

# Bulk Download, Upload, and Edit Contacts

08/20/2025 10:39 am 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:

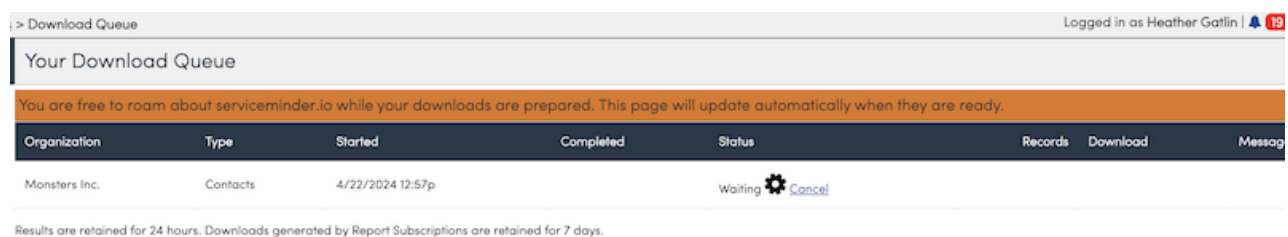
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## Downloading Contacts

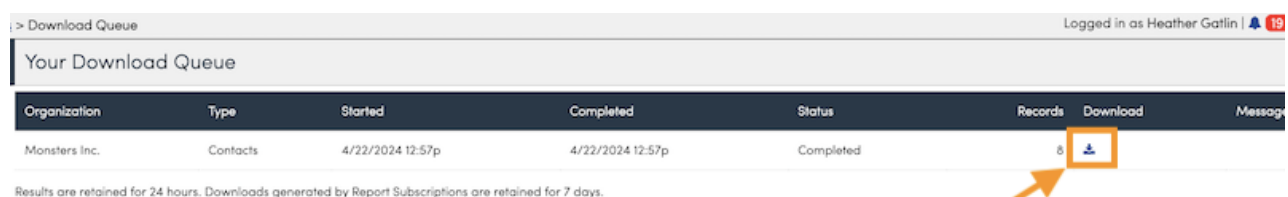
Start by clicking the **Download** button.



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.



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."

AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP	AQ	AR	AS	AT
mer Sir	Last Invoice	Do Not Email	Do Not Mail	Card On File	CC Expiration	Credit Hold	Balance Due	Lifetime Value	Tags	Flash Message	Created By	Created At	Updated At	API Key	Default En R	Last Touch	Managed By	Territory
2/2/24	2/2/24	0	0	0	0	0	0	235	Cancelled Customer	Heather Gati	#####	2/2/24 9:57						
2/2/24	2/14/24	0	0	0	0	0	-125	0	New Customer	Heather Gati	#####	#####						
1/16/24	1/16/24	0	0	0	0	0	0	230	470	Heather Gati	#####	#####						
		0	0	0	0	0	0	0	100	Heather Gati	#####	4/3/24 8:57						
		0	0	0	0	0	0	0	0	Heather Gati	#####	#####						
		0	0	0	0	0	0	0	0	Heather Gati	#####	#####						
		0	0	0	0	0	0	0	0	Heather Gati	#####	#####						
2/21/24	4/25/24	0	0	0	0	0	2150	2150		Heather Gati	#####	#####						

AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP	AQ	AR	AS	AT
ustomer Sir	Last Invoice	Do Not Email	Do Not Mail	Card On File	CC Expiration	Credit Hold	Balance Due	Lifetime Value	Tags	Flash Message	Created By	Created At	Updated At	API Key	Default En R	Last Touch	Managed By	Territory
2/2/24	2/2/24	0	0	0	0	0	0	235	Cancelled Customer	Heather Gati	#####	2/2/24 9:57						
2/2/24	2/14/24	0	0	0	0	0	-125	0	New Customer	Heather Gati	#####	#####						
1/16/24	1/16/24	0	0	0	0	0	0	230	470	Heather Gati	#####	#####						
		0	0	0	0	0	0	0	100	Heather Gati	#####	4/3/24 8:57						
		0	0	0	0	0	0	0	0	Heather Gati	#####	#####						
		0	0	0	0	0	0	0	0	Heather Gati	#####	#####						
		0	0	0	0	0	0	0	0	Heather Gati	#####	#####						
3/21/24	4/25/24	0	0	0	0	0	2150	2150	New Customer	Heather Gati	#####	#####						

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 files of that type, 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.



There is an option to merge duplicate contacts, or if you don't want it to create any new Contacts (this option is in case you made several changes and you don't want the system to create any new Contacts if it doesn't map properly). If it is a very big list of changes, you may want to use the "run later" option since bulk updating can slow the system down and you won't be able to get much work done while it uploads.

If all you did was update tags or categories, then you probably don't need to check any of the checkboxes.

Import Contacts File Post Imports

You may select any CSV file for importing. The column names must match existing serviceminder column names or any custom fields that you have created.

Select a File **contacts.csv**

☒ Disable Contact 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.

Run Later ☒ Run Later  
Enable to run later via console.

**Submit**

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.



Your browser does not support HTML5 video.

## Distribute Contacts


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.

Distribute Contacts ☒ Using OrganizationId column

Upload the contacts to the organization specified by the 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.

 serviceminder.com/c/3788/c/contacts/import

## Review Imports

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

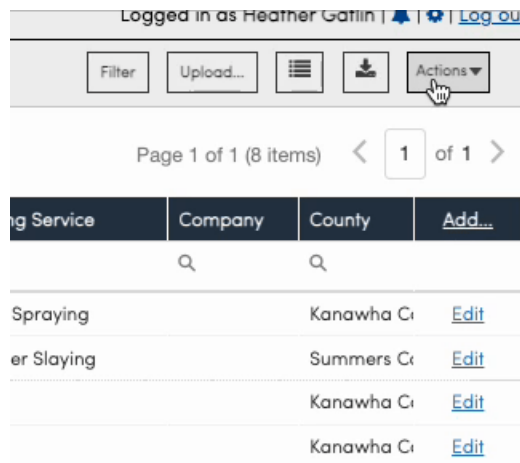
Import History					
1					
Download	Logs	Start Time	End Time	Contacts Imported	Expected Contacts
	<a href="#">View Logs</a>	1/4/2016 3:35:21 PM	1/4/2016 3:35:21 PM	0	0
	<a href="#">View Logs</a>	1/4/2016 3:33:05 PM	1/4/2016 3:33:05 PM	0	0
	<a href="#">View Logs</a>	1/22/2015 2:27:35 PM	1/22/2015 2:27:35 PM	0	0
	<a href="#">View Logs</a>	1/22/2015 2:26:31 PM	1/22/2015 2:26:31 PM	0	0

## Bulk Edit Contacts

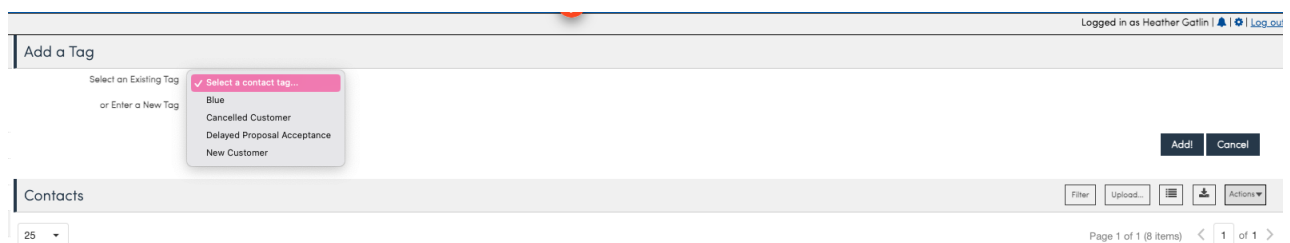
Rather than downloading and editing a list to reupload. You can make several bulk changes directly through

serviceminder.

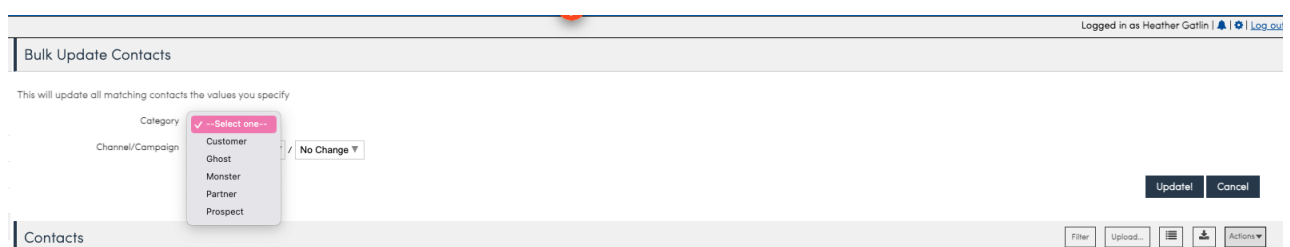
On the **Contacts Grid** page go to **Actions**.



From this menu, you can choose several common options such as adding or removing a **Tag** to the list of Contacts.



Choose **Update** from the menu to bulk adding changing the **Category**, **Channel**, or **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:

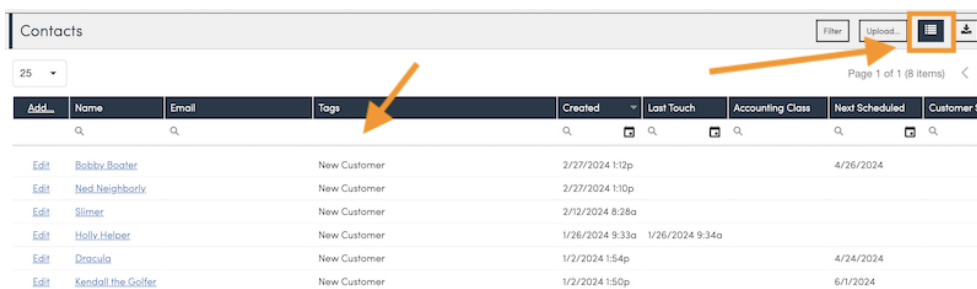
1. The file must be saved as a CSV. You cannot add ".csv" to the file name. The system will reject it. You must

"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.



Contacts

Filter Upload...

Page 1 of 1 (8 items)

Add...	Name	Email	Tags	Created	Last Touch	Accounting Class	Next Scheduled	Customer Sir
Edit	Bobby Boater		New Customer	2/27/2024 1:12p			4/26/2024	
Edit	Ned Neighborly		New Customer	2/27/2024 1:10p				
Edit	Slimer		New Customer	2/12/2024 8:28a				
Edit	Holly Helper		New Customer	1/26/2024 9:33a	1/26/2024 9:34a			
Edit	Dracula		New Customer	1/2/2024 1:54p			4/24/2024	
Edit	Kendall the Golfer		New Customer	1/2/2024 1:50p			6/1/2024	