Groups & Smart Groups vs Tags

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Donor Management System

The DMS has two major ways of categorizing, segmenting, and analyzing your Contacts: Groups & Smart Groups and Tags.

Since both Groups & Smart Groups and Tags are methods of categorization, this article will help you to identify the differences in their functionality will help you decide which to use in a given situation.

Considerations

Groups & Smart Groups

The intention of Groups & Smart Groups is to group and organizing Contacts to perform the same Actions on all these Contacts at once.

Tags

Tags should be generally used for descriptive categories and segmentation of Contacts.

Using Groups, Smart Groups, and Tags separately

You can create and use unique categories of Contacts using Groups, Smart Groups, or Tags

> **Example: Using Groups, Smart Groups & Tags separately**
>
> Karen Filippelli and Andy Bernard are both part of the Management Team, live in London, ON, and are vegetarian.
>
> You can then:
>
> 1. Create a Group called "Management Team" and add all members of this team manually.
> 2. Create a Smart Group with the Search Criteria "lives in London, ON" so everyone who lives there is added automatically.
> 3. Tag them with a Tag called "Vegetarian" so you can easily filter them on future Advanced Searches and Reports.

Using Groups, Smart Groups, and Tags separately

You can use Reports or Advanced Search to segment donors using Groups, Smart Groups, and Tags together.

Example: Using Groups, Smart Groups & Tags together

Now you want a list of all members of the Management Team that live in London, ON and also happen to be vegetarian.

You can then perform an Advanced Search with the following:

1. Contains the Group called "Management Team",
2. Contains the Tag called "Vegetarian",
3. And contains Contacts that live in London, ON.

Finally, Karen Filippelli and Andy Bernard will both show up in this new segmented Smart Group.