

Allied Financial Software Knowledgebase

How to re-assign or move activities en-masse to another user.

OK, we have all been PO'd over the years because ACT! does not have a function to re-assign activities en-masse to other users but here is a workaround.

Many of you know that you can cut and paste activities from within the Task List. I discovered this way back in ACT! Classic when cleaning bad activities and removing activities with recurring settings. I also discovered another use...reassigning activities.

In ACT! 11.0 (and possibly all other ACT! versions), if you cut and paste 'back' activities in the Task List or Activities tab, the pasted activities will be reassigned to the user who is logged into ACT! and doing the cut and paste.

This means you can reassign multiple activities from one user to another.

Here is what to do.

1. MAKE A BACKUP. You may need it.
2. Login to the database as the user who you want to reassign activities to.
3. Filter the Task List for the activities of the ex-user or the user(s) who you want to re-assign the activities from.
4. Multi-select the tasks you want to re-assign and then choose Edit > Cut from the menu. Don't choose too many at one time. Give it time to remove them all from your view.
5. Once all of the desired tasks are gone, choose Edit > Paste. Since there is no status bar, you will have to wait a long time until the screen stops flickering.

When all of the activities are back in the database, the Scheduled For will be replaced with the user who pasted the activities back in!

Caution! There is no Undo. Just restore the backup. Also, activities that have recurring settings don't seem to work in ACT! SQL. But, you can use this same procedure in ACT! 6.0 and it will remove recurring settings in activities that have them.

BUT, be careful. You should login as each user and filter for that user only when cutting and pasting.

Otherwise, the paste will reassign the activities to the user logged in.

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