

Mass Update Names, Vendors, or Customers

Document #:	3210	Product:	CenterPoint®
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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.

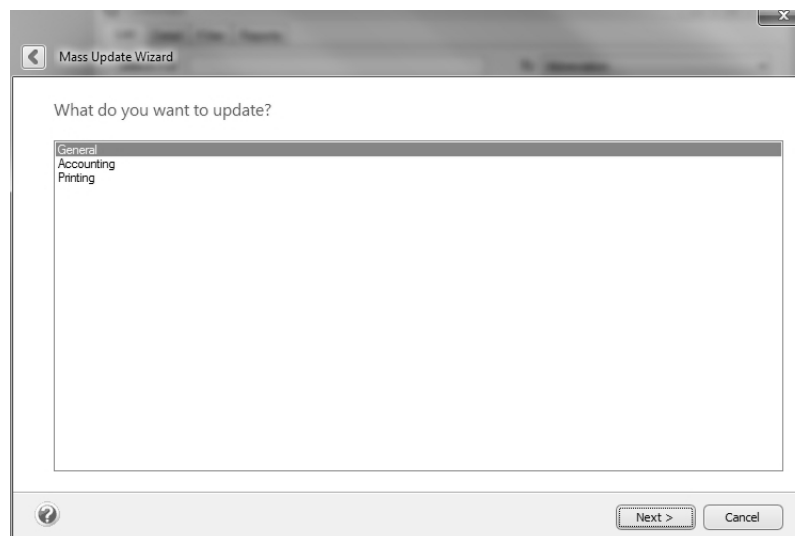
 **Note:** We recommend you do a backup of your database prior to starting the mass update process.

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**.

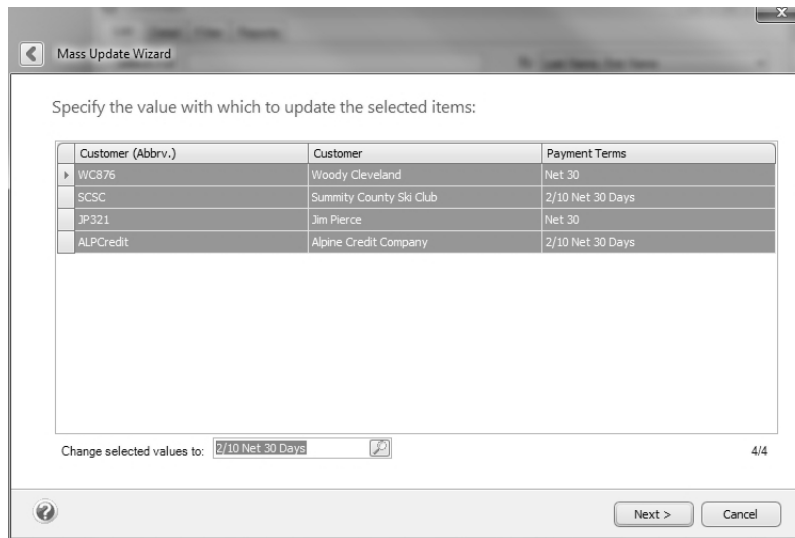
 **Note:** **Next** proceeds through the mass update screens, **Cancel** exits the mass update screen and **Back** returns to the previous page of the mass update process. The Back button is in the upper-left side of the screen.

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 Accounting in the Customers Mass Update process, you can select Default Accounts Receivable Account, Sales Tax Exemption, Statement Type and Finance Charge. Make 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**.



Mass Update Wizard

Specify the value with which to update the selected items:

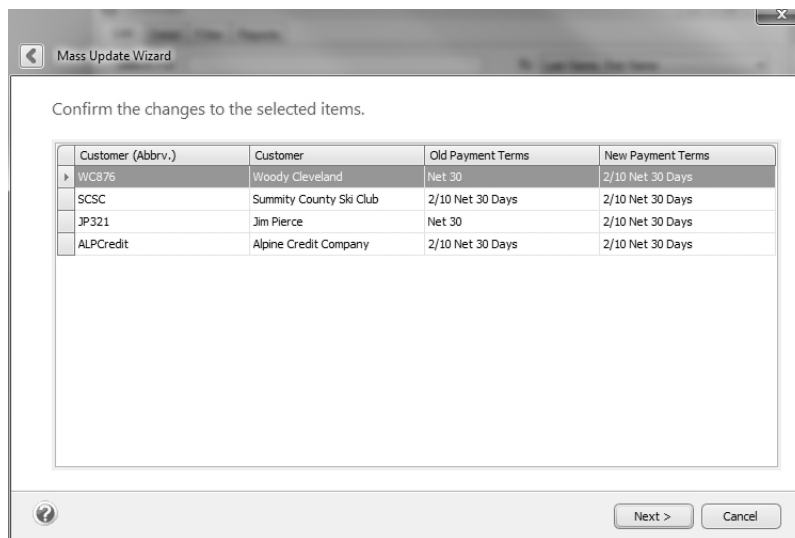
Customer (Abbrev.)	Customer	Payment Terms
WC876	Woody Cleveland	Net 30
SCSC	Summit County Ski Club	2/10 Net 30 Days
JP321	Jim Pierce	Net 30
ALPCredit	Alpine Credit Company	2/10 Net 30 Days

Change selected values to:

4/4

Next > Cancel

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



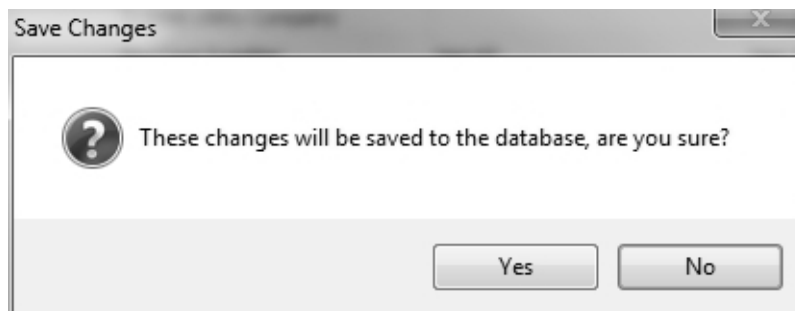
Mass Update Wizard

Confirm the changes to the selected items.

Customer (Abbrev.)	Customer	Old Payment Terms	New Payment Terms
WC876	Woody Cleveland	Net 30	2/10 Net 30 Days
SCSC	Summit County Ski Club	2/10 Net 30 Days	2/10 Net 30 Days
JP321	Jim Pierce	Net 30	2/10 Net 30 Days
ALPCredit	Alpine Credit Company	2/10 Net 30 Days	2/10 Net 30 Days

Next > Cancel

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



Save Changes

These changes will be saved to the database, are you sure?

Yes No

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