# Modifying Multiple Contacts at Once

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#### **Donor Management System**

This article covers modifying multiple Contacts at once. You can also modify a single Contact if needed.

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## Modifying Multiple Contacts at Once

- 1. Visit the Contacts Tab
- 2. Select either:
  - (1) The specific Contacts you wish to modify,
  - (2) Every listed Contact on the page, or
  - (3) All **Contacts** in your DMS (or in your selected search criteria if you've conducted anAdvanced Search for Contacts)

Note: in order to modify multiple Contacts at once, you must only select Contacts that are **the same Contact Type** (i.e., Individual, Organization, or Household).

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earch by cont	tact name or email						Q Advanced Sear
Actions	<ul> <li>4 Selected Records 0</li> </ul>	Only All 174 Reco	3 rds			All contacts 👻 Advar	Add Contact •
	Name	City	Province	Phone	Email	Date Created	Last Modified
<b>Z</b>	A Amadu	Toronto	ON		amadua@canadahelps.org	Jul 13th, 2022 5:12 PM	Feb 24th, 2023 2:57 PM
☑ ▲	A. L. Kostenko	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	Feb 23rd, 2023 1:21 PM
	Accessibility Foundation					Nov 24th, 2022 6:05 PM	Feb 14th, 2023 11:17 AM
	aine@ainemcglynn.com				aine@ainemcglynn.com	Jun 24th, 2022 10:09 AM	Oct 26th, 2022 2:17 PM
I ▲	Alex Fergie	London	ON	5145216699	jubino+woodcoaster@canadahelps.org	Apr 20th, 2022 12:46 PM	Feb 24th, 2023 11:27 AM
	Alex Fergie					Oct 6th, 2022 12:48 PM	Jan 26th, 2023 2:12 PM
☑ ▲	Alicia Mitre	Mississauga	ON		amitreeatwell@outlook.com	Oct 19th, 2022 2:01 PM	Feb 24th, 2023 2:39 PM
					t Contacts 3 ways		

3. Select the Actions menu at the upper-left side of the Contact list

4. Either type "update" in the Actions search bar or scroll the list to find the Update multiple contacts option

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n by contact name or email						٩	Advanced Se
Actions 🔺 (i) 12 Selected Records Only 🔿 All 203 Records						All contacts ~ Advanced Action	ns • Add Contact •
<u>a</u>	City	Province	Phone	Email	Date Created	Last Modified	
enove Contacts from Group move Tag	Toronto	ON			Apr 27th, 2023 9:14 AM	Apr 27th, 2023 2:53 PM	
ind DMS Mail					Jun 24th, 2022 11:09 AM	Apr 27th, 2023 2:53 PM	
nd Regular Email	Ottawa	ON	456-857-8956	raleph@gmail.com	Oct 19th, 2022 3:01 PM	May 1st, 2023 5:05 PM	
pdate multiple contacts * Acts	Burlington	ON	333-555-8888	anderson.a@test.com	Oct 21st, 2021 12:52 PM	May 8th, 2023 1:13 PM	
Andy Duplicate	Test Town	ON	6475556666	andyl+testduplicate@canadahelps.org	Jan 9th, 2023 3:26 PM	Jan 9th, 2023 3:33 PM	
Andy Forms	Toronto	ON	4161112222	andyl+testua00@canadahelps.org	Jul 13th, 2022 12:00 AM	May 1st, 2023 3:23 PM	
Andy Monthly	Toronto	ON		andyl+test2022071301@canadahelps.org	Jul 13th, 2022 12:00 AM	Mar 13th, 2023 6:00 AM	
Andy Wellness	Toronto	ON	4163334444	andyl+test2022071300@canadahelps.org	Jul 13th 2022 12:00 AM	Jan 1st, 2023 1:58 AM	
Angela Noemail	Toronto	ON	647-555-5555		Nov 1st, 2022 8:15 AM	Feb 3rd, 2023 2:33 PM	
angelak@canadahelps.org	Brampton		905-458-5447	angelak@canadahelps.org	Sep 1st, 2022 5:31 PM	Nov 9th, 2022 2:15 PM	
Anne Lee				anne@lemutel.ca	Jul 23rd, 2019 12:19 PM	Jan 1st, 2023 1:58 AM	
Anonymous				anonymousdonor@canadahelps.net	Jan 1st, 2000 12:00 AM	May 1st, 2023 10:23 AM	
Arnold Schwarzeneighger	Burlington	ON	012-345-6789	arnolds@email.com	Sep 18th, 2022 4:42 PM	Feb 24th, 2023 3:37 PM	(
Augus Shah	Promoton	ON		text.cbbain?9/ternail.com	May 5th 2022 12:00 AM	Ive 1++ 2023 1-58 AM	

5. Under *Select Profile*, you will a see a **drop-down list where each option corresponds to specific Contact fields** you would like to modify or update

Select Profile *	- select profile - 🔺	
		0
	Household to individuals	
Continue C	Mailing List Subscribe	ļ
	Name and Address	
	New Individual	
	Primary and	•

**Note:** the fields you are able to modify differ depending on the Contact Type initially selected (i.e., Individual, Organization, or Household).

## Available Fields for Individual Contacts

## Honoree Individual

- Individual Prefix
- First Name
- Last Name
- Email Address

## **New Individual**

- First Name
- Last Name
- Email Address
- Phone
- Street Address (Home)
- City (Home)
- Postal Code (Home)
- Country (Home)
- Sate/Province (Home)

## Search Result Listing

- City (Home)
- Province (Home)
- Phone
- Email

## **Shared Address**

- Street Address (Home)
- City (Home)
- Postal Code (Home)
- Country (Home)
- State/Province (Home)

## Summary Overlay

- Home Phone
- Home Mobile
- Primary Address
- City
- State/Province
- Postal Code
- Primary Email
- Gender
- Date of Birth

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## Available Fields for Organization Contacts

## **New Organization**

- Organization Name
- Email Address
- Phone
- Street Address
- Street Address Line 2
- City
- Postal Code
- Province
- Country

## On Behalf of Organization

- Organization Name
- Phone (Main)
- Email (Main)
- Street Address
- City
- Postal Code
- Country
- State/Province

## Search Result Listing

- City
- Province
- Phone
- Email

## Shared Address

- Street Address (Home)
- City (Home)
- Province (Home)
- Postal Code (Home)
- Country (Home)
- State/Province (Home)

## Summary Overlay

- Home Phone
- Home Mobile
- Primary Address
- City
- State/Province
- Postal Code
- Primary Email

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## Available Fields for Household Contacts

## New Household

- Household Name
- Email Address

- Phone
- Street Address
- Street Address Line 2
- City
- Postal Code
- Province
- Country

#### **Search Result Listing**

- City
- Province
- Phone
- Email

#### **Shared Address**

- Street Address (Home)
- City (Home)
- Postal Code (Home)
- Country (Home)
- State/Province (Home)

#### Summary Overlay

- Home Phone
- Home Mobile
- Primary Address
- City
- State/Province
- Postal Code
- Primary Email

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#### 6. After selecting your desired Profile for your Individual/Organization/Household Contacts, select Continue.

CanadaHelps.org	Home	Contacts	Contributions	Campaigns	Opportunities	Reports	Administer	DMS Charity Admin 👻
N	Name and Address umber of selected con ew Selected Contac	itacts: 5						
Continue	Cancel							
							Select Profile	

7. You'll then be directed to the **Update Page** where you can **modify your Contacts' fields**.

Tip: Selecting the "two pieces of paper" symbol next to a column's name will copy the value of the first row to all subsequent rows of that same column.

			lue for ALL rows, enter that value for the first contact and then click the Copy icon (new	t to the column title).			
Name	C First Name	C Last Name	C Street Address (Home)	City (Home)	Postal Code (Home)	Country (Home)	State (Home)
Allen .	A	Allen				• Canada -	Ontario -
Basi	A	Basi				O Canada -	Ontario -
Basi	A	Basi				O Canada 👻	Ontario +
ble Normal	Abbie	Normal	123 Fake Lane	Orangeburg	171.111	O Canada +	O Ontario +
lamm Timur	Adamm	Timur	434 Arlington Avenue	Toronto	M4C 2H3	O Canada 👻	• Ontario -
Adamm Timur	Adamm	Timur	434 Arlington Avenue	Terento	M4C 2H3	Canada 👻	• •

8. When ready, select *Update Contacts* in the bottom left-hand corner.

9. You'll see a notification message letting you know that your Contacts were updated successfully. Then, select *Done* to return to your main Contacts Tab.

CanadaHelps.org	Home	Contacts	Contributions	Campaigns	Opportunities	Reports	Administer	DMS Charity Admin 👻
Done								
							Done	