

# Mass Update Multiple Opportunity Records

## Please Note!

If you need to update the win or loss stage of a list of opportunities and you are requiring a win or loss reason to be entered by the sales rep, the opportunities will not update! Please review [step 4 of this article](#) to learn more about win/loss requirements. You will need to set the **Require Win/Loss Reason?** to **No**

### Win & Loss Stages

Win Stage:

Win Reasons:

Require Win Reason? Yes  No

Loss Stage:

Loss Reasons:

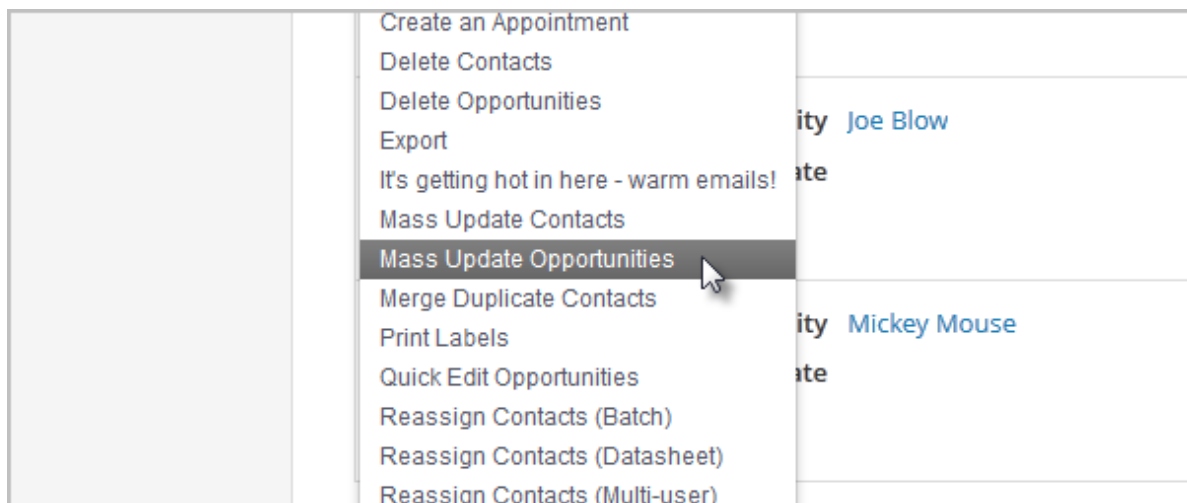
Require Loss Reason? Yes  No

You can mass update the following information for a list of opportunity records:

- Opportunity Title

- Owner (e.g. Sales Rep)
- Next Action Date
- Next Action Notes
- Stage ID
- Estimated Close Date
- Include in Forecast
- Win Reason
- Loss Reason
- Projected Revenue High
- Projected Revenue Low
- Free Trial Days
- Pay Plan ID
- Offer Expires
- Opportunity Record Custom Fields

1. Go to **CRM > Opportunities** in the main navigation menu
2. Search for the opportunity records you want to update
3. Click on the **Actions** button and select **Mass Update Opportunities** from the drop-down



4. Mark the checkbox beside the field(s) you need to update, and enter the new value for that field  
 Note: The new value will override any existing values for these opportunities.

Update?	Field	Value
<input type="checkbox"/>	Opportunity Title	
<input checked="" type="checkbox"/>	Owner	<div style="border: 1px solid black; padding: 2px;"><div style="border-bottom: 1px solid black; padding: 2px;">Please select an owner <span style="float: right;">▼</span></div><div style="padding: 2px;">Please select an owner</div><div style="padding: 2px; background-color: #0070C0; color: white;">Martin Cash</div><div style="padding: 2px;">Mike Bast</div></div>
<input type="checkbox"/>	Next Action Date	
<input type="checkbox"/>	Next Action Notes	
<input type="checkbox"/>	Stage ID	

5. Click on the **Process Action** button to permanently update the opportunities

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