

Mass Editing Records

This topic describes how the Mass Edit feature works with records.

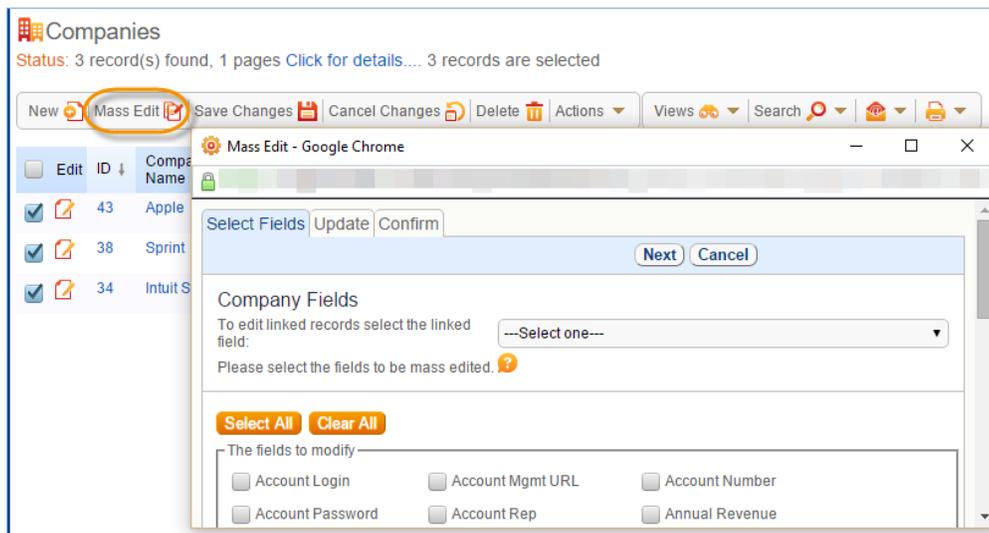
Mass Edit Operations

A Mass Edit operation can modify several records and fields simultaneously. For instance, The Status field in a particular set of records can be assigned the value 'Closed'.

i Example

A more complex example might be to assign all records resulting from a Search filter a Status of 'Closed', assign 'Sep 15 2004' as the date in the Closed On field and append the string 'Resolved in Release 2.4' to the Comment text field.

To select a number of records for mass editing, select the checkboxes in the table view and click Mass Edit in the action bar. This opens the [Mass Edit Wizard](#).



Note that Mass Edit changes, like changes from the record Edit form, are reflected in the record history.

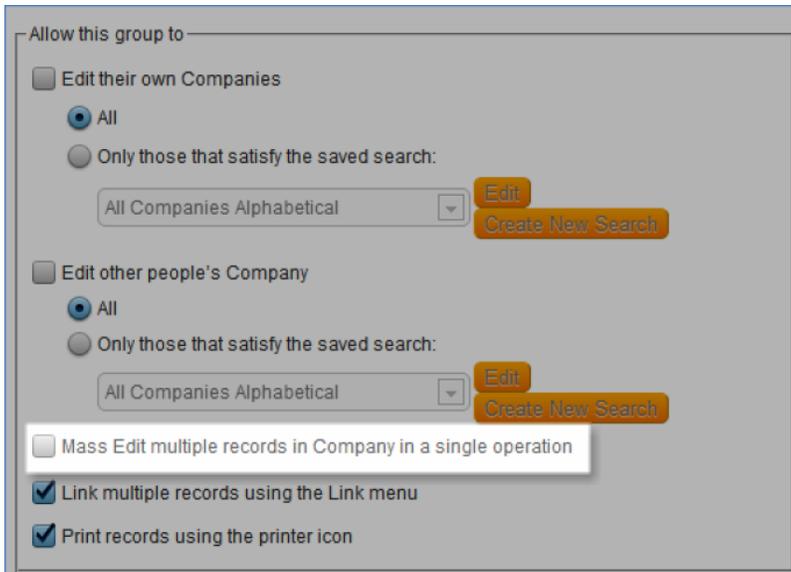
Mass Edit Permissions

Mass Edit permissions are set on the Permission tab of the Groups wizard, and access is controlled by group membership. Groups that are not authorized to mass edit records in a table will not see the Mass Edit icon on the Action Bar for that table.

To grant a group the permission to mass edit records in a single operation...

1. Navigate to **Setup > Access > Manage Groups** and edit the relevant group.

2. In the Groups wizard, click the Table tab and edit the relevant table.
3. In the Table Permissions wizard, click the Record Permissions tab and tick the Mass Edit multiple records in <Table Name> in a single operation checkbox.



The screenshot shows a configuration window titled "Allow this group to" with several options:

- Edit their own Companies
 - All
 - Only those that satisfy the saved search:
 - Dropdown menu: All Companies Alphabetical
 - Buttons: Edit, Create New Search
- Edit other people's Company
 - All
 - Only those that satisfy the saved search:
 - Dropdown menu: All Companies Alphabetical
 - Buttons: Edit, Create New Search
- Mass Edit multiple records in Company in a single operation (highlighted with a white box)
- Link multiple records using the Link menu
- Print records using the printer icon

Mass Edit Wizard

The Mass Edit wizard contains the following tabs:

Select Fields Tab

The Select Fields tab allows you to select which fields to change. Fields which are greyed out may not be modified. You can use the following methods to choose the fields to edit:

- Select a number of fields and click Next
- Click Select All and then click Next.
- Choose a linked field from which to edit linked records from the drop-down.

Update Tab

The Update tab contains a set of inputs for each selected field, with appropriate input aids based on the field type. For example, a Calendar is displayed as the input aid for the 'Start Date' date field.

You can update fields based on formulas and variables, enabling 'search and replace' string substitution and other [update formulas to set the field's value](#). For example, if you had fields Cost, Price and Quantity, you could set the Cost to $\text{Price} * \text{Quantity}$.

Select Fields Update Confirm

Back Next Cancel

You can enter new field values directly, or use the Formula radio button to set field values from existing formula

Please enter new values for these fields

Related To Opportunity Contact Support Case
 Helpdesk Case Change Request Asset

Treat the above as Standard text
 A formula

The new value should Overwrite old values with new value
 Append new choices to existing value

Back Next Cancel

Note: You can use search and replace for most data types, including email fields.

For multi-choice fields you can choose whether the new value should overwrite or append to the old value.

Confirm Tab

The Confirm tab allows you to choose whether to run rules and update default field values when the change is saved.

Select Fields Update Confirm

Back Finish Cancel

Click **Finish** to modify the selected **4 People**. Click [here](#) for a list of their IDs.

Run rules. Deselect this option to prevent rules from being triggered by the change.

Update defaults. Deselect to prevent default field values such as date-modified from being updated.

Back Finish Cancel