

Mass updating Pro for Creatio user guide

Recommendations

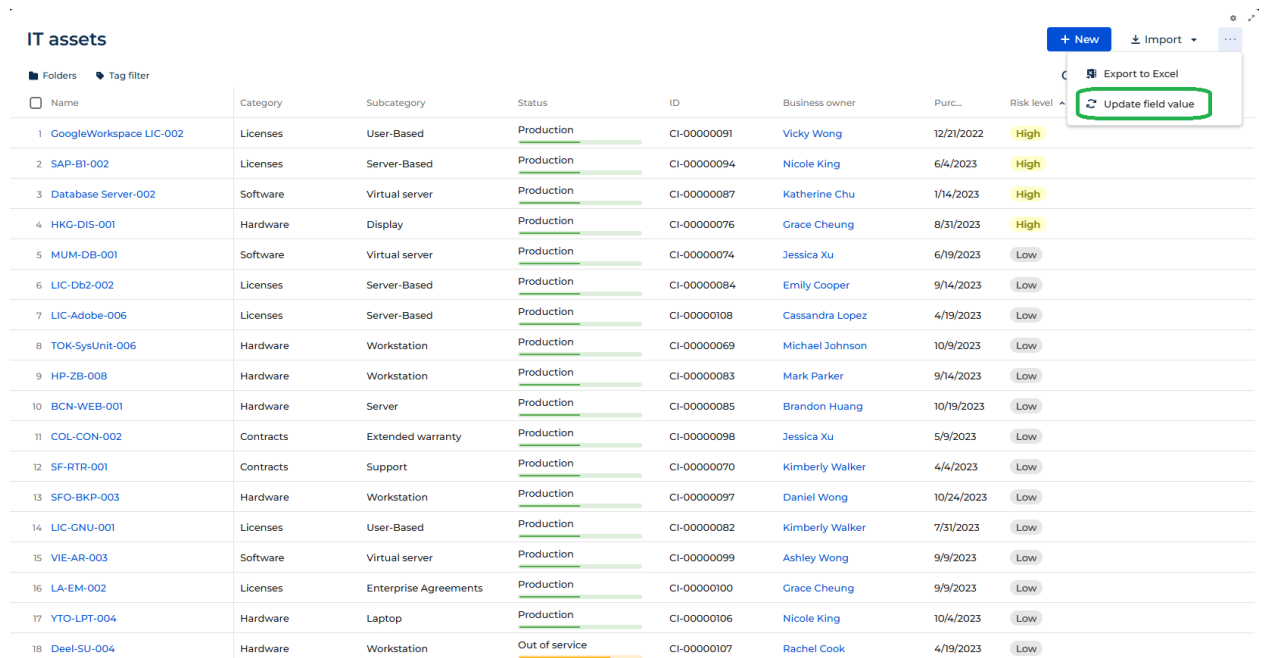
Before starting work with the product, it's recommended to:

- Re-login
- Enable **"Enable live data update"** in the section objects

Next, on the list of section records, you will see "Update field value" button available under the three-dot menu.

Field updates work with:

- Selected records
- Filter group
- Filter group + selected records *combined*
- All records, if neither records are selected nor a filter group is applied



Name	Category	Subcategory	Status	ID	Business owner	Purchased date	Risk level
1 GoogleWorkspace LIC-002	Licenses	User-Based	Production	CI-00000091	Vicky Wong	12/21/2022	High
2 SAP-BI-002	Licenses	Server-Based	Production	CI-00000094	Nicole King	6/4/2023	High
3 Database Server-002	Software	Virtual server	Production	CI-00000087	Katherine Chu	1/14/2023	High
4 HKG-DIS-001	Hardware	Display	Production	CI-00000076	Grace Cheung	8/31/2023	High
5 MUM-DB-001	Software	Virtual server	Production	CI-00000074	Jessica Xu	6/19/2023	Low
6 LIC-Db2-002	Licenses	Server-Based	Production	CI-00000084	Emily Cooper	9/14/2023	Low
7 LIC-Adobe-006	Licenses	Server-Based	Production	CI-00000108	Cassandra Lopez	4/19/2023	Low
8 TOK-SysUnit-006	Hardware	Workstation	Production	CI-00000069	Michael Johnson	10/9/2023	Low
9 HP-ZB-008	Hardware	Workstation	Production	CI-00000083	Mark Parker	9/14/2023	Low
10 BCN-WEB-001	Hardware	Server	Production	CI-00000085	Brandon Huang	10/19/2023	Low
11 COL-CON-002	Contracts	Extended warranty	Production	CI-00000098	Jessica Xu	5/9/2023	Low
12 SF-RTR-001	Contracts	Support	Production	CI-00000070	Kimberly Walker	4/4/2023	Low
13 SFO-BKP-003	Hardware	Workstation	Production	CI-00000097	Daniel Wong	10/24/2023	Low
14 LIC-GNU-001	Licenses	User-Based	Production	CI-00000082	Kimberly Walker	7/31/2023	Low
15 VIE-AR-003	Software	Virtual server	Production	CI-00000099	Ashley Wong	9/9/2023	Low
16 LA-EM-002	Licenses	Enterprise Agreements	Production	CI-00000100	Grace Cheung	9/9/2023	Low
17 YTO-LPT-004	Hardware	Laptop	Production	CI-00000106	Nicole King	10/4/2023	Low
18 Deel-SU-004	Hardware	Workstation	Out of service	CI-00000107	Rachel Cook	4/19/2023	Low

Screenshot 1. Button "Update field value"

Example 1:

We selected several records whose **Risk level** we wanted to update, and applied the change through the “Update field value” option.

IT assets

+ New Import

Search

Name	Category	Subcategory	Status	ID	Business owner	Purc...	Risk level
☒ MUM-DB-001	Software	Virtual server	Production	CI-00000074	Jessica Xu	6/19/2023	Low
2 SAP-BI-002	Licenses	Server-Based	Production	CI-00000094	Nicole King	6/4/2023	Low
3 Database Server-002	Software	Virtual server	Production	CI-00000087	Katherine Chu	1/14/2023	Low
4 LIC-Db2-002	Licenses	Server-Based	Production	CI-00000084	Emily Cooper	9/14/2023	Low
5 LIC-Adobe-006	Licenses	Server-Based	Production	CI-00000108	Cassandra Lopez	4/19/2023	Low
☒ HP-ZB-008	Hardware	Workstation	Production	CI-00000083	Mark Parker	9/14/2023	Low
7 BCN-WEB-001	Hardware	Server	Production	CI-00000085	Brandon Huang	10/19/2023	Low
8 COL-CON-002	Contracts	Extended warranty	Production	CI-00000098	Jessica Xu	5/9/2023	Low
9 HKG-DIS-001	Hardware	Display	Production	CI-00000076	Grace Cheung	8/31/2023	Low
10 SFO-BKP-003	Hardware	Workstation	Production	CI-00000097	Daniel Wong	10/24/2023	Low
11 LIC-GNU-001	Licenses	User-Based	Production	CI-00000082	Kimberly Walker	7/31/2023	Low
12 LA-EM-002	Licenses	Enterprise Agreements	Production	CI-00000100	Grace Cheung	9/9/2023	Low
☒ YTO-LPT-004	Hardware	Laptop	Production	CI-00000106	Nicole King	10/4/2023	Low
14 Deel-SU-004	Hardware	Workstation	Out of service	CI-00000107	Rachel Cook	4/19/2023	Low
15 GoogleWorkspace LIC-002	Licenses	User-Based	Production	CI-00000091	Vicky Wong	12/21/2022	Medium
16 ActiveDirectory-SRV-014	Hardware	Server	Production	CI-00000161	Kevin Wright	7/1/2024	Medium
17 Network Uptime SLA-008	Contracts	Professional services	Production	CI-00000171	Kimberly Walker	12/31/2023	Medium
18 HW-00012345	Hardware	Laptop				9/12/2023	Medium

3 selected Add tag Export to Excel Delete

Screenshot 2. Selected records

Result:

Only the chosen records had their **Risk level** field updated.

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Name	Category	Subcategory	Status	ID	Business owner	Purc...	Risk level
☒ MUM-DB-001	Software	Virtual server	Production	CI-00000074	Jessica Xu	6/19/2023	High
☒ HP-ZB-008	Hardware	Workstation	Production	CI-00000083	Mark Parker	9/14/2023	High
☒ YTO-LPT-004	Hardware	Laptop	Production	CI-00000106	Nicole King	10/4/2023	High
4 SAP-BI-002	Licenses	Server-Based	Production	CI-00000094	Nicole King	6/4/2023	Low
5 Database Server-002	Software	Virtual server	Production	CI-00000087	Katherine Chu	1/14/2023	Low
6 LIC-Db2-002	Licenses	Server-Based	Production	CI-00000084	Emily Cooper	9/14/2023	Low
7 LIC-Adobe-006	Licenses	Server-Based	Production	CI-00000108	Cassandra Lopez	4/19/2023	Low
8 BCN-WEB-001	Hardware	Server	Production	CI-00000085	Brandon Huang	10/19/2023	Low
9 COL-CON-002	Contracts	Extended warranty	Production	CI-00000098	Jessica Xu	5/9/2023	Low
10 HKG-DIS-001	Hardware	Display	Production	CI-00000076	Grace Cheung	8/31/2023	Low
11 SFO-BKP-003	Hardware	Workstation	Production	CI-00000097	Daniel Wong	10/24/2023	Low
12 LIC-GNU-001	Licenses	User-Based	Production	CI-00000082	Kimberly Walker	7/31/2023	Low
13 LA-EM-002	Licenses	Enterprise Agreements	Production	CI-00000100	Grace Cheung	9/9/2023	Low
14 Deel-SU-004	Hardware	Workstation	Out of service	CI-00000107	Rachel Cook	4/19/2023	Low
15 GoogleWorkspace LIC-002	Licenses	User-Based	Production	CI-00000091	Vicky Wong	12/21/2022	Medium
16 ActiveDirectory-SRV-014	Hardware	Server	Production	CI-00000161	Kevin Wright	7/1/2024	Medium
17 Network Uptime SLA-008	Contracts	Professional services	Production	CI-00000171	Kimberly Walker	12/31/2023	Medium
18 HW-00012345	Hardware	Laptop				9/12/2023	Medium

3 selected Add tag Export to Excel Delete

Screenshot 3. Result updating

Example 2:

We applied a filter to show only records with **Category = Contracts**. Then, we updated the

Purchase date field for these filtered records

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4 Contracts x Tag filter

Search Add X

	Name	Category	Status	ID	Business owner	Purchase date	Risk level
☐	COL-CON-002	ed warranty	Production	CI-00000098	Jessica Xu	5/9/2023	Low
☐	2 Network Uptime SLA-008	ional services	Production	CI-00000171	Kimberly Walker	12/31/2023	Medium
☐	3 Premium Support Contract-001	t	Production	CI-00000164	Aizhan Nugmanova	6/1/2024	Medium
☐	4 Extended Warranty Contract-004	ed warranty	Production	CI-00000167	Brian Robinson	10/31/2023	Medium
☐	5 Service Management for Provider...	services	Production	CI-00000170	Michelle Liu	3/31/2024	Medium
☐	6 Service Desk Service Level Agree...	t	Production	CI-00000169	Jane Smith	5/31/2024	Medium
☐	7 Cloud Service Support Contract-0...	services	Production	CI-00000165	Melissa Lee	5/31/2024	Medium
☐	8 SF-RTR-001	t	Production	CI-00000070	Kimberly Walker	4/4/2023	Medium
☐	9 Software Maintenance and Suppo...	ional services	Production	CI-00000166	Rachel Liang	8/31/2024	Medium
☐	10 Incident Management SLA-005	t	Production	CI-00000168	Brian Robinson	4/30/2024	Medium

Screenshot 4. Filtered records

Result:

Only the filtered records had their **Purchase date** field updated.

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4 Contracts x Tag filter

Search Add X

	Name	Category	Subcategory	Status	ID	Business owner	Purch
☐	1 COL-CON-002	Contracts	Extended warranty	Production	CI-00000098	Jessica Xu	7/26/2025
☐	2 Network Uptime SLA-008	Contracts	Professional services	Production	CI-00000171	Kimberly Walker	7/26/2025
☐	3 Premium Support Contract-001	Contracts	Support	Production	CI-00000164	Aizhan Nugmanova	7/26/2025
☐	4 Extended Warranty Contract-004	Contracts	Extended warranty	Production	CI-00000167	Brian Robinson	7/26/2025
☐	5 Service Management for Provider...	Contracts	Cloud Services	Production	CI-00000170	Michelle Liu	7/26/2025
☐	6 Service Desk Service Level Agree...	Contracts	Support	Production	CI-00000169	Jane Smith	7/26/2025
☐	7 Cloud Service Support Contract-0...	Contracts	Cloud Services	Production	CI-00000165	Melissa Lee	7/26/2025
☐	8 SF-RTR-001	Contracts	Support	Production	CI-00000070	Kimberly Walker	7/26/2025
☐	9 Software Maintenance and Suppo...	Contracts	Professional services	Production	CI-00000166	Rachel Liang	7/26/2025
☐	10 Incident Management SLA-005	Contracts	Support	Production	CI-00000168	Brian Robinson	7/26/2025

Screenshot 5. Filtered records

Example 3:

If you want to update specific records within a filter, you can select them individually. For example, we updated the **Name** field for one selected record.

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4 Contracts x Tag filter

Search Add X

	Name	Category	Subcategory	Status	ID	Business owner	Purch
☒	COL-CON-002	Contracts	Extended warranty	Production	CI-00000098	Jessica Xu	7/26/2025
☐	2 Network Uptime SLA-008	Contracts	Professional services	Production	CI-00000171	Kimberly Walker	7/26/2025
☐	3 Premium Support Contract-001	Contracts	Support	Production	CI-00000164	Aizhan Nugmanova	7/26/2025
☐	4 Extended Warranty Contract-004	Contracts	Extended warranty	Production	CI-00000167	Brian Robinson	7/26/2025
☐	5 Service Management for Provider...	Contracts	Cloud Services	Production	CI-00000170	Michelle Liu	7/26/2025
☐	6 Service Desk Service Level Agree...	Contracts	Support	Production	CI-00000169	Jane Smith	7/26/2025
☐	7 Cloud Service Support Contract-0...	Contracts	Cloud Services	Production	CI-00000165	Melissa Lee	7/26/2025
☐	8 SF-RTR-001	Contracts	Support	Production	CI-00000070	Kimberly Walker	7/26/2025
☐	9 Software Maintenance and Suppo...	Contracts	Professional services	Production	CI-00000166	Rachel Liang	7/26/2025
☐	10 Incident Management SLA-005	Contracts	Support	Production	CI-00000168	Brian Robinson	7/26/2025

1 selected Add tag Export to Excel Delete X

Screenshot 6. Filtered and selected record

Result:
Only the selected record had its **Name** field updated.

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4 Contracts x Tag filter

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	Name	Category	Subcategory	Status	ID	Business owner	Purch
☒	Testing product	Contracts	Extended warranty	Production	CI-00000098	Jessica Xu	7/26/2025
☐	2 Network Uptime SLA-008	Contracts	Professional services	Production	CI-00000171	Kimberly Walker	7/26/2025
☐	3 Premium Support Contract-001	Contracts	Support	Production	CI-00000164	Aizhan Nugmanova	7/26/2025
☐	4 Extended Warranty Contract-004	Contracts	Extended warranty	Production	CI-00000167	Brian Robinson	7/26/2025
☐	5 Service Management for Provider...	Contracts	Cloud Services	Production	CI-00000170	Michelle Liu	7/26/2025
☐	6 Service Desk Service Level Agree...	Contracts	Support	Production	CI-00000169	Jane Smith	7/26/2025
☐	7 Cloud Service Support Contract-0...	Contracts	Cloud Services	Production	CI-00000165	Melissa Lee	7/26/2025
☐	8 SF-RTR-001	Contracts	Support	Production	CI-00000070	Kimberly Walker	7/26/2025
☐	9 Software Maintenance and Suppo...	Contracts	Professional services	Production	CI-00000166	Rachel Liang	7/26/2025
☐	10 Incident Management SLA-005	Contracts	Support	Production	CI-00000168	Brian Robinson	7/26/2025

Screenshot 7. Result updating