The QuickBooks® Client Newsletter

The QBC

Helping You Grow A Profitable Business with QuickBooks® Software

July 2011

Add/Edit Multiple List Entries Simplifies Record Changes

Data entry and modifications in QuickBooks can be tedious. Beginning with QuickBooks 2010 Pro Edition and above, that job got a lot easier. The **Add/Edit Multiple List Entries** tool does just what its name implies: It lets you add entries to your lists of customers, vendors, services, inventory parts, and non-inventory parts. It also makes changing one or several of them quick and easy.

Using this feature, you can:

- See customized views of your list data

- Enter missing information

- Create new entries from duplicates of existing ones

- Do a mass change of a whole column

- Copy and paste records from Excel

There are myriad applications for this tool. You could use it, for example, when you're changing Preferred Vendors for a group of items and you don't want to have to edit each individual item record. Or when the area code for select customers or vendors has changed. You could use it if you're adding an inventory item that's just slightly different from another, or when your accountant tells you to change the name of an account.

Building the perfect view

To get started, click **Lists | Add/Edit Multiple List Entries**. In the screen that opens, click the arrow next to the **List** box and select the type of data you want to see, like **Customers**. Then select the group that you want displayed by dropping the **View** list down. Click the **Customize Columns** button. This window opens:
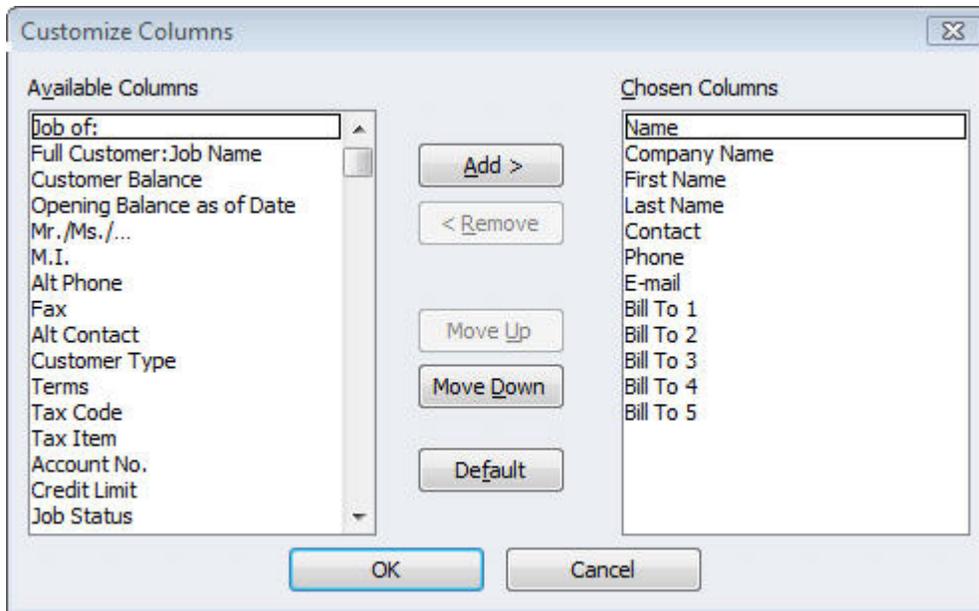
Figure 1: Make sure your columns are correct and in the right order.

The list on the left represents all possible column labels. To make the list on the right reflect what you want to see in your table, highlight the correct item and use the **Add>** or <**Remove** buttons and the **Move Up** or **Move Down** buttons. When you're satisfied, click **OK**. The table will change to display those columns in that order.

TIP: You may have a lot of empty space between columns. To close those gaps, put your cursor on the faint vertical line that separates two column names. A cross-like symbol will appear. Drag it left or right until the columns are positioned well.

Let's say that a customer commissions a new job. Since so much information will remain the same as in previous jobs, you can duplicate her record. Highlight the last entry in her list of jobs and right-click. Select **Duplicate Row**. The new entry will contain her default information, except the name will change to **DUP [NAME OF PREVIOUS JOB].** Change that phrase to the name of the new job and click **Save Changes** if you're done.
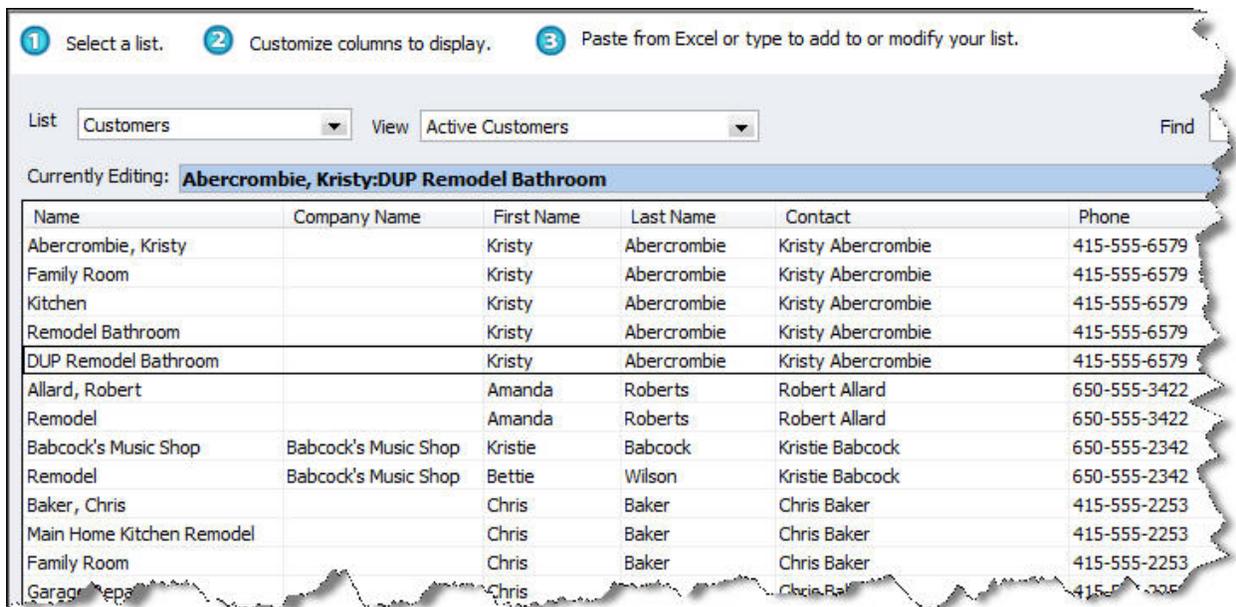
Figure 2: It's easy to duplicate an entry's information.

Mass changes

You may occasionally want to make the same change to a subset of records. Say a city's zip code changed and you want to find the customers affected. You'd open the **Customers** list, click on the **View** arrow and select **Custom Filter**. Then:

- In the **Search** list, choose from All, Active, etc.

- In the **For** box, enter the common attribute, like the zip code.

- Click on the arrow next to the **in** box, and tell QuickBooks where you want to search (address fields, all common fields, etc.).
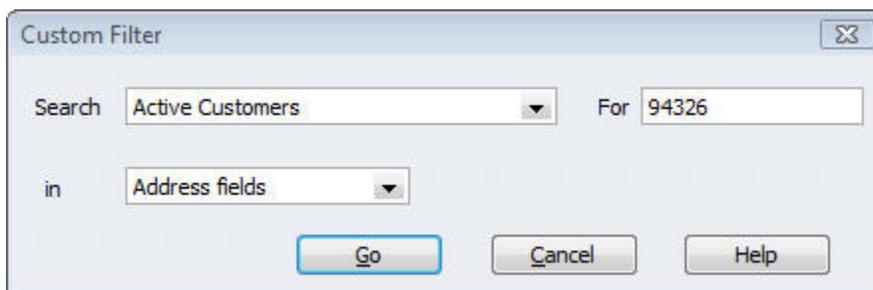

Figure 3: You can search for a group of entries that share a common characteristic.

- Click **Go**. QuickBooks will display a list of all of the matching entries.

- Make your change to the entry at the top of the list, then right-click on it. You'll see this menu:

Bill To 2	Bill To 3	Bill To 4
5647 Cypress Hill Rd	Bayshore CA 94326	
5647 Cypress Hill Rd	Bayshore CA 94	Undo Typing
5647 Cypress Hill Rd	Bayshore CA 94	
5647 Cypress Hill Rd	Bayshore CA 94	Cut
5647 Cypress Hill Rd	Bayshore CA 94	Copy
415 W. Desert Bloom	Bayshore, CA 9	Paste
415 W. Desert Bloom	Bayshore, CA 9	
415 W. Desert Bloom	Bayshore, CA 9	Select All
415 W. Desert Bloom	Bayshore, CA 9	
8753 S. Mountain View	Bayshore, CA 9	Insert Line
8753 S. Mountain View	Bayshore, CA 9	Delete Line
910 S. Ivy	Bayshore, CA 9	Customize Columns...
910 S. Ivy	Bayshore, CA 9	
5920 N. Lighthouse	Bayshore, CA 9	Copy Down
5920 N. Lighthouse	Bayshore, CA 9	Duplicate Row
5920 N. Lighthouse	Bayshore, CA 9	Clear Column
5960 N. Wetmore	Bayshore, CA 94326	
5960 N. Wetmore	Bayshore, CA 94326	
3442 W. Charleston	Bayshore, CA 94326	
3442 W. Charleston	Bayshore, CA 94326	
	CA 94326	

*Figure 4: The **Copy Down** command changes all entries in a column to match the top one.*

When you select **Copy Down**, all of the entries duplicate the first one in the list.

Some housekeeping

Anything you change in these views – as long as you click **Save Changes** – will be reflected throughout QuickBooks, wherever that record appears. If you've made an error, like using a dollar sign, you'll get a message telling you to fix it.

You can use Add/Edit Multiple List Entries in other ways. For example, it's a good way to see how thorough your recordkeeping is. Take a look at your lists occasionally to spot missing data. Or say you were at a trade show and signed up new customers, but you didn't have QuickBooks on your laptop so you entered them in Excel. Once you've made sure that your column names and order in Excel match those displayed in Add/Edit Multiple List Entries, you can just copy and paste the new customers in.

This feature is easy to use, but be cautious. We can help with complex modifications. Add/Edit Multiple List Entries is one of the ten best features QuickBooks has incorporated in recent years. It's an easy way to get a birds' eye view of your lists, and a great time-saver.