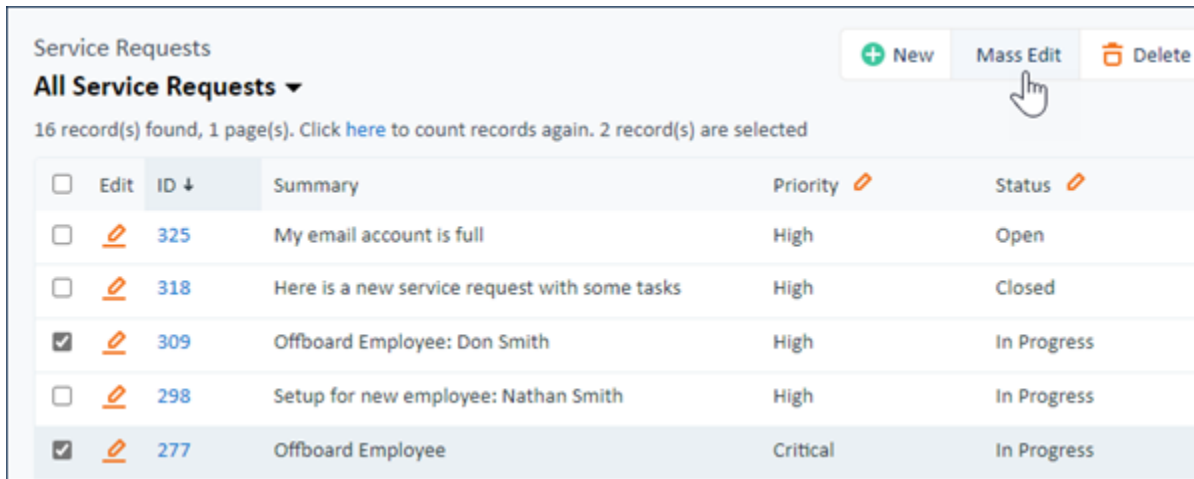# Mass Editing Records

Mass editing allows you to **modify several records and fields simultaneously**. For instance, you can use Mass Edit to close several service requests at once. You can perform more complex updates on records as well, such as changing their status to Closed, updating the Closed On field to a specified date, and appending "Resolved by upgrade" to the Resolution text field. Changes made by Mass Edit are recorded in each record's history, just like they would be if you opened and updated each record individually.

To choose records for mass editing, select the checkboxes next to the desired records in the table view and then click Mass Edit in the action bar.

Select multiple records and click Mass Edit

Using Mass Edit

The Mass Edit wizard appears when you click Mass Edit on a table's action bar. It contains several tabs for configuring the mass edit operation.

Select Fields Tab

On the Select Fields tab, select which fields to change. Fields that are greyed out cannot be modified. You can use the following methods to choose the fields to edit:

- Choose any number of fields by selecting the corresponding checkbox.
- Click Select All to choose all fields.
- Select a linked field from the drop-down menu to edit fields in a linked record.

Select Fields tab

Update Tab

The Update tab contains a set of inputs for each selected field and appropriate input aids based on the field type. For example, Choice fields use radio buttons or drop-down lists, and Date fields include a calendar icon for choosing the date.

Update tab showing example field changes

You can also update fields based on formulas and variables, enable search and replace string substitution for most data types, and use other update formulas to set the field's value. For example, if you're mass editing the Amount field in a table, you could set its value to the product of the Unit Price and Quantity fields.

⚠ Certain data types have additional mass editing options. For example, Multi-Choice fields allow you to decide whether the new value overwrites existing values, is appended to existing values, or is removed from existing values.

Confirm Tab

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

Confirm tab

Mass Edit Permissions

Permissions for mass editing 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 do not see the Mass Edit icon on the action bar for that table.

To grant a group the permission to mass edit records:

1. Click the Setup gear in the top-right corner and go to **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 select the "Mass Edit multiple records in [Table] in a single operation" checkbox.

Mass Edit multiple records setting

4. Click Finish.