

Bulk Edit Contact Records

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Contact records can be bulk edited to apply or remove tags, delete records or merge 2 or more records.

Locate the bulk action feature by selecting **Donors & Contacts** from the left navigation, and select **Contact Listing** from the dropdown.

The screenshot shows the 'Contacts' bulk edit interface. At the top, there's a search bar and user information for 'Stephanie Hann Demo'. The left navigation menu is open to 'Donors & Contacts' > 'Contact Listing'. The main area has a 'Contacts' header with 'ADD NEW +' and 'DOWNLOAD EXCEL (UTC)' buttons. Below the header are filter sections: 'Search by name or address', 'Tags' (set to 'Select Value'), 'Last donated from' (with 'Pick Date' pickers), 'Total donated from' (set to '\$0.00'), and 'Advanced Filter' (with 'Select filter' and 'Invert filter' options). A 'Bulk Actions' dropdown is set to 'APPLY' with a 'Clear All' link. The table below has columns: External Donor ID, Donor ID, Last Name, First Name, Total Gift Amount, Tags, and a status icon. The table contains 9 rows of contact data.

External Donor ID	Donor ID	Last Name	First Name	Total Gift Amount	Tags	
15	900866	Black	Sirius	\$55,526.85	Employee Board Member Staff Member +2	D
45	900896	Black	Regulus	\$7,220.12	Major Donor	St
44	900895	Brown	Lavender	\$6,690.12	Board Member	M
22	900873	Chang	Cho	\$9,799.25	Alumni	D
32	900883	Delacour	Fleur	\$4,538.34	Employee	St
37	900888	Diggory	Cedric	\$5,730.00	Major Donor	St
	900900	DONOR	ANONYMOUS OR UNKNOWN	\$104,495.00	Major Donor	N
9	900860	Dumbledore	Albus	\$7,160.00		D

Merge 2 or more contacts

Quickly merge 2 or more contacts from the contact listing page via bulk actions.

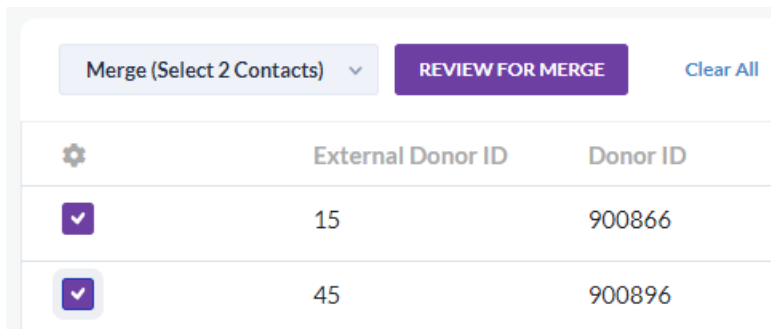
Select the checkbox next to 2 or more contacts, and click **Bulk Actions**. Choose **Merge (Select 2 Contacts)** from the dropdown.

- When 1 contact is selected the Apply button is inactive

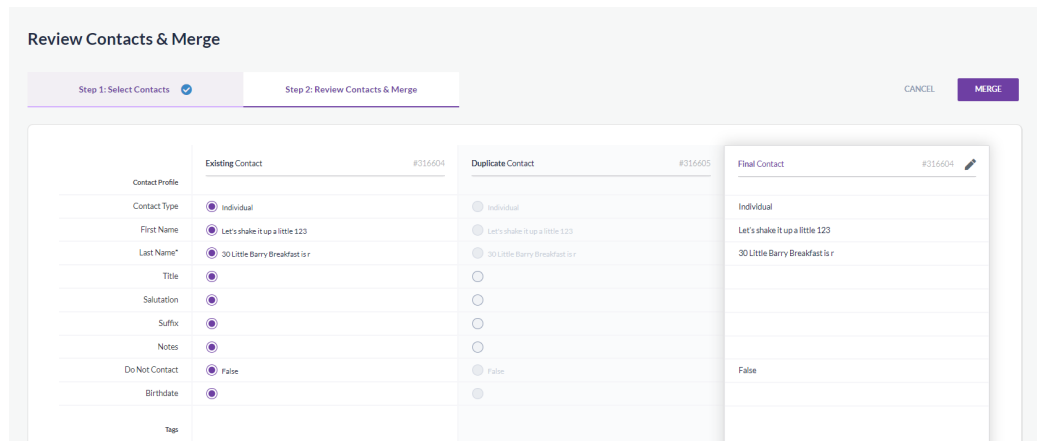
The screenshot shows the bulk actions dropdown menu with 'Merge (Select 2 Contacts)' selected. The 'APPLY' button is inactive. Below the menu is a table with columns for External Donor ID and Donor ID. Two rows are shown, both with checked checkboxes.

External Donor ID	Donor ID
15	900866
45	900896

- When 2 contacts are selected, the Review for Merge button is active



- o Select the Review for Merge button to be taken to a review merge screen for confirmation before merging

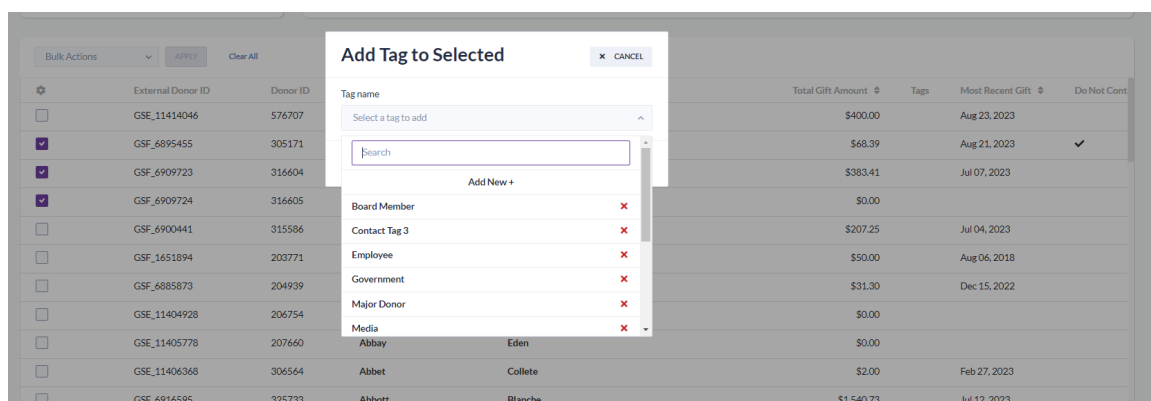


Note: For full merge functionality and to perform a scan of all contacts for potential duplicates, review the [Merge Duplicates](#) article.

Add a tag

Utilize the Add Tags bulk action to quickly add a tag to multiple records at one time. Select the checkbox next to 2 or more contacts, and click **Bulk Actions**. Choose **Add Tags** from the dropdown.

- Select **Apply**
- When Apply is selected all contact tags in Donor CRM will appear as well as the ability to Add New +



- Select the tag from the dropdown or create a new tag by selecting **Add New +**

- Creating a new contact tag will create the tag and automatically add to the selected contact records
- If selecting from the list of existing tags, select **Add Tag** to add the tags to the selected contact records
- Added tags will appear in the Tags column

Bulk Actions		APPLY	Clear All			
⚙️	Donor ID	Last Name ▲	First Name ⇅	Total Gift Amount ⇅	Tags	Most Recent Gift
<input type="checkbox"/>	903419	Donor	New	\$0.00		
<input type="checkbox"/>	331679	Primozić	Matt	\$0.00		
<input checked="" type="checkbox"/>	331680	Primozić	Nico	\$0.00	Volunteer	
<input checked="" type="checkbox"/>	331681	Primozić	Cameron	\$0.00	Volunteer	
<input type="checkbox"/>	335515	User	Test	\$0.00		
Summary Totals		Count: 5				

Remove a tag

Utilize the Remove Tags bulk action to quickly remove a tag from multiple records at one time. Select the checkbox next to 2 or more contacts, and click **Bulk Actions**. Choose **Remove Tags** from the dropdown.

- Select **Apply**
- When Apply is selected the current contact tags related to those selected contacts will appear in the drop down
- Select a tag from the dropdown to remove from the selected contacts
- Click **Remove Tag** to confirm

Delete contacts

Utilize the Delete bulk action to quickly remove from multiple records at one time from Donor CRM. Select the checkbox next to 2 or more contacts, and click **Bulk Actions**. Choose **Delete** from the dropdown.

Important to Note: Bulk deleting a contact will permanently remove this donor from your Donor CRM account.

- Select **Apply**
- When Apply is selected a popup will appear to confirm the permanent removal of these contact records

Warning

✕ CANCEL

You are about to delete **2 contacts**. Are you sure you want to delete these contacts permanently?

Cameron Primozic
Nico Primozic

CANCEL DELETE PERMANENTLY

- Select Delete Permanently to confirm and complete the removal
- A confirmation notification will appear in the top right