



Article # 1245

Technical Note: Utilizing the Mass Search and Replace function to Update Customer Records

Difficulty Level: Beginner Level AccountMate User

Version(s) Affected: AccountMate 7 for SQL and Express, AccountMate 6.5 for SQL and MSDE, and AccountMate 6.5 for LAN

Module(s) Affected: CM

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DESCRIPTION

Your customers' profiles change over time; thus, it is inevitable to update regularly your customers' records; however, updating multiple customer records can become tedious and time consuming. For example, if you change the warehouse from which you ship goods to a certain group of customers, you must update the warehouse assigned to each affected customer record. Rather than updating multiple customer records one at a time, you can use the Mass Search and Replace function in the Contact Manager module to update multiple customer records simultaneously. You achieve the same results in less time with the least effort.

This document discusses how to best use the Mass Search and Replace function in quickly and simultaneously updating multiple customer records. This document also enumerates the affected AccountMate reports and table.

SOLUTION

The following paragraphs discuss how to use the Mass Search and Replace function to update data in one or more fields for all customers who qualify under certain filter criteria.

1. Access the Contact Manager module.
2. From the Transactions menu access the Mass Search and Replace function.
3. Enter a valid filter number that filters the customer records you wish to update.

Note: *You can access a contact filter only if you have access rights. The contact filter's criteria and access rights are set up in the Contact Filter Maintenance function.*

4. In the Criteria tab carefully review the values in the following fields:

- Field Name – this shows the name of the field used as filter.
- Comparison – this displays the comparison clause that the system uses to compare the value in the chosen field used as filter and the value in the Compare To column.
- Compare To – this shows the value being used for the comparison.

Note: This tab shows read-only information; thus, if you wish to change the criteria, update the contact filter record.

5. Go to the Replace tab, and perform these steps:
 - 5.1 In the Field Name column click the List box button and select the field which values you wish to replace.
 - CAUTION:** If you specified a field name, be sure to enter a value in the Replacement field unless your intention is to delete the selected field's value; otherwise, that field will be blank in all the customer records included in the filter.
 - 5.2 Enter in the Replacement column the value that you wish to replace the specified field's current values in the affected customer records.
 - 5.3 Repeat steps 5.1 and 5.2 for each field value you wish to replace.
6. Click the Start button.
7. When a message appears requesting confirmation to proceed in searching and replacing the values in the customer records, click Yes to confirm and to initiate the search and replacement process; otherwise, click No.
8. When the replacement is successful, a message is displayed informing you the number of customer records that are updated. Click OK to close the message window.

After the mass update of customer records, you may verify the updated customer data by generating the following Customer Reports:

- Customer Listing
- Customer Credit Limit and Discount Listing
- Customer Contact Listing
- Customer Additional Address Listing

When you use the Mass Search and Replace function to update the customer records, AccountMate updates the selected fields in the Customer table (ARCUST) only.

Understanding how to best use the Mass Search and Replacement function in updating customer records saves you a lot of time and effort and thus helps you maintain your customer records more efficiently and effectively.

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