

CRM: Bulk Edit Records

Last Modified on 09/18/2023 2:09 pm PDT

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.

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

Merge 2 or more contacts

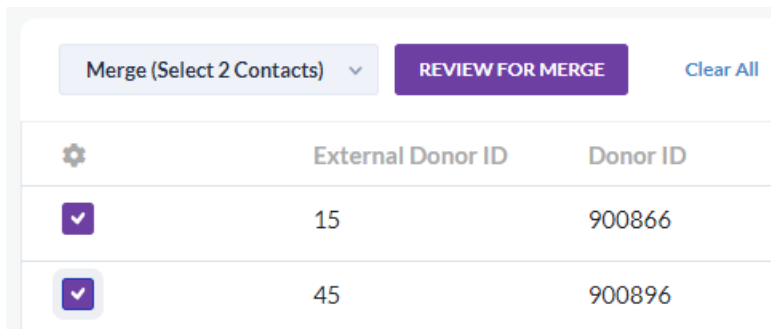
Quickly merge 2 or more contacts from the contact listing page via bulk actions.

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

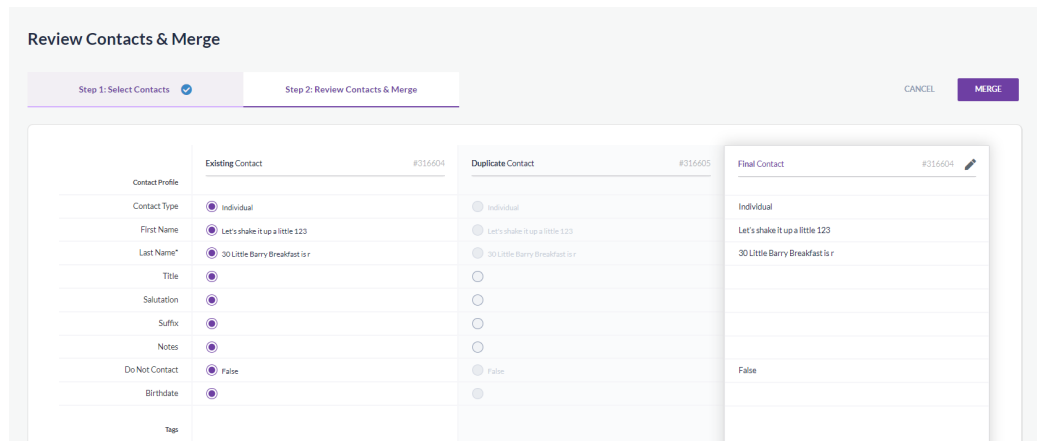
- When 1 contact is selected the Apply button is inactive

	External Donor ID	Donor ID
<input checked="" type="checkbox"/>	15	900866
<input type="checkbox"/>	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

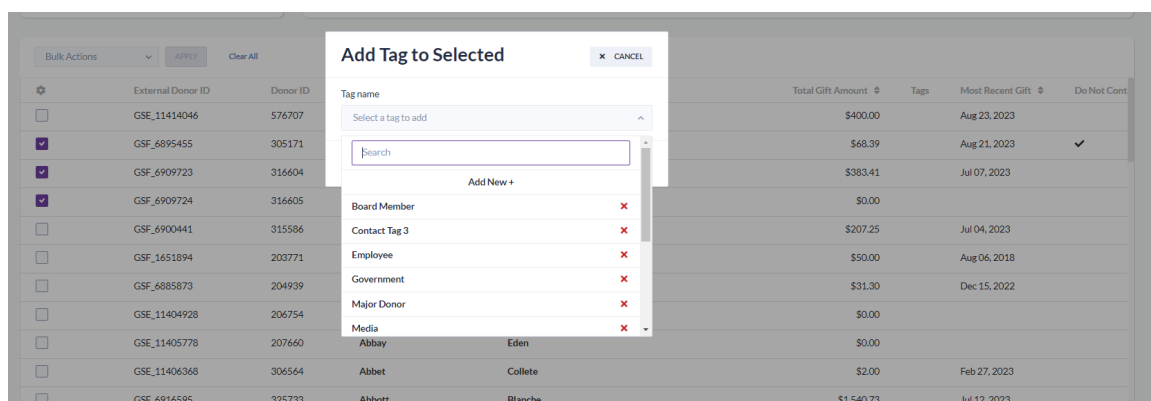


Note: For full merge functionality and to perform a scan of all contacts for potential duplicates, review the [Merge Duplicates](#) article.

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