CRM: Bulk Edit 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.

GiveSmart Donor CRM		Search						Stephanie Hann Demo	✓ S Stephar	ale
💞 Launchpad		Contacts 🌣						ADD NEW +	DOWNLOAD EXCEL	L (UTC)
Dashboard		Search by name o	address	Last	t donated from	🛱 Pick Date	to	Pick Date	APPLY	
Households & Organizations				Tota	al donated from	\$0.00) to			
Donors & Contacts	ř	Tags		Adv	ranced Filter	Select filter		~		
Contact listing		Select Value	~			Invert filter				
Herging Center										
Gifts	<	Bulk Actions	✓ APPLY	Clear All						
Pledges	<	\$	External Donor ID	Donor ID	Last Name 🔺	First Name 🗢	Total Gift Amount 🗢	Tags		м
Collect Donations	<		15	900866	Black	Sirius	\$55,526.85	Employee Board Merr	iber Staff Member +2	D
Activities		6	45	900896	Black	Regulus	\$7,220.12	Major Donor		Se
X Reports			44	900895	Brown	Lavender	\$6,690.12	Board Member		М
Filters			22	900873	Chang	Cho	\$9,799.25	Alumni		D
			32	900883	Delacour	Fleur	\$4,538.34	Employee		Se
			37	900888	Diggory	Cedric	\$5,730.00	Major Donor		St
Resources				900900	DONOR	ANONYMOUS OR UNKNOWN	\$104,495.00	Major Donor		N
Y			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 I contact is selected the Apply button is inactive

Merge (Selec	t 2 Contacts) V APPLY	Clear All
•	External Donor ID	Donor ID
~	15	900866
	45	900896

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

Merge (Selec	t 2 Contacts) V REVIEW FO	R MERGE Clear All
\$	External Donor ID	Donor ID
v	15	900866
	45	900896

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

Step 1: Select Contacts 🤕	Step 2: Review Contacts & Merge	_	CANCEL
	Existing Contact #316604	Duplicate Contact #316605	Final Contact #316604
Contact Profile			
Contact Type	Individual		Individual
First Name	Let's shake it up a little 123		Let's shake it up a little 123
Last Name*	30 Little Barry Breakfast is r		30 Little Barry Breakfast is r
Title	۲		
Salutation	۲		
Suffix	۲		
Notes	۲		
Do Not Contact	False		False
D'ab data			

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 +

Bulk Actions	✓ APPLY Cle	ar All	Add Tag to Selected	× CANCEL			
\$	External Donor ID	Donor ID	Tag name		Total Gift Amount 🗘 Tag	Most Recent Gift 🌲	Do Not
	GSE_11414046	576707	Select a tag to add	^	\$400.00	Aug 23, 2023	
	GSF_6895455	305171	Search	· ·	\$68.39	Aug 21, 2023	~
	GSF_6909723	316604	Add New +		\$383.41	Jul 07, 2023	
	GSF_6909724	316605	Board Member	×	\$0.00		
	GSF_6900441	315586	Contact Tag 3	×	\$207.25	Jul 04, 2023	
	GSF_1651894	203771	Employee	×	\$50.00	Aug 06, 2018	
	GSF_6885873	204939	Government	×	\$31.30	Dec 15, 2022	
	GSE_11404928	206754	Major Donor	×	\$0.00		
	GSE_11405778	207660	Abbay Eden	A •	\$0.00		
	GSE_11406368	306564	Abbet Collet	e	\$2.00	Feb 27, 2023	
	GSF_6916595	325733	Abbott Blanci	he	\$1,540.73	Jul 12, 2023	

• 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

\$	Donor ID	Last Name 🔺	First Name 🏼 🗢	Total Gift Amount 🗢	Tags	Most Recent
	903419	Donor	New	\$0.00		
	331679	Primozic	Matt	\$0.00		
~	331680	Primozic	Nico	\$0.00	Volunteer	
~	331681	Primozic	Cameron	\$0.00	Volunteer	
	335515	User	Test	\$0.00		

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 wan contacts permanently? Cameron Primozic Nico Primozic	to delete these
CANCEL DELETE PERMANENT	Y

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