

Bulk Change

Last Modified on 09/24/2024 9:25 pm EDT

This tool lets you make bulk changes to specific items, and choose which attendees' records to change.

You can change items from all available modules, and within each module choose what can be changed (swap one item for another, change payment status, amend the amount, number of items, dates and much more).

Like all Express Actions based on bulk changes, this action **CANNOT** be undone.

Once you choose what parts of the record you want to change, you can see a complete list of selected records and either choose specific records to change, or change all in bulk.

Like most Express Actions, you have full search and filtering capabilities so you can accurately target the contact records you want to change.

After choosing the module and filtering for which records you want to change, you tick the checkbox(es) for which field(s) you want to change, and under **New Value**, put what you want to change each field to:

Bulk Change [Close]

Details | Selected Records

Module: Registrations

Target Group: [Filter Icon] 29 Registrations Records Selected

Details | Custom Fields

<input type="checkbox"/> Field	New Value
<input checked="" type="checkbox"/> Registration Type*	Member 90.00
<input checked="" type="checkbox"/> Payment Status*	Purchase
<input type="checkbox"/> Adjustment	0.00
<input type="checkbox"/> Discount Code	Please select...
<input type="checkbox"/> Date Registered*	30/11/2022 12:00 AM
<input type="checkbox"/> Comment	

[Cancel](#) [Change](#)

Selected Records tab

After filtering, you can look under the Selected Records tab to see a complete list of the attendees this Express Action will be applied to.

Details		Selected Records	
id	NAME	ORGANIZATION	
<input checked="" type="checkbox"/>	1	Santos, Aditya	Aurora Foundation
<input checked="" type="checkbox"/>	2	Lee, Aditya	Global Horizons Initiative
<input checked="" type="checkbox"/>	3	Khan, Ahmed	Momentum Ventures
<input checked="" type="checkbox"/>	5	Tanaka, Aaliyah	Pinnacle Ventures
<input checked="" type="checkbox"/>	7	Ma, Aditya	Blossom Innovations
<input checked="" type="checkbox"/>	9	Silva, Aditya	Rising Sun Technologies
<input checked="" type="checkbox"/>	10	Takahashi, Aditya	Evergreen Alliance
<input checked="" type="checkbox"/>	11	Gonzalez, Aaliyah	Spectrum Solutions
<input checked="" type="checkbox"/>	12	Bianco, Aditya	Harmony Enterprises
<input checked="" type="checkbox"/>	13	Mo, Aaliyah	Phoenix Foundation
<input checked="" type="checkbox"/>	14	Costa, Ahmed	Phoenix Foundation
<input checked="" type="checkbox"/>	16	Wu, Aditya	Bright Future Foundation
<input checked="" type="checkbox"/>	18	Mo, Ahmed	Phoenix Foundation
<input checked="" type="checkbox"/>	19	Yamada, Aaliyah	Evergreen Alliance

Total Records: 435

You may see slightly different buttons underneath the list as those that appear in the image above, depending on the Express Action you're using.

- You can use all the Selected Records, or just pick out some from within that list.
- To exclude individual records, manually deselect them. You can select them again to include them if you change your mind.

When you're happy with the list, press the "Start" button to start the Express Action (you can also do this from the Details tab).

Save as Data Snapshot

You'll see this option under the Selected Records tab.

A Data Snapshot captures, or "remembers" the results of a search or report filter so you can re-use the data later. (If you want to save the filter itself, to search on it again later, use the save filter function.)

Read more about using Data Snapshots [in this article](#).

Note: Save As Data Snapshot saves the results, not the selection criteria. Any Attendees added *after* you made this selection are NOT included, even if they match your original filter criteria. If you want to save the *Selection Criteria* (instead of the *results*), use the **Save** button inside the Filter screen.

Create Data Snapshot



Create New

Name

Remove After

3 DAYS



Append to existing

Please select...



Replace existing

Please select...



Clear

Save