

How to Change Contact Type for Existing Contacts

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Donor Management System

In the Donor Management System, you can change a Contact's *Contact Type*. This can be useful in cases where you've manually added a new Contact to the DMS and mistakenly set the Contact as the wrong Contact Type, but this Contact has data that you wish to retain (e.g., Contributions, Activities, Groups, Tags, etc).

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Considerations

1. You should not modify a Contact that has come from CanadaHelps, as the donor will have explicitly chosen to contribute as either a corporate donor or individual donor when making their donation via CanadaHelps.org.
2. *Individuals* cannot be changed to an *Organization* type while they have birth or death data in their Contact profile. You can remove this information anytime.
3. A *Household* Contact Type cannot be changed while they have other Contacts linked via Relationships. You'll need to first delete any Relationships associated with this Household before changing their Contact Type.

Modifying a Contact Type

1. Visit your **Contacts tab** in the Main Menu
2. Use the search bar to **search for the Contact you wish to modify** by name or email.
3. Once found, **click on the Contact's name** to be brought to their Contact Profile

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

Search: Karolina

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

	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 Contact

4. On the Contact Profile, select **Actions** and then on **Change Contact Type**

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

Karolina Maya | Summary | Contributions 34 | Activities 91 | Relationships 2 | Groups 7 | Notes 0 | Tag

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:

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

Actions menu:

- Record Activity:
- Call
- MailMerge
- Meeting
- Mailchimp Mailing
- Solicitor
- Picture
- Outlook Email
- Volunteer Hours
- Fall/Winter Newsletter
- Stewardship
- Annual Report
- Monthly Contribution Follow-Up
- Add Contribution
- Add Opportunity
- Add Relationship
- Add Note
- Add to Group
- Tag Contact
- Change Contact Type**
- Print Summary

Change Contact Type

5. From the drop down menu, choose the new Contact type and **Save**

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

Contact Type Change

Change contact type for Karolina Maya

Contact Type: Individual

You can change the contact's type provided they do not have any data that would be invalidated. Some more trivial data (name prefix & suffix) will be stored in an activity rather than lost.

Save | Cancel

Select the preferred Contact Type

Note: When a changing an *Organization* contact type to an *Individual* contact type, the system will input the Organization's name in the Individual's *Last Name field*. **Make sure to update this field with the Contact's last name this by selecting *Edit***

Edit Vlada Fedorchenko



COLLAPSE ALL TABS

^ Contact Details

Prefix	Formal Title	First Name	Middle Name	Last Name	Suffix
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Vlada Fedorchenko	<input type="text"/>

Current Employer	Job Title	Recognition Name	Contact Type
-select Contact-	<input type="text"/>	<input type="text"/>	-select Contact Type-

Email	add	On Hold?	Bulk Mailings?
vla@canadahelps.org	Home	<input type="checkbox"/>	<input type="checkbox"/>

Phone	Phone Location	Phone Type
<input type="text"/> ext. <input type="text"/>	Home	Home

Add another phone number

Check for Matching Contact(s)