

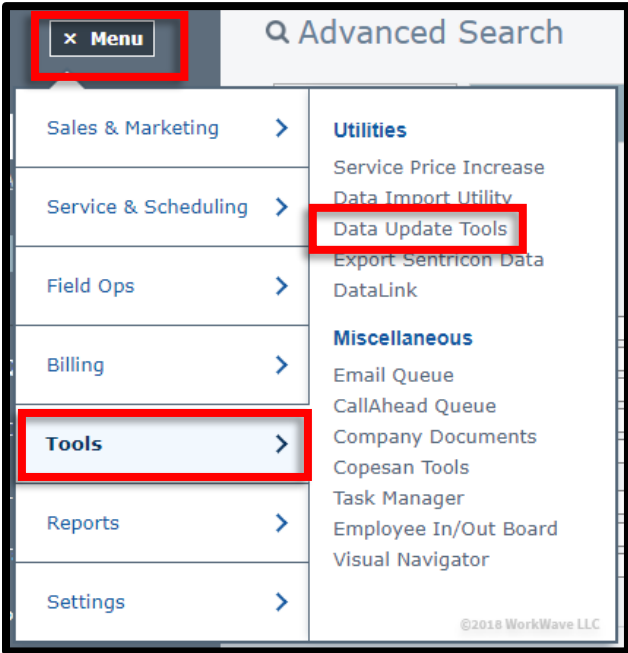
Data Update Utility

The Data Update Utility allows you to mass update data fields for Location, Bill-To, Service Setup, Service Order, Invoice, Invoice History, and Location Documents using a Location list.

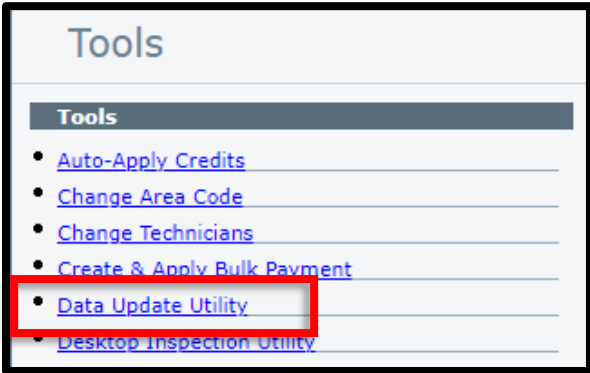
Note: Prior to using the utility, you need to create a list of the accounts you want to update. Please refer to the [List Management](#) document for more information.

To use the Data Update Utility, complete the following steps:

1. Go to *Menu > Tools > Data Update Tools*.



2. Select *Data Update Utility*.



3. For Selection Criteria, choose the relevant Location List and Data Table. For Update Data, select the relevant options.

Data Update Utility

Note: It is highly recommended to run large data updates (1000+ records) after normal business hours to prevent freezing and other performance issues within the software.

Selection Criteria

Location List: All customers ▼

Data Table: Bill-Tos ▼

Update Data

Data Field: Automated E-Mail Inspection Reports ▼

Match Old Value On: Any Blank Specified

New Value:

Note that Match Old Value On is set to *Specified* as the default. Select *Specified* if you want the utility to make an update to a specific old value using a specific new value. For this option, both Old and New Values need to be populated.

Select *Any* if you want the utility to make an update to a new value regardless of what the old value was. For this option, only the New Value field needs to be populated.

Select *Blank* if you want the utility to make an update to a new value only if the old value was blank or did not have a value. For this option, only the New Value needs to be populated.

If the field is a checkbox instead of a drop-down, you will see Old Value and New Value checkboxes rather than data fields.

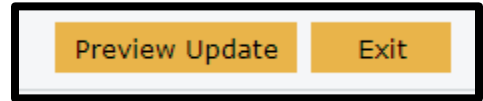
Also note that there are certain data fields (e.g., city) that will show the Old Value and New Value as open text fields where you have to manually type the values.

What are you updating?	Selections
Bill-Tos	<ul style="list-style-type: none"> List: Bill-Tos Data Table: Bill-Tos (Example) Data Field: Automated Email Inspection Reports (Example) Match Old Value On: Any (Example) Check New Value

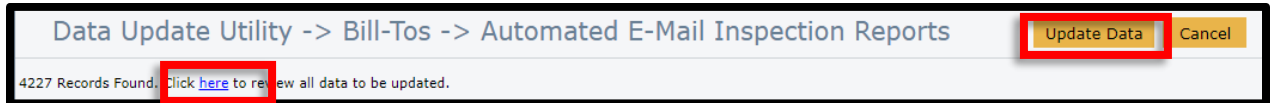
Locations	<ul style="list-style-type: none"> • List: Locations • Data Table: Locations • (Example) Data Field: Automated Email Inspection Reports • (Example) Match Old Value On: Any • (Example) Check New Value
Service Setups	<ul style="list-style-type: none"> • List: Service Setups • Data Table: Service Setups • Service Code (if you want to limit the update to Service Setups with a specific Service Code) • (Example) Data Field: Target • (Example) Match Old Value On: Any • (Example) New Value: ANTS (or another Target Pest)
Service Order	<ul style="list-style-type: none"> • List: Service Order • Data Table: Service Orders • Service Code (if you want to limit the update to Service Setups with a specific Service Code) • Starting and Ending Work Dates (if you want to limit the update to Service Orders within a specific work date range) • (Example) Data Field: Duration • (Example) Match Old Value On: Any • (Example) New Value: 00:30 (or another Duration)
Invoice	<ul style="list-style-type: none"> • List: Invoice Data • Data Table: Invoices • Service Code (if you want to limit the update to Service Setups with a specific Service Code) • Starting and Ending Work Dates (if you want to limit the update to Service Orders within a specific work date range) • (Example) Data Field: Terms • (Example) Match Old Value On: Specified • (Example) Old Value: NET 30 • (Example) New Value: COD (or other Terms)
Invoice History	<ul style="list-style-type: none"> • List: Invoice History • Data Table: Invoice History • Service Code (if you want to limit the update to Service Setups with a specific Service Code) • Starting and Ending Work Dates (if you want to limit the update to Service Orders within a specific work date range) • (Example) Data Field: PO#

	<ul style="list-style-type: none">• (Example) Match Old Value On: Specified• (Example) New Value: 5788M (or another PO#)
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4. Click the *Preview Update* button, and click the blue link to review the data.



5. The file will download to your computer where you can open it to view or save it for reference. After you have reviewed the file, click the *Update Data* button.



6. Click *OK* in the popup.



7. When finished, the screen will refresh and show that the update has been completed.

REMEMBER: For additional setup, training, and usage resources for FREE, including live webinars and a robust video library, please visit [PestPac University](#).