

Deleting and Restoring Contacts

Last Modified on 04/24/2023 12:12 pm EDT

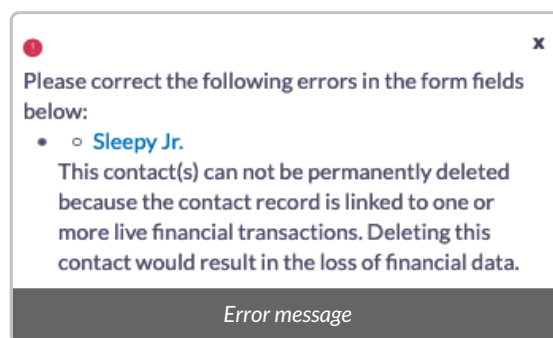
Donor Management System

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Considerations

- Before deleting Contacts, consider [merging them instead](#).
- If you delete (not permanently) a Contact with at least one Contribution, the Contributions associated with this Contact will be hidden (cannot be seen nor searched for). Once you restore the deleted Contact, then the Contributions will also go back.
- If you try to permanently delete a Contact with at least one offline Contribution, you will get this message



How to Delete Contacts

Deleting a Single Contact

1. Go to the **Contacts Tab**

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

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

Settings | Help

DMSCA DMSCA

Karolina

Advanced Search

Actions **The Found Record** All contacts Advanced Actions Add Contact

<input type="checkbox"/>	Name	City	Province	Phone	Email	Date Created	Last Modified
<input type="checkbox"/>	Karolina Maya	Ottawa	ON		celinaabernalq@gmail.com	May 8th, 2022 11:00 PM	Feb 27th, 2023 1:28 AM

Search for a Contact

3. In the **Summary tab** of the Contact's profile, select **Delete Contact** at the bottom of the page.

Note: Once completed, this contact will remain (soft) deleted indefinitely until you manually delete them permanently (i.e., purge the record entirely from your DMS).

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

Settings | Help

DMSCA DMSCA

Karolina Maya

Actions Edit

Summary Contributions 34 Activities 91 Relationships 2 Groups 7 Notes 0 Tags 1 Opportunities

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

Website

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: Gold Donor

Contact Type: Individual

Contact ID: 333

External ID

Gender: She/Her

Date of Birth

Age

Employer

Job Title

Recognition Name

Source: CanadaHelps

Delete Contact

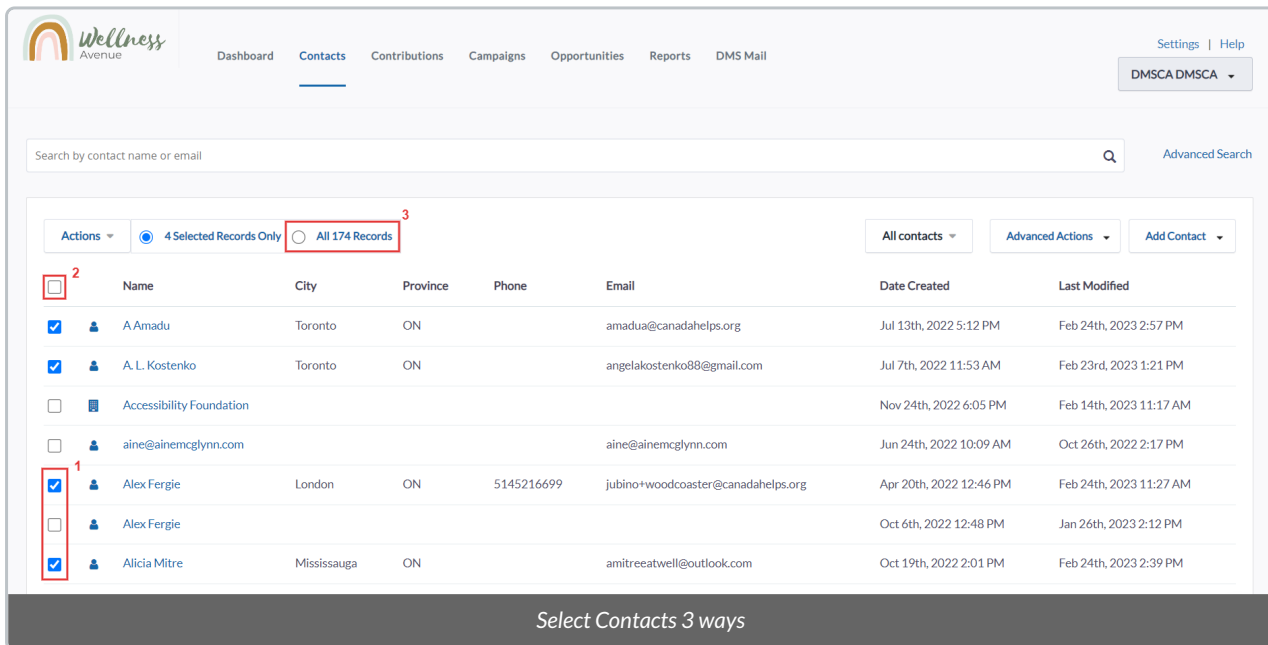
Delete Contact

Deleting Multiple Contacts at once

1. Go to the **Contacts Tab**

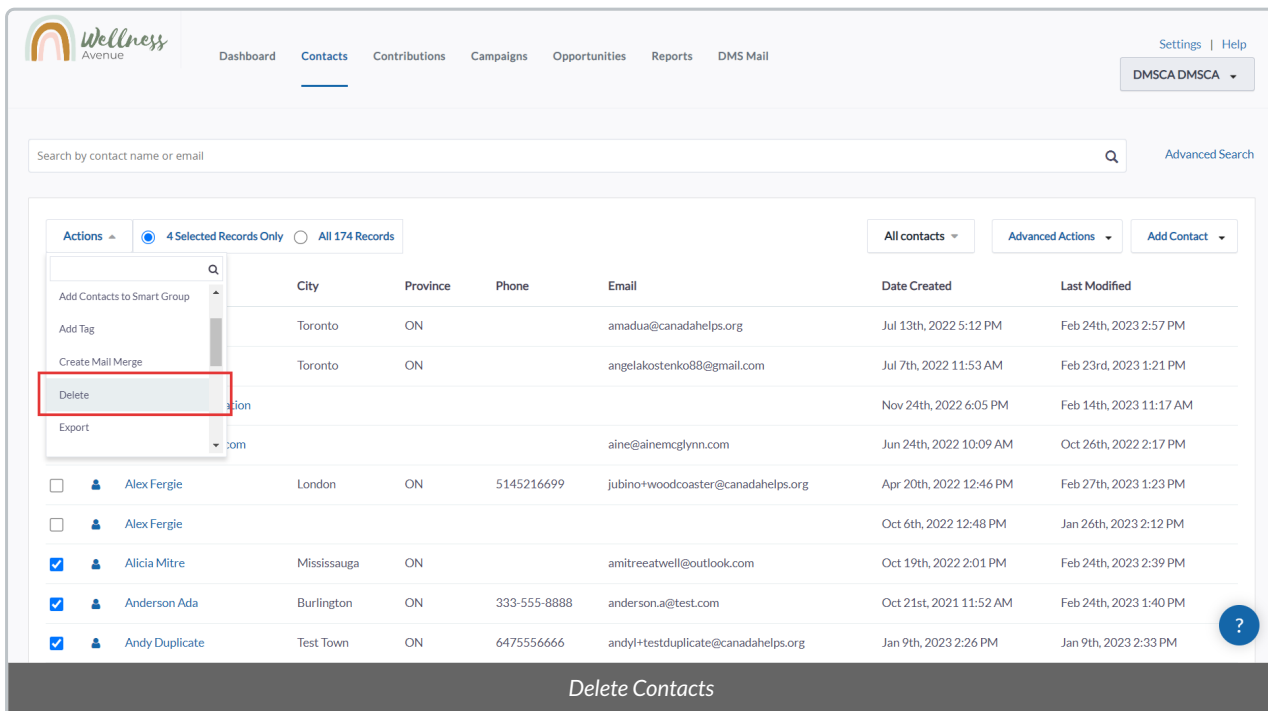
2. Search for a specific Contact or select either:

- (1) The specific Contacts you wish to delete,
- (2) Every listed Contact on the page, or
- (3) All Contacts in your DMS



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

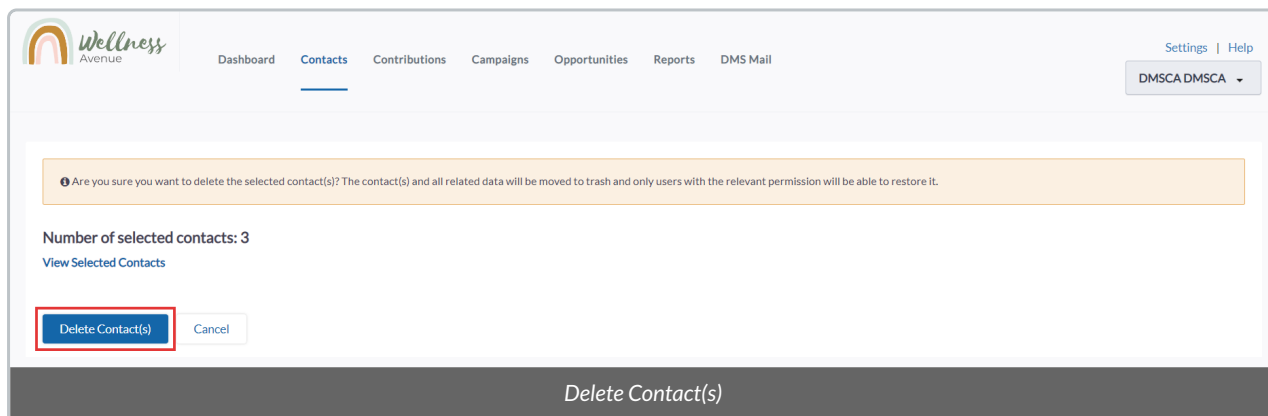
4. Either type "delete" in the **Actions** search bar or scroll the list to find the **Delete contacts** option



5. On the next page, select **Delete Contact(s)**. You will also be able to view the selected Contacts by selecting **View**

Selected Contacts before deletion.

Note: Once completed, these contacts will remain (soft) deleted indefinitely until you delete them permanently (i.e., purge the records entirely from your DMS).



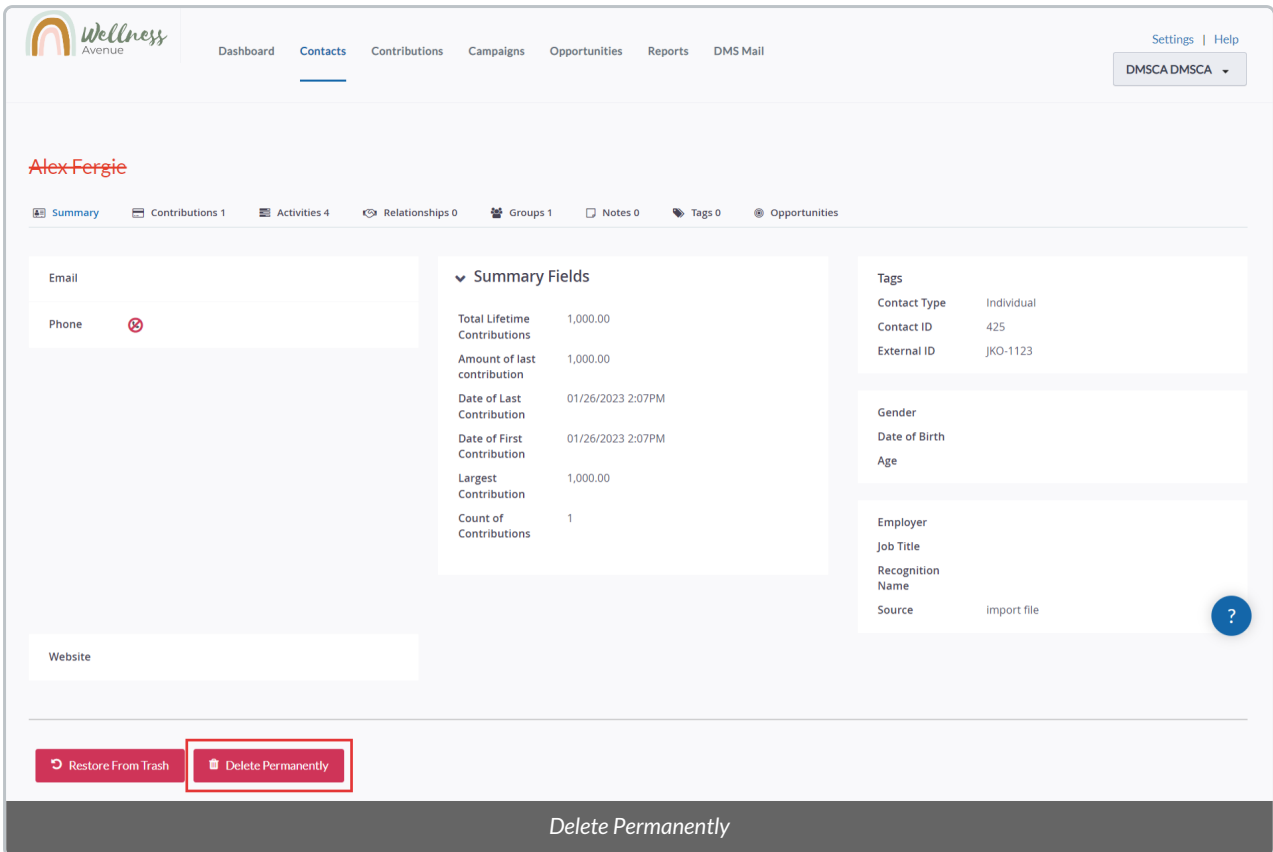
Deleting a Contact Permanently

Once you have deleted a **single Contact**, you can also delete them permanently.

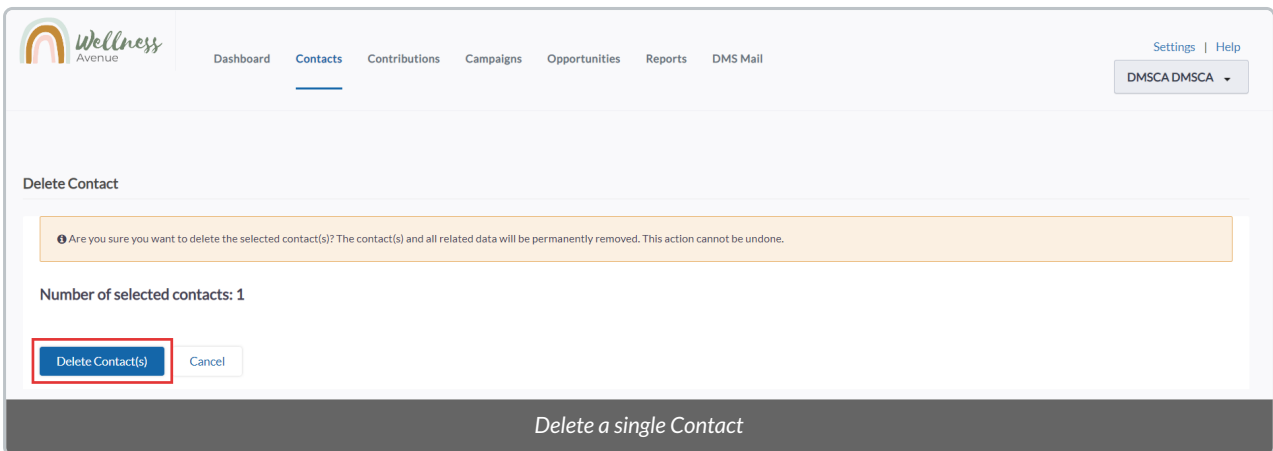
Note: If you delete a Contact permanently, **you will not be able to retrieve them.**

From a Contact Profile

1. Follow the steps above to delete a **single Contact**
2. If you're still on the deleted Contact's **Contact Profile**, scroll down and select **Delete Permanently**.



3. The system will prompt you to confirm that you wish to delete your single Contact permanently



From the Contacts Tab

If you have navigated away from the deleted Contact's **Contact Profile** after deleting them:

1. Go to the **Contacts Tab**
2. In the top right-hand corner of the screen, select **Advanced Search**

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

Settings | Help

DMSCA DMSCA

Search by contact name or email

Actions 0 Selected Records Only All 173 Records

All contacts Advanced Actions Add Contact

<input type="checkbox"/>	Name	City	Province	Phone	Email	Date Created	Last Modified
<input type="checkbox"/>	A Amadu	Toronto	ON		amadia@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

Advanced Search

3. Under **Display Settings**, check the box **Search in trash (deleted contacts)** and select **Search**

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

Settings | Help

DMSCA DMSCA

^ Edit Search Criteria

^ Display Settings

DISPLAY RESULTS AS

Contacts

SEARCH OPERATOR

Search in trash (deleted contacts)

AND OR

^ Contacts

^ Address Fields

^ Custom Fields

^ Activities

^ Demographics

Search in trash (deleted contacts)

4. Scroll down to view your search results, and **select the name** of the Contact you wish to delete permanently.

^ Edit Search Criteria

^ Display Settings

^ Contacts

^ Address Fields

^ Custom Fields

^ Activities

^ Demographics

^ Notes

^ Change Log

^ Contributions

^ Mailings

^ Opportunities

Search Reset Form

Actions 0 Selected Records Only All 75 Records

Advanced Actions Add Contact

<input type="checkbox"/>	Name	City	Province	Phone	Email	Date Created	Last Modified
<input type="checkbox"/>	275 4007					Dec 14th, 2022 4:29 PM	Dec 14th, 2022 4:29 PM
<input type="checkbox"/>	Adam Anderson	Toronto	ON		adam@dsssssssss.ca	Oct 21st, 2021 11:52 AM	Dec 30th, 2021 1:32 PM

Select a single Contact

5. Once on their **Contact Profile**, scroll down and select **Delete Permanently**

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

Settings | Help

DMSCA DMSCA

Adam Anderson

Summary Contributions 0 Activities 1 Relationships 0 Groups 0 Notes 0 Tags 0 Opportunities

Work Address 123 3 St
Toronto, ON N3N 4N4
Canada

Home Email adam@dsssssssss.ca

Phone

Website

Summary Fields

- Total Lifetime Contributions
- Amount of last contribution
- Date of Last Contribution
- Date of First Contribution
- Largest Contribution
- Count of Contributions

Tags

Contact Type Individual
Contact ID 281
External ID

Gender
Date of Birth
Age

Employer
Job Title
Recognition Name A
Source DMS Manual

Restore From Trash **Delete Permanently**

Delete Permanently

How to Restore Contacts

If you've only (soft) deleted a Contact/s (i.e., not yet permanently deleted them; see section above), you'll be able to restore the Contact record/s anytime.

Restoring a Single Contact

1. Go to the **Contacts Tab**
2. On the top right corner of the screen, select **Advanced Search**

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

Settings | Help

DMSCA DMSCA

Search by contact name or email

Advanced Search

Actions 0 Selected Records Only All 173 Records

All contacts Advanced Actions Add Contact

<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 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

Advanced Search

3. Under **Display Settings**, check the box **Search in trash (deleted contacts)**

^ Edit Search Criteria

^ Display Settings

DISPLAY RESULTS AS

Contacts ▾

SEARCH OPERATOR

AND OR

Search in trash (deleted contacts)

▾ Contacts

▾ Address Fields

▾ Custom Fields

▾ Activities

▾ Demographics

Search in trash (deleted contacts)

4. Under **Contacts**, type the name of the deleted Contact and select **Search**

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

Settings | Help

DMSCADMSCA

^ Edit Search Criteria

^ Display Settings

^ Contacts

NAME
Dagny Thompson

EMAIL
Complete or partial email

CONTACT TYPE(S)

GROUP(S)

CONTACT TAGS(S)

Exclude Include by Privacy Option(s)

PHONE

PHONE LOCATION
Any

PREFERRED COMMUNICATION METHOD
Any

Email On Hold

PHONE TYPE
Any

Punctuation and spaces are ignored.

CONTACT ID

CONTACT SOURCE
Contact source

JOB TITLE
Job title

EXTERNAL ID

PREFERRED LANGUAGE
Any

^ Address Fields

^ Custom Fields

^ Activities

^ Demographics

^ Notes

^ Change Log

^ Contributions

^ Mailings

^ Opportunities

Search Reset Form

Search Contact name and select Search

5. From the search results at the bottom of your screen, select the name of the Contact you wish to restore

^ Edit Search Criteria

^ Display Settings

^ Contacts

^ Address Fields

^ Custom Fields

^ Activities

^ Demographics

^ Notes

^ Change Log

^ Contributions

^ Mailings

^ Opportunities

Search


Reset Form

Actions

The Found Record

Advanced Actions

Add Contact

<input type="checkbox"/>	Name	City	Province	Phone	Email	Date Created	Last Modified
<input type="checkbox"/>	 Dagny Thompson	Toronto	ON		akostenko+test@gmail.com	Jul 14th, 2022 11:34 AM	Jan 13th, 2023 5:44 PM

Select a single Contact

6. Once on their **Contact Profile**, under **Summary**, select **Restore From Trash**.

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

Dagny Thompson

Summary | Contributions 10 | Activities 16 | Relationships 1 | Groups 4 | Notes 0 | Tags 0 | Opportunities

Home Address: Address belongs to A. L. Kostenko
79 Earls court Ave.
Toronto, ON M6E4A7
Canada

Home Email: akostenko+test@gmail.com

Phone:

Website:

Summary Fields:

- Total Lifetime Contributions: 950.00
- Amount of last contribution: 100.00
- Date of Last Contribution: 11/24/2022 4:42PM
- Date of First Contribution: 07/14/2022 12:33PM
- Largest Contribution: 400.00
- Count of Contributions: 7

Tags:

- Contact Type: Individual
- Contact ID: 383
- External ID:
- Gender:
- Date of Birth:
- Age:
- Employer:
- Job Title:
- Recognition Name:
- Source:

Actions: Restore From Trash | Delete Permanently

Restore from trash

Restoring Multiple Contacts at Once

1. Go to the **Contacts Tab**
2. On the top right corner of the screen, select **Advanced Search**

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

Search by contact name or email

Actions | 0 Selected Records Only | All 173 Records

All contacts | **Advanced Actions** | **Add Contact**

<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 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

Advanced Search

3. Under **Display Settings**, check the box **Search in trash (deleted contacts)** and select **Search**.

The screenshot shows the CanadaHelps.org search interface. At the top left is the logo and the text "CanadaHelps.org". A navigation menu includes "Home", "Contacts", "Contributions", "Campaigns", "Opportunities", "Reports", and "Administer". The "Contacts" menu item is highlighted. In the top right corner, there is a user profile dropdown labeled "DMS Charity Admin". Below the navigation is a search form with two expandable sections: "Edit Search Criteria" and "Display Settings". The "Display Settings" section contains three main controls: "RESULTS" with a dropdown menu set to "Contacts", "VIEW" with a dropdown menu set to "Search Result Listing", and "SEARCH OPERATOR" with radio buttons for "AND" (selected) and "OR". Below these controls is a checkbox labeled "Search in trash (deleted contacts)" which is checked and highlighted with a red box. To the right of the checkbox are "Reset Form" and "Search" buttons. At the bottom of the form, a dark grey bar displays the text "Search in trash (deleted contacts)".

4. From the search results at the bottom of your screen, select multiple Contacts, and then from the **Actions** menu, select **Restore contacts from trash**

- ^ Edit Search Criteria
- ^ Display Settings
- ^ Contacts
- ^ Address Fields
- ^ Custom Fields
- ^ Activities
- ^ Demographics
- ^ Notes
- ^ Change Log
- ^ Contributions
- ^ Mailings
- ^ Opportunities

Remove Contact from Trash

Remove Contact from Trash

Actions 3 Selected Records Only All 75 Records

Advanced Actions Add Contact

<input type="checkbox"/>	Name	City	Province	Phone	Email	Date Created	Last Modified
<input type="checkbox"/>	275-4007					Dec 14th, 2022 4:29 PM	Dec 14th, 2022 4:29 PM
<input checked="" type="checkbox"/>	Adam Anderson	Toronto	ON		adam@dssssssss.ca	Oct 21st, 2021 11:52 AM	Dec 30th, 2021 1:32 PM
<input type="checkbox"/>	Adam Anderson					Oct 21st, 2021 11:53 AM	Nov 1st, 2021 8:31 AM
<input type="checkbox"/>	Adam Anderson				anderson.b@gmail.com	Oct 21st, 2021 11:52 AM	Nov 11th, 2022 3:25 PM
<input type="checkbox"/>	Adam Anderson					Oct 21st, 2021 11:52 AM	Nov 11th, 2022 3:25 PM
<input type="checkbox"/>	Adam Anderson			555-555-5555	adam@iiiiiiiiiii.org	Oct 21st, 2021 11:52 AM	Jan 4th, 2022 1:06 PM
<input type="checkbox"/>	Adam Anderson	Burlington	ON	888-888-8888		Oct 21st, 2021 11:52 AM	Jan 4th, 2022 1:06 PM
<input type="checkbox"/>	Adam Anderson			5555555555		Apr 12th, 2022 5:59 PM	Apr 12th, 2022 5:59 PM
<input type="checkbox"/>	Adam Anderson			123-123-1234		Apr 18th, 2022 2:54 PM	Apr 18th, 2022 2:54 PM
<input type="checkbox"/>	Adam Anderson					Apr 18th, 2022 3:01 PM	Apr 18th, 2022 3:01 PM
<input type="checkbox"/>	aine@ainemcglynn.com				aine@ainemcglynn.com	Feb 24th, 2022 1:58 PM	Feb 24th, 2022 1:58 PM
<input type="checkbox"/>	aine@ainemcglynn.com				aine@ainemcglynn.com	Jun 2nd, 2022 2:29 PM	Jun 2nd, 2022 2:29 PM
<input type="checkbox"/>	Alex Fergie					Oct 6th, 2022 12:48 PM	Jan 26th, 2023 2:12 PM
<input checked="" type="checkbox"/>	Alex Leader	Aurora	ON	6479273545	alex@canadahelps.org	Apr 20th, 2022 12:46 PM	Nov 11th, 2022 3:25 PM
<input checked="" type="checkbox"/>	Amadu Adams	Toronto	ON		amadua@canadahelps.org	Jul 14th, 2022 9:42 AM	Feb 27th, 2023 3:59 PM
<input type="checkbox"/>	Andy Duplicate					Jan 9th, 2023 2:33 PM	Jan 9th, 2023 2:33 PM

Restore contacts from trash

5. On the next page, select **Restore Contact(s)**. You will also be able to view the selected Contacts by selecting **View Selected Contacts** before restoration.

Are you sure you want to restore the selected contact(s)? The contact(s) and all related data will be fully restored.

Number of selected contacts: 3

[View Selected Contacts](#)

Restore Contact(s)

Cancel

Restore Contact(s)