JOBZ! **Printing Sales Software**

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Replace Field Contents

There are times when you might want to make the same change to an entire set of records. For example, to change the assigned sales rep on 50 different contacts. Well, actually, there is a button for managers to use to reassign the sales rep on any number of contacts at once. Or maybe you need to change the address on all ten contacts in a company. Well, actually you can do this by pulling down Action > Change Common Data. But what if you need to change something on a whole bunch of jobs or contacts that we haven't made a button for?

You can, if you have Management access. It is called the Replace Field Contents command, and it is so powerful that we only allow managers to do it. For one thing, it can't be un-done. And it can change all the records in the database, permanently. Can you imagine if all ten thousand contacts are re-named John Doe? (By the way, if this happens we can help you do an emergency restore from last night's backup, so let us know right away if you really screw up.)

But if you are careful, and know what you are doing, it can save you a lot of time. Just follow these directions:

Let's say you have 16 jobs that all need the job title to be changed from "2009 Calendar" to "2010 Calendar." And let's say you don't want to click through every job and type or paste the change into each job.

First, make sure you have just those jobs "Found" that need to be changed. If you are not comfortable with what this means then stop now- you need basic training.

Next, on one of those 16 jobs (any one) click into the field that is to be changed on all the found records, and make it the way you want all of them to be. In our example here, we click into the job title field and make it say "2010 Calendar."

Then pull down Scripts, Manager Access (#1) to invoke management menu commands, which will not appear to do anything, but it will cause the Replace Field Contents command to appear in the Records menu.

Next, pull down the Records menu (it is called Jobs or People, depending on where you are) and invoke the Replace Field Contents command. Note that it will prompt you with exactly what will happen if you proceed. Just click Replace and all of the 16 jobs will be renamed "2010 Calendar."

The only way this can go wrong is if you don't read the dialog box, and you happen to be in the wrong field by accident, so pay attention. Don't do this when you are distracted.