



# Activities Mass Update

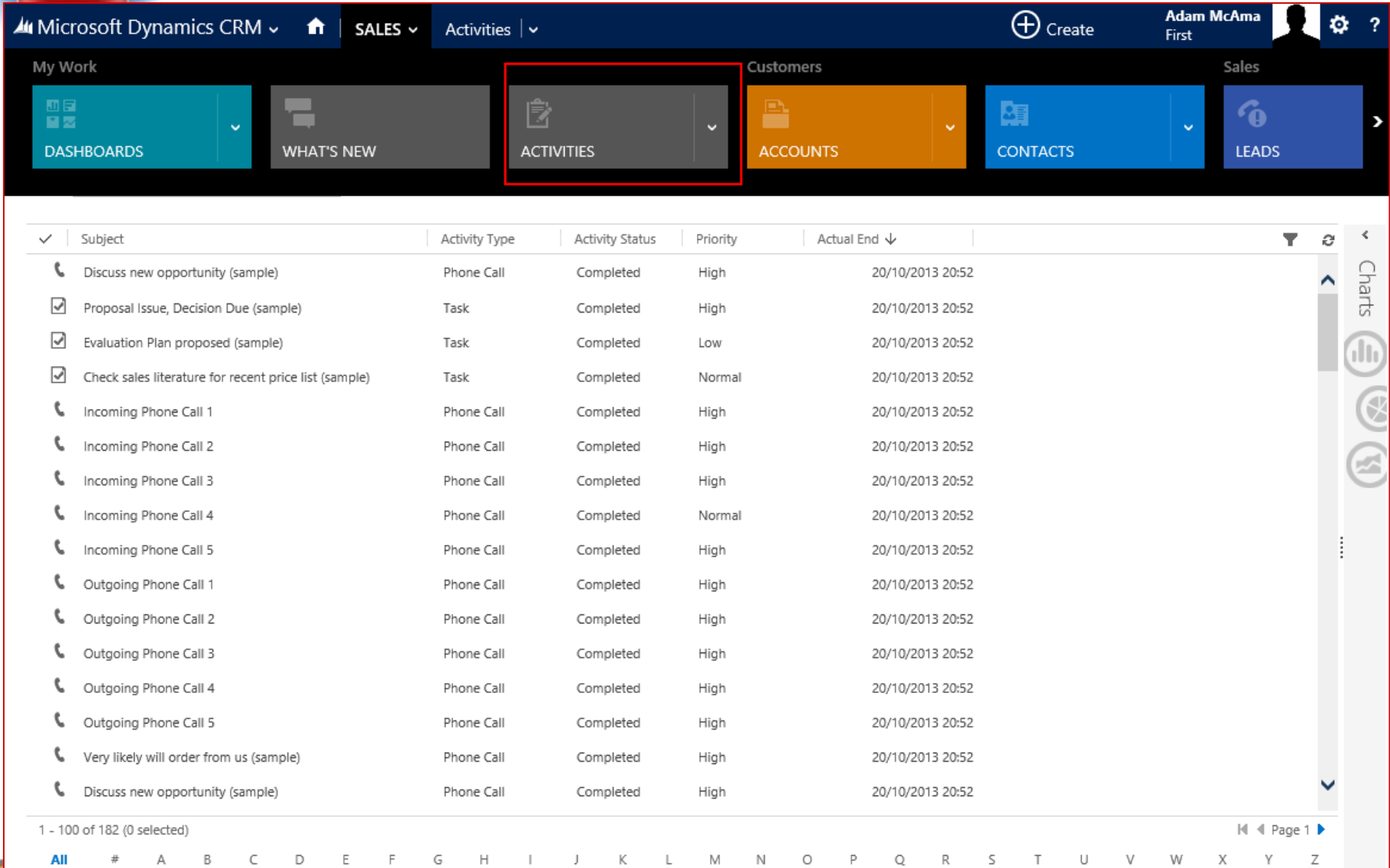
For Dynamics CRM 2013



## **Activities Mass Update**

**Activities Mass Update is a Dynamics CRM add-on that allows you to close several activities at the same time or change existing Status Reason for the previously closed activities.**

# Open Dynamics CRM 2013 and open activities list view.



Microsoft Dynamics CRM | SALES | Activities | Create | Adam McAma First

My Work: DASHBOARDS, WHAT'S NEW, **ACTIVITIES**, ACCOUNTS, CONTACTS, LEADS

✓	Subject	Activity Type	Activity Status	Priority	Actual End ↓
<input type="checkbox"/>	Discuss new opportunity (sample)	Phone Call	Completed	High	20/10/2013 20:52
<input checked="" type="checkbox"/>	Proposal Issue, Decision Due (sample)	Task	Completed	High	20/10/2013 20:52
<input checked="" type="checkbox"/>	Evaluation Plan proposed (sample)	Task	Completed	Low	20/10/2013 20:52
<input checked="" type="checkbox"/>	Check sales literature for recent price list (sample)	Task	Completed	Normal	20/10/2013 20:52
<input type="checkbox"/>	Incoming Phone Call 1	Phone Call	Completed	High	20/10/2013 20:52
<input type="checkbox"/>	Incoming Phone Call 2	Phone Call	Completed	High	20/10/2013 20:52
<input type="checkbox"/>	Incoming Phone Call 3	Phone Call	Completed	High	20/10/2013 20:52
<input type="checkbox"/>	Incoming Phone Call 4	Phone Call	Completed	Normal	20/10/2013 20:52
<input type="checkbox"/>	Incoming Phone Call 5	Phone Call	Completed	High	20/10/2013 20:52
<input type="checkbox"/>	Outgoing Phone Call 1	Phone Call	Completed	High	20/10/2013 20:52
<input type="checkbox"/>	Outgoing Phone Call 2	Phone Call	Completed	High	20/10/2013 20:52
<input type="checkbox"/>	Outgoing Phone Call 3	Phone Call	Completed	High	20/10/2013 20:52
<input type="checkbox"/>	Outgoing Phone Call 4	Phone Call	Completed	High	20/10/2013 20:52
<input type="checkbox"/>	Outgoing Phone Call 5	Phone Call	Completed	High	20/10/2013 20:52
<input type="checkbox"/>	Very likely will order from us (sample)	Phone Call	Completed	High	20/10/2013 20:52
<input type="checkbox"/>	Discuss new opportunity (sample)	Phone Call	Completed	High	20/10/2013 20:52

1 - 100 of 182 (0 selected) | Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

# Select activities you intend to update.

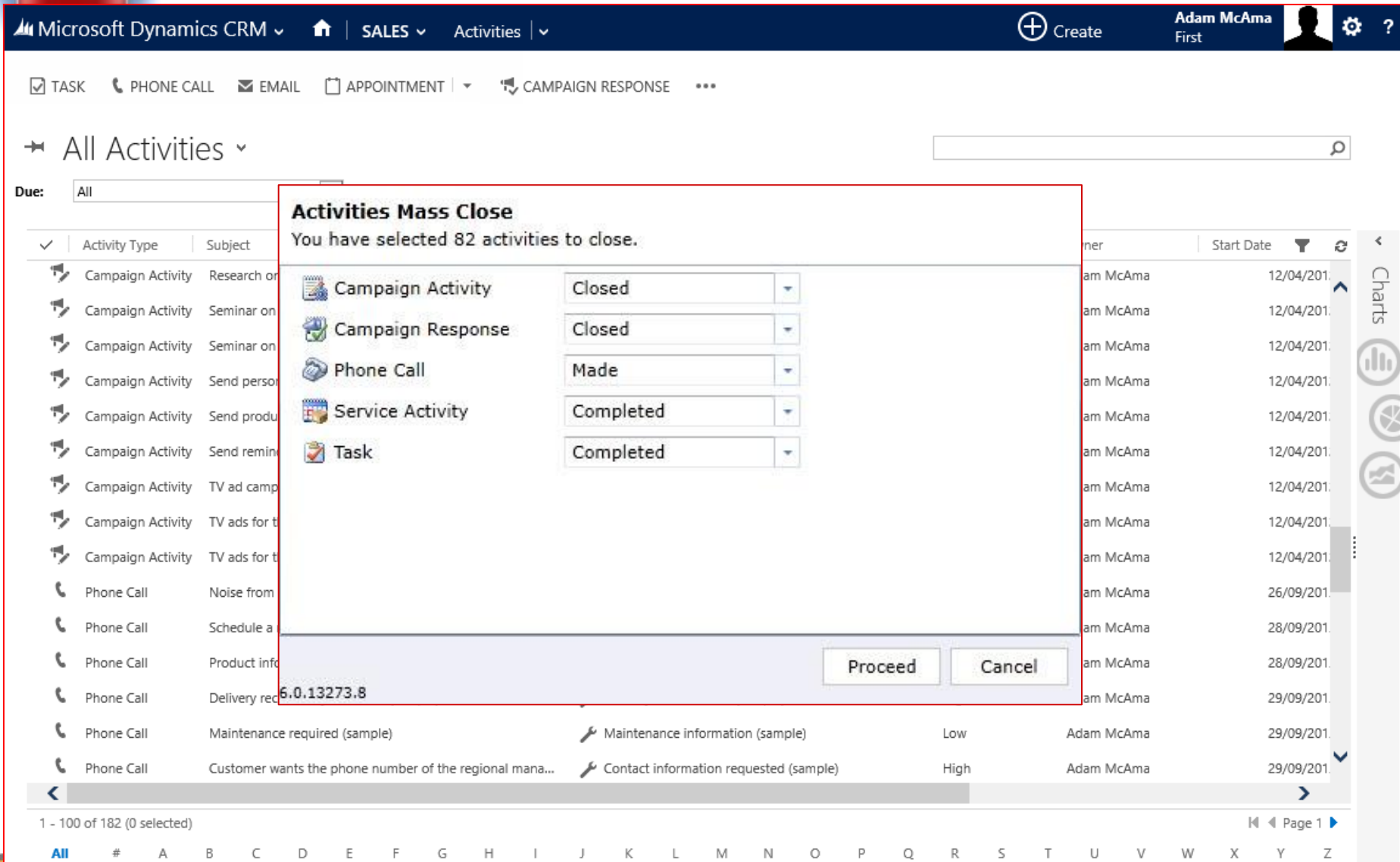
The screenshot displays the Microsoft Dynamics CRM interface. At the top, the navigation bar shows 'SALES' and 'Activities'. The user is identified as 'Adam McAmara First'. Below the navigation bar, there are filters for activity types: TASK, PHONE CALL, EMAIL, APPOINTMENT, and CAMPAIGN RESPONSE. The main area is titled 'My Activities' with a 'Due:' filter set to 'All'. A table of activities is shown, with 82 items selected. A context menu is open over the table, listing various actions. The 'Activities Mass Update' option is highlighted with a red box.

Activity Type	Subject	Regarding
Campaign Resp...	NIE CHCE NIC OD WAS	Co-branding v
Service Activity	Scheduled Service Activity 1	2B.net Ltd
Service Activity	Scheduled Service Activity 2	2B.net Ltd
Service Activity	Scheduled Service Activity 5	
Service Activity	Scheduled Service Activity 6	
Service Activity	Scheduled Service Activity 9	Sales Opportu
Service Activity	Scheduled Service Activity 10	New Order - B
Service Activity	Scheduled Service Activity 3	
Service Activity	Scheduled Service Activity 4	
Service Activity	Scheduled Service Activity 7	Invoice for Sof
Service Activity	Scheduled Service Activity 8	Ito Shu
Service Activity	Scheduled Service Activity 11	Oferta
Service Activity	Scheduled Service Activity 12	Invoice for Sof

1 - 84 of 84 (82 selected)

Activities Mass Update

# Use dropdown list to select status for each activity type.



The screenshot displays the Microsoft Dynamics CRM interface. At the top, the navigation bar includes 'Microsoft Dynamics CRM', 'SALES', and 'Activities'. A user profile for 'Adam McAma' is visible in the top right. Below the navigation bar, there are filters for activity types: TASK, PHONE CALL, EMAIL, APPOINTMENT, and CAMPAIGN RESPONSE. The main area shows 'All Activities' with a search bar and a 'Due:' filter set to 'All'. A modal dialog box titled 'Activities Mass Close' is open, indicating that 82 activities have been selected for closure. The dialog lists the activity types and their corresponding status dropdown menus:

Activity Type	Status
Campaign Activity	Closed
Campaign Response	Closed
Phone Call	Made
Service Activity	Completed
Task	Completed

At the bottom of the dialog, there are 'Proceed' and 'Cancel' buttons. The background shows a list of activities with columns for 'Activity Type', 'Subject', 'Owner', and 'Start Date'. The status bar at the bottom indicates '1 - 100 of 182 (0 selected)' and 'Page 1'.





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**Thank You!**

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