

# 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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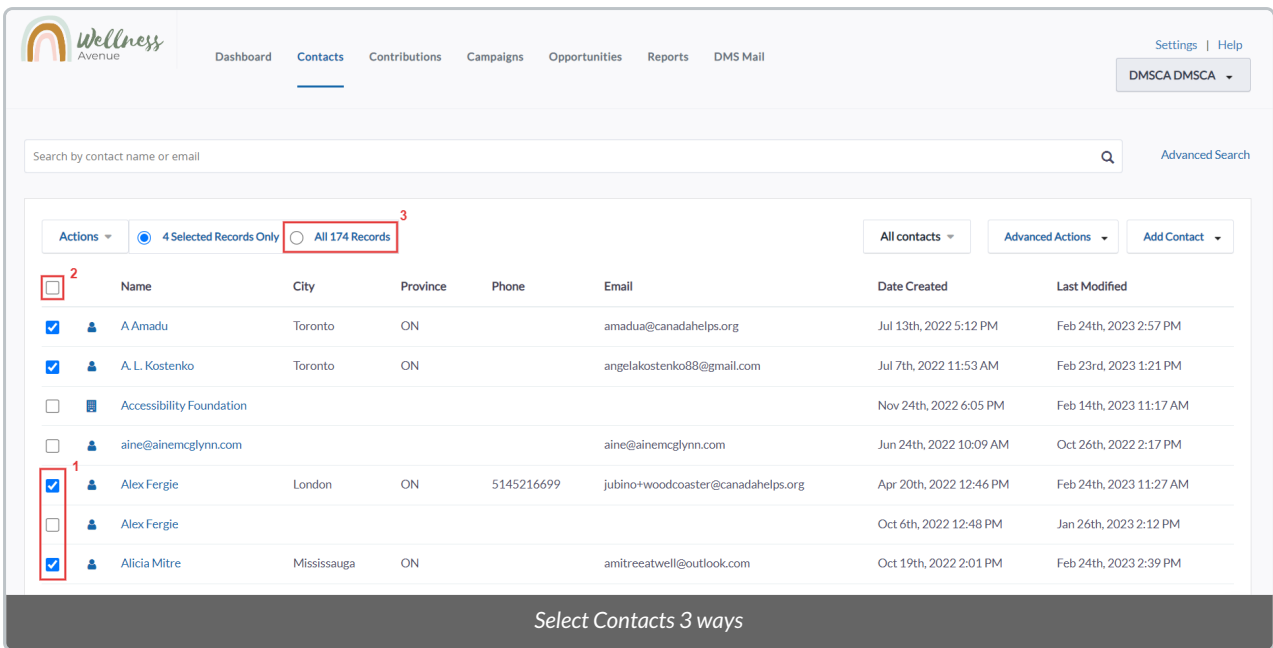
## Modifying Multiple Contacts at Once

1. Visit the **Contacts Tab**

2. Select either:

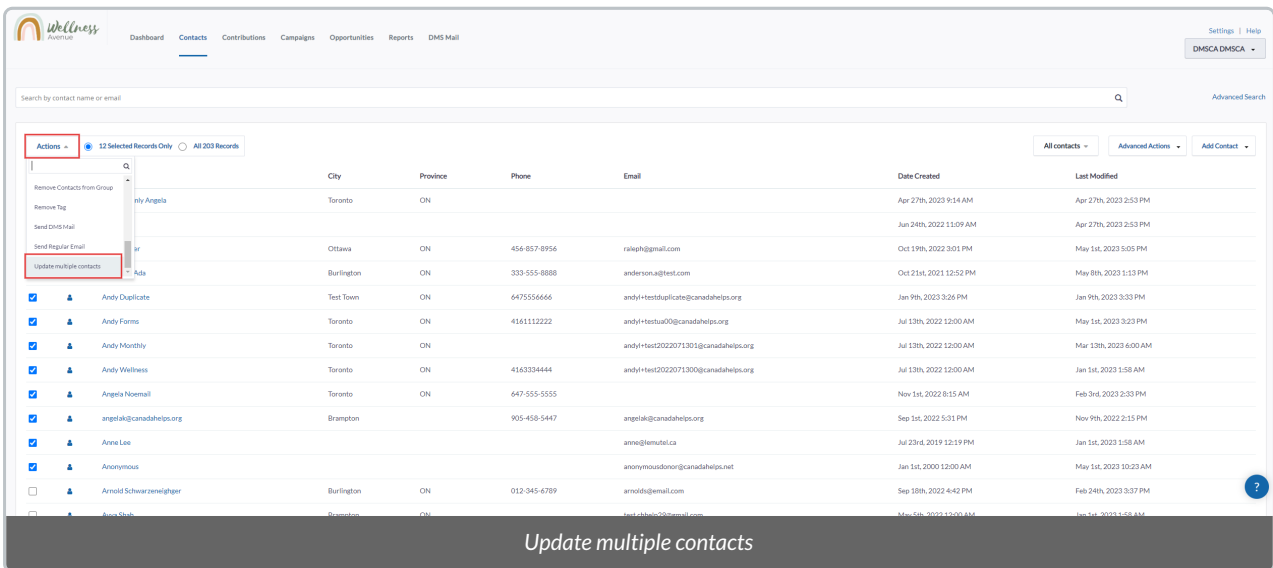
- (1) **The specific Contacts** you wish to modify,
- (2) Every listed Contact **on the page**, or
- (3) All **Contacts** in your DMS (or in your selected search criteria if you've conducted an [Advanced Search for Contacts](#))

**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).

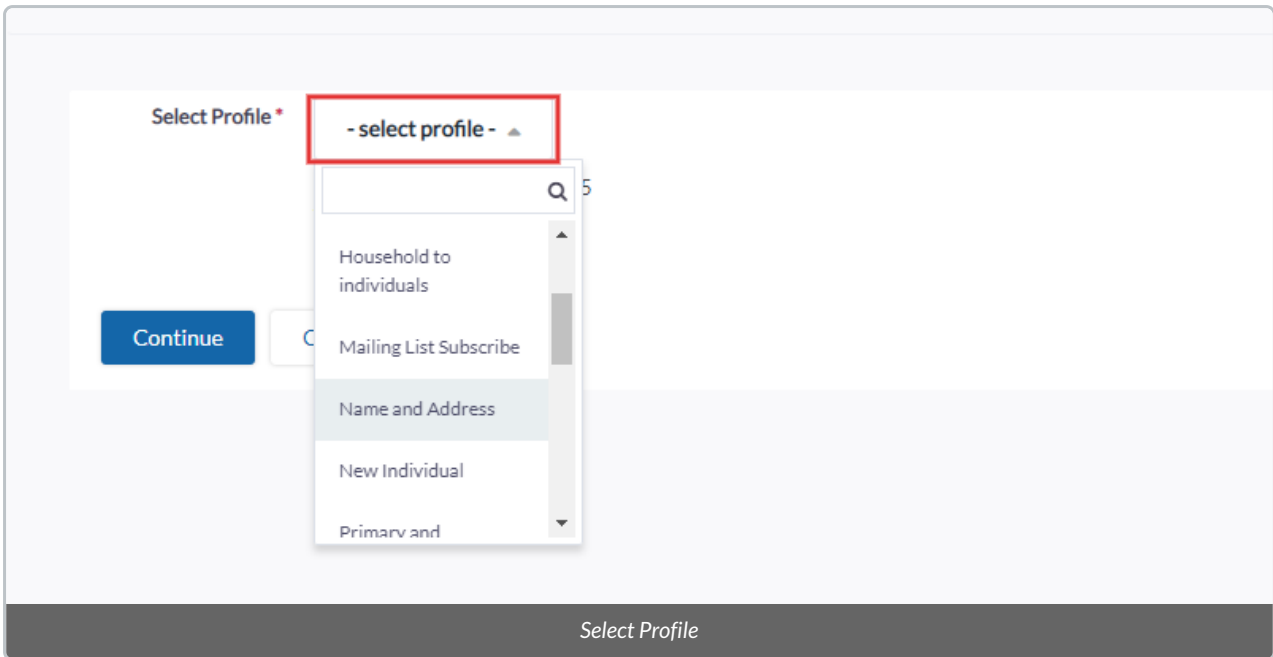


3. Select the **Actions** menu at the upper-left side of the Contact list

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



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



**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

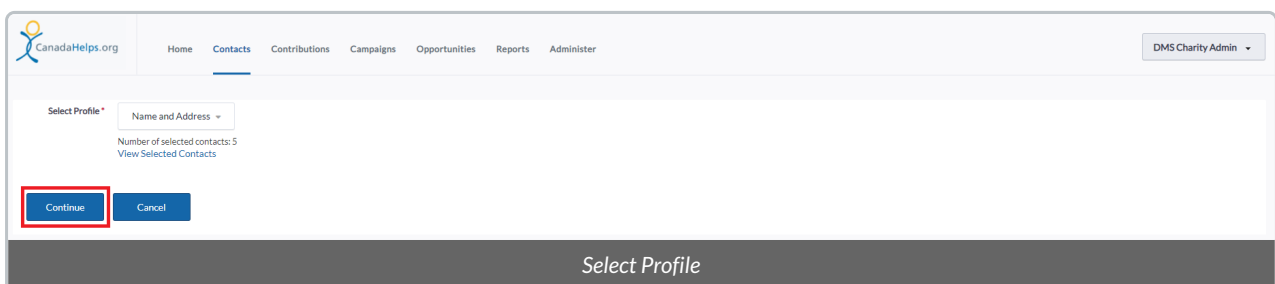
- Street Address (Home)
- City (Home)
- Postal Code (Home)
- Country (Home)
- State/Province (Home)

### 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**.



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.

Wellness Avenue | Dashboard | **Contacts** | Contributions | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMS Charity Admin

Update field values for each contact as needed. Click **Update Contacts** below to save all your changes. To set a field to the same value for ALL rows, enter that value for the first contact and then click the **Copy icon** (next to the column title).

Name	First Name	Last Name	Street Address (Home)	City (Home)	Postal Code (Home)	Country (Home)	State (Home)
A. Allen	A.	Allen				Canada	Ontario
A. Basi	A.	Basi				Canada	Ontario
A. Basi	A.	Basi				Canada	Ontario
Abbie Normal	Abbie	Normal	123 Fake Lane	Orangeburg	L7L 1L1	Canada	Ontario
Adamm Timur	Adamm	Timur	484 Arlington Avenue	Toronto	M4C 2H3	Canada	Ontario

**Update Contacts** | Cancel

Modify the Contact's fields

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