

## Mass Update Names, Vendors, or Customers

Document #:	3210	Product:	CenterPoint <sup>®</sup>
	•		update more than one name, vendor, or customer at the same time. You can mass ing accounts, payment terms, printing/publishing options, etc.
Note: We re	commen	d you do a bacł	kup 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.

ist Detail	Filter Reports			
Search For			By Abbreviation	
Current Filter N	lo Filter			
Abbreviation	Last Name, First Name	▲ City	State/Province	Zip/Postal Code
A789	Adams, Chuck			
ALPCredit	Alpine Credit Company	Idaho Springs	CO	80452
Alpine	Alpine, Inc	Leadville	CO	80461
B456	Buchanan, Frank			
VC876	Cleveland, Woody			
ORevDep	Colorado Dept of Revenue			
F987	Ford, Herb			
ceMan	Ice Man Supplies	International Falls	MN	56649
	Jefferson, Zach			
J123	Johnson, Andy			
Jones	Jones, Ted			
<b>INRevDept</b>	Minnesota Dept of Revenue			
P321	Pierce, Jim			
roCast	Pro Cast Supplies	Red Wing	MN	55066
WBike	Red Wing Bike Club	Red Wing	MN	55066
WFC	Sherman Village Fishing Club	Golden	CO	80439
peedy	Speed Racer Supplies	Indianapolis	IN	46214
iUtility	Summit Utility Company	Dumont	CO	80436
Water	Summit Water Company	Keystone	CO	80435
CSC	Summity County Ski Club	Montezuma	CO	80435

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.
- 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 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**.

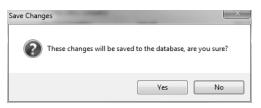
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Sp	ecify the value with wh	nich to update the selected items:	
1	Name (Abbrv.)	Name	Payment Terms
Þ	ZJ321		
	FB456	Frank Buchanan	
	SUtility	Summit Utility Company	
	ProCast		

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

	Name (Abbrv.)	Name	Old Payment Terms	New Payment Terms
Þ	ZJ321	Zach Jefferson		Net 30
	FB456	Frank Buchanan		Net 30
	SUtility	Summit Utility Company		Net 30
	ProCast	Pro Cast Supplies	Net 60	Net 30

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.