

## Global Account Edit

Last Modified on 12/12/2023 4:30 pm EST

### **Records > Accounts > Edit > Global Edit**

Edits an entire selection or range of accounts. 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:** Specify the accounts you wish to change.

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

**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 Status for the Account Item. Uncheck the Active box. Click OK.

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