

How to See All of Your Groups and Smart Groups

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Donor Management System

This article covers finding your previously-created Groups and Smart Groups. You can also:

- Add, modify, and delete a [Group](#) or [Smart Group](#), or
- [Manage the Contacts](#) in those [Groups & Smart Groups](#)

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Viewing All Groups

From the Contacts Tab

1. Go to the **Contacts Tab**
2. Select **Advanced Actions** on the top right corner of the screen and then **Manage Groups**

The screenshot displays the Donor Management System interface. At the top left is the logo for Wellness Avenue. The navigation menu includes Dashboard, Contacts (selected), Contributions, Campaigns, Opportunities, Reports, and DMS Mail. On the top right, there are links for Settings and Help, and a dropdown menu for DMSCA/DMSCA. Below the navigation is a search bar with the placeholder text "Search by contact name or email" and an "Advanced Search" link. The main content area shows a table of contacts with columns for Name, City, Province, Phone, Email, and Date Created. The table is filtered to show "0 Selected Records Only" and "All 174 Records". The "Advanced Actions" dropdown menu is open, and the "Manage Groups" option is highlighted with a red box. The "Manage Groups" page is partially visible at the bottom of the screenshot.

	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 AM	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

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)	unknown	John Bonjovi	Donors who have made donations more than \$500	Mailing List	User and User Admin Only	Contacts Settings 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

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.

Note: Smart Groups will be labeled with *(Smart Group)*

From the Administrative Settings

1. Go to the **Administrative Settings**
2. Under **CanadaHelps Contribute**, select **Manage Groups**

Administer CanadaHelps DMS

Customize Data and Screens

Website Forms

Contact Types

Activity Types

Tags (Categories)

Communications

Organization Address and Contact Info

Print Page (PDF) Formats

Message Templates

Localization

Date Formats

System Settings

Payment Processor Settings

Import/Export Mappings

Misc (Undelete, PDFs, Limits, Logging, etc.)

Receipt Settings

CanadaHelps Contribute

Manage Campaigns

GL Accounts

Funds

Manage Groups

CanadaHelps Campaign Group

Campaign Groups

DMS Mail

Headers, Footers, and Automated Messages

DMS Templates

From Email Addresses

Draft, Schedule, and Manage DMS Mails

Mailchimp Settings



Manage Groups from your Settings

3. On the **Manage Groups** page, you will be able to see a list of all Groups and various actions:

Note: Smart Groups will be labelled (**Smart Group**)

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Manage Groups

+ Add Group

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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

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