

## 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.

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## 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 it into the contents window. Commas are not needed; each cell will act as its own row.
- Select Import.

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

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## 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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