

Bulk Creation

Last Modified on 02/28/2025 1:38 am EST

Bulk Creation lets you add new module details for all selected contacts in a single operation.

You can add information to these modules using the Bulk Creation Express Action: Notes, Marketing, Registrations, Agenda, Functions, CE Courses, Accommodation, Travel, and Sponsorship.

- Not all items in these modules can be added, and you can't add Presentation or Exhibition items using Bulk Create.
- You can add Marketing tags in Bulk Creation, then filter on these to add Presentation items using Bulk Change.


Like all Express Actions based on bulk changes, this action CANNOT be undone.

- After you choose the module, the corresponding module fields appear for you to edit.
- Use Target Group filter to search for the specific contact records who'll have these new module items added.
- Complete the details for the module item(s) you want to add, making sure to fill in all mandatory fields.
- If you're adding items that have an inventory, such as Accommodation or Functions, you can select the Check Inventory button to make sure you have adequate inventory before creating your new items.
- Once you have defined the new items and are happy with the target group list, press the Start button to bulk add the items to the attendee records.

Bulk Creation

Details Selected Records

Module: Registrations

Target Group:  0 Records Selected

Details Tax

Registration Type* Please select...

Payment Status* Please select...


Adjustment 0.00

Discount Code Please select...

Discount 0.00

Tax 0.00

Total Charge 0.00

Date Registered* 30/11/2022 03:33 PM 

Comment

Clear Cancel Start

Selected Records tab

After filtering, you can look under the Selected Records tab to see a complete list of the attendees this Express Action will be applied to.

Details		Selected Records	
<input checked="" type="checkbox"/>	ID	NAME	ORGANIZATION
<input checked="" type="checkbox"/>	1	Santos, Aditya	Aurora Foundation
<input checked="" type="checkbox"/>	2	Lee, Aditya	Global Horizons Initiative
<input checked="" type="checkbox"/>	3	Khan, Ahmed	Momentum Ventures
<input checked="" type="checkbox"/>	5	Tanaka, Aaliyah	Pinnacle Ventures
<input checked="" type="checkbox"/>	7	Ma, Aditya	Blossom Innovations
<input checked="" type="checkbox"/>	9	Silva, Aditya	Rising Sun Technologies
<input checked="" type="checkbox"/>	10	Takahashi, Aditya	Evergreen Alliance
<input checked="" type="checkbox"/>	11	Gonzalez, Aaliyah	Spectrum Solutions
<input checked="" type="checkbox"/>	12	Bianco, Aditya	Harmony Enterprises
<input checked="" type="checkbox"/>	13	Ma, Aaliyah	Phoenix Foundation
<input checked="" type="checkbox"/>	14	Costa, Ahmed	Phoenix Foundation
<input checked="" type="checkbox"/>	16	Wu, Aditya	Bright Future Foundation
<input checked="" type="checkbox"/>	18	Ma, Ahmed	Phoenix Foundation
<input checked="" type="checkbox"/>	19	Yamada, Aaliyah	Evergreen Alliance

Total Records: 435

[Save As Data Snapshot](#) [Export To Excel](#) [Cancel](#) [Change](#)

You may see slightly different buttons underneath the list as those that appear in the image above, depending on the Express Action you're using.

- You can use all the Selected Records, or just pick out some from within that list.
- To exclude individual records, manually deselect them. You can select them again to include them if you change your mind.

When you're happy with the list, press the "Start" button to start the Express Action (you can also do this from the Details tab).

Save as Data Snapshot

You'll see this option under the Selected Records tab.

A Data Snapshot captures, or "remembers" the results of a search or report filter so you can re-use the data later. (If you want to save the filter itself, to search on it again later, use the save filter function.)

Read more about using Data Snapshots [in this article](#).

Note: Save As Data Snapshot saves the results, not the selection criteria. Any Attendees added *after* you made this selection are NOT included, even if they match your original filter criteria. If you want to save the *Selection Criteria* (instead of the *results*), use the **Save** button inside the Filter screen.

Create Data Snapshot



Create New

Name

Remove After

3 DAYS



Append to existing

Please select...



Replace existing

Please select...



Clear

Save