



CHANGING FIELD CONTENT FOR MULTIPLE RECORDS

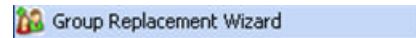
This Riata™ CRM Wizard is used to change the content of a field in multiple customer records. A typical example is to re-assign a different sales person to a selected group of customer records.

Group Replacement Wizard

The **Group Replacement** wizard is used to set the value of a field to a new value for a group of selected contacts. The **Group Replacement** wizard makes this a very simple process and will walk you through the process one step at a time. To access the **Group Replacement** wizard, from the pull-down menus, select **Wizards | Group Replacement wizard**. For example, if you want to change the salesperson field for all contacts in California to "TEST", the Group Replacement wizard will make this a quick and easy task.

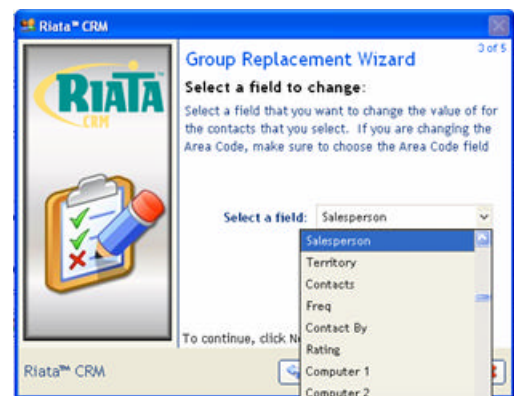
In the **Group Replacement** wizard, the first step is to select the contacts that you want to update. In our example, we can use the Quick search to select contacts where the state equals "CA".

You can use any of the searches to select your contacts. Remember, **if you already have a search in effect, you can press the Next button and it will be used. If you do not have a search in effect, all contacts will be selected for the wizard.**



The second step in the **Group Replacement** wizard is to select the field whose value you want to set or change. In our example, we would want to select Salesperson.

To access the field names, click on the down arrow to the right of the select a field drop-down list box.



The third step in the **Group Replacement** wizard is to enter in the new value for the field. In our example, we want to enter in "TEST" for the salesperson field. An example of the wizard screen is shown below. Hint: the entry here is case sensitive; enter the data exactly the way you want it displayed.



The next and final step in the **Group Replacement** wizard is to confirm your field selection, value to set, and number of contacts that will be updated. An example of this wizard screen is shown below.



Make sure to verify your settings before pressing the Start button. If you only wanted to update a few contacts, and the contacts selected is a larger number, this is an indication that you need to review your settings using the Back button.

After pressing the **Start** button, your contacts will be updated with the new value you entered, and the contact history file will be updated for each of the contacts. During the group replacement process, a dialog showing the progress will be displayed. When finished, press the Close button to exit the wizard. An example of the progress screen is shown below:



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