

Bulk Change

Last Modified on 11/30/2022 12:32 am EST

This powerful utility makes it a snap to choose specific records and execute detail changes on any number of areas surrounding that specific item. You can change items in all of the different modules, and each module displays a selection of fields where you can change actual items, payment information, number of tickets, dates and much more.

Once you choose what parts of the record you wish to change, you are able to view a complete list of selected records and choose specific records to change, or simply change all in bulk.

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

Bulk Change


Details

Selected Records

Module

Registrations

Target Group



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 you search for records against a specific module, you can view a complete list of Selected Records. You are able to use all selected records (by default) or select specific records that you want to process a bulk change against.

Tip: As we are selecting module records, your module selection in the Filter should match the module you have selected in the Module drop-down. For example, if you want to change Registration details, use a Filter selection on Registration fields.

Bulk Change

Details

Selected Records

<input checked="" type="checkbox"/>	ID	NAME	ORGANIZATION	REGISTRATION TYPE	PAYMENT STATUS
<input checked="" type="checkbox"/>	1	McDonald, Mrs. Joanne	Ainsley School District	Early Registration	Purchase
<input checked="" type="checkbox"/>	2	Strader, Ms. Sonia	Manu School District	Early Registration	Purchase
<input checked="" type="checkbox"/>	3	Sprouse, Ms. Cathy	Anderson School District	Early Registration	Purchase
<input checked="" type="checkbox"/>	4	Felix, Mr. Daniel	Auto School District	Early Registration	Purchase
<input checked="" type="checkbox"/>	5	Davis, Mr. Robert	Antitum School District	Early Registration	Purchase
<input checked="" type="checkbox"/>	6	Lor, Mr. Jose	Auckland Science of Technology	Early Registration	Purchase
<input checked="" type="checkbox"/>	7	Waller, Mrs. Amy	Prototype School District	Early Registration	Purchase
<input checked="" type="checkbox"/>	8	Tyler, Mrs. Irma	Geoteam School District	Early Registration	Purchase
<input checked="" type="checkbox"/>	9	Thorne, Ms. Kimberly	Sunnybank School District	Early Registration	Purchase
<input checked="" type="checkbox"/>	10	Demasi, Ms. Patricia	Flickerteam School District	Early Registration	Purchase
<input checked="" type="checkbox"/>	11	Leslie, Mr. Keith	Biosphere School District	Early Registration	Purchase
<input checked="" type="checkbox"/>	12	Page, Mrs. Manuela	Las Angeles School District	Early Registration	Purchase

Total Records: 52

Save As Data Snapshot

Export To Excel

Cancel

Change

Save as Data Snapshot Option

Selecting the **Save as Data Snapshot** option lets you save the current set of selected records. You can then later re-use that Snapshot in a future filter operation. For example, if you made a set of changes to a specific selection of records, you can recall that same set of records in order to send an email communication, or run a report specific to the selection.

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

Create Data Snapshot

☒ Create New

Name

Remove After

☐ Append to existing

☐ Replace existing

Clear

Save

