

# Adding, Modifying & Deleting a Smart Group

Last Modified on 02/28/2023 12:26 pm EST

## Donor Management System

This article covers adding and modifying Smart Groups. You can also [add and modify \(regular\) Groups](#).

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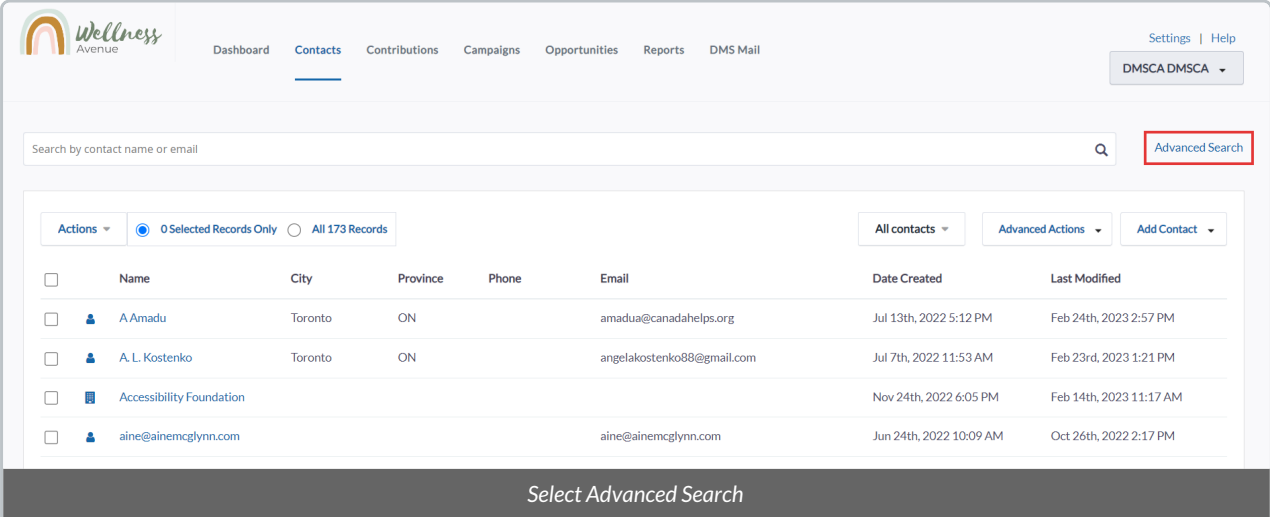
- [Adding a Smart Group](#)
- [Modifying & Deleting a Smart Group](#)

## Adding a Smart Group

To begin adding Contacts to a Smart Group, leverage your Advanced Search for Contacts to **segment your Contact list** by your desired criteria for the Smart Group.

**Example Scenario:** organize all Contacts that have donated over \$100 in the last calendar year.

1. Visit the **Contacts Tab** and select **Advanced Search** to expand the search filters



The screenshot shows the Donor Management System interface. At the top, there is a navigation bar with the following items: Dashboard, **Contacts**, Contributions, Campaigns, Opportunities, Reports, and DMS Mail. On the right side of the navigation bar, there are links for Settings and Help, and a dropdown menu for DMSCA DMSCA. Below the navigation bar, there is a search bar with the placeholder text "Search by contact name or email" and a search icon. To the right of the search bar is a button labeled "Advanced Search" which is highlighted with a red box. Below the search bar, there is a table with the following columns: Name, City, Province, Phone, Email, Date Created, and Last Modified. The table contains four rows of contact information. At the bottom of the interface, there is a button labeled "Select Advanced Search".

	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 24th, 2023 2:57 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

2. Scroll down and select the **Contributions** subsection

The screenshot shows the Wellness Avenue dashboard with the 'Contributions' subsection expanded in the search criteria menu. The 'Contributions' subsection is highlighted with a red box. Below the menu, various search filters are visible, including Date Received, Contribution Status, Currency, Contribution Amounts, Payment Method, Fund, Transaction ID, Invoice Number, GL Account, Campaign Groups, Campaign, Source, Thank You Sent, and Contribution Received. A blue question mark icon is present on the right side of the filters.

*Expand the Contributions subsection*

3. Select the following:

- **Date Received:** either search for “calendar year” or scroll the list to find the Previous calendar year option.
- **Contribution Amounts:** to filter for amounts over \$100, add “100” only on the *From* field.

The screenshot shows the Wellness Avenue dashboard with the 'Contributions' subsection expanded in the search criteria menu. The 'Date Received' dropdown is set to 'Previous calendar year' and the 'Contribution Amounts' 'From' field is set to '100'. Both are highlighted with red boxes. The other search filters remain the same as in the previous screenshot.

*Advanced Search Contributions subsection*

4. After making these selections select **Search** to reveal your search results at the bottom of the screen. If needed, you can edit your search parameters by selecting **Edit Search Criteria** at the top.

[~ Edit Search Criteria](#)

~ Display Settings

~ Contacts

~ Address Fields

~ Custom Fields

~ Activities

~ Demographics

~ Notes

~ Change Log

~ Contributions

~ Mailings

~ Opportunities

Reset Form

Actions

0 Selected Records Only  All 48 Records

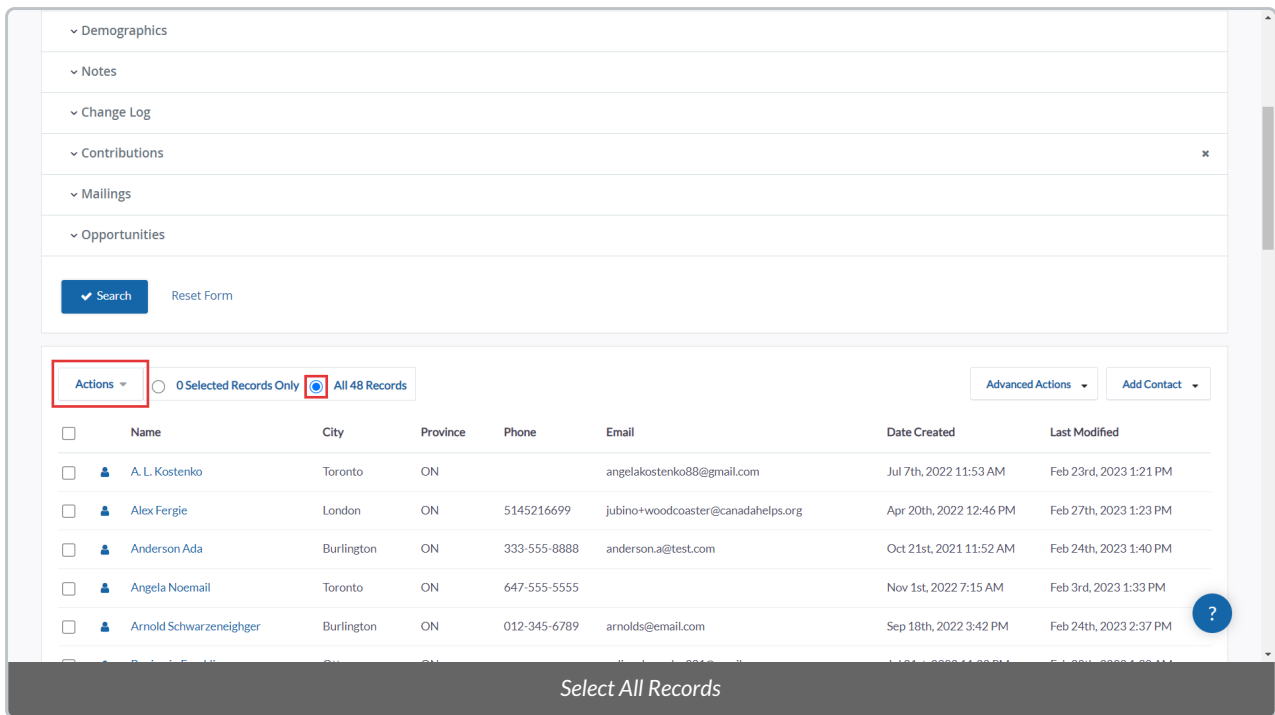
Advanced Actions

Add Contact

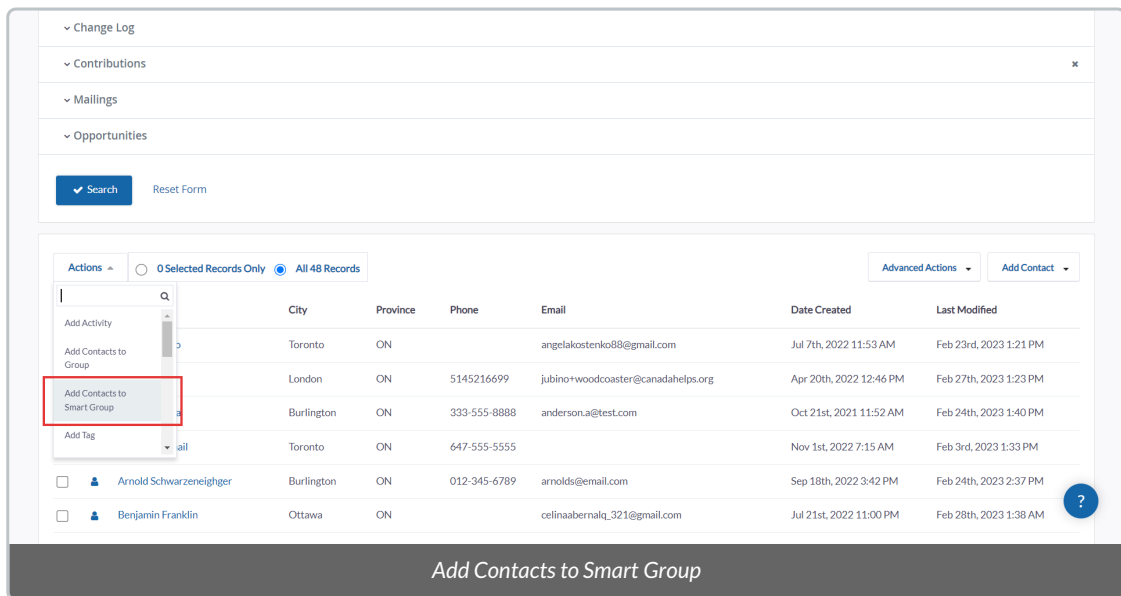
<input type="checkbox"/>	Name	City	Province	Phone	Email	Date Created	Last Modified
<input type="checkbox"/>	A. L. Kostenko	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	Feb 23rd, 2023 1:21 PM
<input type="checkbox"/>	Alex Fergie	London	ON	5145216699	jubino+woodcoaster@canadahelps.org	Apr 20th, 2022 12:46 PM	Feb 27th, 2023 1:23 PM
<input 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"/>	Angela Noemail	Toronto	ON	647-555-5555		Nov 1st, 2022 7:15 AM	Feb 3rd, 2023 1:33 PM
<input type="checkbox"/>	Arnold Schwarzenighger	Burlington	ON	012-345-6789	arnolds@email.com	Sep 18th, 2022 3:42 PM	Feb 24th, 2023 2:37 PM
<input type="checkbox"/>	Benjamin Franklin	Ottawa	ON		celinaabernalq_321@gmail.com	Jul 21st, 2022 11:00 PM	Feb 28th, 2023 1:38 AM
<input type="checkbox"/>	Bernadette Love	Saskatoon	SK		bernielove@hotmail.com	Sep 30th, 2021 11:00 PM	Jan 26th, 2023 2:12 PM
<input type="checkbox"/>	Bill Kostenko	Brampton	ON	905-458-5447	bkostenko@test.com	Nov 10th, 2022 4:44 PM	Jan 1st, 2023 12:58 AM
<input type="checkbox"/>	Bridget Jones	Ottawa	ON		celinaabernalq@gmail.com	Jul 27th, 2022 11:00 PM	Jan 1st, 2023 12:58 AM
<input type="checkbox"/>	C Nancy	Toronto	ON		nancyc@canadahelps.org	Jun 6th, 2022 1:35 PM	Feb 27th, 2023 3:59 PM
<input type="checkbox"/>	Cara Miley	Montréal	QC		caramiley1@hotmail.com	Jul 19th, 2022 11:00 PM	Feb 9th, 2023 2:53 PM
<input type="checkbox"/>	Carrie Lim	Richmond Hill	ON	6476889561	carriel@canadahelps.org	Apr 12th, 2022 10:38 AM	Jan 1st, 2023 12:58 AM

Results of the Search

5. Select all Records on the page, and then select the **Actions** menu



6. Either type “smart group” in the **Actions** search bar or scroll the list to find the **Add Contacts to Smart Group**



7. You will be directed to the **Smart Group creation page** with the following fields and information:

- **Group Title:** the name of the Group.
- **Group Description:** optional description of the Group.
- **Group Type - Mailing List:** select if you wish to use the group for **Bulk Emails**
- **Parent Groups - Add Parent:** add this new Smart Group to be under an existing Group to help organize your Group list. The Group parent/child relationship can be filtered on new Advanced Searches and Reports.

## 8. After adding all the necessary information, select *Save Smart Group*

Wellness Avenue

Dashboard **Contacts** Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

### Advanced Search

#### Smart Group

This smart group will stay up-to-date with all contacts who meet the search criteria.

Date Received is Previous calendar year (between Jan 1st, 2022 12:00 AM and Dec 31st, 2022 11:59 PM)  
Contribution Amount - greater than "\$100"  
(Learn more...)

GROUP TITLE \* 2022 Donations over \$100

GROUP DESCRIPTION Donations over \$100 previous Calendar Year (2022)

GROUP TYPE  Mailing List

Parent Groups

ADD PARENT

**Save Smart Group** Cancel

Build Smart Group

## Modifying & Deleting a Smart Group

1. Go to the **Contacts Tab**

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

Wellness Avenue

Dashboard **Contacts** Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Search by contact name or email

0 Selected Records Only All 174 Records

All contacts Advanced Actions Add Contact

	Name	City	Province	Phone	Email	Date Created	
<input type="checkbox"/>	A Amadu	Toronto	ON		amadua@canadahelps.org	Jul 13th, 2022 5:12 PM	3:59 PM
<input type="checkbox"/>	A Amadu				amadua@canadahelps.org	Feb 27th, 2023 4:40 PM	4:50 PM
<input type="checkbox"/>	A. L. Kostenko	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	1:21 PM
<input type="checkbox"/>	Accessibility Foundation					Nov 24th, 2022 6:05 PM	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 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

Manage Groups

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

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

### Manage Groups

[Add Group](#)

Update Smart Group Counts

Show 25 entries

First Previous 1 2 3 4 Next Last

Name	Count	Created By	Description	Group Type	Visibility	Mailchimp Sync
<\$1000 Donors - All Time (Smart Group)	1	John Bonjovi	2	User and User Admin Only	User and User Admin Only	3 Contacts 4 Settings 5 More
\$500 and Above (Smart Group)	unknown	John Bonjovi	Donors who have made donations more than \$500	Mailing List	User and User Admin Only	Contacts Settings More

Modify Groups 5 ways

- 1) Hover your cursor to be able to edit the Smart Group **Name**.
- 2) Press on the “pencil icon” to edit the Group **Description**.
- 3) See a list of all Contacts in the Smart 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 Smart Group.