Bulk Edit

Speech	Cursor Actions
Bulk edit lets you change multiple records at once.	
It's a really handy tool, and can be used in many lists in Sumac.	Show Sumac console.
Let's use the Contact List for this example.	Open Contacts list.
Perhaps you want to standardize the way you enter states and provinces. But in the past, data has been entered inconsistently,	
for example, some people used NV, others used the whole name: Nevada.	Point to NV and then Nevada under Residence State.
To find all contacts with Nevada listed as their state, do a field search by residence state is equal to Nevada,	Choose "Field Search" from the Search Type drop-down menu. Choose "Resident State." Choose "Is equal to." Type "Nevada."
then select the contacts and click Bulk Edit.	Expand Special Editing, and click Select All. Click Bulk Edit.
Read and click the confirmation dialogs that appear.	Click Selected, then Continue.
Tell Sumac whether you are changing contact types, communication preferences, volunteer types, or other fields.	Point to each field.
Choose other fields to open a new window that asks you what should be changed.	
You can set each field to a new value, or clear the values currently in the field, for all the selected contacts.	Point to New Value, then Clear Existing Values.
Enter the new state as NV.	Write "NV" next to Resident State.
When you click OK,	Click OK.
Sumac shows you all the values that are currently in each field that is being changed, in this case Nevada.	Point to "Nevada."
Click "OK" and Sumac changes all the contact records as specified.	Click OK.
You can see that now those contacts have NV listed as their state.	Show "NV" in highlighted entries.
You may also find bulk editing handy in the communications list, donations list and more.	
Check out more training videos to learn more about Sumac.	