Bulk Download, Upload, and Edit Contacts

10/23/2024 9:15 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 service **minder**.

Downloading Contacts

Start by clicking the **Download** button.



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

> Download Queue					Lo	gged in as Heather Gat	lin 🌲 19					
Your Download Q	Your Download Queue											
You are free to roam abo	out serviceminder.i	io while your downloads are pre	pared. This page will u	update automatically when they are ready.								
Organization	Туре	Started	Completed	Status	Records	Download	Messag					
Monsters Inc.	Contacts	4/22/2024 12:57p		Waiting 🛱 <u>Concel</u>								

Results are retained for 24 hours. Downloads generated by Report Subscriptions are retained for 7 days.

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

> Download Queue					L	ogged in as Hea	ther Gatlin 🌲 19
Your Downloa	id Queue						
Organization	Туре	Started	Completed	Status	Records	Download	Message
Monsters Inc.	Contacts	4/22/2024 12:57p	4/22/2024 12:57p	Completed	8	۸	
Results are retained for 2	24 hours. Downloads gene	erated by Report Subscriptions are r	atained for 7 days.				

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."

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;	X V	fx Ta	gs															
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1/16/24	1/16/24	0	0	0		0	0	100	New Customer		Heather Ga	(4/3/248:57					
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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 service**minder** will not upload it.

Uploading Contacts

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

 Logged in as Heather Gatiin | # | \$ | Log out

 Filter
 Upload...

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		Past Imports
You may select any CSV file for importing Select a File	The column names must match existing serviceminder column names or any custom fields that you have created. Contacts.csv	
Disable contact merging	L'usobie Merging If disobled, 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	
	Endble 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 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.



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 Log	96 I	Start Time	End Time	Contacts Imported	Expected Contacts
Vie	w Logs	1/4/2016 3:35:21 PM	1/4/2016 3:35:21 PM	0	0
Vie	w Logs	1/4/2016 3:33:05 PM	1/4/2016 3:33:05 PM	0	0
Vie	w Logs	1/22/2015 2:27:35 PM	1/22/2015 2:27:35 PM	0	0
Vie	w Logs	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 service **minder**.

On the Contacts Grid page go to Actions.

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Filter	Upload	≣ ≰	Actions 🔻
I	Page 1 of 1 (8 ite	ems) < 1	of 1 $>$
ng Service	Company	County	<u>Add</u>
	Q	Q	
Spraying		Kanawha Ce	Edit
er Slaying		Summers Co	Edit
		Kanawha Ci	Edit
		Kanawha Ci	Edit

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

	Logged in as Heather Gatlin 🧳
✓ Select a contact tag	
Blue Cancelled Customer	
Delayed Proposal Acceptance	Addi G
New Customer	
	Filter Uplood. 🔳 🛓
	Dens 4 of 4 (0 lisses)
	Select a contact tag Bue Cancelled Customer Delayed Proposal Acceptance New Customer

Choose Update from the menu to bulk adding changing the Category, Channel, or Campaign.

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Bulk Update Contacts		
This will update all matching contacts	the values you specify	
Category	✓Select one	
Channel/Campaign	Customer / No Change V	
	Monster	
	Partner	Update! Cancel
	Prospect	
Contacts		Filter Upload 🔳 ᆂ Actions 🔻

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.

Troubleshooting

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 "Tags" column (or whichever 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.

Conta	cts					Filter Upload	•
25 🔹			/			Page 1 of 1 (8	items) <
Add	Name	Email	Tags 🖌	Created 👻 Last Tou	ch Accounting Class	Next Scheduled	Customer Sir
	Q	Q		Q 🗖 Q		۹ 🖬	Q
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 1/26/20	24 9:34a		
Edit	Dracula		New Customer	1/2/2024 1:54p		4/24/2024	
Edit	Kendall the Golfe	2	New Customer	1/2/2024 1:50p		6/1/2024	