

Navigating the Contacts Tab

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Donor Management System

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Overview

- By selecting **Contacts** in the Main Menu, you will be directed to the Contacts Tab.
- The main screen of the Contacts Tab presents a list of every Contact record in your DMS with basic information about each Contact.
- Contacts are sorted alphabetically by the first name (or organization name) of each Contact.
- To access a Contact Profile, click on the name of the Contact.
- You can also [add a Contact](#) from this Tab by selecting **Add Contact** in the top right corner.

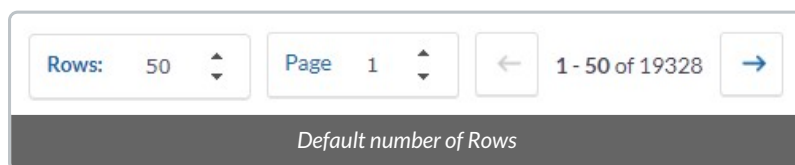
The screenshot shows the 'Wellness Avenue' Donor Management System interface. The 'Contacts' tab is highlighted in the main menu. The interface includes a search bar, a table of contacts, and various action buttons.

	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 24th, 2023 11:27 AM

Contacts List Columns

- **Name:** Contact's first and last names (for Individuals) and organization name (for Organizations).
 - **City:** the city the Contact resides in.
 - **Province:** the province the Contact resides in.
 - **Phone:** Contact's main phone number.
 - Note: at the moment, only phone numbers provided through Custom Donation Forms for one-time gifts sync into the DMS
 - **Date Created:** the date the Contact was created.
 - **Last Modified:** the date the Contact record was last modified.
-

Rows



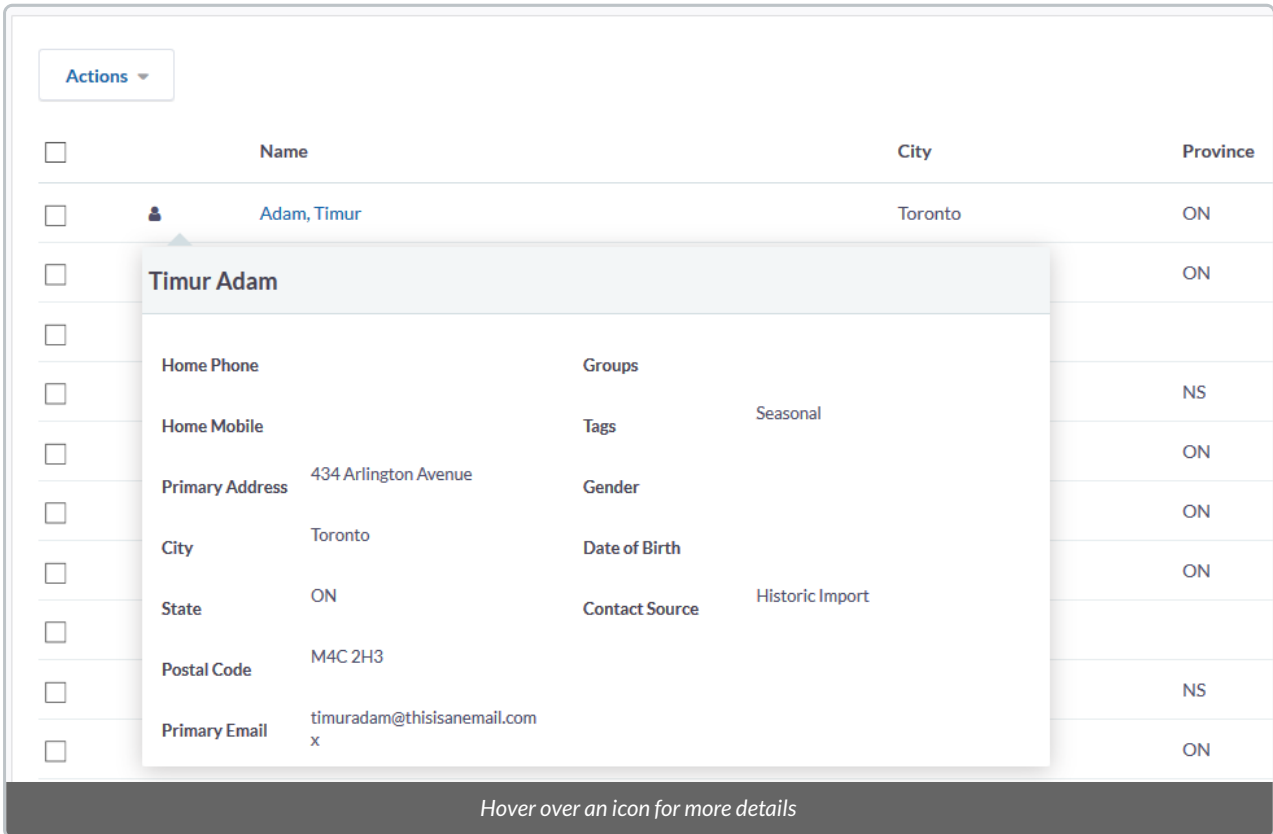
- The default number of Rows displayed on the Contacts Tab is set to 50.
 - To adjust the number of Rows of Contacts displayed in the list view, scroll to the bottom of the page and press the "up" or "down" arrows on the box that is labelled Rows.
 - To the right of the box labelled Rows are the number of pages of rows, the total number of Contacts in your DMS, as well as the ability to navigate to the next page list view.
 - To navigate to the next page of Contacts, click the arrow pointing right on the far right side of the page. Click on the arrow pointing left to go back to the previous page.
-

Contact Types

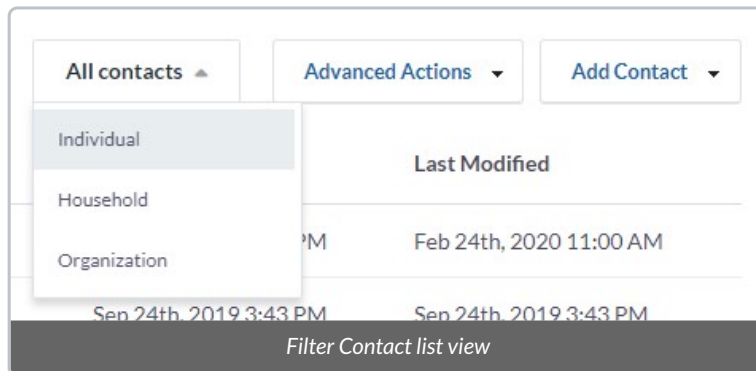
- There are three default types of Contacts in the DMS: **(1) Individuals**, **(2) Organizations** (3) Households (legacy feature).
- To the left of the Contact Name, you'll see 3 icons representing the different Contact Types.



- If you hover your mouse cursor over one of these icons, you can see more details for the specific Contact.



- To filter your list view by Contact Type, select **All Contacts** on the top right corner of the screen, and then select your desired Contact Type.



- Beyond the default Contact Types, you can also add new, additional Contact Types.

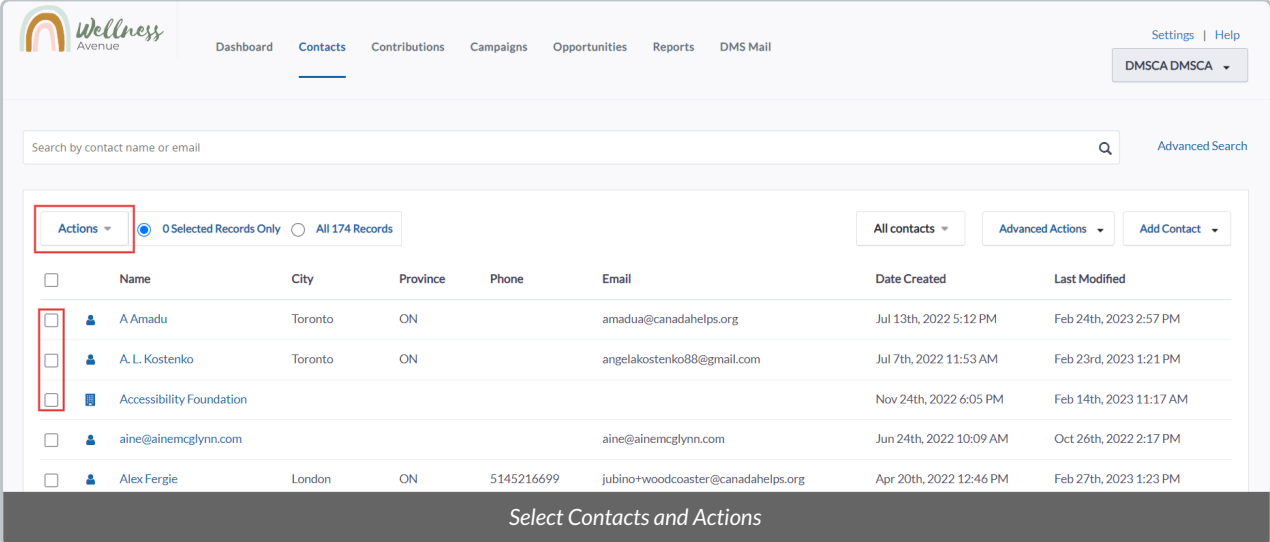
---> Learn more about [adding additional Contact Types](#) in your DMS

Actions

- There are many Actions you can perform from the Contacts Tab to one or more Contacts.
- The available Actions include adding Contacts to Groups, applying or removing Tags, sending emails, exporting Contacts and more.

Performing an Action

1. To perform an Action, select specific Contacts (by checking the boxes on the left) or select all listed Contacts on the page (top checkbox)
2. Once you have selected the Contact(s), press the **Actions** button on the top left corner of the page



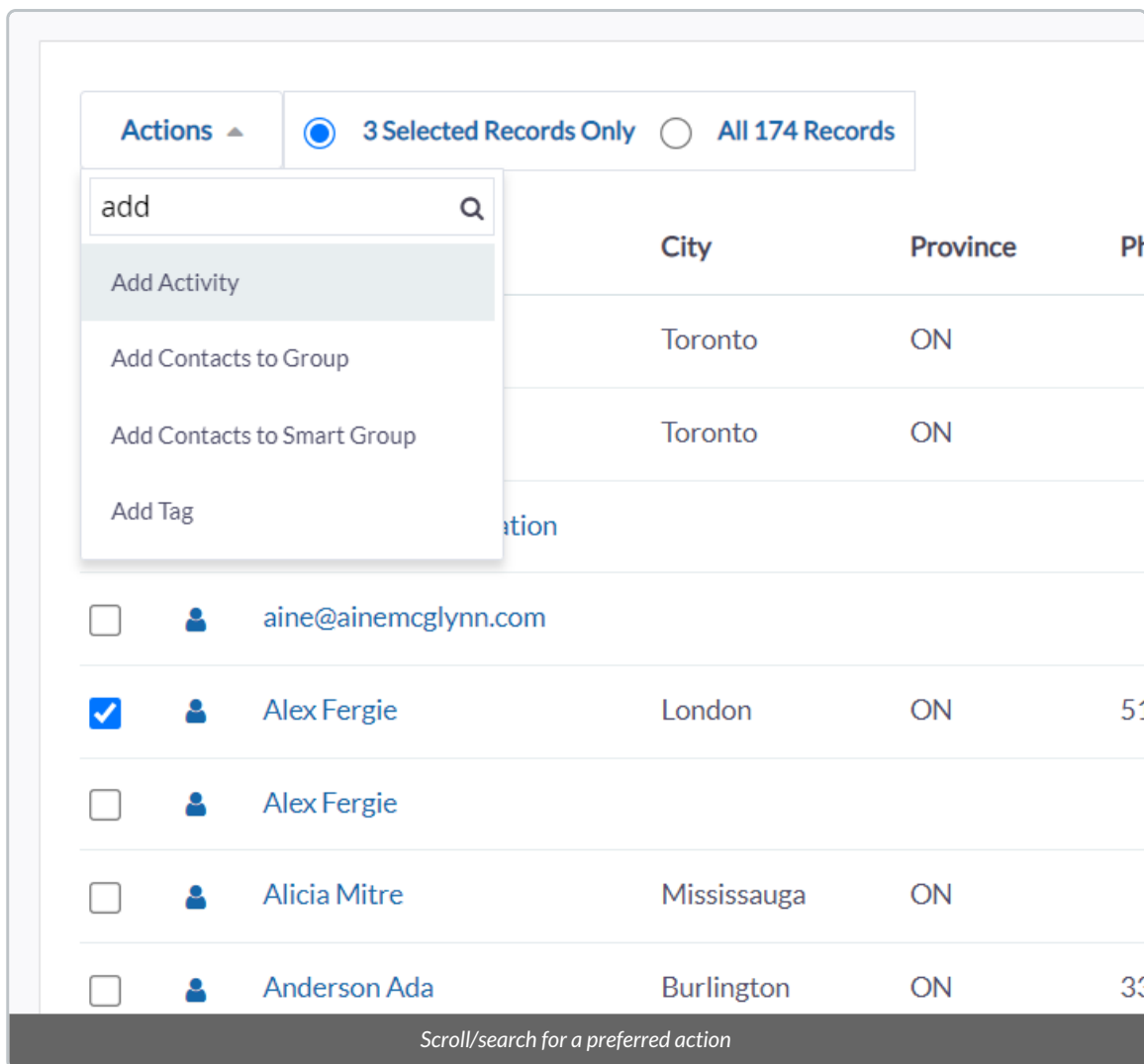
The screenshot shows the Wellness Avenue web application interface. At the top, there is a navigation menu with options: Dashboard, **Contacts**, Contributions, Campaigns, Opportunities, Reports, and DMS Mail. On the right, there are links for Settings and Help, and a dropdown menu for DMSCA DMSCA. Below the navigation is a search bar with the placeholder text "Search by contact name or email" and a magnifying glass icon, followed by a link for "Advanced Search".

The main content area features a table of contacts. Above the table, there is a red-bordered box containing the "Actions" button and two radio buttons: "0 Selected Records Only" (which is selected) and "All 174 Records". To the right of these buttons are three more buttons: "All contacts", "Advanced Actions", and "Add Contact".

<input type="checkbox"/>	Name	City	Province	Phone	Email	Date Created	Last Modified
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At the bottom of the page, there is a dark grey bar with the text "Select Contacts and Actions" in white.

3. Select the **Actions** button to view a dropdown menu of available Actions. If there is a particular Action you wish to take, you can find it by scrolling the list or typing its name into the search bar.

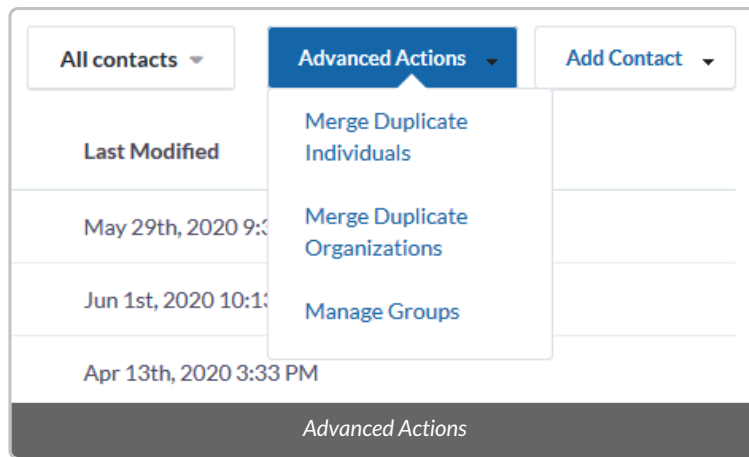


Common Actions

- Export Contacts: exports selected Contacts to a .csv format
- Group – Create Smart Group: [create a Smart Group](#) based on your search criteria
- Issue Annual Tax Receipts: issue an annual tax receipt via email and/or PDF format
- Send Email: [send a single email](#) to one of your Contacts

Advanced Actions

- In addition to the Actions listed above, the Contacts Tab has additional Advanced Actions.
- To access these Advanced Actions, click on *Advanced Actions* next to *All Contacts*.



All Advanced Actions

- Merge Duplicate Individuals: merge duplicated individuals from the selected Contacts.
- Merge Duplicate Organizations: merge duplicated organizations from the selected Contacts.
- Manage Groups: see and manage a list of all [Groups](#) & [Smart Groups](#).