

Manage Your Contacts

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The main screen of the **Contacts** tab presents a list of every Contact record in your account with basic information about each Contact with the option of selecting the contact to view their contact profile for more information. In this article you will learn how to Add a contact, Modify a contact, Delete a contact, Delete multiple contacts and Export contacts.

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Adding a Contact

1. You can add a Contact from this tab by selecting **Add Contact** in the top right corner.

The screenshot displays the 'Contacts' tab in the CanadaHelps Ensemble system. On the left is a sidebar with 'Essentials' and 'Contacts' (selected). The main area shows a table of contacts. A search bar and filters for 'Type' and 'Province' are at the top. A red box highlights the '+ Add Contact' button. The bottom of the page features a dark grey bar with the text 'Adding a Contact'.

Contact	City	Province	Email	Phone
<input type="checkbox"/> Tribbiani Productions	Windsor	ON	joey.tribbiani@tribbianiproducti...	+1 (519) 888-6543
<input type="checkbox"/> Bob's Flay	Toronto	ON	bob@flay.com	
<input type="checkbox"/> Sean Fafinski	Toronto	ON	seanf@canadahelps.org	
<input type="checkbox"/> The Gellers	Vancouver	BC		+1 (773) 567-4722
<input type="checkbox"/> Central Perk	Los Angeles	CA	coffee@ilovecoffee.com	+1 (813) 899-9241
<input type="checkbox"/> Mike Hannigan	Toronto	ON	mike.buffay@friends.com	+1 (416) 555-1234
<input type="checkbox"/> Richard Burke	Vancouver	BC	richard.burke@friends.com	+1 (604) 555-5678
<input type="checkbox"/> Frank Buffay Jr.	Winnipeg	MB	frank.buffay@friends.com	+1 (204) 555-3456

2. Complete the three-step form:

- **Contact Details:** First Name and Last Name, Organization Name or Household Name are required.

New Contact

Contact Type

Individual

Contact Name

Prefix

First Name *

Last Name *

▼

Middle Name

Preferred Name

Email address

Type

Email

Personal ▼

☒ Set as primary

Clear

+ Add Email

Phone number

Type

Phone

Ext.

Mobile ▼

+1

☒ Set as primary

Clear

1/3

Next

- **Address:** Addresses are optional but will be required to issue a CRA compliant tax receipt.

New Contact

Address (optional)

Type

Street address

Home ▾

Enter a location

Address line 2 (optional)

Country

Province

▾

City

Postal Code

☒ Set as primary

Clear

+ Add Address

2/3

Back

Next

- **Other Details:** Preferred communication methods, notes, etc.

New Contact

Other details

Preferred communication method

Communication opt-outs

☐ Do not email
 ☐ Do not phone
 ☐ Do not text
 ☐ Do not mail
 ☐ Do not contact (phone, email, text, mail)

Receipting preference

Any

Contact source

Preferred language

English

External Contact ID

Back

Save

3/3

Additional Note

If you are adding a new contact with an email that's already in use, you'll receive a message letting you know the email is already taken.

Email address

Type	Email
Personal	hosenstein.janice@gmail.com

⚠ This email address is already the primary email for another contact. Please use another email address.

Modifying a Contact

1. Go to the **Contacts** tab.
2. Use the search bar to find and select the contact you wish to edit.
3. On the contact's profile page, switch the view from Donations to *Profile*.
4. Click any of the **Edit** options to modify the fields in that section.

CanadaHelps Ensemble

Essentials

Contacts

Donations

Richard Burke

Key information

Primary Email

richard.burke@friends.com

Primary Phone (Mobile)

+1 (604) 555-5678

Location

Vancouver, BC

Donations

Profile

Delete contact

Contact information

Name

Richard Burke

Type

Individual

Primary Email (Personal)

richard.burke@friends.com

Primary Phone (Mobile)

+1 (604) 555-5678

Location

Location

Vancouver, BC

Primary Address (Home)

456 Robson St, V6B 2B3

Additional details

Preferred communication method

None

Receipting preference

Aggregate/Annual Only

Contact source

Offline

Language Preference

English

External Contact ID

12

Date added

February 7, 2025

Contact is deceased

No

Contact ID

2842

Modifying a contact

Deleting a Contact

1. Go to the **Contacts** tab.
2. Use the search bar to find and select the contact you wish to delete.
3. On the Contacts profile page, click on the red Delete contact option located on the top-right of the screen.

CanadaHelps Ensemble

Essentials

- Contacts**
- Donations

Mike Hannigan

Key information

- Primary Email: mike.buffay@friends.com
- Primary Phone (Mobile): +1 (416) 555-1234
- Location: Toronto, ON
- Opt-outs: Do not text

Donations Profile

Total lifetime donations: \$0.00

Last donation: \$0.00

Largest donation: \$0.00

Number of donations: 0 All-time

[Delete contact](#)

[+ Add Donation](#)

Date	Amount	Campaign	Status	Receipted
Show 10 of 0				

Deleting a contact

4. Confirm that you want to delete the contact.

Bulk delete Contacts

1. Go to the **Contacts** tab.
2. Select the checkboxes next to the Contacts you wish to delete.
3. From the **Bulk Actions** dropdown menu, choose *Delete Contacts*.

CanadaHelps Ensemble

Essentials

- Contacts**
- Donations

Contacts

[Bulk Actions](#)

- Delete Contacts
- Export Contacts

Search by name or email

Type Province [+ Add Contact](#)

2 contacts are selected. [Select all 22 contacts](#)

Contact	City	Province	Email	Phone
<input checked="" type="checkbox"/> Rosebud Motel			Info@rosebudmotel.ca	
<input type="checkbox"/> Robin Scherbatsky	Calgary	AB	robin.scherbatsky@himym.c...	+1 (403) 555-7890
<input checked="" type="checkbox"/> Richard Burke	Vancouver	BC	richard.burke@friends.com	+1 (604) 555-5678
<input type="checkbox"/> The Gellers	Vancouver	BC		+1 (773) 567-4722
<input type="checkbox"/> Barney Stinson	Vancouver	BC	barney.stinson@himym.com	+1 (604) 555-5050
<input type="checkbox"/> Central Perk	Los Angeles	CA	coffee@ilovecoffee.com	+1 (813) 899-9241

Deleting contacts

4. Confirm that you want to delete the contacts.

Exporting Contacts

1. Go to the **Contacts** tab.
2. Select the checkboxes next to the Contacts you wish to export. To export all contacts, click on **Select all # contacts** that appears once at least 1 contact checkbox has been selected.
3. From the **Bulk Actions** dropdown menu, choose *Export Contacts*.
4. The exported contacts will be download as a .CSV file onto your computer.

The screenshot shows the 'Contacts' page in the CanadaHelps Ensemble system. On the left sidebar, 'Contacts' is selected under the 'Essentials' section. The main area displays a table of contacts with columns: Contact, City, Province, Email, and Phone. A red box highlights the first column, and a red circle with the number '1' is next to the first checkbox. A dropdown menu is open, showing 'Bulk Actions' with options 'Delete Contacts' and 'Export Contacts'. A red circle with the number '2' is next to the 'Export Contacts' option. A red box highlights the 'Select all 22 contacts' button. The table lists several contacts, including Tribbiani Productions, Bob's Flay, Sean Fafinski, The Gellers, Central Perk, and Mike Hannigan. A dark grey bar at the bottom of the page reads 'Exporting Contacts'.

Contact	City	Province	Email	Phone
<input checked="" type="checkbox"/> Tribbiani Productions	Windsor	ON	joeytribbiani@tribbianiproduct...	+1 (519) 888-6543
<input checked="" type="checkbox"/> Bob's Flay	Toronto	ON	bob@flay.com	
<input checked="" type="checkbox"/> Sean Fafinski	Toronto	ON	seanf@canadahelps.org	
<input checked="" type="checkbox"/> The Gellers	Vancouver	BC		+1 (773) 567-4722
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