

Bulk Download, Upload, and Edit Contacts

10/27/2025 3:37 pm CDT

Overview

On several grids, you have the ability to download and upload. This is useful for saving or sharing data, but it also allows you to make bulk changes via Excel and then quickly implement those changes into serviceminder.

This article will review:

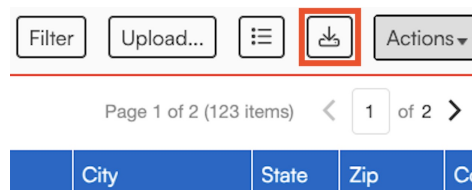
- [Downloading Contacts](#)
- [Uploading Contacts](#)
- [Review Imports](#)
- [Bulk Edit Contacts](#)
- [FAQs](#)

Video Tutorial

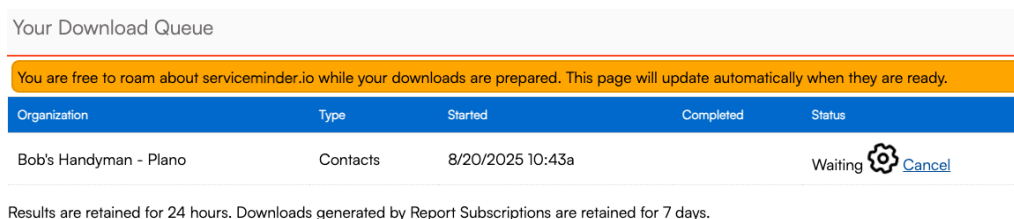
Your browser does not support HTML5 video.

Downloading Contacts


Start by clicking the **Download** button above the contacts grid.



It will take you another screen showing you that the system is processing your request.



Once complete, you will see a download icon for the list you exported.

Completed	Status	Records	Download
8/20/2025 10:43a	Completed	123	

When you open that list in Excel, you can see all the columns of information associated with the Contacts grid. You can update many columns at once or just a single column, like "Tags."

AG	AH	AI	AJ	AK	AL	AM
CC Expiration	Credit Hold	Balance Due	Lifetime Value	Tags	Owner	Flash Message
	0	0	0			
	0	201.99	201.99	Pest Control, Fall 2025		
Dec-24	1	800	3369.72	Fall 2025		
	0	0	0	Fall 2025		
	0	0	0	Fall 2025		
	0	0	0	Pest Control		
	0	0	0	Fall 2025		
	0	0	0	Holiday Lighting		
	0	0	0	Fall 2025		
	0	0	0	Fall 2025		

To simplify the update process, consider deleting any columns that you are not going to be updating. Keep only the required columns and updated columns. This reduces the likelihood of triggering an error when re-uploading the file later.

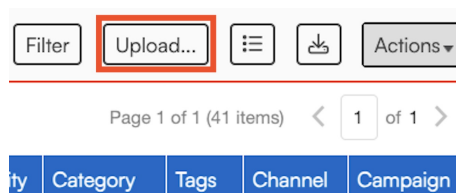
Edit the information you wish, and go to **File > Save As**. Keep the same name or change it, that part doesn't really matter. Just make sure that you save as **File Type - CSV**.



Our system will only import CSV files, so if you just change the name to be .CSV, you will get an error message. Also, be sure to close the file or serviceminder will not upload it.

Uploading Contacts

Go back to the Contacts Grid and select the **Upload** button to import the new contact list.



Make sure the file you are uploading contains the following **required fields**:

- Name
- Phone
- Address1
- City
- State
- Zip

Select a CSV file to upload by clicking the upload icon and selecting your file, or by clicking and dragging your file to the upload icon.

Choose a File to Upload

Select a File



The Settings section below will offer you several configuration options for greater control over your upload:

- **Disable Contact Merging** – If disabled, contacts sharing the same name, email, phone, or address will not be merged together. *(Use this if you don't want duplicates automatically combined.)*
- **Updates Only** – If enabled, any contacts that don't match an existing contact in ServiceMinder will be ignored. *(Use this if you don't want new contacts created in case of mapping issues.)*
- **Distribute Contacts** – *(Brand administrators only)* Upload the contacts to the organization specified by the **OrganizationID** column. Learn more about this option below.
- **Run Later** – Enable to run the upload later via the console. *(Recommended for very large lists of changes, since bulk updating can slow the system down and prevent other work while it uploads.)*
- **Organization Name** – *(Brand administrators only)* Run the upload in a specific organization different from the one you are currently working in.

Settings

Disable Contact Merging

☐ Disable Merging

If disabled, contacts sharing the same name, email, phone, or address will not be merged together.

Updates Only

☐ Only allow contacts to be updated, don't create new

If enabled, any contacts that don't match an existing contact in serviceminder will be ignored.

Distribute Contacts

☐ Using OrganizationId column

Upload the contacts to the organization specified by the OrganizationId column

Run Later

☐ Run Later

Enable to run later via console.

Organization Name



Run In Organization

After hitting **Submit**, you will see a pop-up window letting you know if the update was successful. If it was, you can click the **Here** link or just go to **Contacts** in the main menu to see the changes reflected.

Your import completed.

There were no issues.

Click [here](#) to view your contacts.

If the upload was **not** successful, you'll see an error reason with the option to retry after making adjustments to your file.

Your file had the following issues:

Message	Exception	Stack Trace
An exception occurred:	Multiple columns with the same name detected. This can also include empty columns. Please update the column names or remove any extra empty columns.	at System.ThrowHelper.ThrowArgumentOutOfRangeException(Resource) at System.Collections.Generic.Dictionary`2.Insert(TKey key, TValue value, Boolean add) at LumenWorks.Framework.IO.Csv.CsvReader.ReadNextRecord(Boolean onlyReadHeaders, Boolean skipToNextLine) in D:\a\l\libraries\LumenWorks.Framework\IO\Csv\CsvReader.cs:line 1547 at LumenWorks.Framework.IO.Csv.CachedCsvReader.ReadNextRecord(Boolean onlyReadHeaders, Boolean skipToNextLine) in D:\a\l\libraries\LumenWorks.Framework\IO\Csv\CachedCsvReader.cs:line 307 at LumenWorks.Framework.IO.Csv.CsvReader.EnsureInitialized() in D:\a\l\libraries\LumenWorks.Framework\IO\Csv\CsvReader.cs:line 795 at LumenWorks.Framework.IO.Csv.CsvReader.Get_FieldCount() in D:\a\l\libraries\LumenWorks.Framework\IO\Csv\CsvReader.cs:line 573 at ServiceMind.Api.AsyncTasks.ContactImportRunFileContext.Context, String filename, Boolean disable_contact_merging, Boolean contact_merging_only, BackgroundTaskHistory async_task) in D:\a\l\libs\Core\ServiceMind.Api\AsyncTasks\ContactImport.cs:line 101

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There is an additional option when bulk uploading Contacts. **Distribute Contacts** will allow you upload a list of contacts according to which organization they should be in. So you upload a list including contacts from multiple territories and it doesn't matter which organization you are uploading them into.

☐ Using OrganizationId column

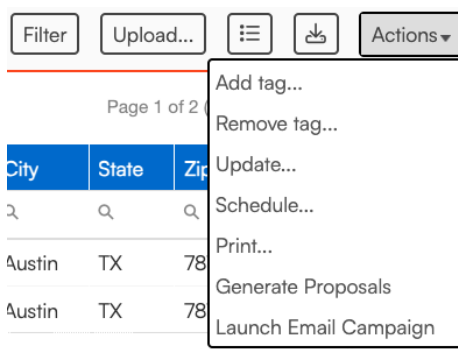
You must use the column header, "OrganizationID". Then you must make sure the organization ids are listed correctly. You can find this information in three places:

1. If you are in an org, go to **Control Panel > General**.
2. If you are a brand admin, you can see all org ids by going to **Dashboard > Organizations**.
3. In the url string if you are impersonating into an organization.

The **Past Imports** button in the top-right corner of the upload page takes you to a table displaying all of your previous contact imports with links to logs and data about each import.

Rather than downloading and editing a list to reupload. You can make several bulk changes directly through **serviceminder**.

On the **Contacts Grid** page, use the filters to narrow down your contacts to only the ones you want to update. Then go to the **Actions** menu.



From this menu, you can choose several common actions:

- Add or Remove a **Tag**.
- Update the the **Category** as well as the **Channel or Campaign**.
- Schedule queued appointments on a specified date.
- Print using a Print Template for all contacts at once.
- Generate Proposals for many contacts at once.
- Launch an Email Campaign.

FAQs

How do I know if my import was successful?

Go to **Calendar > Contacts > Upload Contacts > Import History**. You can look here to view any imports you've done and see what the errors were to help troubleshoot when an import fails.

My import didn't work. What went wrong?

To make bulk updates, you must be sure that your list meets the following criteria:

1. The file must be saved as a CSV. You cannot add ".csv" to the file name. The system will reject it. You must "Save As" file "CSV".
2. You must label the column headers in a way that the system will understand. Although we do not have a specific list, a good rule of thumb is to use what you see on the grid page. For instance, use the column headers from the downloaded list such as "Service Address" and "CC Expiration".
3. If you have empty columns in the spreadsheet, the system will reject it. Make sure that you don't have a space in an empty column.

I don't see the fields I just uploaded on the grid.

If you do not see the column you are looking for, don't forget to click the **Column Chooser** button and make sure you have activated all the data columns you want to appear.

Filter

Upload...

Actions▼

	City	State	Zip	Community
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