

# Batch Edit Customers

Last Modified on 06/17/2024 9:37 am CDT

The Batch Edit Customers function in Admin Utilities is used to edit several areas of the Customer file without opening Customer files one at a time. Multiple Customers can be selected to edit at the same time.

	Cust ID	Name	Tax Rate	Pricing Level	Sales Person	Tax Status	MeppellID	MeppResa	ResellerID	Cross Ref4	County	Date Opened	Credit Limit	Location	Finance Charge%	<State Tax
1	235879	Alisia Adkin	999.000...	List Price	BarFra	<input checked="" type="checkbox"/>	AdkAli					07/10/2017	0	00...	0.00	
2	237018	Abby Laken	999.000...	List Price	Farbre	<input checked="" type="checkbox"/>	AbeLak					08/11/2015	1000000	00...	0.00	
3	238072	John Ady	999.000...	List Price		<input checked="" type="checkbox"/>	AdyJan					07/06/2017	75000	00...	0.00	
4	239634	Raul Ableman	999.000...	List Price		<input checked="" type="checkbox"/>	AbiRau					09/25/2017	3500	00...	0.00	
5	239809	Ken Aikins	999.000...	List Price		<input checked="" type="checkbox"/>	AikKim					04/09/2015	75000	00...	0.00	
6	239873	Larry Baker	999.000...	List Price	CroJam	<input checked="" type="checkbox"/>	BakLarr					12/18/2002	25000	00...	0.00	IL
7	AndBa	Barry Anderson	999.000...	List Price	Farbre	<input checked="" type="checkbox"/>						05/31/1992	75000	00...	5.00	
8	ConTo	Tony Cone	999.000...	List Price	BeanSt	<input checked="" type="checkbox"/>						12/18/2002	25000	00...	0.00	

1. To access the utility, go to *Hub / Utilities / Admin Utilities / Hub / Batch Edit Customers*.
2. Choose to *Manually Select Customers* or *Automatically Select Customers based on a Filter* by selecting an option in the *Filter By* drop-down and optionally entering a value in the *Where value is* field.

**Note:** When *Filter By* is set to *Pricing Level*, the following numbers entered in the *Where value is* field searches for the specific *Price Level* numeric value:

- o 0 – List Price
  - o 1 - 8 – User-Defined Price Levels 1 - 8
  - o 9 – Average
  - o 10 – Last
  - o 11 – Replacement
  - o 12 - 27 – User-Defined Price Levels 9 - 24
  - o 28 – Estimated Average
3. Make the appropriate changes in the grid, editing several Customer settings with this utility. Select **Save**.
    - o Customer Sales Tax Rate
    - o Pricing Level
    - o Salesperson
    - o Sales Taxable Status
    - o Customer Cross-Reference Text Boxes

- County for the Customer
- Date Opened
- Customer Credit Limit
- Location
- Finance Charge %
- State Tax code
- Adj Tax code
- Last Reviewed Date
- Credit Line
- Credit Line Name
- Credit Line \$ Amount