

## Editing Custom Segments

### WARNING

This feature is not currently enabled in your account. To enable this feature, please contact your administrator.

In some cases, you may want to make changes to an existing custom segment. For example, you may want to change the segment's label, the record types where the segment is applied, or the segment's default value. Most fields on a custom segment can be changed after the segment is created, but note the following exceptions:

- The **ID** field cannot be changed.
- The **GL Impact** option cannot be changed.
- Your ability to change the **Type** field varies depending on your permissions. For details, see [Required Permissions for Editing Custom Segments](#).

For more information about editing custom segments, see [Inactivating a Custom Segment](#) and [Deleting a Custom Segment Definition](#).

When a custom segment is created, an associated custom record type is also created. The custom record type has the same name as the custom segment, and you can edit the custom record at any time to add custom segment values. For more information about creating custom record types, see [Creating Custom Record Types](#).

Custom segment definitions can be updated at any time, even if the segment is used in a transaction that is in a closed period.

Note also that changing the **Type** field from Multiple Select to List/Record can cause data loss. For details, see [Custom Segment Types](#).

### To edit a custom segment:

1. Go to Customization > Lists, Records, & Fields > Custom Segments (Administrator).
2. In the list, locate the appropriate segment and click **Edit**.
3. Change any fields as appropriate. If you need to add or update values, and the Values sublist is dimmed, click **Manage Values** to open a separate page for working with values. For details, see [Creating Values by Clicking Manage Values](#).

If you need help understanding other fields on the segment definition, see the following topics.

- [Filtering for a Custom Segment](#)
- [Applying a Custom Segment to Record Types](#)
- [Dynamic Default Value Sourcing for Custom Segments](#)
- [Validation and Static Default Values for Custom Segments](#)
- [User Permissions for a Custom Segment](#)
- [Dependent Segments](#)
- [Setting Display Order of All Custom Segments](#)

4. After making all needed changes on the segment definition, click **Save**.

## Related Topics