Quickly Edit 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:	Won 🔻			
Win Reasons:				
Require Win Reason?	Yes No 🖲			
Loss Stage:	Lost			
Loss Reasons:				
Require Loss Reason?	Vos 🔍 No 🌒			
Require Loss Reason:				

- 1. Go to **CRM > Opportunities** in the main navigation menu.
- 2. Search for the records you would like to update.

3. Click on the Actions drop-down and select Quick Edit Opportunities.

Export	-
It's getting hot in here - warm emails	i ite
Mass Update Contacts	
Mass Update Opportunities	
Merge Duplicate Contacts	
Print Labels	ity Mickey Mouse
Quick Edit Opportunities	ite
Reassign Contacts (Batch)	
Reassign Contacts (Datasheet)	
Reassign Contacts (Multi-user)	
Reassign Opportunities (Batch)	
Reassign Opportunities (Multi-user)	
Reassign Opportunities (Quick Edit)	1.29.3.6 opportunitySearch

4. Update the *opportunity title*, next *action date*, and/or *stage*.

Results				
Id	Opportunity title	Next action date	Stage id	
	New Opportunity	05-10-2013	New Opportunity	
	Joe Blow		Working	
	Mickey Mouse		New Opportunity	

5. Click the **Save** button to apply the updates.