

# Importing Contacts in Bulk

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

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## Preparing for Import

To make your import process as smooth as possible, we've created a ready-to-use template. It takes the guesswork out of formatting, just copy the column names into your data file so the system can map everything correctly.

[Importer Template for Contacts and Donations](#)📎

### A little prep goes a long way. Here are a few things to check before uploading your file:

- Use consistent formats for dates and phone numbers across the file.
- Keep names separate: First, Middle, and Last should each have their own column.
- Organization names should go in their own column (not under First Name).
- Double-check your settings: Make sure prefixes, organization types, and other fields are already set up in CanadaHelps Ensemble.
- Save your file as a .CSV or .XLSX.

**Tip:** Look out for column colours in the template:

- **Green = Mandatory**
- **Yellow = Recommended**
- **Grey = Optional** (you can skip these if they're not relevant)

**1.** Download the import templates zip file, which includes both the Contacts and Donations import templates.

**2.** Copy and paste all **Mandatory** headers, along with any **Recommended** and **Optional** headers, from the template file into your existing file, or copy and paste your data into the corresponding columns in

the template file.

**3.** Make sure to save the data you're importing as a Comma-Separated Values (.CSV) file or a Microsoft Excel Spreadsheet (.XLSX).

**Note:** If your existing file is missing a column (for example, if the donor's first and last names are in one column in your file, but CanadaHelps Ensemble separates them), you'll need to add the missing column (e.g., for the last name). Then, simply copy and paste all the last names into the new column.

First Name (Required)	Middle Name (Optional)	Last Name (Required)	Organization Name (Required)	Email (Optional)	External Contact ID (Optional)	Total Amount (Required)	Payment Method (Required)	Date Received (Required)	Notes
Contact must already exist in system before import; only individuals and organizational contacts can enter donations.									
3.	Zoe	Laurel	Agashae			\$10.00	Cash	2024-10-26	Gen
4.	Rita		Agashae			\$50.00	Cash	2024-08-15	Gen
5.	Pirkko		Ahonen			\$99.00	EFT	2024-10-19	Gen
6.	Craig	Allen	Annacott			\$5.00	PayPal	2024-10-26	New
7.	Ms. Jessica		Ahonen-Hargrave			\$14.00	EFT	2024-10-19	Gen
8.	Shirley	Temple	Aldous			\$10.00	Cash	2024-10-26	Gen
9.			Farrow International			\$100.00	Cash	2024-10-26	Gen
10.	Desmond		Allen			\$60.00	Cheque	2024-10-19	Gen

## Accessing the Import Tool

Once you've organized your data, you're ready to start importing!

**1.** To access **Settings**, click on the **gear icon** in the top-right corner of your account.

**2.** Select **Import data**.

CanadaHelps Ensemble

Wellness Avenue

### Settings

**Tax Receipting**

Configure and manage your tax receipt settings.

**Donations**

Customize your donation form fields.

**Contacts**

Customize your contact form fields.

**Import data**

Import contact and donation data from a file.

**Subscription**

View, update, and manage your subscription and billing details.

Select Import data

3. When you're ready to begin the import, click on **Next**.

### Import data (Beta)

Getting your data ready.

To ensure a smooth import, we recommend formatting your data to match our import template. This will ensure your file has all the necessary fields for a successful import. You can either:

- **Fill the template:** Download and enter your data directly into our ready-made import template.
- **Use your own file:** If you already have a file, reference the import template to ensure all required fields are included.

When your file is ready, click "Next" to continue.

[Download import template](#)

**Next**

Download the import template and click on Next

4. Select **Contacts** from the drop down list option.

### Import data (Beta)

Select data type to import \*

Contacts

e.g., Contacts or Donations

Contacts

Donations

Select Contacts

## Importing Your Contacts

### 1. Upload and Sheet Selection

To upload your file, either drag and drop your file into the box or click on **Select files** to locate the file in

your computer to upload the file. The accepted file types are .CSV, .XLS.

## Upload

Drag your files here or browse and upload your files.

Excel template (.xlsx)

CSV template

XLS(X)

CSV

TSV

Drop your files here

or

Select files

Click on Select files

## 2. Header Selection

From the file uploaded, select the row that contains the header information (**usually the first row**). This row will identify the labels for each column and help CanadaHelps Ensemble map the data correctly.

Upload > Sheet Selection > **Header Selection** > Match Columns > Review Entries

### Header Selection

Confirm or select the header of this sheet.

Sheet1  
Friends Example.xlsx

	A	B	C	D	E
1	External Contact ID (Optional, bu...	Contact Type (Required)	Prefix (Optional)	First Name (Required)	Middle Name (Optional)
2	1	Household			
3	2	Organization			
4	3	Individual			Karen
5	4	Individual		Joey	
6	5	Organization	Dr.	Ross	Eustace

← Back

Continue

Select the row with the Header information

## 3. Match Columns

CanadaHelps Ensemble will try to match your column headers automatically based on common keywords. If something doesn't match or gets matched incorrectly, just click on the drop down menu next to the column. You can then search for the correct field or scroll through the list to find the right one.

The development mode is activated. This mode is not allowed for commercial use, but only for pure testing purposes.

Upload > Sheet Selection > Header Selection > **Match Columns** > Review Entries

A	Contact ID	→	External Contact ID	✓ Automatically matched to EXTERNAL CONTACT ID ⓘ	▼
B	Type	→	Select...	! Not matched	▼
C	Prefix	→	Prefix	✓ Automatically matched to PREFIX ? 18.75 % of rows have a value ! Not all values are matched	^
1	Empty	↪	Select...		
2	Dr.	↪	Select...		
3	Dr. & Mrs	↪	Mrs		
D	First Name	→	First Name	✓ Automatically matched to FIRST NAME	▼
E	Middle name/Initial	→	Middle Name	✓ Automatically matched to MIDDLE NAME	▼
F	Surname	→	Select...	! Not matched	▼
G	Organization Legal Name (Optional)	→	Organization Legal Name	✓ Automatically matched to ORGANIZATION LEGAL NAME ⓘ	▼
H	Organization Type (Optional)	→	Organization Type	✓ Automatically matched to ORGANIZATION TYPE ⓘ <small>4.95 % of rows have a value</small>	^

Match the headers

**If an option is missing:** for example, if you're trying to select **School** under *Organization Type* and it's not showing up, you'll need to add it first. Refer to [this article](#) on how to new Contact options:

- (in a new tab) click on **Settings**
- Select **Contacts**, then **Organizations**
- Add the missing option there

Once that's done, return to your import tab and click on **Back**. This refreshes the available options so the one you just added appears in the list. Don't worry, you won't lose your entire progress. You'll just be taken back one step in the process, and can pick up right where you left off.

G	Organization Type (Optional)	→	Organization Type <span>×</span> <span>▼</span>
1	Empty	↪	Select... <span>▼</span>
2	School	↪	<div> Select... <span>▼</span> <div> Business Foundation Government </div> </div>
H	Email (Primary) (Optional)	→	

Missing option for Organization Type

G	Organization Type (Optional)	→	Organization Type <span>×</span> <span>▼</span>
1	Empty	↪	Select... <span>▼</span>
2	School	↪	School <span>×</span> <span>▼</span>

Select the newly added Organization Type

Once all the fields have been mapped and the checkmarks on the right turn green, click on **Confirm**.

**Import data (Beta)**

Select data type to import \*

Contacts

The development mode is activated. This mode is not allowed for commercial use, but only for pure testing purposes.

Upload > Sheet Selection > Header Selection > **Match Columns** > Review Entries

A	Contact ID	→	External Contact ID	Automatically matched to EXTERNAL CONTACT ID
B	Type	→	Contact Type	Matched to CONTACT TYPE 100 % of rows have a value
1	Individual	↪	Individual	
2	Organization	↪	Organization	
C	Prefix	→	Prefix	Automatically matched to PREFIX 88.75 % of rows have a value Not all values are matched
1	Empty	↪	Select...	
2	Dr.	↪	Dr.	
3	Dr. & Mrs	↪	Mrs	
D	First Name	→	First Name	Automatically matched to FIRST NAME
E	Middle name/initial	→	Middle Name	Matched to MIDDLE NAME

← Back **Confirm**

Click on Confirm

#### 4. Review Entries

If there are errors with any of the entries (such as):

- **Empty fields:** for mandatory columns.
- **Invalid formats:** for dates or phone numbers.

CanadaHelps Ensemble will flag these issues by showing the number of affected rows in the **Error Rows (#)** tab.

Upload > Sheet Selection > Header Selection > Match Columns > **Review Entries**

**Find error** All rows **Error rows (8)**

↶ ↷ ⬇

To fix them, just click on **Find Error**. That'll bring you right to the row with the issue. Look for the **red-highlighted cell**, double-click it, and make your correction directly on the page.

Once you've gone through and fixed all the errors, just hit **Complete Import** to finish things up!

The development mode is activated. This mode is not allowed for commercial use, but only for pure testing purposes.

Upload > Sheet Selection > Header Selection > Match Columns > **Review Entries**

Find error

All rows

Error rows (2)



	External Contact ID	Contact Type *	Prefix	First Name
1	1	Individual		Zoë
2	2	Individual	Dr.	Rita
3	3	Individual		Pirkko
4	4	Individual		Craig
5	5	Individual		Ms Jessica
6	6	Individual	Mrs	Shirley
7	7	Individual		Sherrill
8	8	Individual		Desmond
9	9	Individual		Tim
10	10	Individual		D.
11	11	Individual	Dr.	Naomi M.
12	12	Individual		Hjordis
13	13	Individual		Larry
14	14	Individual		Tamarah Rose

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Complete Import

Review and complete!

## 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 CanadaHelps Ensemble!