'd like to add the selected contacts to a set, click the drop-down list and select a set in the **Add Contacts to Set** section.
- Add detailed information regarding your mass activities in the Activity Subject and Reason fields.
- Click **OK**.



To view the untimed Activities:

- Click on the **DayView** button.
- The Mass Activities will be scheduled in subsequent order, depending on settings in the **Group Size** and **Every (Days)** fields in the Mass Activity Creation Window.

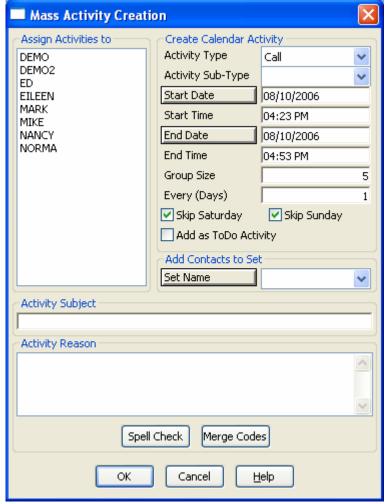


Figure 1: Mass Activity Creation window