Managing Contacts in Groups & Smart Groups

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Donor Management System

After adding a Group or a Smart Group, you can manage and add new Contacts to them.

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Managing Contacts in the Group or Smart Group

1. Go to the **Contacts Tab**

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

3. Find the desired Group or Smart Group and select **Contacts** next to it to see the Contacts making up this Group/Smart Group and make further changes.

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	✏️		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 ⋮
0-100 donors (Smart Group)	unknown	DMSCA DMSCA	Contribution Amount - greater than "0" AND less than "100"	, Mailing List,	User and User Admin Only		Contacts
							Settings More ⋮
2021 donors (Smart Group)	unknown	DMSCA DMSCA	Date Received is This calendar year (between Jan 1st, 2021 12:00 AM and Dec 31st, 2021 11:59 PM)	, Mailing List,	User and User Admin Only		Contacts
							Settings More ⋮
2021 Engaged Year-End Donors	2	DMSCA DMSCA	Donors who engaged with an email and made a donation between November 1 and December 31, 2021.	, Mailing List,	User and User Admin Only		Contacts
							Settings More ⋮

See Contacts in Group

Creating New Contacts to Add to a Group

1. After selecting **Contacts** to view the list of Group or Smart Group Contacts (see above), select **Add Contact** select either **Individual, Organization or Household.**

Add New Contact to Group or Smart Group

2. Fill out all relevant information about your **new Contact and select Save** to add them to the Group.


Add new Contact to Group

Adding Existing Contacts via Search

1. After selecting *Contacts* to view the list of Group or Smart Group Contacts (see above), press *Add Contacts to {Group Name}*

Add existing Contacts to Group
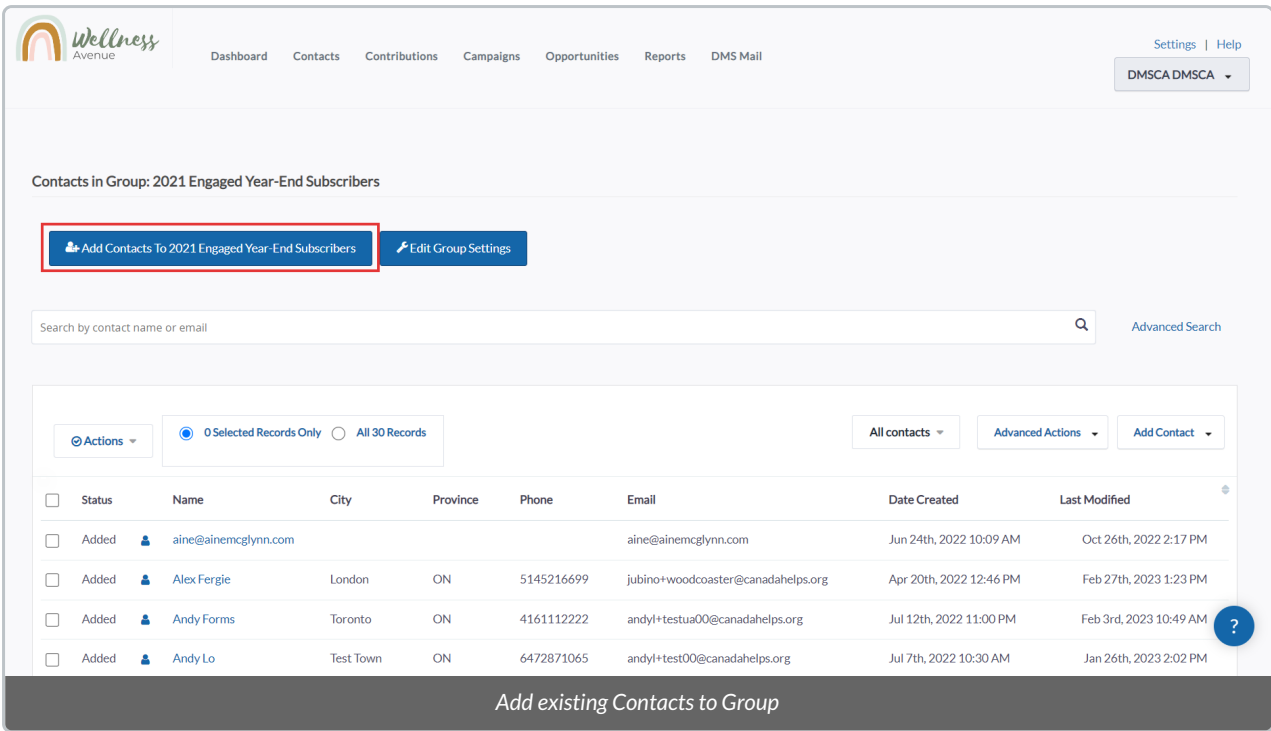
2. Perform a simple search (or an Advanced Search) to find the Contact/s you wish to add

3. Once found, select the specific Contacts and then *Add Contacts to {Group Name}*

Image caption
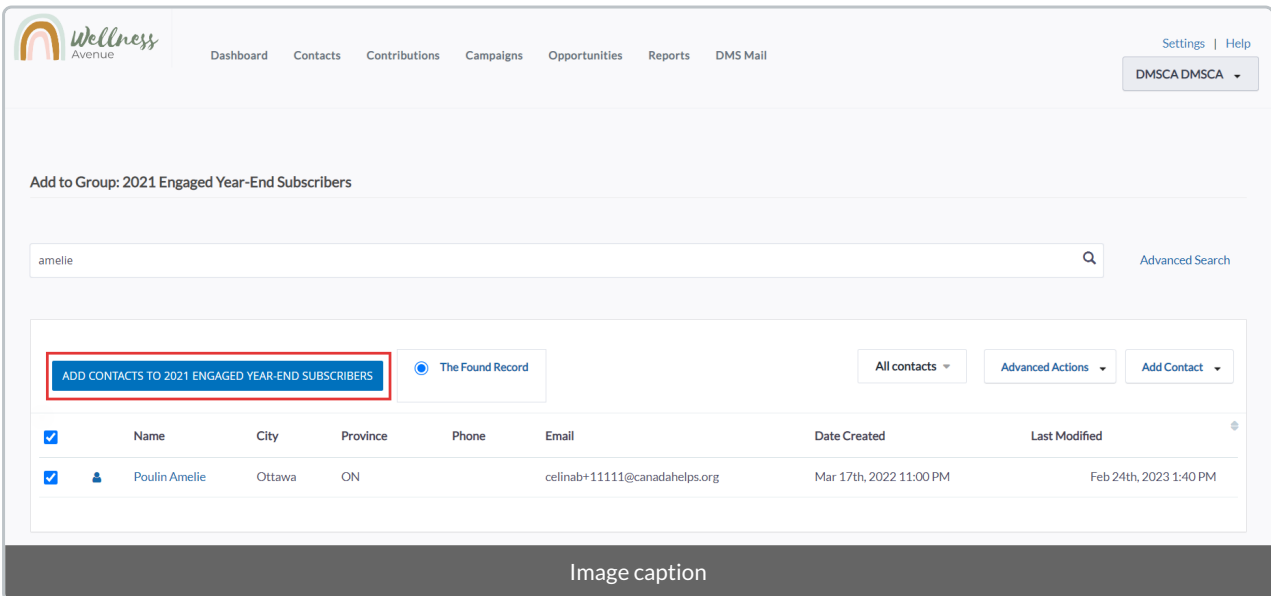
4. Confirm your selection on the next page by selecting *Add to Group*.

Add Contacts: 2021 Engaged Year-End Subscribers

Group   2021 Engaged Year-End Subscribers

Number of selected contacts: 1

Add to Group   Cancel

Confirm selection

Note: when manually adding Contacts to a Smart Group, you will see that their Status is *Added* (1) as opposed to *Smart* (2), meaning the Smart search criteria has been **overridden**. Only Contacts added via the Smart search criteria will be added as *Smart*.

☐	Added **1**	👤	Amelie Poulin	Ottawa	ON		Mar 18th, 2022 12:00 AM	Jun 6th, 2022 12:11 PM
☐	Smart **2**	👤	Avya Shah	Brampton	ON		May 5th, 2022 12:00 AM	May 11th, 2022 9:14 AM

Added vs Smart Contacts

Editing the Smart Group Search Criteria

Once you add a **Smart Group,** you can edit and **update its Advanced Search criteria** (e.g. From "Contacts that donated over $500 in the past calendar year" to "Contacts that donated over $500 in the past calendar year that live in Toronto, ON".

1. From your *Manage Groups page*, select *Contacts* to view the desired Smart Group

View Smart Group Contacts

2. Select **Edit Smart Group Search Criteria For {Group Name}** on the top left corner of the screen

Edit Smart Group Search Criteria

3. Edit and/or update your criteria using the Advanced Search filter provided and select **Search**

Edit Smart Group Criteria

4. From your updated Search Results at the bottom of your screen, select **all Contacts** and then from your *Actions* menu, select *Group - update smart group.*

Group - update smart group
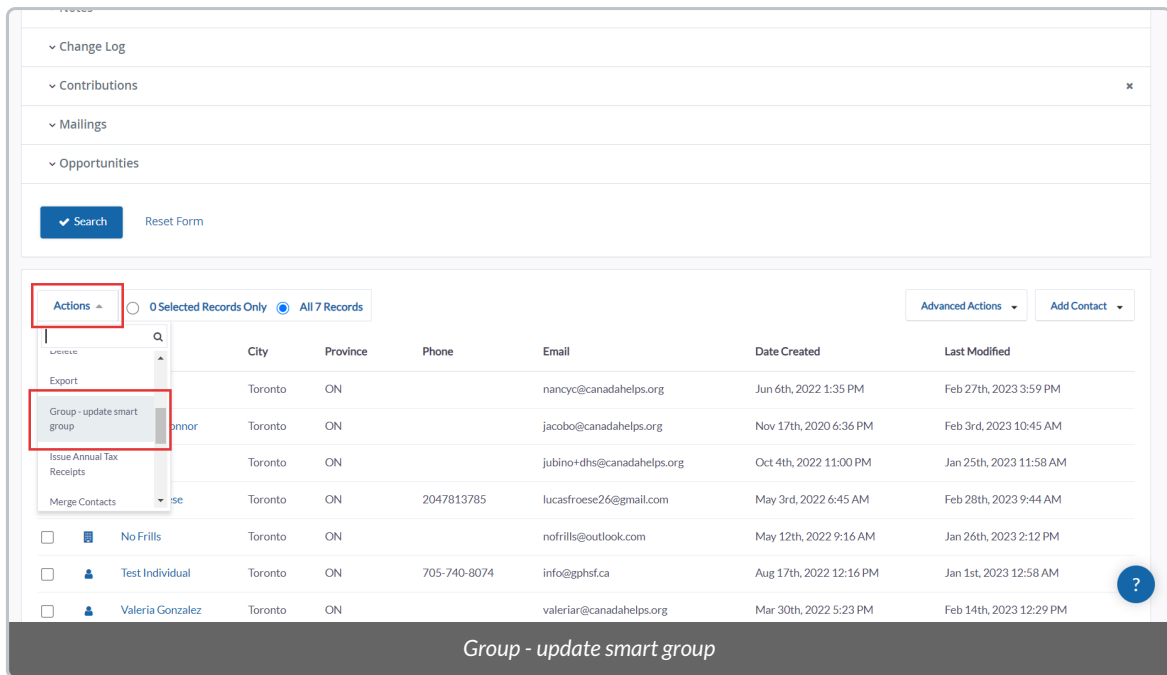
5. On the next screen, after making any necessary updates to the Smart Group title/description, select *Update Smart Group.*

Confirm update to Smart Group search criteria
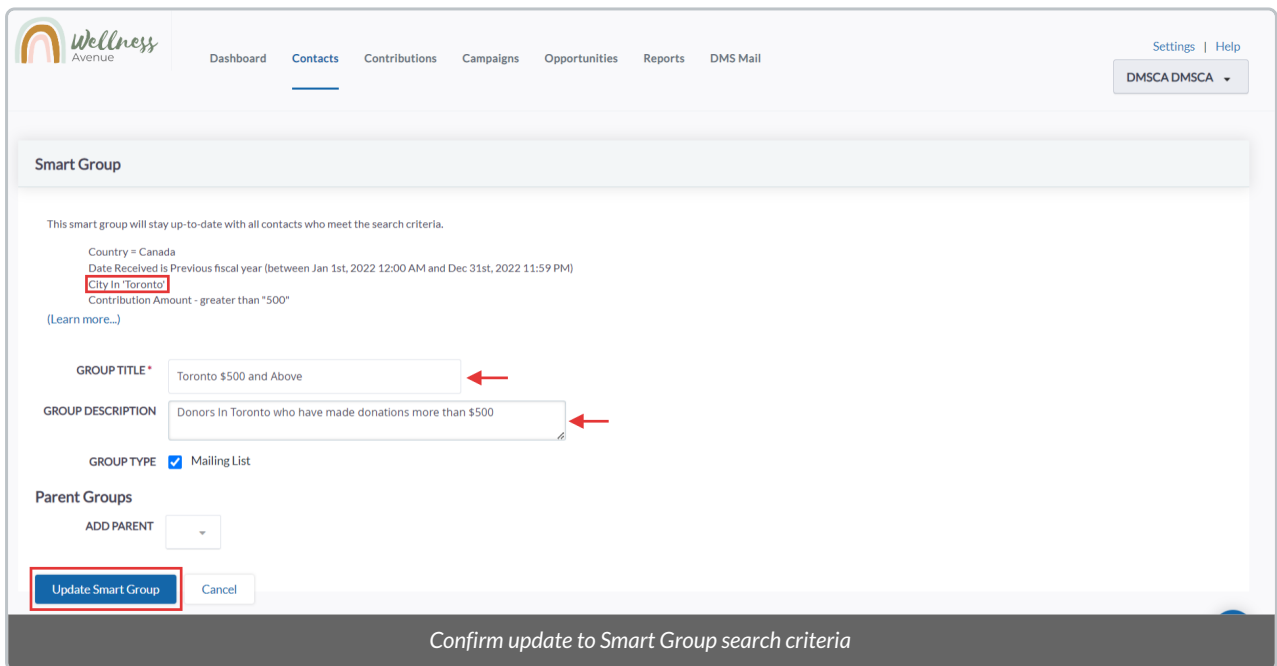
Performing Actions on Groups Contacts

1. After selecting *Contacts* to view the list of Group or Smart Group Contacts (see above), select either:

a) **The specific Contacts** you wish to perform an Action to,

b) Every listed Contact **on the page**, or

c) All **Contacts** in the Group or Smart Group

Select your Grouped contacts in 3 ways

2. After selecting your Contacts, select *Actions* at the top left and **choose your desired Action.**

Actions on Group Contacts