Bulk Download, Upload, and Edit Contacts

08/20/2025 10:39 am CDT

Overview

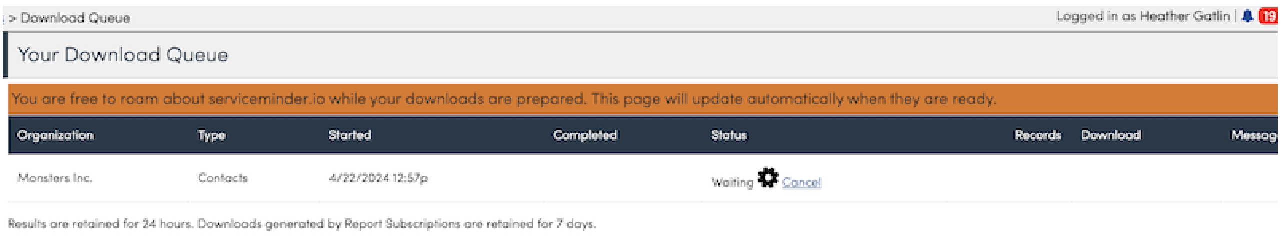
On several grids, you have the ability to download and upload. This is useful for saving or sharing data, but it also allows you to make bulk changes via Excel and then quickly implement those changes into service**minder**.

This article will review:

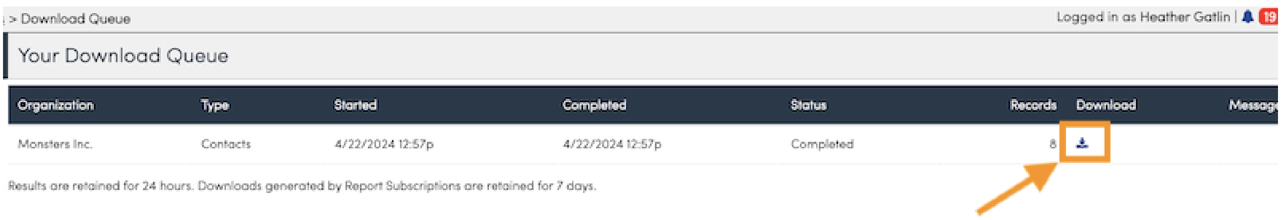
Downloading Contacts

Start by clicking the **Download** button.

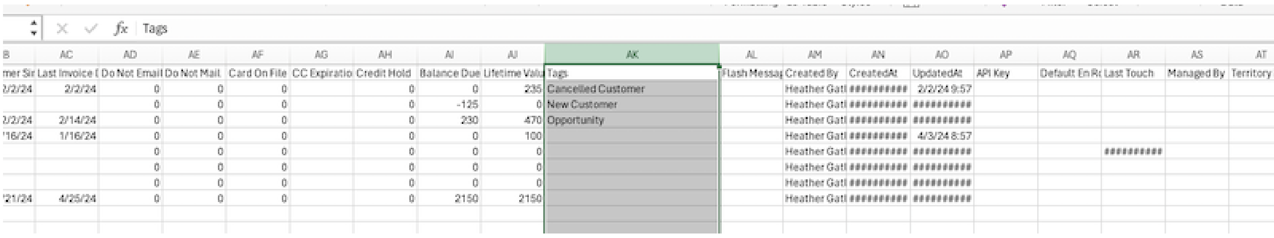
It will take you another screen showing you that the system is processing your request.

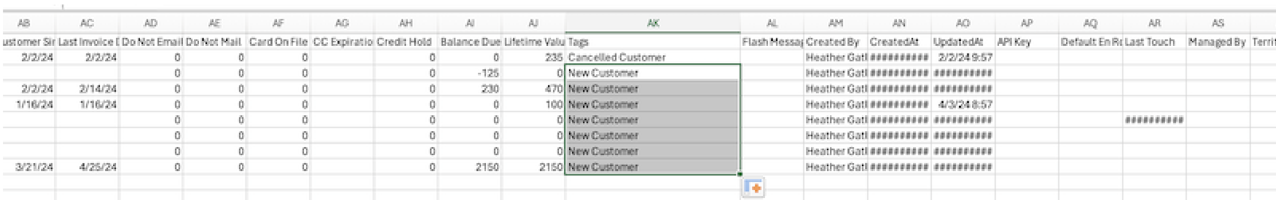


Once complete, you will see a download icon for the list you exported.



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."



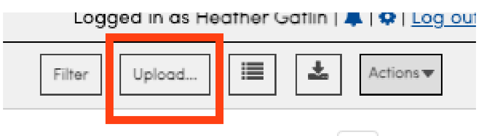


Edit the information you wish, and go to **File > Save As**. Keep the same name or change it, that part doesn't really matter. Just make sure that you save as **File Type - CSV**.

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.

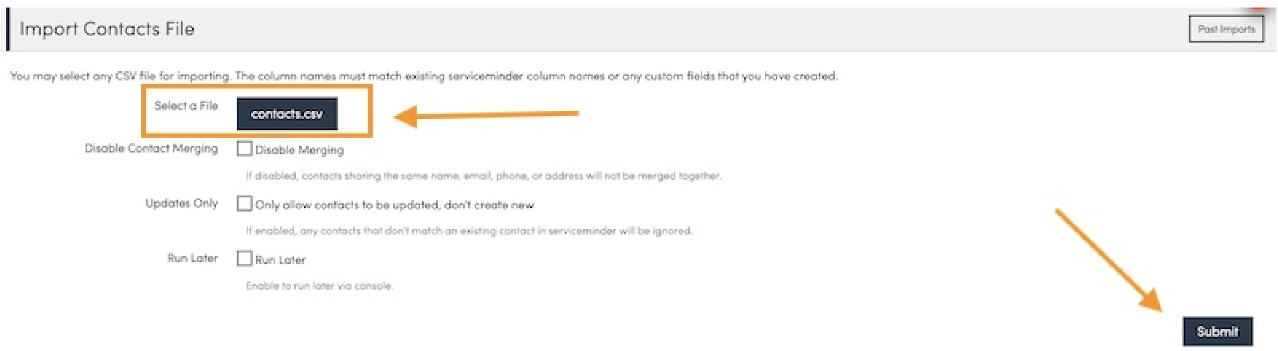
Uploading Contacts

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

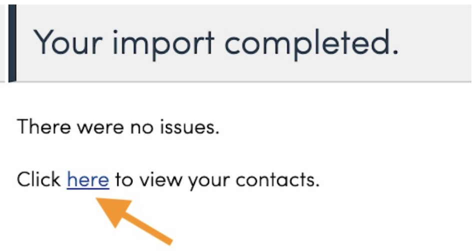


There is an option to merge duplicate contacts, or if you don't want it to create any new Contacts (this option is in case you made several changes and you don't want the system to create any new Contacts if it doesn't map properly). If it is a very big list of changes, you may want to use the "run later" 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.



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

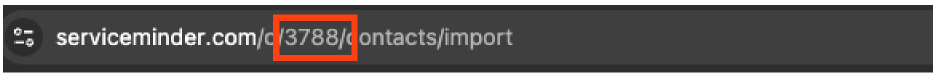
There is an additional option when bulk uploading Contacts. **Distribute Contacts** will allow you upload a list of contacts according to which organization they should be in. So you upload a list including contacts from multiple territories and it doesn't matter which organization you are uploading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

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.**

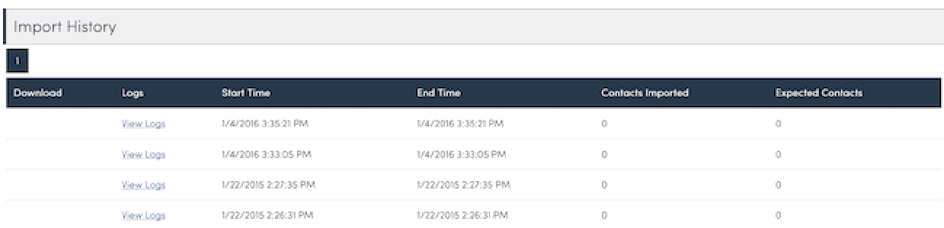
2. If you are a brand admin, you can see all org ids by going to **Dashboard > Organizations.**

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.

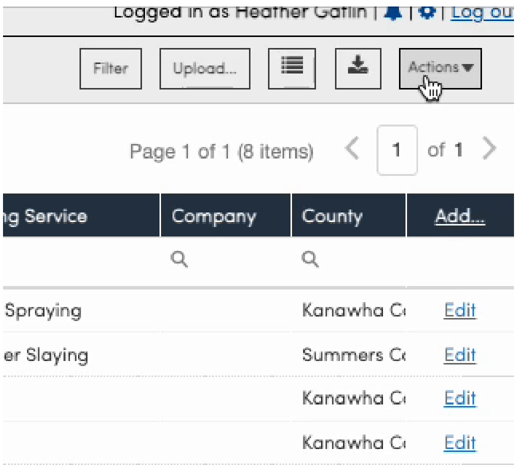

Import History

Download	Logs	Start Time	End Time	Contacts Imported	Expected Contacts
	View Logs	1/4/2016 3:35:21 PM	1/4/2016 3:35:21 PM	0	0
	View Logs	1/4/2016 3:33:05 PM	1/4/2016 3:33:05 PM	0	0
	View Logs	1/22/2015 2:27:35 PM	1/22/2015 2:27:35 PM	0	0
	View Logs	1/22/2015 2:26:31 PM	1/22/2015 2:26:31 PM	0	0

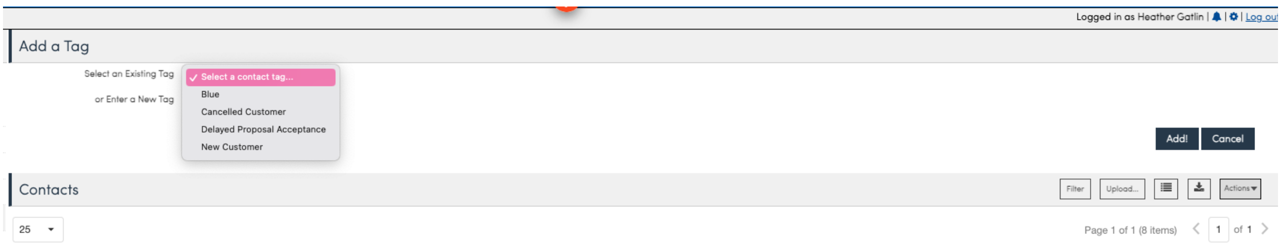
Bulk Edit Contacts

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

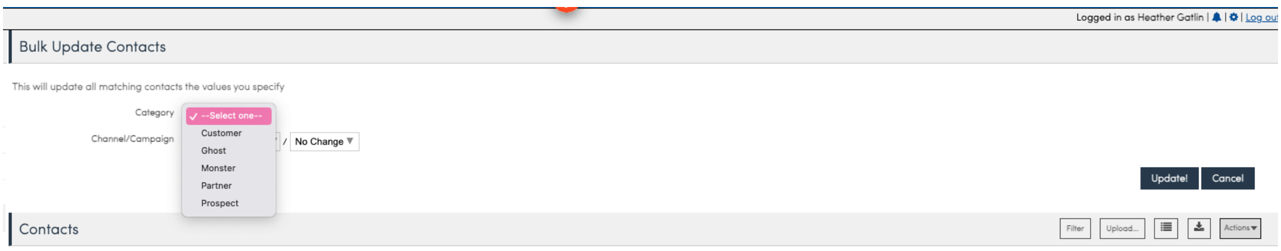
On the **Contacts Grid** page go to **Actions**.



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.