Editing a Custom Segment's Values by Clicking Manage Values
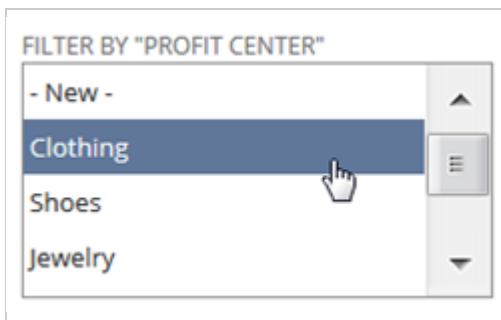
> **WARNING**
>
> This feature is not currently enabled in your account. To enable this feature, please contact your administrator.

One way to edit a custom segment's values is to view the segment definition and click the button labeled Manage Values. You should use this method if you do not have permission to edit the segment definition.

> **Note:** Custom segment values on transactions that impact GL cannot be edited in closed periods.

To edit a custom segment's values by clicking Manage Values:

1. Go to Customization > Lists, Records, & Fields > Custom Segments (Administrator).
2. In the list, select the name of the segment for which you want to edit values.

   The system opens the segment definition in view mode.
3. Click **Manage Values**. A list of the existing segment values appears.
4. Locate the value you want to modify and click the corresponding **Edit** button.
5. Make any of the following changes, as appropriate:
   - In the **Name** column, you can change the value's name. The value's name is displayed in the segment's list when the segment appears on a record.
   - If you want to create a parent or change the value's parent, adjust the **Parent** list. For more information about parent-child relationships, see Creating Hierarchies Among a Custom Segment's Values.
   - If this segment uses filtering, the page displays one or more list boxes. These lists have headings that begin with the words **Filter by**. In each list, change the selections as appropriate. You can use the Ctrl key to select more than one value or to clear a value. For more information about filtering, see Filtering for a Custom Segment.

- ○ If you want to change whether this value is visible to users, check or clear the **Inactive** box. Note that making the value inactive prevents the value from appearing as a stand-alone choice. However, if the value is a parent to another value, the value still appears as a parent.

6. Click **Save**.

Related Topics