

Adding, Modifying & Deleting a Group

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Donor Management System

This article covers adding and modifying Groups. Building regular Groups like these are recommended for contact lists that are manually generated. For lists that have been segmented using [Advanced Search](#) criteria, try [adding a Smart Group](#) instead.

Table of Contents:

- [Adding a \(regular\) Group](#)
- [From the Contacts Tab](#)
- [From the Manage Groups Page](#)
- [Modifying & Deleting a Group](#)

Adding a (regular) Group

From the Contacts Tab

1. Go to the **Contacts Tab**

2. Search for a specific Contact or select either:

- (1) **The specific Contacts** you wish to add to the Group,
- (2) Every listed Contact **on the page**, or
- (3) All **Contacts** from your search criteria

Wellness Avenue Dashboard: Contacts

Search by contact name or email

Actions ▾ 4 Selected Records Only All 174 Records ³

All contacts ▾ Advanced Actions ▾ Add Contact ▾

<input type="checkbox"/>	Name	City	Province	Phone	Email	Date Created	Last Modified
<input checked="" type="checkbox"/>	A Amadu	Toronto	ON		amadua@canadahelps.org	Jul 13th, 2022 5:12 PM	Feb 24th, 2023 2:57 PM
<input checked="" type="checkbox"/>	A. L. Kostenko	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	Feb 23rd, 2023 1:21 PM
<input type="checkbox"/>	Accessibility Foundation					Nov 24th, 2022 6:05 PM	Feb 14th, 2023 11:17 AM
<input type="checkbox"/>	aine@ainemcglynn.com				aine@ainemcglynn.com	Jun 24th, 2022 10:09 AM	Oct 26th, 2022 2:17 PM
<input checked="" type="checkbox"/>	Alex Fergie	London	ON	5145216699	jubino+woodcoaster@canadahelps.org	Apr 20th, 2022 12:46 PM	Feb 24th, 2023 11:27 AM
<input type="checkbox"/>	Alex Fergie					Oct 6th, 2022 12:48 PM	Jan 26th, 2023 2:12 PM
<input checked="" type="checkbox"/>	Alicia Mitre	Mississauga	ON		amitreetatwell@outlook.com	Oct 19th, 2022 2:01 PM	Feb 24th, 2023 2:39 PM

Select Contacts

3. Select the **Actions** menu at the upper-left side of the Contact list

4. Either type “group” in the **Actions** search bar or scroll the list to find the **Group – add contacts** option

Wellness Avenue Dashboard: Contacts

Search by contact name or email

Actions ▾ 50 Selected Records Only All 174 Records

All contacts ▾ Advanced Actions ▾ Add Contact ▾

<input type="checkbox"/>	Name	City	Province	Phone	Email	Date Created	Last Modified
<input type="checkbox"/>	A Amadu	Toronto	ON		amadua@canadahelps.org	Jul 13th, 2022 5:12 PM	Feb 27th, 2023 3:59 PM
<input type="checkbox"/>	A. L. Kostenko	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	Feb 23rd, 2023 1:21 PM
<input type="checkbox"/>	Accessibility Foundation					Nov 24th, 2022 6:05 PM	Feb 14th, 2023 11:17 AM
<input type="checkbox"/>	aine@ainemcglynn.com				aine@ainemcglynn.com	Jun 24th, 2022 10:09 AM	Oct 26th, 2022 2:17 PM
<input checked="" type="checkbox"/>	Alex Fergie	London	ON	5145216699	jubino+woodcoaster@canadahelps.org	Apr 20th, 2022 12:46 PM	Feb 27th, 2023 1:23 PM
<input checked="" type="checkbox"/>	Alicia Mitre	Mississauga	ON		amitreetatwell@outlook.com	Oct 19th, 2022 2:01 PM	Feb 24th, 2023 2:39 PM

Add Contacts to Group

5. On the next page, select **Create New Group** and fill out the fields:

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Add Contact To Existing Group Create New Group

Group Name: *

Description:

Group Type Access Control Mailing List

Mailchimp Settings

Number of selected contacts: 50
View Selected Contacts

Add to Group Cancel

Create New Group

Fields:

- **Group Name:** the name of the Group.
- **Description:** optional description of the Group.
- **Group Type - Access Control:** only check this when adding Admin Users to a Group.
- **Group Type - Mailing List:** select if you'd like to be able to send [Bulk Emails](#) to this Group.

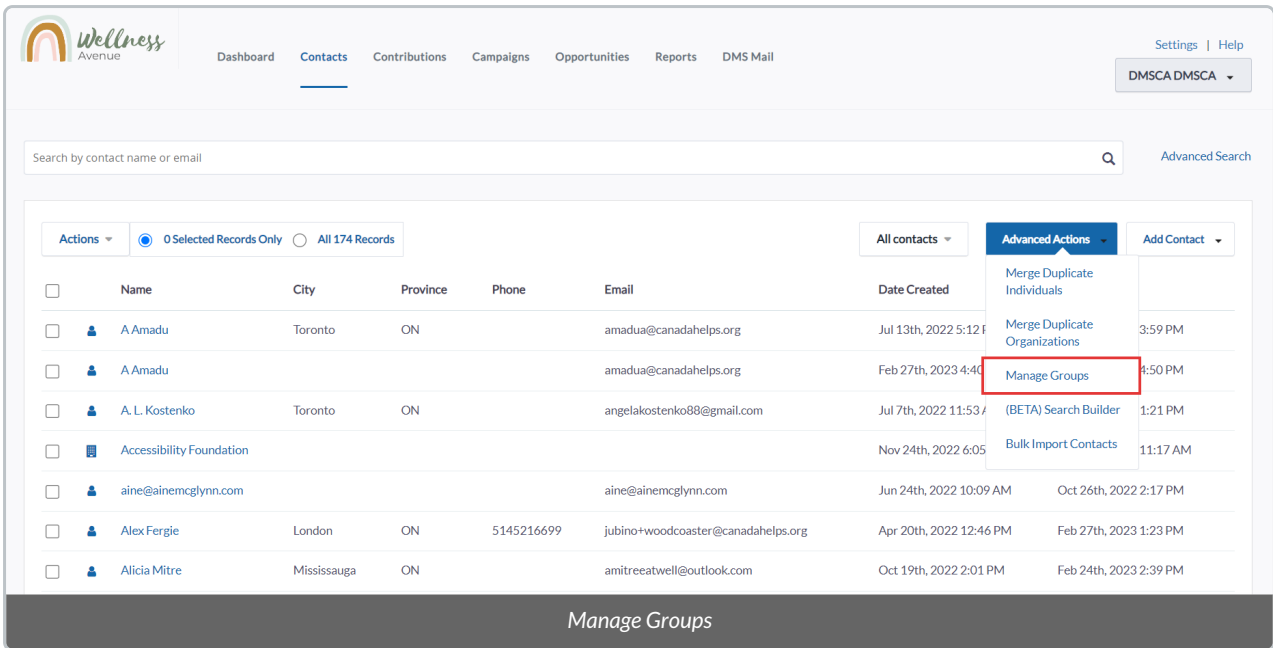
6. After adding all the necessary information, select **Add To Group**

7. Your Group will then be created! You can select **Done** to view the newly created Group Details with all the selected Contacts in it.

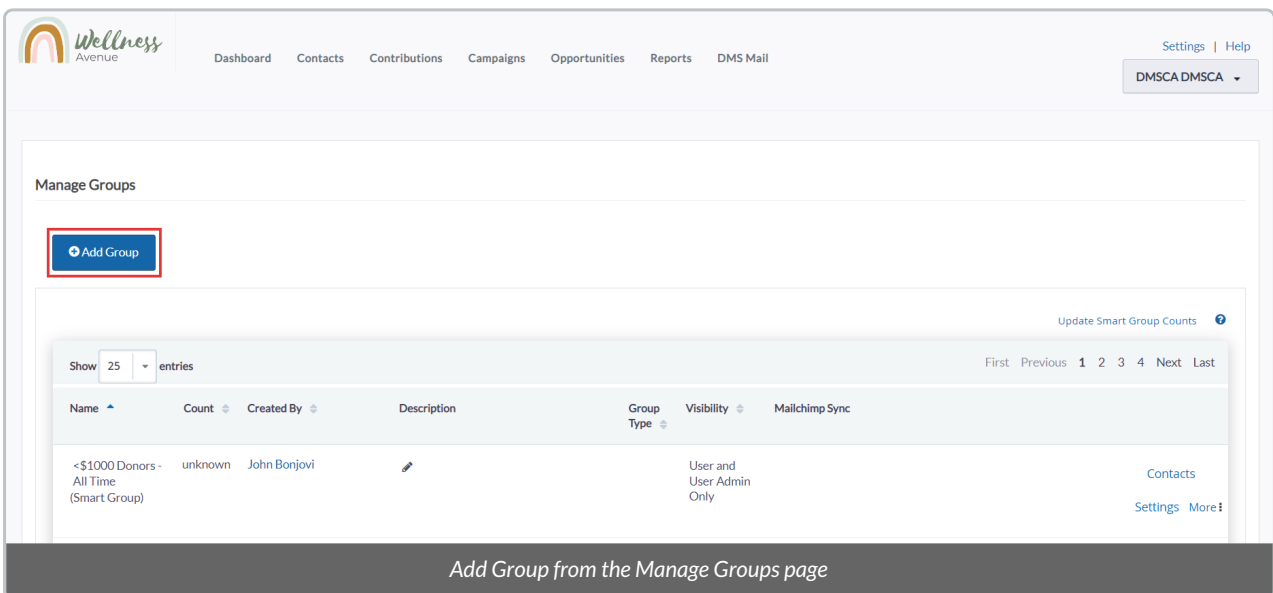
From the Manage Groups Page

1. Go to the **Contacts Tab**

2. Select **Advanced Actions** on the top right corner of the screen and then **Manage Groups**



3. You will be directed to the **Manage Groups** Page. Select the **Add Group** button on either top or bottom of the page



4. A **New Group** popup will show up with the following information:

New Group
🖨️ ↗️ ✕

Group Title *

Group Description

Group description is displayed when groups are listed in Profiles and Mailing List Subscribe forms.

^ **Mailchimp Settings**

No integration

Membership Sync: Contacts in this group should be subscribed to a Mailchimp List

Interest Sync: Contacts in this group should have an "interest" set at Mailchimp

Parent Groups ⓘ

Add Parent

✕ Cancel
✓ Save

Add New Group

Fields:

- Group Title:** the name of the Group.
- Group Description:** optional description of the Group.
- MailChimp Settings – No integration:** leave this blank if you don't want this Group to communicate with your MailChimp Integration.
- MailChimp Settings – Membership Sync:** select this box to have this Group communicate with your MailChimp Membership integration.
- MailChimp Settings – Interest Sync:** select this box to have this Group communicate with your MailChimp Interest integration.
- Parent Groups – Add Parent:** add this new Group to be under an existing Group to help organize your Group list (e.g. Dietary Restrictions > Vegan). The Group parent/child relationship can be filtered on Advanced Search and Reports, and will show up on the *Manage Groups* page like this:



Julie's Group	unknown	Admin, DMS Charity	This is julie's group	Mailing List	User and User Admin Only	Contacts Settings ⓘ
Party Planning Committee	1	Admin, DMS Charity	No green balloons allowed.	Mailing List	User and User Admin Only	Contacts Settings ⓘ


Parent-Child Group Display

5. After filling out all the necessary information, select **Save**

6. On the following page, you'll be able to select which Contacts to include in the new Group that is being created:

Add to Group: Volunteers in Hamilton

Name or Email Search by contact name or email  

174 Contacts Advanced Search 

ADD CONTACTS TO VOLUNTEERS IN HAMILTON 4 Selected Records Only All 174 Records

<input type="checkbox"/>	Name	City	Province	Phone	Email	Date Created	Last Modified
<input type="checkbox"/>	A Amadu	Toronto	ON		amadua@canadahelps.org	Jul 13th, 2022 5:12 PM	Feb 27th, 2023 3:59 PM
<input checked="" type="checkbox"/>	A Amadu				amadua@canadahelps.org	Feb 27th, 2023 4:40 PM	Feb 27th, 2023 4:50 PM
<input type="checkbox"/>	A. L. Kostenko	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	Feb 23rd, 2023 1:21 PM
<input type="checkbox"/>	Accessibility Foundation					Nov 24th, 2022 6:05 PM	Feb 14th, 2023 11:17 AM
<input type="checkbox"/>	aine@ainemcglynn.com				aine@ainemcglynn.com	Jun 24th, 2022 10:09 AM	Oct 26th, 2022 2:17 PM
<input checked="" type="checkbox"/>	Alex Fergie	London	ON	5145216699	jubino+woodcoaster@canadahelps.org	Apr 20th, 2022 12:46 PM	Feb 27th, 2023 1:23 PM
<input type="checkbox"/>	Alicia Mitre	Mississauga	ON		amitreetwell@outlook.com	Oct 19th, 2022 2:01 PM	Feb 24th, 2023 2:39 PM
<input checked="" type="checkbox"/>	Anderson Ada	Burlington	ON	333-555-8888	anderson.a@test.com	Oct 21st, 2021 11:52 AM	Feb 24th, 2023 1:40 PM
<input type="checkbox"/>	Andy Duplicate	Test Town	ON	6475556666	andyl+testduplicate@canadahelps.org	Jan 9th, 2023 2:26 PM	Jan 9th, 2023 2:33 PM
<input type="checkbox"/>	Andy Forms	Toronto	ON	4161112222	andyl+testua00@canadahelps.org	Jul 12th, 2022 11:00 PM	Feb 3rd, 2023 10:49 AM
<input type="checkbox"/>	Andy Lo	Test Town	ON	6472871065	andyl+test00@canadahelps.org	Jul 7th, 2022 10:30 AM	Jan 26th, 2023 2:02 PM
<input type="checkbox"/>	Andy Monthly	Toronto	ON		andyl+test2022071301@canadahelps.org	Jul 12th, 2022 11:00 PM	Feb 13th, 2023 6:01 AM
<input type="checkbox"/>	Andy Wellness	Toronto	ON	4163334444	andyl+test2022071300@canadahelps.org	Jul 12th, 2022 11:00 PM	Jan 1st, 2023 12:58 AM
<input checked="" type="checkbox"/>	Angela Kostenko	Toronto	ON		angelak@canadahelps.org	Dec 12th, 2022 2:27 PM	Feb 14th, 2023 1:32 PM
<input type="checkbox"/>	Angela Lee			555-555-5555	angiel@email.com	Feb 2nd, 2023 9:51 AM	Feb 2nd, 2023 11:16 AM

Add Contacts to Group

7. Add specific Contacts by selecting the checkboxes next to their names, or add all Contacts by selecting **All records**. You can also search for a specific Contact at the top of the page.

8. Once you're done choosing the Contacts to be added to the Group, select **Add Contacts to Group Name**

9. You will have to confirm your choices by selecting **Add To Group** on the following page

Add Contacts: Volunteers in Hamilton

Group: Volunteers in Hamilton

Number of selected contacts: 6
View Selected Contacts

Add to Group Cancel

Create Group Confirmation Page

10. Your Group will then be created! You can select **Done** to view the newly created Group Details with all the selected Contacts in it.

Modifying & Deleting a Group

1. Go to the **Contacts Tab**

2. Select **Advanced Actions** on the top right corner of the screen and then **Manage Groups**

The screenshot shows the Wellness Avenue interface. At the top, there's a navigation bar with 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. The 'Contacts' tab is active. A search bar is present with the text 'Search by contact name or email'. Below the search bar, there are filters for 'Actions' (0 Selected Records Only, All 174 Records) and 'All contacts'. The 'Advanced Actions' menu is open, showing options like 'Merge Duplicate Individuals', 'Merge Duplicate Organizations', 'Manage Groups' (highlighted with a red box), '(BETA) Search Builder', and 'Bulk Import Contacts'. A table of contacts is visible below, with columns for Name, City, Province, Phone, Email, and Date Created. The 'Manage Groups' button is highlighted in red.

3. On the **Manage Groups** Page, you will see the following fields and actions:

The screenshot shows the 'Manage Groups' page. At the top, there's a navigation bar with 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. The 'Contacts' tab is active. A search bar is present with the text 'Search by contact name or email'. Below the search bar, there are filters for 'Actions' (0 Selected Records Only, All 174 Records) and 'All contacts'. The 'Advanced Actions' menu is open, showing options like 'Merge Duplicate Individuals', 'Merge Duplicate Organizations', 'Manage Groups' (highlighted with a red box), '(BETA) Search Builder', and 'Bulk Import Contacts'. A table of groups is visible below, with columns for Name, Count, Created By, Description, Group Type, Visibility, and Mailchimp Sync. The 'Manage Groups' button is highlighted in red.

1) Hover your cursor to be able to edit the Group **Name**.

2) Press on the "pencil icon" to edit the Group **Description**.

3) See a list of all Contacts in the Group.

4) Change the Group Settings. You will also be able to add or remove a **Parent Group** associated with the Group.

5) Press on "More" to **Delete** the Group.