Bulk Workflow Operation Utility

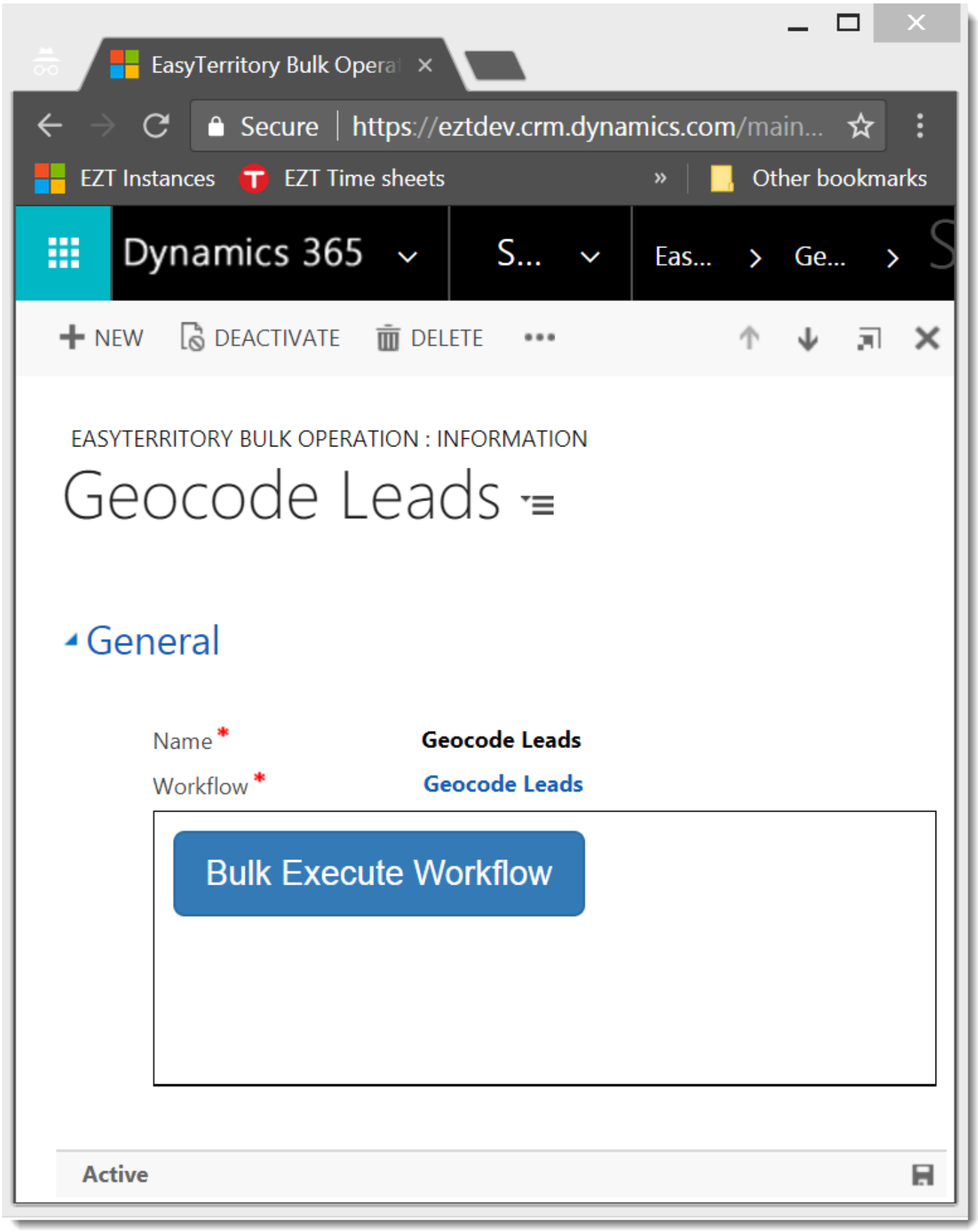
Workflow Plugins · https://www.easyterritory.com/documentation/dynamics-365-managed-solution/workflow-plugins/crm-bulkoperation/

Bulk Operation Utility

Bulk Operation is a utility used for bulk executing workflows. For example, Bulk Operation could be used to fire a geocode workflow on all the records on a 'leads' entity (New version of Bulk Operation Utility).

Get started with these easy steps

1. Register with EasyTerritory.com, under the CRM solution files, download and import the EasyTerritory_Components_2017_9_7_managed.zip for Dynamics CRM.
2. Please refer to Geocoding workflow plugin for a tutorial on configuring EasyTerritory workflows.
3. Under Processes, add a new workflow on a specific entity or select and existing workflow.
4. Make sure to check 'As an on-demand process' in the process' general settings.
5. Browse to EasyTerritory 'Bulk Operations' form and click 'NEW'.
6. Specify a name to save the Bulk Operation as in order to access at another time.
7. Specify the workflow to bulk execute and click button to start operation.


EasyTerritory Bulk Operat
Secure
https://eztdev.crm.dynamics.com/main...
EZT Instances
EZT Time sheets
Other bookmarks
Dynamics 365
S...
Eas...
Ge...
NEW
DEACTIVATE
DELETE
EASYTERRITORY BULK OPERATION : INFORMATION
Geocode Leads
General
Name *
Geocode Leads
Workflow *
Geocode Leads
Bulk Execute Workflow
Active

Update Bulk Operation Utility with version 2018.10.4 of EasyTerritory's managed solution:

- Register with EasyTerritory.com, under the CRM solution files, download and import the EasyTerritory_Components_2017_9_7_managed.zip for Dynamics CRM.
- Please refer to Geocoding workflow plugin for a tutorial on configuring EasyTerritory workflows.
- Under Processes, add a new workflow on a specific entity or select and existing workflow.
- Make sure to check 'As an on-demand process' in the process' general settings.
- Browse to EasyTerritory 'Bulk Operations' form and click 'NEW'.
- Specify a name to save the Bulk Operation as in order to access at another time.
- Specify the workflow to bulk execute.
- Click 'Get View' to get a list of system and user views associated with the entity the workflow configured with.
- Click the radio button in the list of views and click 'Bulk Execute Workflow' to run workflow on records contained in the view.

General

Name * Geocode Active Accounts

Workflow * Geocode Accounts

Get View | Bulk Execute Workflow

- [account] - Account Advanced Find View
- [account] - My Active Accounts
- [account] - Active Accounts
- [account] - Inactive Accounts
- [account] - Account Associated View
- [account] - Account BulkOperation View
- [account] - Accounts I Follow
- [account] - Accounts Being Followed
- [account] - Account List Member View
- [account] - Accounts: Responded to Campaigns in Last 6 Months
- [account] - All Members
- [account] - All Accounts
- [account] - My Accounts
- [account] - Quick Find Marketing List Members
- [account] - Quick Find Active Accounts
- [account] - Active Members