

# Fast-Class File

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.

**Mass Activity Creation**

**Assign Activities to**

- DEMO
- DEMO2
- ED
- EILEEN
- MARK
- MIKE
- NANCY
- NORMA

**Create Calendar Activity**

Activity Type: Call

Activity Sub-Type:

Start Date: 08/10/2006

Start Time: 04:23 PM

End Date: 08/10/2006

End Time: 04:53 PM

Group Size: 5

Every (Days): 1

Skip Saturday  Skip Sunday

Add as ToDo Activity

**Add Contacts to Set**

Set Name:

**Activity Subject**

**Activity Reason**

Spell Check Merge Codes

OK Cancel Help

**Figure 1: Mass Activity Creation window**