

Tech Tip Tuesday— May 9, 2023

Globally Changing Company Name

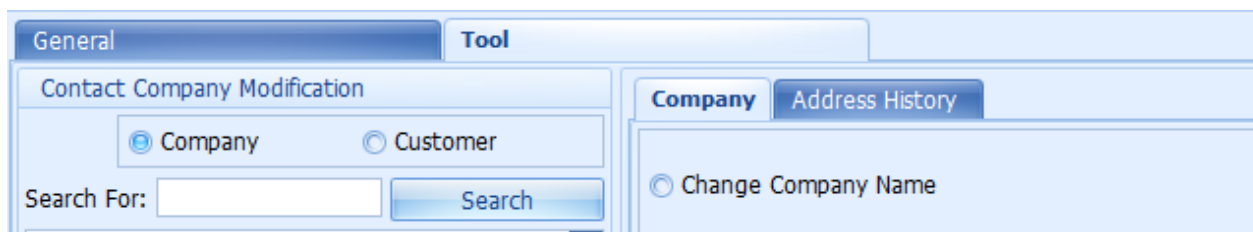
As you know, Livery Coach doesn't have a separate entry form to set up Company names. When you create the first contact for a company, if the company name doesn't exist on the drop-down, you can just type in a new company name and it will appear on the dropdown for the next time.

However, sometimes there are situations that arise where you end up with the company name being entered two different ways, and you want to fix it. Or, a company changes its name.

The "manual" way is, of course, to just go to every contact with the old or wrong name and change it (using the dropdown) to the correct name. That's fine if there are only a few...but this can be tedious if you have a lot of contacts to change.

Fortunately, there is an easier way.

Simply navigate to Setup->Maintain->Company List, and select the Tool tab.

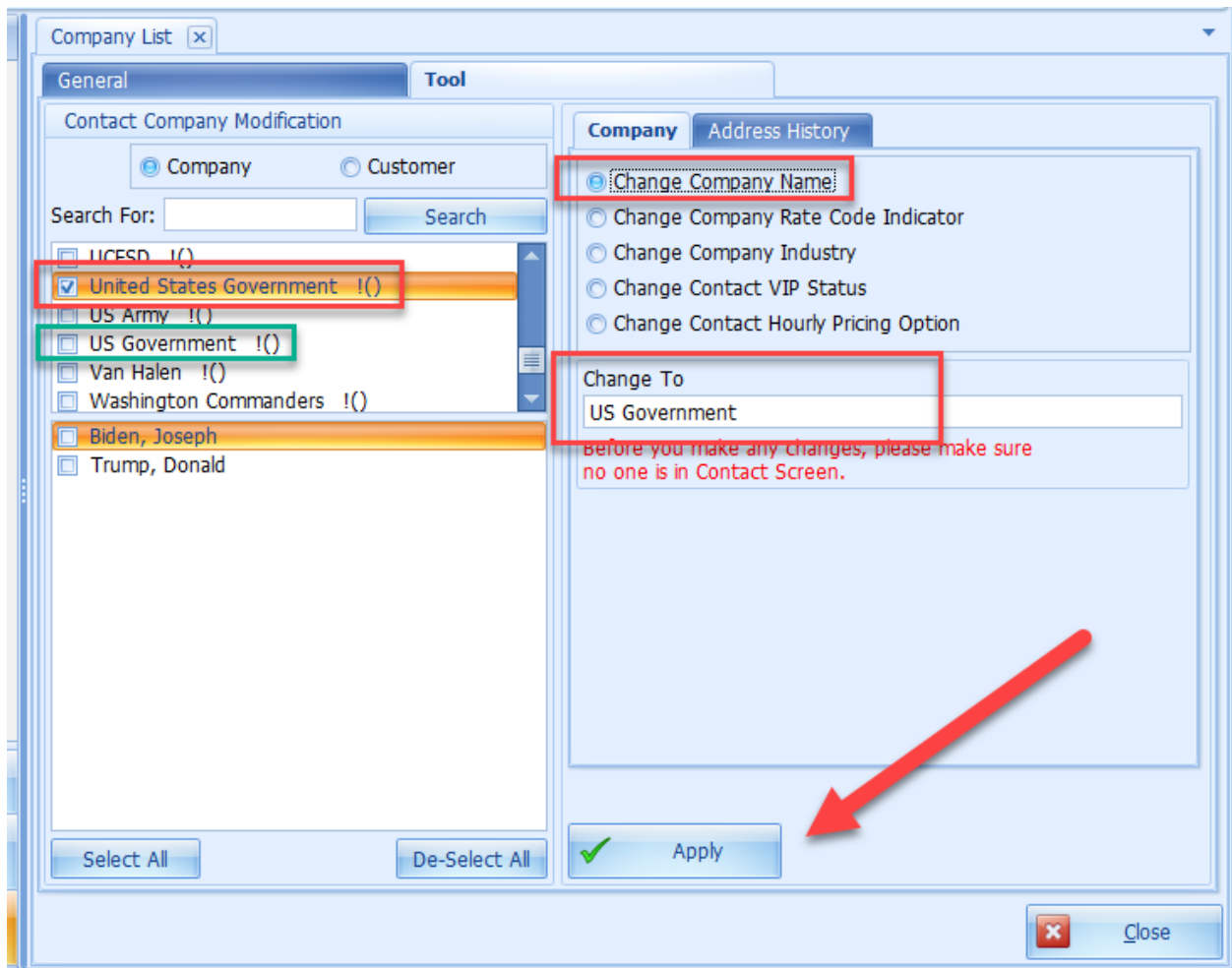


Then, on the left side, you can either type the beginning of the name you are looking for, or simply scroll down to find it. Once found, select it.

You may note that when you select a Company Name, you will see a list of all the contacts below that name—this is for informational purposes only, and you do not need to select any or all of these names to effect the Company Name change.

Once selected, enter the new name in the Change To field, and click Apply. Note that you can change the name to an existing name, which has the effect of merging the company names, as in our screen shot example below.

CAUTION: THERE IS NO UN-DO—SO BE CAREFUL!



Once you click Apply, your change is complete.