Changing Field Values with Mass Change

In Mass Change, you can replace the data in a selected field with new information. You can change records based on search results, filter results, or a selection. To learn more, see the examples in the Additional Field Information.

> ⊘ **Make a Backup**
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> We recommend performing a manual backup before using the Mass Change feature. A current backup is the only way to be sure you can "undo" the changes in case of a mistake.

1. Select your data prior to entering Mass Change. This means processing a search or applying a filter to find the records you want to change. If you are replacing particular values, or changing all records, this step won't be necessary.
2. **Optional:** Set up new values in Define Lists, if needed. You cannot enter new values while in Mass Change.
3. Under Manage Records, click the **Tasks** tab.
4. In the drop-down list, select **People Mass Change** or **Organizations Mass Change**, then click **Go** .
5. Under **Change Mode**, select **Change Field Value**.
6. Under **Available Fields**, select the field you want to change.
7. Under **Include**, select which records to include in the change. To learn about each option, see the Additional Field Descriptions below.
8. **Optional:** If you select **Change Records that Match selection below**, in the **Value to Change** field, select or enter the field value you want to change.
9. In the **New Value** field, select or enter the new field value for the selected field, then click **Change**.
10. When the confirmation message displays, click **Yes**.
11. Click **OK**, then **Close**.

Additional Field Information

Change Records that Match Search Results
All records from your most recent search will be changed to include the new information. Old values or empty cells will be replaced with the new data.

For example, suppose you have created an additional field to assist the Stewardship Team with the Building Fund campaign. Each week, the fields are updated to indicate the giver status. Each week, you run a search to determine who meets "Leadership Giving" (such as a pledge of $5,000 or more to the Building Fund). You then Mass Change the additional list field to enter "Leadership" into those records.

Change Records that Match Filter Results
All records from your filter will be changed to include the new information.

For example, suppose you created a filter to show all records where Gender was left blank. You manually edited the filter results so you were sure you had only males on the list. You then did a mass change to enter Male into the Gender Field for records that match filter results. Then you filter again for all records with blank gender fields. These are the Females, so you do another Mass Change to enter Female into all those records.

Change Records that Match selection below
This option replaces one selection with another.

For example, suppose you have an additional category for employer. The local bank, formerly named First Trust, is now called Reliance Bank. You mass change with the option to Change Records that Match Selection Below, replacing "First Trust" with "Reliance Bank". You could also use this option to mass change individuals with a phone type of Work to a phone type of Business.

Change All Records
All records, regardless of whether any data is currently in the selected field, will be changed to include the new information.