



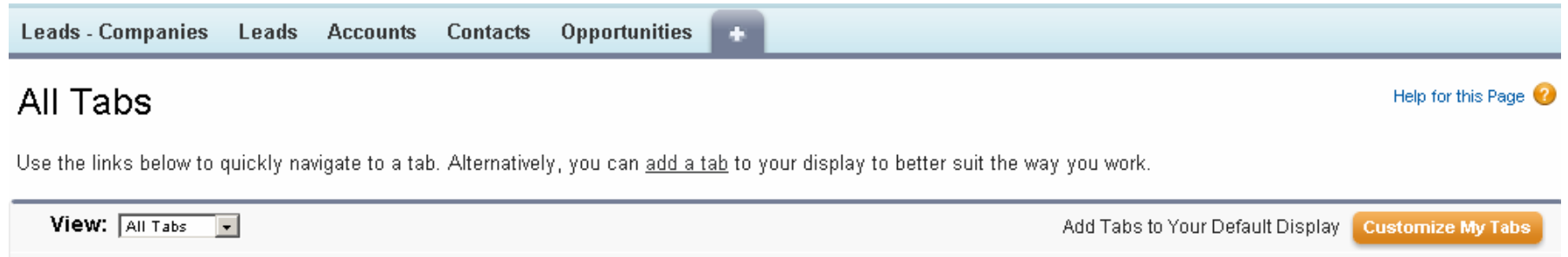
Unleash Your Sales Force

**Mass Update Tasks + Create Multiple Tasks +
Activities Tab**

Post install Setup Instructions and User Guide

Step 1: Add “Activities” Tab

1



Leads - Companies Leads Accounts Contacts Opportunities +

All Tabs

[Help for this Page](#) ?

Use the links below to quickly navigate to a tab. Alternatively, you can [add a tab](#) to your display to better suit the way you work.

View: All Tabs ▾

[Add Tabs to Your Default Display](#) [Customize My Tabs](#)

Click on "+" (right most tab) | 'Customize My Tabs' | Add “Activities” Tab.

Step 2: Add Mass Update Task Button to Activities List View

2

- ▶ My Personal Information
- ▶ Email
- ▶ Import
- ▶ Desktop Integration
- ▶ My Chatter Settings
- ▶ My Social Accounts and Contacts **New!**

App Setup

- ☑ Customize
 - ▶ Tab Names and Labels
 - ▶ Home
 - ☑ Activities
 - Task Fields
 - Task Validation Rules
 - Task Triggers
 - Task Buttons and Links
 - Task Page Layouts
 - Task Field Sets
 - Task Record Types
 - Event Fields
 - Event Validation Rules
 - Event Triggers
 - Event Buttons and Links
 - Event Page Layouts
 - Event Field Sets
 - Event Record Types
 - Activity Custom Fields
 - Activity Search Layouts**
 - Activity Buttons

Activity Search Layouts

Action	Layout	Columns Displayed	Buttons Displayed
Edit	Search Results	Subject, Name, Related To, Due Date, Assigned Alias	Mass Update Tasks
Edit	Activities List View	N/A	New Task, New Event, Mass
Edit	Search Filter Fields		N/A

Step 1: Click ***Your Name*** | **Setup** | **Customize** | Activities | Choose Activities **Search Layouts** link.

Step 2: Click **Edit** next to the “List View”

Step 2: Add Mass Update Tasks Button to Activities List View

Step 3: Add Button(s).

The screenshot shows a dialog box for configuring buttons. It has two main sections: "Standard Buttons" and "Custom Buttons".

Standard Buttons:

- ☒ New Task [NewTask]
- ☒ New Event [NewEvent]

Custom Buttons:

This section contains two lists: "Available Buttons" and "Selected Buttons".

- Available Buttons:** A list box containing "Reply".
- Selected Buttons:** A list box containing "Mass Update Tasks". This list box is highlighted with a red rectangle.

Between the two lists are four buttons:

- Add:** A button with a right-pointing arrow.
- Remove:** A button with a left-pointing arrow.
- Up:** A button with an up-pointing arrow.
- Down:** A button with a down-pointing arrow.

At the bottom right of the dialog are two buttons: "Save" and "Cancel".

Step 3: Add “Create Tasks” Button Leads/Contacts/Accounts/Opportunities/Cases

[Desktop Integration](#)
[My Chatter Settings](#)
[My Social Accounts and Contacts **New!**](#)

App Setup

☒ **Customize**
[Tab Names and Labels](#)
[Home](#)
[Activities](#)
[Campaigns](#)
☒ **Leads**
 Fields
 Validation Rules
 Triggers
 Page Layouts
 Field Sets
[Search Layouts](#)
 Assignment Rules

Lead Search Layouts

Action	Layout	Columns Displayed	Buttons Displayed
Edit	Search Results	Name, Title, Phone, Company, Email, Lead Status, Lead Source, All Leads & Contacts From This Company	Send Mass Email, C
Edit	Lookup Dialogs	Name, Company, Email, Title	N/A
Edit	Lookup Phone Dialogs	Name, Company, Phone, Mobile	N/A
Edit	Leads Tab	Name, Title, Email, Company, Lead Source, All Leads & Contacts From This Company	N/A
Edit	Leads List View	N/A	New, Change Status, Date, Create Tasks,
Edit	Search Filter Fields	Subscriber Org Type, Type, All Leads & Contacts From This Company	N/A

Click ***Your Name*** | **Setup** | **Customize** |
 Leads/Contacts/Accounts/Opportunities/Cases | Choose **Search Layouts** link |
 “Edit” List View -> Add Create Tasks Button.

Repeat the steps to add “Create Tasks” buttons for appropriate records (leads, accounts, contacts and opportunities)

How to Mass Update Multiple Tasks?

Option 1: Goto Activities Tab| Leads/Accounts/Contacts/Opportunities tab | select a list view | hit "go".

Home Leads Licenses **Activities** Packages Package Versions Reports Dashboards Documents Google Docs +

Overdue Tasks [Edit](#) | [Delete](#) | [Create New View](#)

[New Task](#) [New Event](#) **Mass Update Tasks**

[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#)

☐	Action	Subject	Name ↑	Related To	Due Date	Status	Priority
☐	Edit Del	Unresolved Email: RE: Thank you for Trying Data Q...			1/19/2011	Not Started	Normal
☐	Edit Del	Unresolved Email: RE: Thank you for Installing Ma...			1/19/2011	Not Started	Normal
☐	Edit Del	Unresolved Email: Re: Thank you for Upgrading M...			1/20/2011	Not Started	Normal
☐	Edit Del	Unresolved Email: Re: Data Quality on Demand S...			1/20/2011	Not Started	Normal
☐	Edit Del	Unresolved Email: RE: Data Quality on Demand S...			1/25/2011	Not Started	Normal
☐	Edit Del	Unresolved Email: test email			2/2/2011	Not Started	Normal
☐	Edit Del	Email: Targeted / Prospects 2011		00001102	2/8/2011	Not Started	Normal

Option 2: Go to Standard Activities
List View from Calendar Button

[Calendar Help](#)

< **March 2012** >

Sun Mon Tue Wed Thu Fri Sat

26 27 28 29 01 02 03

04 **05** 06 07 08 09 10

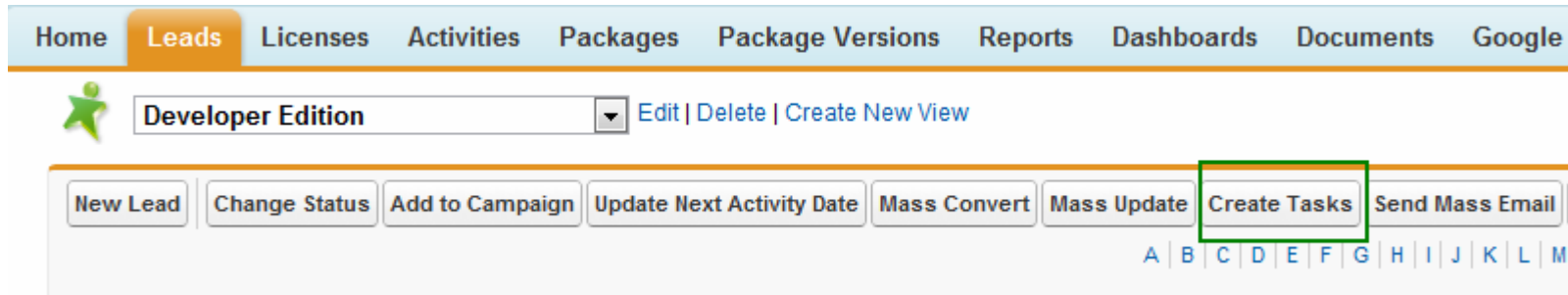
11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28 29 30 31

How to Create Multiple Tasks?

Goto Leads/Accounts/Contacts/Opportunities tab | select a list view | hit "Go" | Select multiple records | Hit "Create Tasks" Button.



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Your Success.

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