

Navigating the Contacts Tab

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Overview

The main screen of the Contacts Tab presents a list of every Contact record in your CanadaHelps Ensemble with basic information about each Contact with the option of selecting the contact to view their contact profile for more information

- 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 CanadaHelps Ensemble 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 anywhere on the row of the name of the Contact.
- You can also add a Contact from this tab by selecting **Add Contact** in the top right corner.

CanadaHelps Ensemble

Essentials

Contacts

Donations

< >

Wellness Avenue

Contacts

Search by name, email or phone

Type

Province

+ Add Contact

Contact	City	Province	Email	Phone
<input type="checkbox"/> Alexis Rose	Vittoria	ON	alexis.rose@schittscreek.com	+14165553456
<input type="checkbox"/> Barney Stinson	Vancouver	BC	barneystinson@hilmym.com	+16045555050
<input type="checkbox"/> Central Perk	Los Angeles	CA	coffee@lovecoffee.com	+18138999241
<input type="checkbox"/> Estelle Leonard	Fredericton	NB	estelle.leonard@friends.com	+15065553344
<input type="checkbox"/> Frank Buffay Jr.	Winnipeg	MB	frank.buffay@friends.com	+12045553456
<input type="checkbox"/> Lily Aldrin	Montreal	QC	lilyaldrin@hilmym.com	+15145554141
<input type="checkbox"/> Marshall Eriksen	Brandon	MB	marshall.eriksen@hilmym.com	+12045553322
<input type="checkbox"/> Mike Hannigan	Toronto	ON	mike.buffay@friends.com	+14165551234
<input type="checkbox"/> Mr. Heckles	Charlottetown	PE	mrheckles@friends.com	+19025555566
<input type="checkbox"/> Richard Burke	Vancouver	BC	richard.burke@friends.com	+16045555678

Show

10

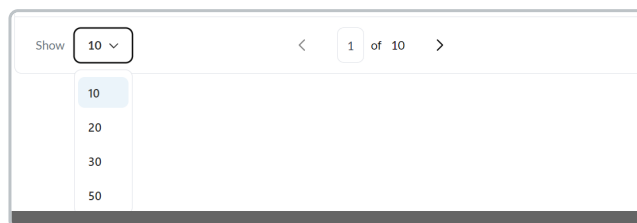
< 1 of 2 >

Contacts List Columns

Column Header	Description
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Column Header	Description
Contact Display Name	<ul style="list-style-type: none"> • First and Last name of an individual Ex, John Doe • Name of the Organization ex, CanadaHelps • Household name ex, The Does
City	Primary city of the address added
Province	Primary province of the address added
Email	Primary email added for the contact
Phone Number	Primary phone number listed for the contact
Contact Type	Individual, Group or Organization

Rows



Default number of Rows

- The default number of Rows displayed on the Contacts Tab is set to 10.
- To adjust the number of Rows of Contacts displayed in the list view, scroll to the bottom of the page and click the dropdown next to *Show*.
- To the right of the box labelled *Show* are the number of pages of rows and 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

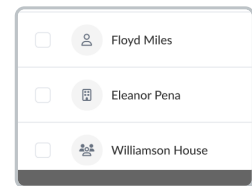
There are three default types of Contacts in the CanadaHelps Ensemble:

- Individuals
- Organizations

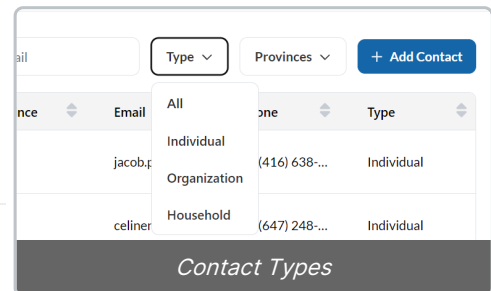
- Households

Contact types

- To the left of the Contact Name, you'll see 3 icons representing the different Contact Types.



- 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.



Actions

- There are **Actions** you can perform from the Contacts Tab to one or more Contacts.
- The available Actions include:
 - Exporting
 - Deleting

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 **Bulk Actions** button on the top left corner of the page
3. Pressing the **Bulk Actions** button will display a dropdown menu of available Actions. If there is a particular Action you wish to take, you can find it by scrolling the list.

Common Actions

- Export (.csv): exports selected Contacts to a .csv format
- Delete: Delete the contact

