

# Exporting Contacts

Last Modified on 02/28/2023 10:13 am EST

## Donor Management System

Whether you're looking to export a complete list of your Contacts, the results of a simple search, or a set Group, the DMS allows you to export your Contacts as a .CSV (comma separated values) format. Contacts may be exported for various purposes such as archiving, mailings, importing on 3rd party tools, further analysis, etc.

You can also select which DMS fields you would like to export, which can be useful for subsequent import into a third-party platform, such as MailChimp, Constant Contact, or another software.

**This article will cover how to complete an Export of your DMS Contacts.**

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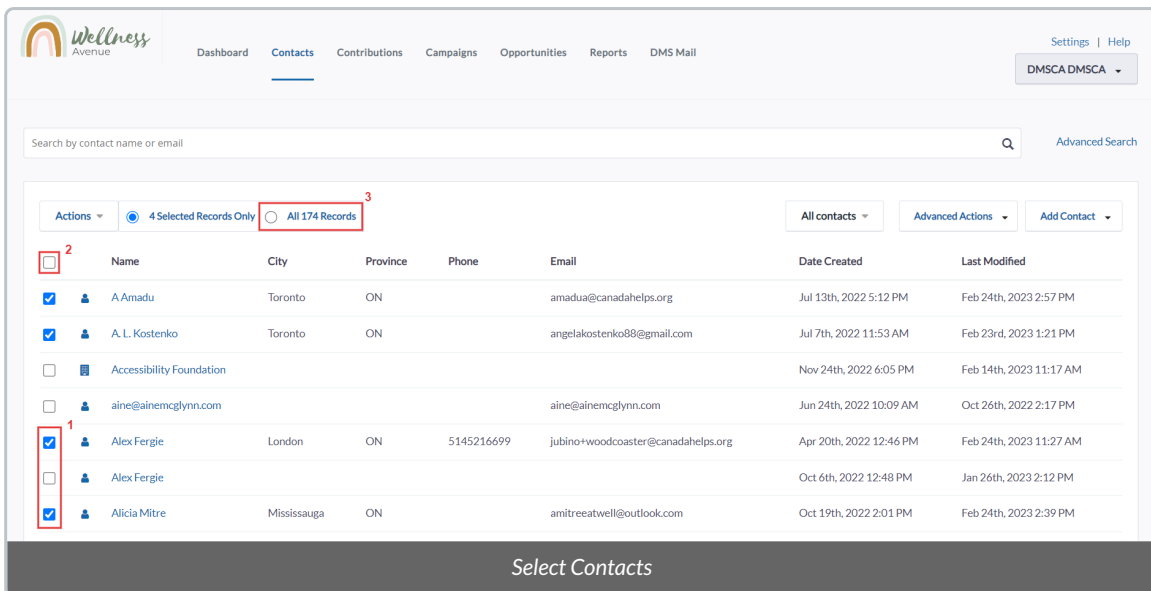
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## Considerations

- Before completing an Export of your Contacts, ask yourself if it's possible for you to access the same information by performing (and downloading) an [Advanced Search](#) or a [Report](#).

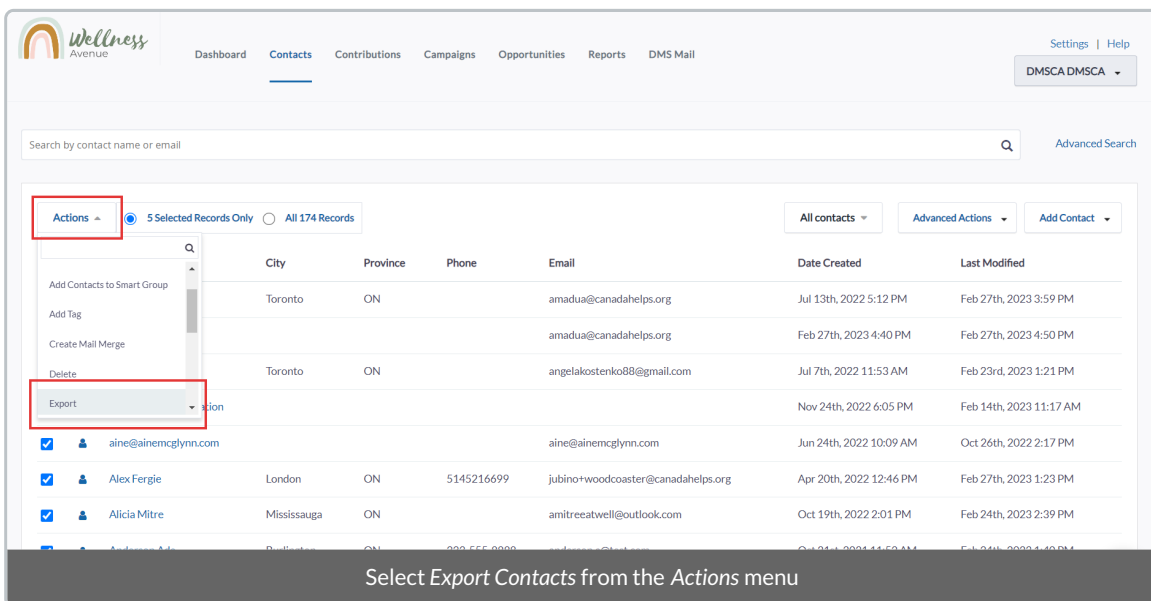
## Export your Contacts: First Steps

1. Go to the **Contacts Tab**
2. Search for a specific Contact or select either:
  - (1) **The specific Contacts** you wish to export,
  - (2) Every listed Contact **on the page**, or
  - (3) All **Contacts** in your search criteria



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

4. Either type “export” in the **Actions** search bar or scroll the list to find the **Export Contacts** option



5. Once selected, you will be brought to the **Export Page** which we’ll go into detail below.

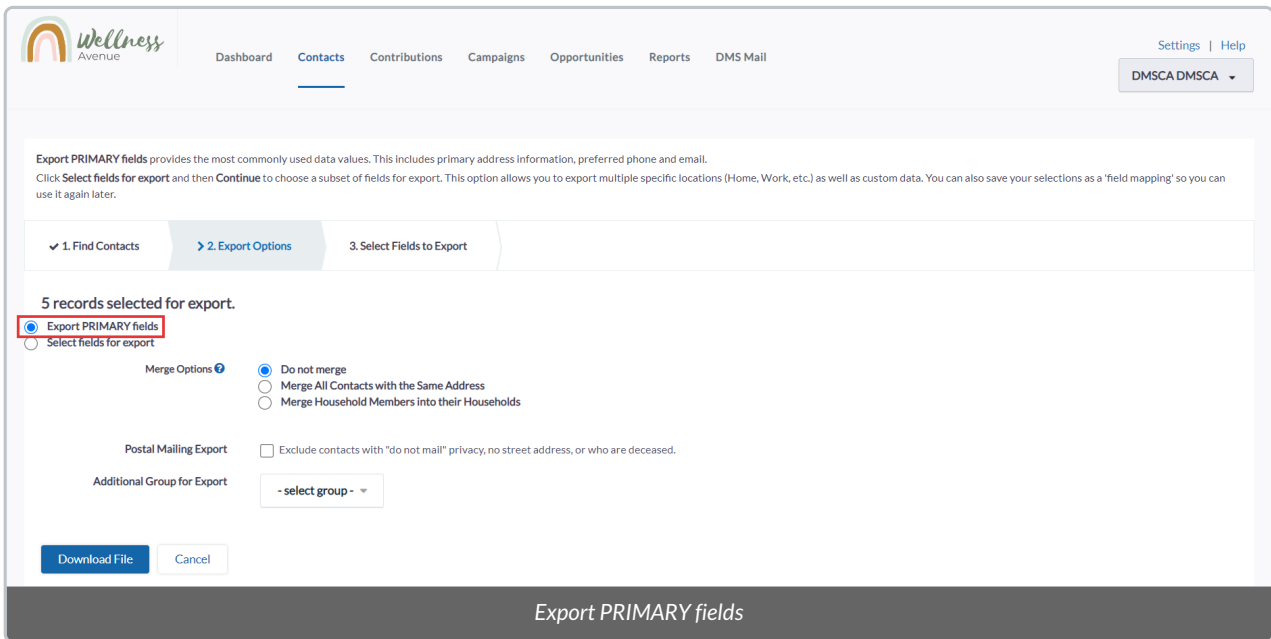
## Exporting your Contacts

On this page, you can export:

- Every Contact field, or
- Select Contact fields.

## Export Primary Fields

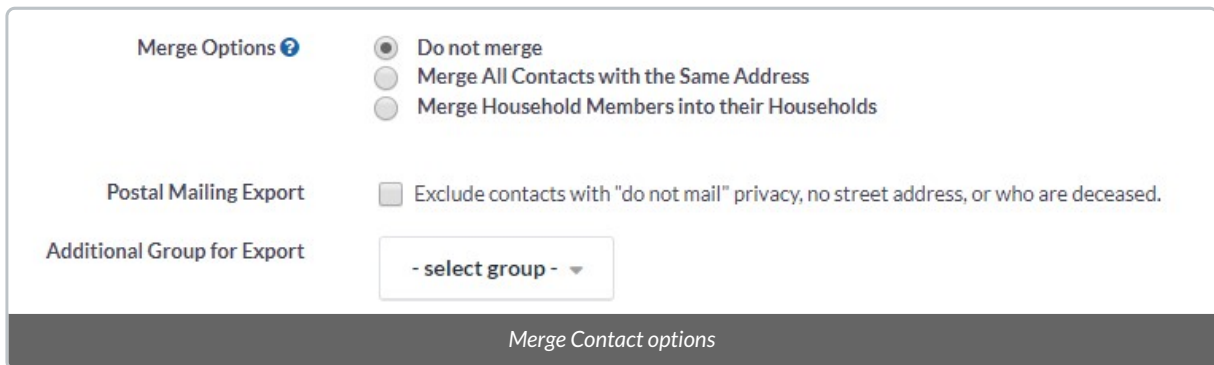
6. By default, the **Export PRIMARY fields** option will be selected. This will allow you to download all the Contact fields in the DMS.



7. Before exporting your Contacts, you'll have options to **further segment your selection**

## Merge Options

Use one of the Merge Contact options when exporting records to reduce your mailing size by sending a single piece of mail to each address:



**Merge All Contacts with the Same Address** combine any Contacts having the same address (street, city, postal code, country) into a single record.

- If a Household record already exists in which multiple Individuals share the same address, the Household will be exported as the combined record.

Example:

1. Julie D. and Fred Nick (Individual records) both have the same address as "34 Huron St"
2. Julie D. and Fred Nick are part of the "D. & Nick" Household

- The export would list them as a single Contact named "D. & Nick".
- If no Household record exists, the records will be combined and the **Addressee** field will list the Contact names, comma-separated.

Example:

- Julie D. and Fred Nick (Individual records) both have the same address as "34 Huron St"
- Both Contacts are not part of a Household
- The export would list them as a single Contact, and the **Addressee** field would show "Julie D., Fred Nick".

**Merge Household Members into their Households:** export the Household record for any Contacts sharing a Household address.

### Postal Mailing Export

- Selecting **Exclude contacts with "do not mail" privacy, no street address, or who are deceased.** will simply exclude Contacts who cannot or do not wish to be contacted.

- This relies on the Contact's details being kept up to date and accurate.

[Learn more about Data Hygiene & Best Practices](#)

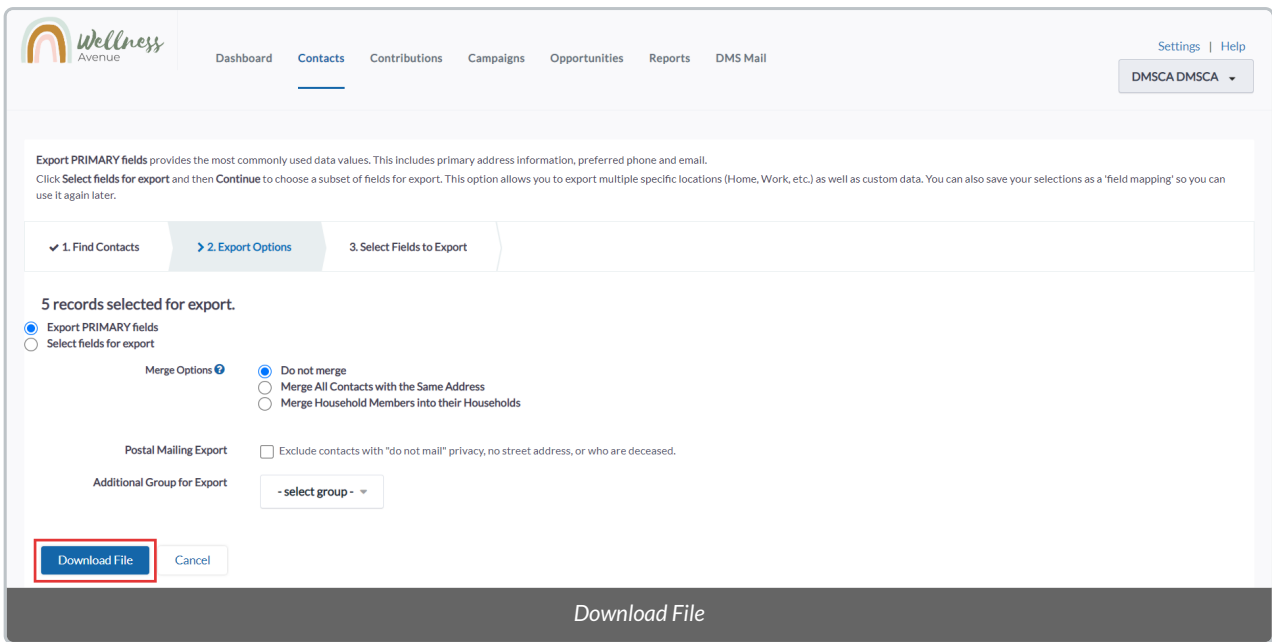
### Additional Group for Export

- Select an additional **Group** for exporting. Your previous export options parameters will also be applied to this additional Group.

Contact ID	Contact Type	Contact Status	Do Not Enter	Do Not Phone	Do Not Mail	Do Not Send	Do Not Track	No Bulk Email	Legal Identifier	External ID	Sort Name	Display Name	Recognized Legal Name	Image URL	Preferred Name
278	Individual			1						ID00018	Collins, Jec	Jed Collins			
283	Individual			1						ID00023	Buck, Tye	Tye Buck			
302	Individual									ID00042	Cottrell, Jc	Jordan-Lee Cottrell			

Example: Exporting Contacts resulting from a search

- Once all your options have been reviewed and selected, proceed by selecting the **Download File** button at the bottom left of the screen.



9. The DMS will begin **compiling a list of all your selected Contacts**. This process usually takes a few seconds but may take up to a few minutes, so please do not refresh your page until the process is finished.

10. **The resulting .csv** can be opened with any recent version of Excel, Google Sheets, etc.

## Select Fields for Export

6. Select the **Select fields for export** option so you can choose which Contact fields you'd like to export

**Note:** If you'd like to export the same fields in the future, you can save your selection to be used on future exports as **Saved Field Mappings**. Read on to learn more

7. Select your **Use Saved Field Mapping** option if you have saved fields you'd like to export

8. Before exporting your Contacts, you'll have options to **further segment your selection**

## Merge Options

Use one of the Merge Contact options when exporting records to reduce your mailing size by sending a single piece of mail to each address:

**Merge Options** ?

Do not merge  
 Merge All Contacts with the Same Address  
 Merge Household Members into their Households

**Postal Mailing Export**  Exclude contacts with "do not mail" privacy, no street address, or who are deceased.

**Additional Group for Export**

Merge Contact options

**Merge All Contacts with the Same Address** combine any Contacts having the same address (street, city, postal code, country) into a single record.

- If a Household record already exists in which multiple Individuals share the same address, the Household will be exported as the combined record.

Example:

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  2. Julie D. and Fred Nick are part of the "D. & Nick" Household
  3. The export would list them as a single Contact named "D. & Nick".
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Example:

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### Postal Mailing Export

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[Learn more about Data Hygiene & Best Practices](#)

### Additional Group for Export

- **Select an additional Group for exporting.** Your previous export options parameters will also be applied to this additional Group.

CanadaHelps\_DMS\_Contact\_Search (7) - Excel

Contact ID	Contact Type	Contact Status	Do Not Enter	Do Not Phone	Do Not Mail	Do Not Send	Do Not Track	No Bulk Email	Legal Identifier	External ID	Sort Name	Display Name	Recognized	Legal Name	Image URL	Preferred
278	Individual			1						ID00018	Collins, Jc	Jed Collins				
283	Individual			1						ID00023	Buck, Tye	Tye Buck				
302	Individual									ID00042	Cottrell, Jc	Jordan-Lee Cottrell				

Example: Exporting Contacts resulting from a search

9. Once all your options have been reviewed and selected, select **Continue**

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Export PRIMARY fields provides the most commonly used data values. This includes primary address information, preferred phone and email. Click **Select fields for export** and then **Continue** to choose a subset of fields to export. This option allows you to export multiple specific locations (Home, Work, etc.) as well as custom data. You can also save your selections as a 'field mapping' so you can use it again later.

1. Find Contacts > 2. Export Options 3. Select Fields to Export

5 records selected for export.

Export PRIMARY fields

**Select fields for export**

Merge Options

Do not merge

Merge All Contacts with the Same Address

Merge Household Members into their Households

Postal Mailing Export

Exclude contacts with "do not mail" privacy, no street address, or who are deceased.

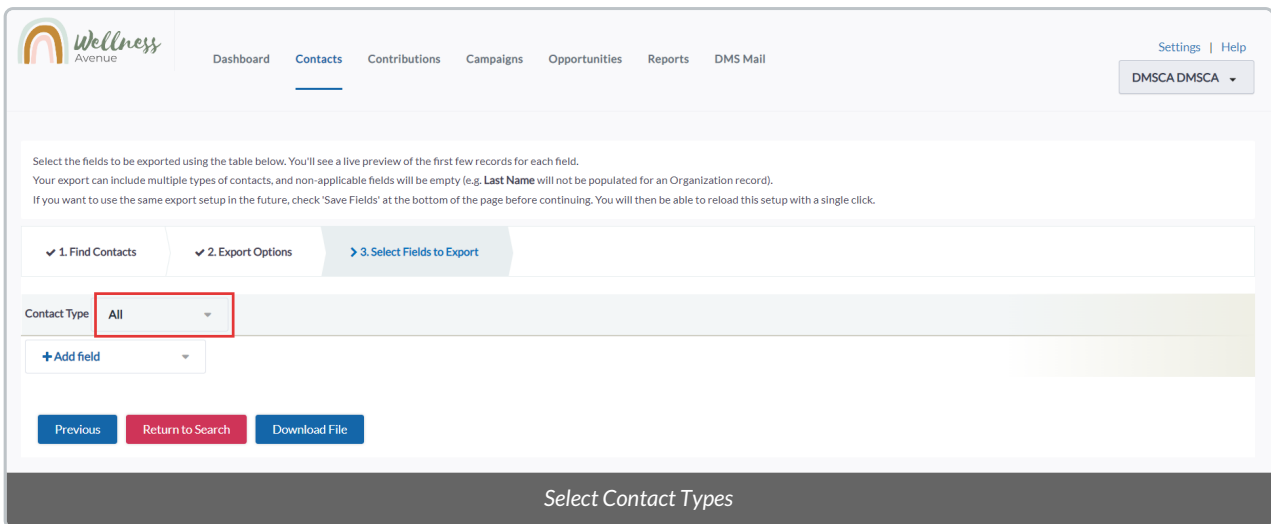
Additional Group for Export

-select group-

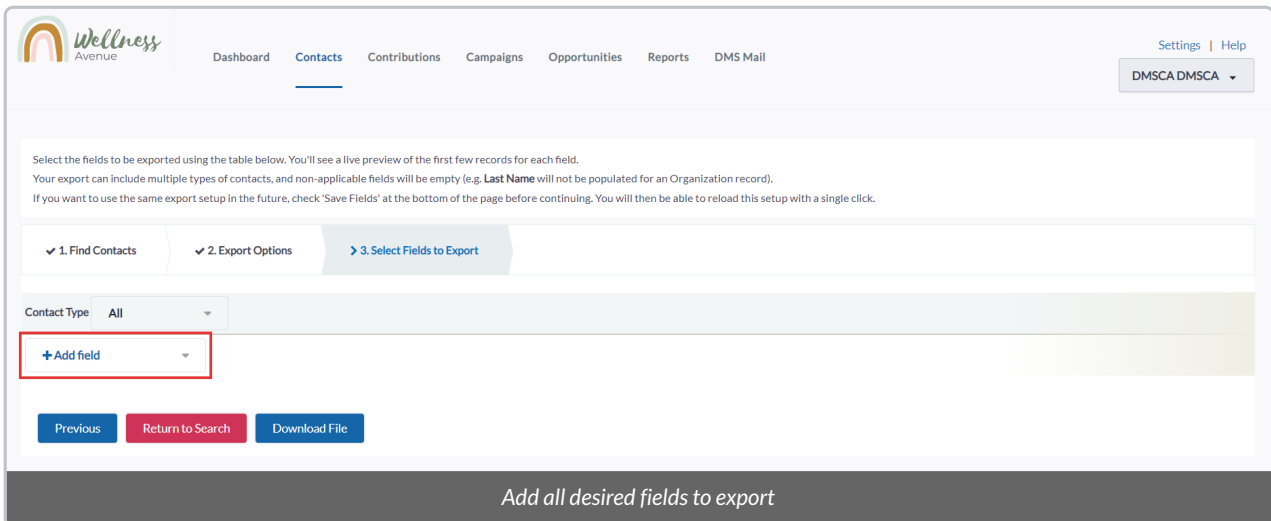
**Continue** Cancel

Review Export options and select Continue

10. On the next page, select your **desired Contact Type** that you'd like to export or export **All** of them.



11. Select **Add field** to choose which fields you'd like to export



12. If you'd like to save this field selection for the future, select **Save Fields** and choose a name for it. You will then be able to choose this selection in the future as a **Saved Field Mapping**

**Note:** You can also modify your Saved Field Mappings' Name and Description.



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Select the fields to be exported using the table below. You'll see a live preview of the first few records for each field.  
Your export can include multiple types of contacts, and non-applicable fields will be empty (e.g. **Last Name** will not be populated for an Organization record).  
If you want to use the same export setup in the future, check 'Save Fields' at the bottom of the page before continuing. You will then be able to reload this setup with a single click.

1. Find Contacts 2. Export Options **3. Select Fields to Export**

Contact Type: All

First Name	Ada	Alex	Alicia
Last Name	Anderson	Fergie	Mitre
Email	anderson.a@test.com	aine@ainemcglynn.com	jubino+woodcoaster@canadahelps.org
Pr...			

+ Add field **SAVE FIELDS**

Previous Return to Search Download File

Save Fields for future exports

13. Once all you've reviewed and selected all your options, select **Download File**.

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Select the fields to be exported using the table below. You'll see a live preview of the first few records for each field.  
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1. Find Contacts 2. Export Options **3. Select Fields to Export**

Contact Type: All

First Name	Ada	Alex	Alicia
Last Name	Anderson	Fergie	Mitre
Email	anderson.a@test.com	aine@ainemcglynn.com	jubino+woodcoaster@canadahelps.org
Pr...			

+ Add field **SAVE FIELDS**

Previous Return to Search **Download File**

Download the export file

14. The DMS will begin **compiling a list of all your selected Contacts**. This process usually takes a few seconds but may take up to a few minutes, so please do not refresh your page until the process is finished.

15. **The resulting .csv** can be opened with any recent version of Excel, Google Sheets, etc.