

Global Account Edit

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Global Account Edit

Records > Accounts > Edit (down arrow) > Global Edit

When you need to edit an entire selection or range of accounts, use the global account edit. Enter the account selections you wish to edit and select the account item/process you want to edit. Then key the value, if applicable, that you wish to change the item to and click the **OK** button.

Accounts Tab

The edit screen will default to all accounts, choose accounts to use paste from Excel.

Paste from Excel: Offers the ability to paste account selections directly from Excel.

- Click the down arrow next to the plus icon to select the **Paste From Excel** column type from the drop-down menu - this can be completed for full accounts or any account segment.
- Copy the column in Excel and paste into the contents window. Commas are not needed, each cell will act as its own row.
- Select Import.

Note: The system shows the number of lines processed; however, it does not validate any accounts or segments.

All Accounts Tab

The edit screen will default to All Accounts. Specify the accounts you wish to change.

- **Account Item:** Select the account item you wish to edit.
 - **Change to:** Specify the value you wish to change the item to.
 - **How to deactivate a group of accounts:**
 - Select the accounts.
 - Choose a Status for the Account Item.
 - Uncheck the Active box.
 - Click **OK**.
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