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.

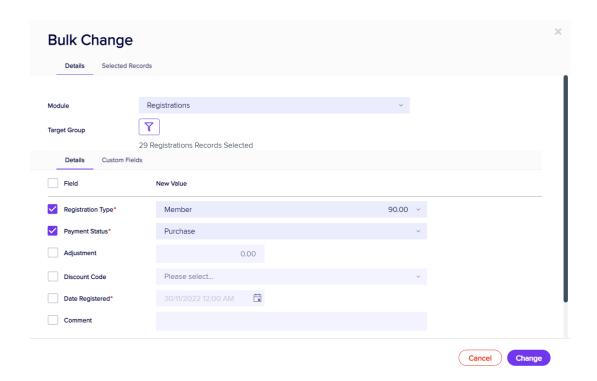
You can change items from all available modules, and within each module choose what can be changed (swap one item for another, change payment status, amend the amount, number of items, dates and much more).

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.

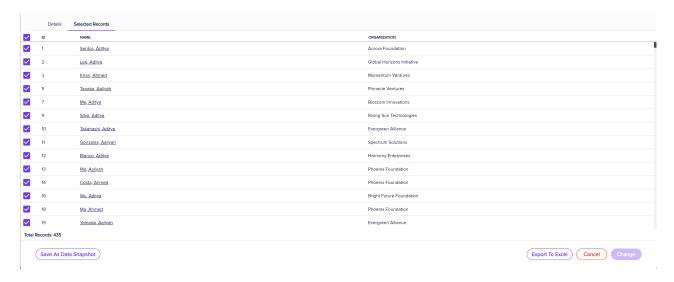
Like most Express Actions, you have full search and filtering capabilities so you can accurately target the contact records you want to change.

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:



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.



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.

