

Adding and Modifying a Single Contact

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Donor Management System

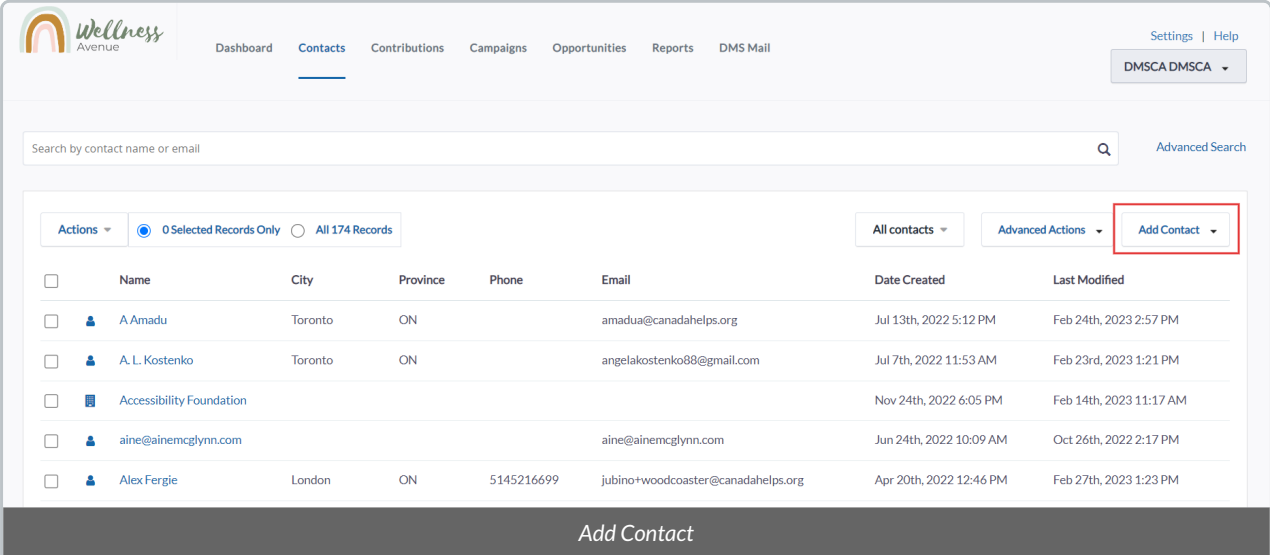
This article covers adding and modifying a single Contact. You can also [modify multiple Contacts at once](#).

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Adding a single Contact

1. Go to the **Contacts Tab**
2. Select **Add Contact** on the top right



The screenshot displays the Donor Management System interface. At the top, there is a navigation bar with the 'Wellness Avenue' logo and several menu items: Dashboard, **Contacts**, Contributions, Campaigns, Opportunities, Reports, and DMS Mail. On the right side of the navigation bar, there are links for 'Settings' and 'Help', and a dropdown menu for 'DMSCA DMSCA'. Below the navigation bar, there is a search bar with the placeholder text 'Search by contact name or email' and a magnifying glass icon. To the right of the search bar is an 'Advanced Search' link. Below the search bar, there is a table of contacts. The table has columns for 'Name', 'City', 'Province', 'Phone', 'Email', 'Date Created', and 'Last Modified'. The table contains six rows of contact information. Above the table, there are several controls: an 'Actions' dropdown menu, radio buttons for '0 Selected Records Only' (selected) and 'All 174 Records', a dropdown menu for 'All contacts', a dropdown menu for 'Advanced Actions', and a dropdown menu for 'Add Contact' which is highlighted with a red box. Below the table, there is a dark grey bar with the text 'Add Contact' in white.

	Name	City	Province	Phone	Email	Date Created	Last Modified
<input type="checkbox"/>	A Amadu	Toronto	ON		amadua@canadahelps.org	Jul 13th, 2022 5:12 PM	Feb 24th, 2023 2:57 PM
<input type="checkbox"/>	A.L. Kostenko	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	Feb 23rd, 2023 1:21 PM
<input type="checkbox"/>	Accessibility Foundation					Nov 24th, 2022 6:05 PM	Feb 14th, 2023 11:17 AM
<input type="checkbox"/>	aine@ainemcglynn.com				aine@ainemcglynn.com	Jun 24th, 2022 10:09 AM	Oct 26th, 2022 2:17 PM
<input type="checkbox"/>	Alex Fergie	London	ON	5145216699	jubino+woodcoaster@canadahelps.org	Apr 20th, 2022 12:46 PM	Feb 27th, 2023 1:23 PM

3. You'll see a dropdown list showing the different **Contact Types** in the DMS. Select whether your new Contact is an **Individual** or an **Organization**.

Note: 'Household' is a legacy feature of the DMS and not recommended for use. Instead, learn how to [add a Relationship](#) to your Contacts.

The screenshot shows the Wellness Avenue DMS interface. The top navigation bar includes 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. The 'Contacts' page is active, displaying a search bar and a table of contacts. The 'Add Contact' button is highlighted with a red box, and its dropdown menu is open, showing options for 'Individual', 'Organization', and 'Household'. The table below shows a list of contacts with columns for Name, City, Province, Phone, Email, Date Created, and Last Modified.

<input type="checkbox"/>	Name	City	Province	Phone	Email	Date Created	Last Modified
<input type="checkbox"/>	A Amadu	Toronto	ON		amadua@canadahelps.org	Jul 13th, 2022 5:12 PM	Feb 24th, 2023 1:21 PM
<input type="checkbox"/>	A. L. Kostenko	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	Feb 23rd, 2023 1:21 PM
<input type="checkbox"/>	Accessibility Foundation					Nov 24th, 2022 6:05 PM	Feb 14th, 2023 11:17 AM
<input type="checkbox"/>	aine@ainemcglynn.com				aine@ainemcglynn.com	Jun 24th, 2022 10:09 AM	Oct 26th, 2022 2:17 PM
<input type="checkbox"/>	Alex Fergie	London	ON	5145216699	jubino+woodcoaster@canadahelps.org	Apr 20th, 2022 12:46 PM	Feb 27th, 2023 1:23 PM

4. Next, you can provide details about your new Contact

New Individual

EXPAND ALL TABS

Contact Details

Prefix: [] First Name: [] Middle Name: [] Last Name: []

Current Employer: [-select Contact -] Job Title: [] Recognition Name: [] Contact Type: [-select Contact Type -]

Email add: [] Home: [] On Hold?: [] Bulk Mailings?: []

Phone: [] ext. [] Phone Location: Home [] Phone Type: Phone []

Add another phone number

Website: [] Website Type: Work []

Add another website

Check for Matching Contact(s)

Address

Communication Preferences

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Demographics

Tags and Groups

Save Save and New Cancel

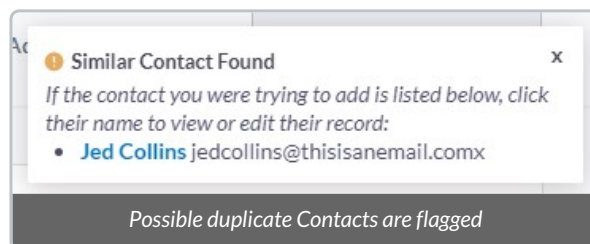
Add Contact Details

5. Complete the page's Mandatory Fields (you can see a list of all Fields below):

- **Individual Contacts:** First and Last Name OR and Email Address
- **Households and Organization:** First and Last Name

Note: It is best practice to fill in as many details about your Contact as possible.

6. As you enter the name of your new Contact, the DMS will automatically check for possible duplicate entries



- If you begin adding a Contact and the DMS recognizes the name, a box will appear on the right-hand side of the screen to prompt you to check if that Contact is already in your DMS.

- If you recognize the Contact, select the name of the Contact from the box and you will be directed to that Contact Profile.

7. Once you have filled in the details about your Contact, select **Save** to add the Contact or **Save And New** to add the Contact and create a new one.

Modifying a single Contact

1. Go to the **Contacts Tab**
2. Search for the Contact you wish to modify and select its name

The screenshot shows the 'Wellness Avenue' dashboard with the 'Contacts' tab selected. A search bar at the top contains the text 'Karolina'. Below the search bar, there is a table of contacts. The first contact in the table is 'Karolina Maya', with details: City: Ottawa, Province: ON, Email: celinaabernalq@gmail.com, Date Created: May 8th, 2022 11:00 PM, and Last Modified: Feb 27th, 2023 1:28 AM. The name 'Karolina Maya' in the table is highlighted with a red box. At the bottom of the screenshot, there is a dark grey bar with the text 'Search and select Contact'.

3. Select the **Edit** button on the top right of the screen

The screenshot shows the contact profile for 'Karolina Maya'. At the top right, there is an 'Actions' menu with an 'Edit' button highlighted by a red box. Below the name, there are several tabs: Summary, Contributions 34, Activities 91, Relationships 2, Groups 7, Notes 0, Tags 0, and Opportunities. The main content area is divided into three columns:

- Home Address:** 45 Sweetland St, Ottawa, ON K1N 6G1, Canada
- Billing Address:** Karolina Maya, 45 Sweetland St, Ottawa, ON K1N 6G1, Canada
- Home Email:** celinaabernalq@gmail.com
- Billing Email:** celinaabernalq@gmail.com
- Phone:**
- Summary Fields:**
 - Total Lifetime Contributions: 638.44
 - Amount of last contribution: 1.23
 - Date of Last Contribution: 02/27/2023 1:28AM
 - Date of First Contribution: 05/09/2022 3:40PM
 - Largest Contribution: 400.00
 - Count of Contributions: 34
- Tags:**
 - Contact Type: Individual
 - Contact ID: 333
 - External ID:
- Gender:**
 - Date of Birth:
 - Age:
- Employer:**
 - Job Title:
 - Recognition Name:
 - Source: CanadaHelps

 At the bottom of the screenshot, there is a dark grey bar with the text 'Edit Contact'.

4. Edit and/or add new information about this Contact on the next page

Wellness Avenue

Dashboard **Contacts** Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Edit Karolina Maya

COLLAPSE ALL TABS

Contact Details

Prefix: [] First Name: Karolina Middle Name: [] Last Name: Maya

Current Employer: -select Contact- Job Title: [] Recognition Name: [] Contact Type: -select Contact Type-

Email add: celinaabernalq@gmail.com Home On Hold? [] Bulk Mailings? [] Primary? [x]

celinaabernalq@gmail.com Billing On Hold? [] Bulk Mailings? [] Primary? [] delete

Signature: []

Phone: [] ext. [] Phone Location: Home Phone Type: Phone

Add another phone number

Website: [] Website Type: Work

Add another website

Check for Matching Contact(s)

Address

Communication Preferences

Demographics

Tags and Groups

Save Save and New Cancel

Edit Contact

5. Once you're done, select **Save** to edit the Contact or **Save And New** to edit the Contact and create a new one.

Note: When you modify a Contact, you will be able to see the **Last Modified date** as a default column when going back to the Contacts Tab.

Modifying Contact Type

Considerations for Modifying a Contact Type

1. You can change the Contact Type if you have manually added a new Contact as the incorrect Type, but it has existing data that you wish to retain (Contributions, Activities, Groups, Tags, etc).
2. You should not modify Contact that have come from CanadaHelps, as your donors have decided to contribute as either a corporate donor or individual donor via CanadaHelps.org.

1. Go to the **Contacts Tab**

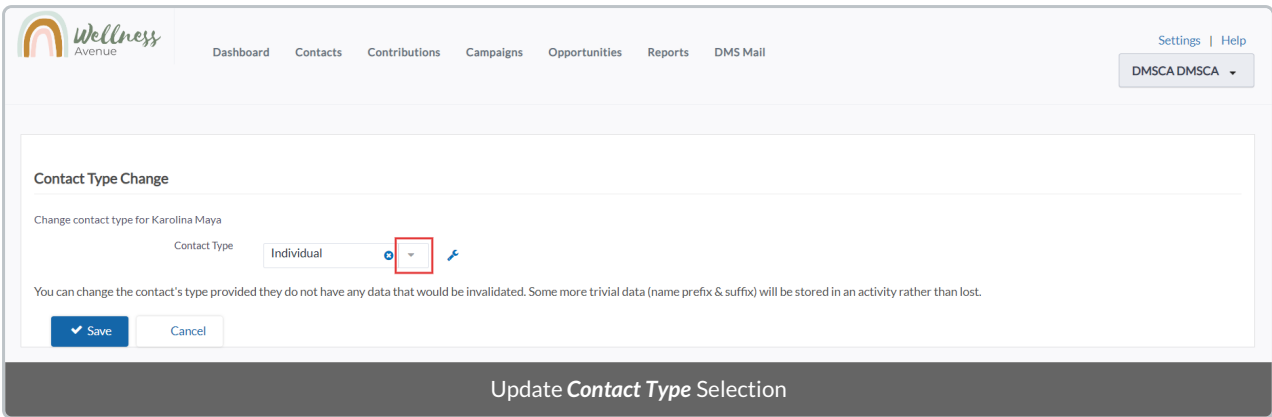
2. Search for the Contact you wish to modify and select its name

The screenshot shows the Wellness Avenue software interface. At the top, there is a navigation bar with 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. The 'Contacts' tab is selected. A search bar at the top left contains the text 'Karolina'. Below the search bar, there is a table of contacts. The first contact in the table is 'Karolina Maya', with columns for Name, City, Province, Phone, Email, Date Created, and Last Modified. The name 'Karolina Maya' is highlighted with a red box. At the bottom of the screenshot, there is a dark grey bar with the text 'Search and select Contact'.

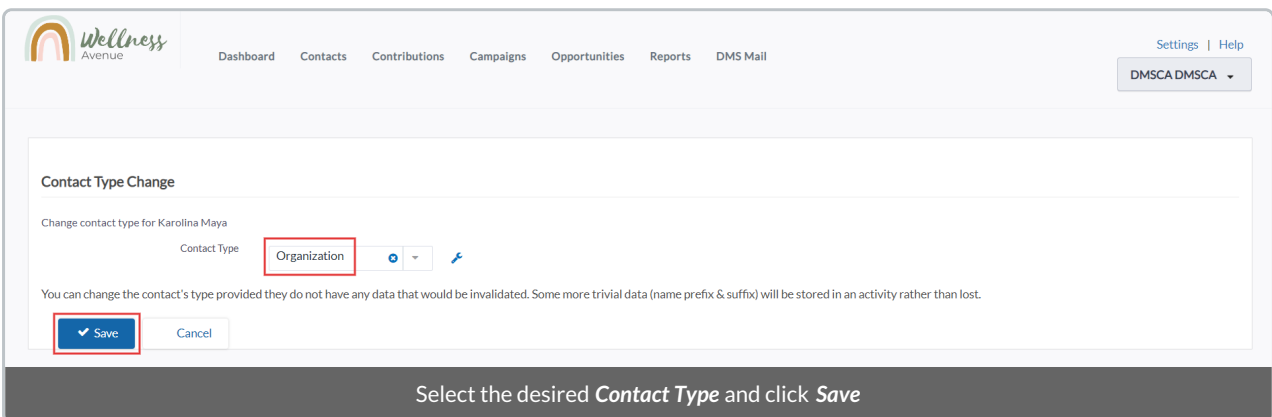
3. Click the **Actions** button on the top right of the screen then select **Change Contact Type**

The screenshot shows the contact profile for 'Karolina Maya'. The profile includes contact information such as Home Address, Billing Address, Home Email, and Billing Email. A 'Summary Fields' section is also visible. On the right side of the profile, there is an 'Actions' button and an 'Edit' button. The 'Actions' button is highlighted with a red box, and a dropdown menu is open, showing various options. The 'Change Contact Type' option is highlighted with a red box. At the bottom of the screenshot, there is a dark grey bar with the text 'Select Change Contact Type'.

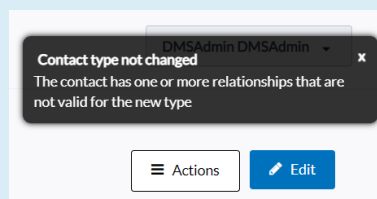
4. Click on the current **Contact Type** selection to view the drop-down options



5. Select the new **Contact Type** and click **Save**



Note: You may notice the following prompt indicating **Contact type not changed**. Please delete any current **Contact Relationship** and try updating the **Contact Type** again.



Understanding All Contact Fields

Individual Contact Fields

Contact Details:

- **First Name:** the first name of the Contact.
- **Middle Name:** the middle name(s) of the Contact.
- **Last Name:** the last name of the Contact.

- **Current Employer:** associate an existing or new Organization Contact in the DMS as the employer of the Individual Contact being added. Select **New Organization** to create a brand new Organization Contact.
- **Job Title:** the job title of the Contact.
- **Recognition Name:** optional recognition / preferred name of the Contact to be used in any Communications with them.
- **Contact Type:** a segmentation tool for your Contacts. Learn how to create [additional, custom Contact Types](#)
- **Email:** the email address and type (e.g. Home, Work, etc.) of the Contact. Select **add** to include an additional email address for the Contact.
- **On Hold?:** when sending an email to this Contact's email address, if the email address was undeliverable 3 times (our servers try sending the same email 3 days in a row), it is automatically flagged as *On Hold* to prevent the DMS from sending additional emails to this address.
- **Bulk Mailings?:** select this checkbox if you want to include this email address as the default email when sending Bulk DMS Mail to this Contact.
- **Phone + ext.:** the phone number + ext of the Contact. Select **Add another phone number** to include an additional phone number for the Contact.
- **Phone Location:** if the Contact's phone number is for personal, work, etc. use.
- **Phone Type:** if the Contact's phone number is a landline, mobile, etc. Select the "gear icon" right next to it to add new Types.
- **Check For Matching Contact(s):** after adding the Contact's name and/or email address, this button checks if there are other Contacts in DMS with the same information so you don't add a duplicate.

Address:

- **Address Location Type:** if the Contact's address is marked as their home, work, etc.
- **Primary location for this contact:** if the Contact's *Address Location Type* should be prioritized during Communications.
- **Billing location for this contact:** if this address should also be used for billing.
- **Use another contact's address:** check this if you want to easily add another Contact's address as the address for the Contact being added.
- **Street Address:** number and street name.
- **Supplemental Address 1:** optional field for information such as apartment number, etc.
- **Supplemental Address 2:** optional field for additional information.
- **City:** address's city.
- **Postal Code:** address's postal code.
- **Country:** address's country. You can browse through the list of type the name of the country.
- **Province:** after selecting the *Country*, you will see a list of provinces or states.
- **Another Address:** include an additional address for the Contact.

Communication Preferences:

- **Communication Style:** internal reference of the preferred style of communication to be used with this Contact. Select the “gear icon” on the right to add new Communication Styles.
- **Email Greeting:** how your communications greeting will appear to the Contact when sending them an email (e.g. “Dear {Contact’s First Name}”). Select **Customized** in the drop-down list to add a new greeting.
- **Postal Greeting:** how your communications greeting will appear to the Contact when mailing letters (PDF). Select **Customized** in the drop-down list to add a new greeting.
- **Addressee:** how your Contact’s address will appear on your communications greetings with them. Select **Customized** in the drop-down list to add a new greeting.
- **Privacy:** shows if the Contact opted out from any forms of communication (e.g. do not phone or email).
- **Preferred Communication Method:** you can select all that apply.
- **Preferred Language:** you can browse through the list of type the name of the preferred language.
- **Email Format:** change the default communications email format to HTML, Text or Both. We suggest keeping it Both.

Notes:

- **Subject:** the subject of the Note.
- **Note:** the contents of the Note (text only).

Demographics:

- **Gender:** the Contact’s gender. Select the “gear icon” on the right to add new Gender options.
- **Birth Date:** the Contact’s birth date.
- **Contact is Deceased:** marks the Contact as deceased. This flag will be displayed across the DMS.

Tags and Groups:

- **Tag(s):** see a list of all the Tags in the DMS and associate one or more to the Contact. You can browse through the list of type the name of the Tag.
- **Group(s):** see a list of all Groups & Smart Groups and associate one or more to the Contact. You can browse through the list of type the name of the Group or Smart Group.

Organization Contact Fields

Contact Details:

- **Organisation Name:** the name of the Organization.
- **Legal Name:** the legal name of the Organization.
- **Recognition Name:** optional recognition / Organization main contact's Name to be used in any communications with them.
- **Sic Code:** the Standard Industrial Classification of the Organization.
- **Contact Type:** additional segmentation tool for your Organisation such as Corporation, Foundation, etc. To

add more Sub-Types, please contact your Onboarding Specialist.

- **Email:** the email address and type (e.g. Home, Work, etc.) of the Organization. Select **add** to include an additional email address for the Organization.
- **On Hold?:** when sending an email to this Organization's email address, if the email address was undeliverable 3 times (our servers try sending the same email 3 days in a row), it is automatically flagged as *On Hold* to prevent the DMS from sending additional emails to this address.
- **Bulk Mailings?:** select this checkbox if you want to include this email address when sending Bulk DMS Mail.
- **Phone + ext.:** the phone number + ext of the Organization. Select **Add another phone number** to include an additional phone number for the Organization.
- **Phone Location:** if the Organization's phone number is for personal, work, etc. use.
- **Phone Type:** if the Organization's phone number is a landline, mobile, etc. Select the "gear icon" right next to it to add new Types.
- **Check For Matching Contact(s):** after adding the Organization's name and/or email address, this button checks if there are other Contacts in DMS with the same information so you don't add a duplicate.

Address:

- **Address Location Type:** if the Organization's address is marked as their main, work, etc.
- **Primary location for this contact:** if the Organization's *Address Location Type* should be prioritized during Communications.
- **Billing location for this contact:** if this address should also be used for billing.
- **Use another contact's address:** check this if you want to easily add another Contact's address as the address for the Organization being added.
- **Street Address:** number and street name.
- **Supplemental Address 1:** optional field for information such as unit number, etc.
- **Supplemental Address 2:** optional field for additional information.
- **City:** address's city.
- **Postal Code:** address's postal code.
- **Country:** address's country. You can browse through the list or type the name of the country.
- **Province:** after selecting the *Country*, you will see a list of provinces or states.
- **Another Address:** include an additional address for the Organization.

Communication Preferences:

- **Communication Style:** internal reference of the preferred style of communication to be used with this Organization. Select the "gear icon" on the right to add new Communication Styles.
- **Email Greeting:** how your communications greeting will appear to the Organization when sending them an email (e.g. "Dear {Organization Name}"). Select **Customized** in the drop-down list to add a new greeting.
- **Postal Greeting:** how your communications greeting will appear to the Organization when mailing letters (PDF). Select **Customized** in the drop-down list to add a new greeting.

- **Addressee:** how your Organization's address will appear on your communications greetings with them. Select **Customized** in the drop-down list to add a new greeting.
- **Privacy:** shows if the Organization opted out from any forms of communication (e.g. do not phone or email).
- **Preferred Communication Method:** you can select all that apply.
- **Preferred Language:** you can browse through the list of type the name of the preferred language.
- **Email Format:** change the default communications email format to HTML, Text or Both. We suggest keeping it Both.

Notes:

- **Subject:** the subject of the Note.
- **Note:** the contents of the Note (text only).

Tags and Groups:

- **Tag(s):** see a list of all the Tags in the DMS and associate one or more to the Organization. You can browse through the list of type the name of the Tag.
- **Group(s):** see a list of all Groups & Smart Groups and associate one or more to the Organization. You can browse through the list of type the name of the Group or Smart Group.

Household Contact Fields

Contact Details:

- **Household Name:** the name of the Household.
- **Recognition Name:** optional recognition / preferred name of the Household to be used in any Communications with them.
- **Email:** the main email address and type (e.g. Home, Work, etc.) of the Household. Select **add** to include an additional email address for the Household.
- **On Hold?:** when sending an email to this Household's main email address, if the email address was undeliverable 3 times (our servers try sending the same email 3 days in a row), it is automatically flagged as *On Hold* to prevent the DMS from sending additional emails to this address.
- **Bulk Mailings?:** select this checkbox if you want to include this email address when sending Bulk DMS Mail.
- **Phone + ext.:** the phone number + ext of the Household. Select **Add another phone number** to include an additional phone number for the Household.
- **Phone Location:** if the Household's phone number is for personal, work, etc. use.
- **Phone Type:** if the Household's phone number is a landline, mobile, etc. Select the "gear icon" right next to it to add new Types.
- **Check For Matching Contact(s):** after adding the Household's name and/or email address, this button checks if there are other Contacts in DMS with the same information so you don't add a duplicate.

Address:

- **Address Location Type:** if the Household's address is marked as their home, work, etc.
- **Primary location for this contact:** if the Household's *Address Location Type* should be prioritized during Communications.
- **Billing location for this contact:** if this address should also be used for billing.
- **Use another contact's address:** check this if you want to easily add another Contact's address as the address for the Household being added.
- **Street Address:** number and street name.
- **Supplemental Address 1:** optional field for information such as apartment number, etc.
- **Supplemental Address 2:** optional field for additional information.
- **City:** address's city.
- **Postal Code:** address's postal code.
- **Country:** address's country. You can browse through the list or type the name of the country.
- **Province:** after selecting the *Country*, you will see a list of provinces or states.
- **Another Address:** include an additional address for the Household.

Communication Preferences:

- **Communication Style:** internal reference of the preferred style of communication to be used with this Household. Select the "gear icon" on the right to add new Communication Styles.
- **Email Greeting:** how your communications greeting will appear to the Household when sending them an email (e.g. "Dear {Household Name}"). Select **Customized** in the drop-down list to add a new greeting.
- **Postal Greeting:** how your communications greeting will appear to the Household when mailing letters (PDF). Select **Customized** in the drop-down list to add a new greeting.
- **Addressee:** how your Household's address will appear on your communications greetings with them. Select **Customized** in the drop-down list to add a new greeting.
- **Privacy:** shows if the Household opted out from any forms of communication (e.g. do not phone or email).
- **Preferred Communication Method:** you can select all that apply.
- **Preferred Language:** you can browse through the list or type the name of the preferred language.
- **Email Format:** change the default communications email format to HTML, Text or Both. We suggest keeping it Both.

Notes:

- **Subject:** the subject of the Note.
- **Note:** the contents of the Note (text only).

Tags and Groups:

- **Tag(s):** see a list of all the Tags in the DMS and associate one or more to the Household. You can browse

through the list of type the name of the Tag.

- **Group(s):** see a list of all Groups & Smart Groups and associate one or more to the Household. You can browse through the list of type the name of the Group or Smart Group.