

Importing Contacts in Bulk (Import Tool)

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Donor Management System

This article will cover how to import a large number of Contacts into your DMS at once using the **Bulk Import tool for Contacts**.

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Preparing for Import

1. Download our two handy Data Templates, and use them as guides when preparing your contact data for import. All you have to do is **copy the Template column names, and paste them directly into your data's corresponding columns**.

[Importer Template for Contacts- Individuals](#) 

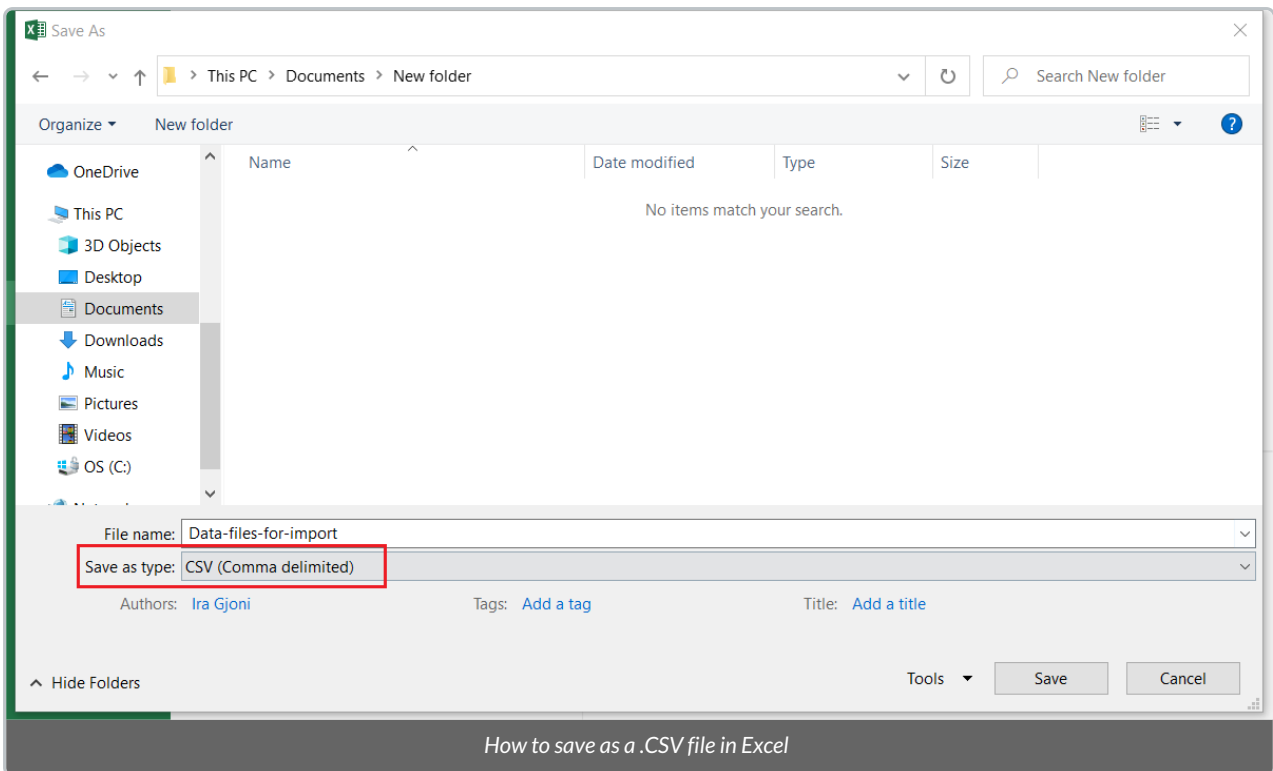
[Importer Template for Contacts- Organizations](#) 

Tip: Pay special attention to columns labelled **Mandatory (green)** and **Recommended (yellow)**, so you can be sure to include the information that the DMS needs in order to map your Contacts successfully.

If they aren't relevant to your import, feel free to leave out any **Optional (grey)** columns from your import file.

2. For a successful import, your **Contacts must be sorted by Contact Type** (i.e., *Individuals* and *Organizations*). For this, simply sort your Contact data into **two separate .CSV files** (one file for *Individuals*, and one file for *Organizations*; see two templates above). You can then perform **two separate imports** (one for each .CSV file) following the instructions in this article.

3. You'll need to ensure that the data you'll be importing is saved as a **Comma-Separated Values (.CSV) file**:



 *Need a walk-through of the 'Preparing for Import' steps above? Check out this short video tutorial.*

(Note: This video contains no audio.)

Your browser does not support HTML5 video.

Accessing the Import Tool

Once you've finished organizing your data based on the Template/s above, you're ready to start the import into your DMS!

1. Login to your DMS and visit the **Contacts** tab
2. Under **Advanced Actions** on the right, select **Bulk Import Contacts**.

Wellness Avenue

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

Settings | Help

DMSCA DMSCA

Search by contact name or email

0 Selected Records Only All 174 Records

	Name	City	Province	Phone	Email	Date Created	
<input type="checkbox"/>	A Amadu	Toronto	ON		amadua@canadahelps.org	Jul 13th, 2022 5:12 PM	
<input type="checkbox"/>	A Amadu				amadua@canadahelps.org	Feb 27th, 2023 4:40 PM	
<input type="checkbox"/>	A. L. Kostenko	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	
<input type="checkbox"/>	Accessibility Foundation					Nov 24th, 2022 6:03 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 27th, 2023 1:23 PM
<input type="checkbox"/>	Alicia Mitre	Mississauga	ON		amitreatwell@outlook.com	Oct 19th, 2022 2:01 PM	Feb 24th, 2023 2:39 PM

Bulk Import Contacts

Note: Don't see the Bulk Import tool for Contacts in your DMS? Reach out to our team at info@canadahelps.org and we'll get you set up!

3. On the next page, you'll see the 4 steps required to import your Contacts.

Bulk Import Contacts

1. Choose Data Source
2. Match Fields
3. Preview
4. Summary

Four steps to complete the import

Importing Your Contacts

Step 1: Choose Your Data Source

1. The **Data Source** field will be pre-selected for you as **Comma-Separated Values (.CSV)** format.
2. Click on **Choose File** and select the data file you'd like to import
3. If your data file has column headers, check off **First row contains column headers** to ensure that your headers aren't imported as a Contact (but rather used to map your data).

Note: If your data file doesn't have any headers (i.e., the first row contains Contact information and not

column names), leave this box unchecked.

Choose Data Source

Data Source * Comma-Separated Values (CSV) ▾

Upload CSV File

Import Data File * Contacts-For-Import.Csv

File format must be comma-separated-values (CSV). File must be UTF8 encoded if it contains special characters (e.g. accented letters, etc).
Maximum Upload File Size: 3 MB

First row contains column headers
Check this box if the first row of your file consists of field names (Example: 'First Name';'Last Name';'Email')

Upload Your Data

4. Tell the system what **type of Contacts** you'll be importing (*Individuals* or *Organizations*)

Reminder: The Import tool requires Contacts to be imported separately by **Contact Type**.

See [Preparing for Import \(point 2\)](#) above for more information.

Import Options

Contact Type **Individual** Household **Organisation** Subtype - select - ▾

Importing by Contact Type

5. Select what you'd like the Import tool to do if it comes across **duplicate Contacts during import**:

- **Skip:** if any duplicate contacts are detected, any updates being imported will be skipped
- **Update:** if any duplicate contacts are detected, the import tool will update any existing information with what is being imported
- **Fill:** if any duplicate contacts are detected, the import tool will only fill in the blank fields. If information already exists in a field, it will stay the same.
- **No Duplicate Checking:** the import tool will not check for any duplicates during the import

6. If your data includes any dates (e.g. Date of birth, Deceased date), select the Date Format that matches the format in your data:

Note: If there aren't any dates in the Contact data you'll be importing, your selection here won't affect the import.

Date Format

- yyyy-mm-dd OR yyyyymmdd (1998-12-25 OR 19981225) OR (2008-9-1 OR 20080901)
- mm/dd/yy OR mm-dd-yy (12/25/98 OR 12-25-98) OR (9/1/08 OR 9-1-08)
- mm/dd/yyyy OR mm-dd-yyyy (12/25/1998 OR 12-25-1998) OR (9/1/2008 OR 9-1-2008)
- Month dd, yyyy (December 12, 1998)
- dd-mon-yy OR dd/mm/yy (25-Dec-98 OR 25/12/98)
- dd/mm/yyyy (25/12/1998) OR (1/9/2008)

Select the format that is used for date fields in your import data.

Select the date format used in your data file

 Need a walk-through of the 'Step 1: Choose Your Data Source' steps above? Check out this short video tutorial.

(Note: This video contains no audio.)

Your browser does not support HTML5 video.

Step 2: Match Fields

1. If you've selected **First row contains column headers** (step 3 above), your column headers should now show up under **Column Names** and your first row's data under **Import Data (row 1)** (and so on).

Import Contacts

✓ 1. Choose Data Source > 2. Match Fields 3. Preview 4. Summary

Review the values shown below from the first 2 rows of your import file and select the matching CanadaHelix DMS database fields from the drop-down lists in the right-hand column. Select 'Save this field mapping' at the bottom of the page before continuing. The saved mapping can then be easily reused for future imports.

Column Names	Import Data (row 1)	Import Data (row 2)
External Identifier	HC-00001	HC-78657
Contact Type	Individual	Individual

Column Names + Rows

2. Based on the file uploaded, the Import Tool will **automatically suggest the Matching DMS Field** that corresponds to your rows, but you can always edit this field by selecting the drop-down arrow.

Import Contacts

1. Choose Data Source 2. Match Fields 3. Preview 4. Summary

Review the values shown below from the first 2 rows of your import file and select the matching CanadaHelps DMS database fields from the drop-down lists in the right hand column. Select 'do not import' for any columns in the import file that you want ignored. If you intend you may be importing additional data from the same data source, check 'Save this field mapping' at the bottom of the page before continuing. The saved mapping can then be easily reused the next time data is imported.

Column Names	Import Data (row 1)	Import Data (row 2)	Matching CanadaHelps DMS Field
External Identifier	HC-00001	HC-78657	External Identifier * <input checked="" type="checkbox"/>
Contact Type	Individual	Individual	Contact Subtype
Organization Name			-do not import-
Individual Prefix	Ms.		Individual Prefix
First Name	Mary	Ann	First Name (match to contact) *
Middle Name			Middle Name
Last Name	Baker	Taylor	Last Name (match to contact) *
Street Address (primary)	33 Green Pt	89 Summer St	Street Address (match to contact) Home
Supplemental Address 1 (primary)			Supplemental Address 1 Home
City (primary)	St. Catharines	Richmond Hill	City Home
Province (primary)	ON	ON	Province Home
Country (primary)	Canada	Canada	Country Home
Postal Code (primary)	M4W 1J7	NSW 259	Postal Code (match to contact) Home
Email (Primary)	bakerm1234@gmail.com		Email (match to contact) * Home
Phone Number (Primary)			Phone (match to contact) Home Phone
Job Title	Administrator	Chief Executive Officer	Job Title

Matching your fields to the DMS fields

3. Use the **Save this field mapping** checkbox at the bottom of your screen to save your mapped fields and avoid having to map them again should you need to upload an updated file to correct any errors (see *Step 4: Summary*).


Note: Adding or removing **columns** in any subsequently uploaded data file/s may affect your saved mapping. Only check this box if you plan on updating information in either **rows/individual cells** (but your columns will stay the same).

Save this field mapping

Name

Description

Save Field Mapping

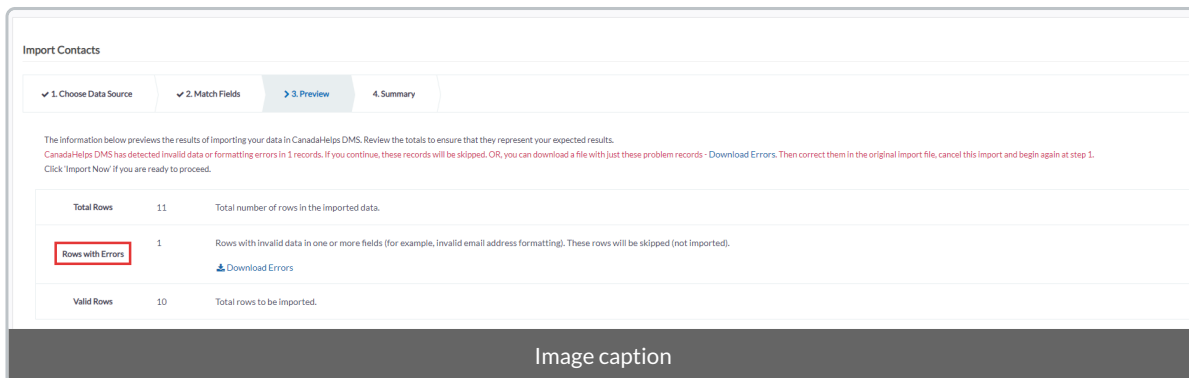
 **Need a walk-through of the 'Step 2: Match Fields' steps above? Check out this short video tutorial.**

(Note: This video contains no audio.)

Your browser does not support HTML5 video.

Step 3: Preview

1. If there are any obvious errors with your data, the Import Tool will prompt you to **review a list of rows** before proceeding to the final step.



Here are some of the most **common formatting errors and how to resolve them:**

- **Province**
 - For all Canadian Provinces and the American States, please use the two-letter abbreviations (e.g. Ontario as ON, Prince Edward Island as PE, California as CA, Washington as WA).
- **Country**
 - Countries can be spelled out in full (e.g. Canada, United States of America, Great Britain) or using the two-letter abbreviations (e.g. CA, US, GB)
- **Email**
 - Must be imported as a valid email address in proper format (e.g. noname@domain.com)
 - If the email provided does not include a period or contains a comma instead, it will get flagged by the import tool

2. In this step, you can also **Tag** all contacts or add them to a **Group**.

- **Add imported records to a new group:** Create an entirely new Group to add all Contacts imported here
- **Add imported records to existing group(s):** Add all Contacts imported here to an existing Group in your DMS
- **Create a new tag:** Create an entirely new Tag and apply it to all Contacts imported here
- **Tag imported records:** Tag all Contacts imported here with an existing Tag in your DMS

Note: If you'd like to create a hierarchy of your newly created Groups and/or Tags (i.e., apply a **parent group/tag**), we recommend doing this **after your Bulk Import**.

---> [Learn how to manage an existing Group](#) or [manage an existing Tag](#).

- Add imported records to a new group
 Name for new group: Bulk Imported Sept 2022
 Description of new group: Contacts imported Sept.
 Group Type: Access Control Mailing List

- Add imported records to existing group(s)
 2022 - Personal Outreach List

- Create a new tag and assign it to imported records
 Tag: Gala 2022 Attendee
 Description:

- Tag imported records
 Annual Members
 Bi-yearly Donor
 Board Member
 Board Members
 Bottle Drive
 Volunteers
 Campers
 Chocolate Lovers
 Committee Member
 Donor
 Event Attendees
 Events
 Fosters Volunteer
 Full-Time
 Fundraisers
 Gift Donor

Add Imported Contacts to new/existing Group and apply new/existing Tags

3. Once you've reviewed your mapped fields and finished assigning any Groups/Tags (if applicable), scroll to the bottom of your page and select **Import Now** to complete your bulk import.

Note: Depending on how large the file you're importing is, the completion time will vary. Make sure **not to close/exit this page** until you've been brought to the **Summary page** (next page).

v Add imported records to a new group
 v Add imported records to existing group(s)
 v Create a new tag and assign it to imported records
 v Tag imported records

Completing the Import

 **Need a walk-through of the 'Step 3: Preview' steps above? Check out this short video tutorial.**

(Note: This video contains no audio.)

Your browser does not support HTML5 video.

Step 4: Summary

This is the final step of your data import. Hooray!

1. If there were **no errors with the import**, the number of **Valid Rows will match the Total Rows**. If this is the case, you can select **Done**, as there's no further action required of you

The screenshot shows the 'Import' summary screen. At the top, there is a progress bar with four steps: '1. Choose Data Source', '2. Match Fields', '3. Preview', and '4. Summary'. The '4. Summary' step is highlighted. Below the progress bar, a message states: 'Import has completed successfully. The information below summarizes the results.' There are two 'Done' buttons: one at the top left and one at the bottom left, both highlighted with red boxes. In the center, there are two rows of summary data: 'Total Rows' with the value '189' and 'Total Contacts' with the value '189'. Both values are highlighted with red boxes. The bottom of the screen features a dark grey bar with the text 'A successful import'.

2. On the other hand, if the **Import tool detected any errors** (e.g., mismatched Contacts, unclear duplicates) during the import, it'll produce a file/s for you to review:

The screenshot shows the 'Import Contacts' summary screen. At the top, there is a progress bar with four steps: '1. Choose Data Source', '2. Match Fields', '3. Preview', and '4. Summary'. The '4. Summary' step is highlighted. Below the progress bar, a message states: 'Import has completed successfully. The information below summarizes the results.' There are two paragraphs of text, each with a red box around a link: 'CanadaHelps DMS has detected mismatched contact IDs. These records have not been updated. You can [Download Mismatched Contacts](#). You may then correct them, and import the new file with the corrected data.' and 'CanadaHelps DMS has detected 7 records which are duplicates of existing CanadaHelps DMS contact records. These records have not been imported. You can [Download Duplicates](#). You may then review these records to determine if they are actually duplicates, and correct the email address for those that are not.' The bottom of the screen features a dark grey bar with the text 'Import errors to review and address'.

3. Depending on the amount of records needing correction, you can decide how you'd like to proceed:

- You may want to make the necessary changes to your data file and repeat the import steps outlined above;
OR
- You may prefer to simply [add/modify these Contact records manually](#) in your DMS directly

 *Need a walk-through of the 'Step 4: Summary' steps above? Check out this short video tutorial.*

(Note: This video contains no audio.)

Your browser does not support HTML5 video.

Questions?

If you have any questions as you complete the Bulk Import, don't hesitate to **contact our team**. That's what we're here for!

What's Next?

Once you've finished importing all of your Contacts, you may want to check out how to use the Import Tool to **bulk upload Contributions** as well.

Or, if you've finished with all of your bulk importing, go ahead and check out all of this newly-imported Contact data in your DMS!

Tip: Perform an [Advanced Search](#) to filter your Contacts by whatever *Source* name you gave your import (e.g., May 2023 Import).