Mass Update Names, Vendors, or Customers

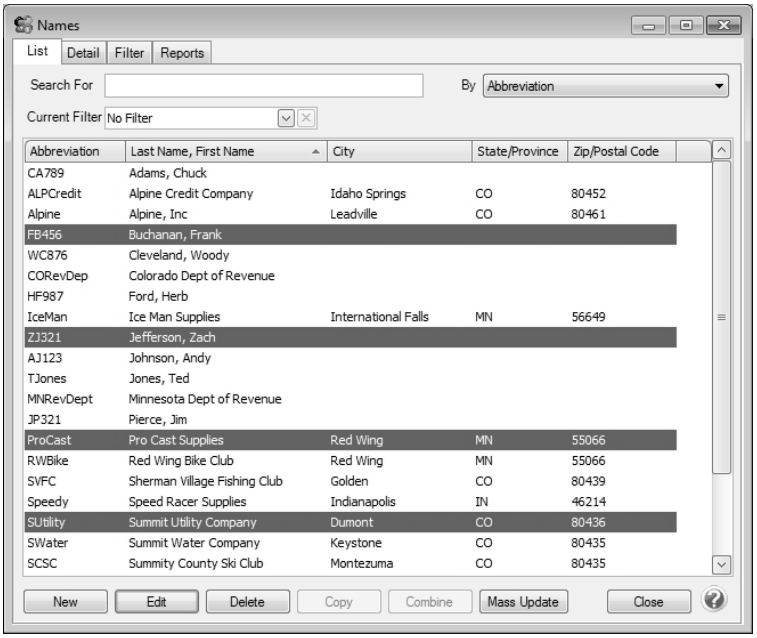
Document #:	3210	Product:	CenterPoint®

The mass update process can be used to update more than one name, vendor, or customer at the same time. You can mass update various types of information, including accounts, payment terms, printing/publishing options, etc.

Note: We recommend you do a backup of your database prior to starting the mass update process.

Mass Update Names, Vendors, or Customers

1. Select **Setup > Names, Vendors** or **Customers**.
2. From the List tab, select the names, vendors, or customers you want to update. Multiple names can be selecting by pressing the CTRL key while you make your selections. If you do not limit your list to selected names, all names will be included in the update.



3. Click **Mass Update**. The Mass Update Wizard window will open. The wizard will guide you through the process. Click **Next**.

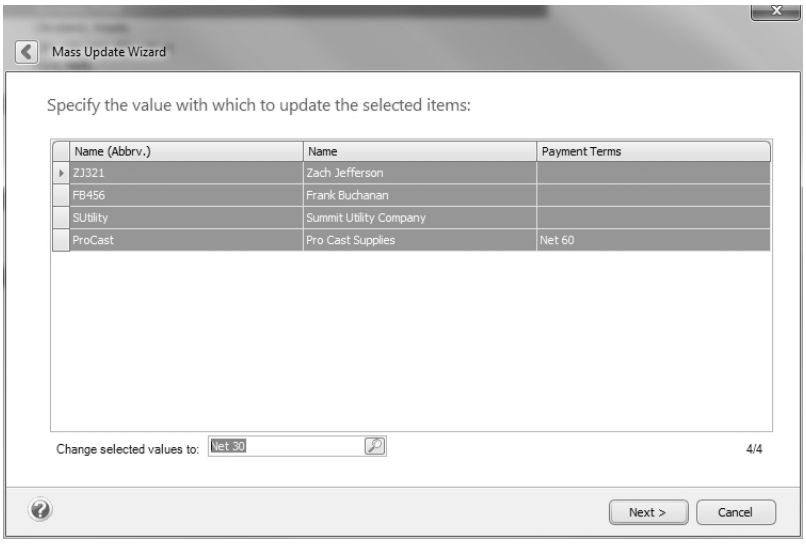
Note: **Next** proceeds through the mass update screens, **Cancel** exits the mass update screen and **Back** returns to the previous page of the mass update process. The Back button is in the upper-left side of the screen.

4. Select the type of item you'd like to change and click **Next**. The choices listed correspond with different tabs and buttons in the Names, Vendors, or Customers screens.
5. Depending on the selection you made in step 5, screens will be displayed asking you to make other selections. For example, if you choose Vendor, you can select Default Accounts Payable Account, Payment Terms, or Issue 1099. Make

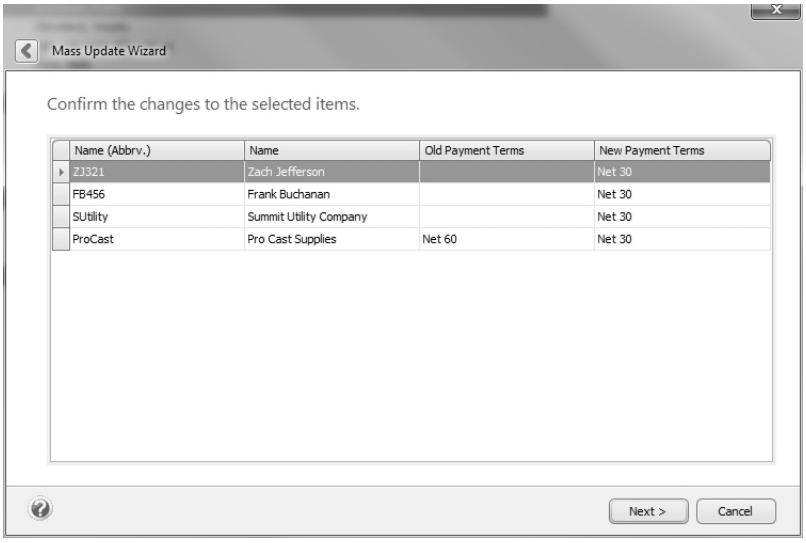
This documentation is for informational purposes only. For specific accounting guidance, please contact your accountant.

your selection and click **Next**.

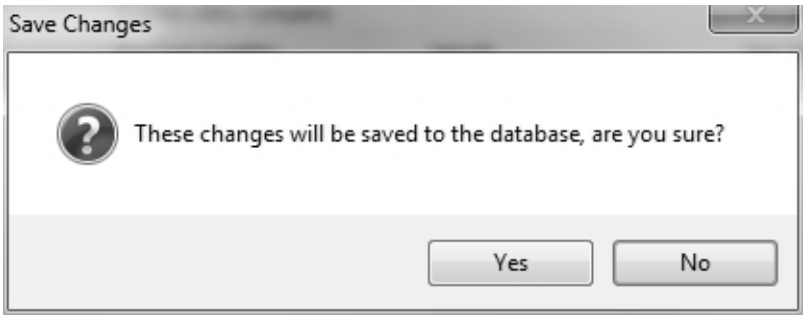
6. A list of all customers or vendors that have the specified information assigned will be displayed. Specify the value with which to update the selected items. For example, if you chose Payment Terms, specify the terms you'd like assigned to each of the selected vendors. Click **Next**.



7. Verify the information that will be changed and click **Next**.



8. At the *These changes will be saved to the database, are you sure?* message, click **Yes** to finalize the changes.



9. Click **Finish** to exit, click the **Back** button to perform a similar update, or click **New** to start a new update.