

# Fast•Class File

SmartOffice

## Volume 33: Mass Activity Creation

The Mass Activity Creation tool can be used to simultaneously create activities for a group of selected contacts.

You can find the **Mass Activity Creation** button on record summary toolbars such as the **Individual Contact Summary** toolbar and **Set Member Summary** toolbar.

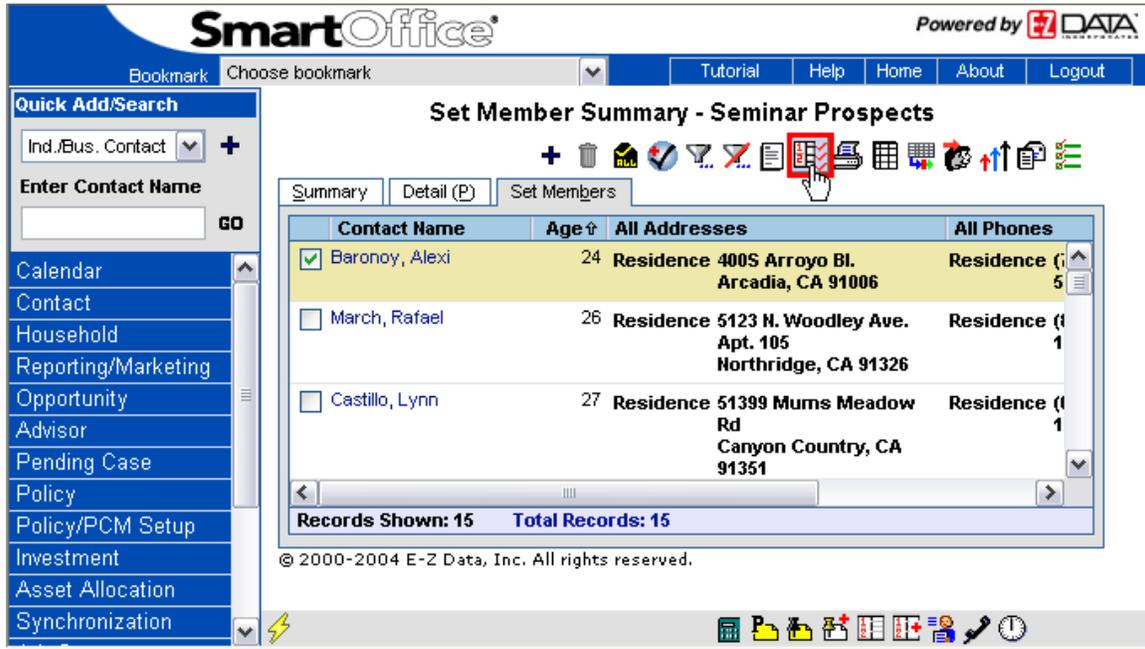


Figure 1: The Mass Activity Creation button on the Set Member Summary toolbar.

Whenever a **Mass Activity Creation** button appears on a summary toolbar, mass activities can be generated for selected contacts.

To use the Mass Activity Creation tool to create activities for a group of selected contacts –

- Open a record summary (Set Member Summary, dynamic report results summary, Individual Contact Summary, etc.) with the **Mass Activity Creation** button in the toolbar.
- Select the records for activity creation. (All records can be selected by clicking the **Tag All** button in the toolbar.)
- Click the **Mass Activity Creation** button.
- Define activity details in the **Mass Activity Creation Options** screen.

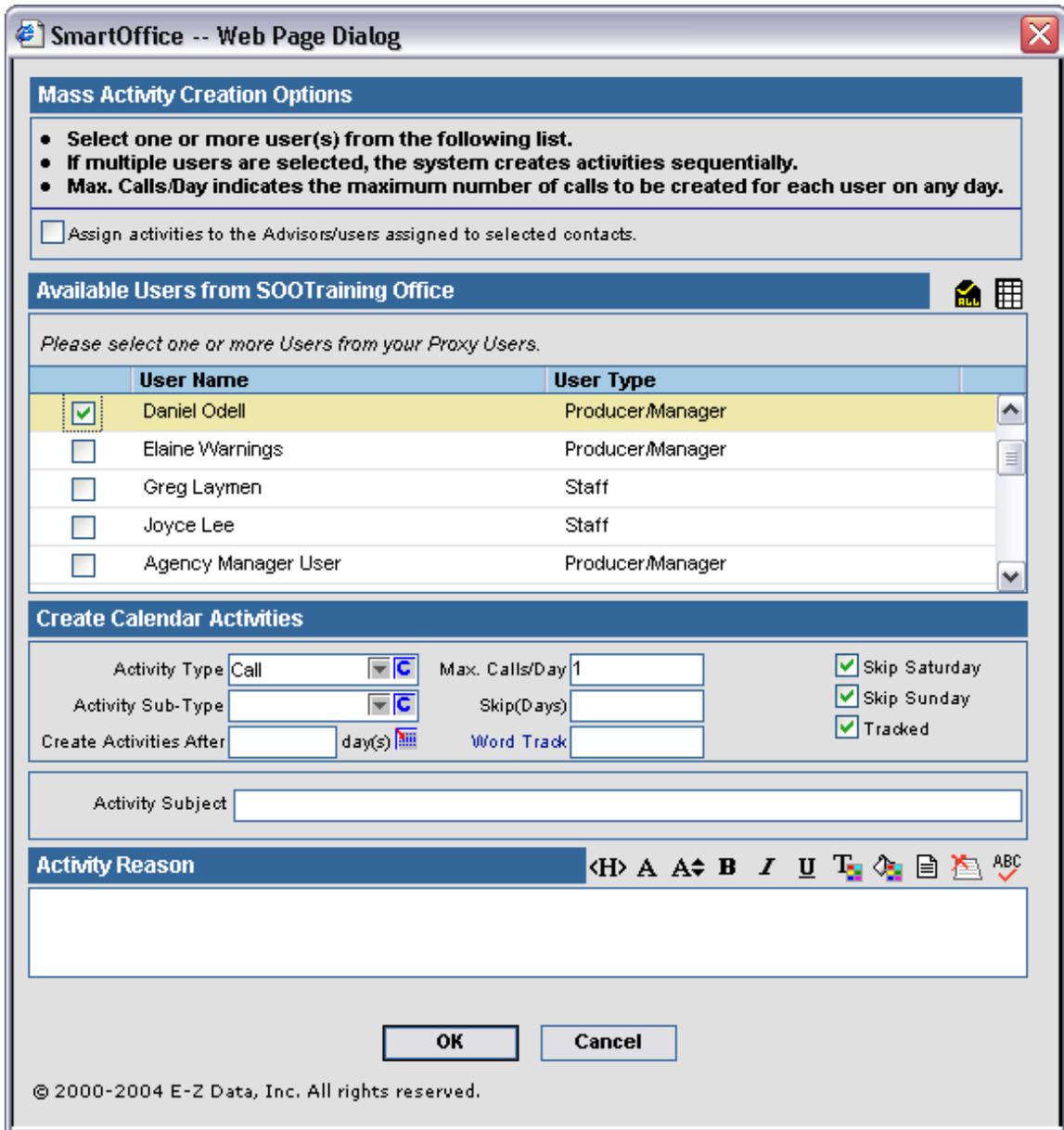


Figure 2: The Mass Activity Creation Options screen.

- Define activity-user assignments the **Available Users** section. If multiple users are selected, activities will created in sequential order based on other options selected.

*Note: To assign activities to users based on contact-user assignment, select the **Assign activities to the Advisors/users assigned to selected contacts** option.*

- Define activity creation parameters in the **Create Activities** section of the **Mass Activity Creation Options** screen.

Create Calendar Activities				
Activity Type	Call	Max. Calls/Day	1	<input checked="" type="checkbox"/> Skip Saturday
Activity Sub-Type		Skip(Days)		<input checked="" type="checkbox"/> Skip Sunday
Create Activities After		Word Track		<input checked="" type="checkbox"/> Tracked

**Figure 3: The Create Calendar Activities section of the Mass Activity Creation Options screen.**

- Use the **Activity Type** and **Activity Sub-Type** drop-downs to define the type of activity (Call, Appointment, etc.).
- Use the **Create Activities After** field to establish a lead-time for activity creation. To have activities created beginning with the current day, leave the **Create Activities After** field blank.
- Define the number of activities to be created each day with the **Max. Calls/Day** field. If 15 contacts have been selected for Mass Activity Creation and 3 is entered in the **Max. Calls/Day** field, five days worth of activities will be created.
- Use the **Skip(Days)** field to skip a specified number of days between created activities.
- Add a Word Track to activities with the **Word Track** field. To select from a list of all available Word Tracks available in SmartOffice, click the **Word Track** hyperlink.
- Use the **Skip Saturday** and **Skip Sunday** options to avoid activity creation on the weekend.
- Select the **Tracked** option to enter outcome information when each activity is marked done.
- Add subject and reason information in the **Activity Subject** and **Activity Reason** fields. Information in these fields will be added to each created activity.
- After selecting options, click **OK** to create activities.

The Mass Activity Creation Fast Class can be viewed at <http://www.ez-data.com/news/eznews/SOFCv33MassAct/SOFCv33MassActFlash/SOFCv33MassAct.html>