

# 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**

The screenshot displays the Donor Management System interface. At the top left is the logo for Wellness Avenue. The navigation menu includes Dashboard, **Contacts**, 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 a search icon. To the right of the search bar is a link for "Advanced Search".

The main content area shows a table of contacts. At the top of the table, there are filters for "Actions" (0 Selected Records Only, All 174 Records) and "All contacts". A dropdown menu for "Advanced Actions" is open, showing options: Merge Duplicate Individuals, Merge Duplicate Organizations, **Manage Groups** (highlighted with a red box), (BETA) Search Builder, and Bulk Import Contacts. Below the table, there is a button labeled "Manage Groups".

<input type="checkbox"/>	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@ainemglyn.com				aine@ainemglyn.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		amitreetatwell@outlook.com	Oct 19th, 2022 2:01 PM	Feb 24th, 2023 2:39 PM

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.

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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			User and User Admin Only	<a href="#">Contacts</a> <a href="#">Settings</a> <a href="#">More!</a>
\$500 and Above (Smart Group)	unknown	John Bonjovi	Donors who have made donations more than \$500	Mailing List	User and User Admin Only	<a href="#">Contacts</a> <a href="#">Settings</a> <a href="#">More!</a>
0-100 donors (Smart Group)	unknown	DMSCA DMSCA	Contribution Amount - greater than "0" AND less than "100"	Mailing List	User and User Admin Only	<a href="#">Contacts</a> <a href="#">Settings</a> <a href="#">More!</a>
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	<a href="#">Contacts</a> <a href="#">Settings</a> <a href="#">More!</a>
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	<a href="#">Contacts</a> <a href="#">Settings</a> <a href="#">More!</a>

[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**.

Wellness Avenue | Dashboard | Contacts | Contributions | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Contacts in Group: Volunteers in Hamilton

[Add Contacts To Volunteers In Hamilton](#) [Edit Group Settings](#)

Search by contact name or email  [Advanced Search](#)

Actions  0 Selected Records Only  All 6 Records

<input type="checkbox"/>	Status	Name	City	Province	Phone	Email	Date Created	Last Modified	
<input type="checkbox"/>	Added	A Amadu				amadua@canadahelps.org	Feb 27th, 2023 4:40 PM	Feb 27	Individual Organization Household
<input type="checkbox"/>	Added	Alex Fergie	London	ON	5145216699	jubino+woodcoaster@canadahelps.org	Apr 20th, 2021 12:46 PM	Feb 27th, 2023 1:23 PM	
<input type="checkbox"/>	Added	Anderson Ada	Burlington	ON	333-555-8888	andersona@test.com	Oct 21st, 2021 11:52 AM	Feb 24th, 2023 1:40 PM	
<input type="checkbox"/>	Added	Angela Kostenko	Toronto	ON		angelak@canadahelps.org	Dec 12th, 2022 2:27 PM	Feb 14th, 2023 1:32 PM	

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.

Wellness Avenue | Dashboard | **Contacts** | Contributions | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

**New Individual** [COLLAPSE ALL TABS](#)

**Contact Details**

Prefix  
 First Name 
 Middle Name 
 Last Name

Current Employer 
 Job Title 
 Recognition Name 
 Contact Type

Email add  Home   On Hold?  Bulk Mailings?

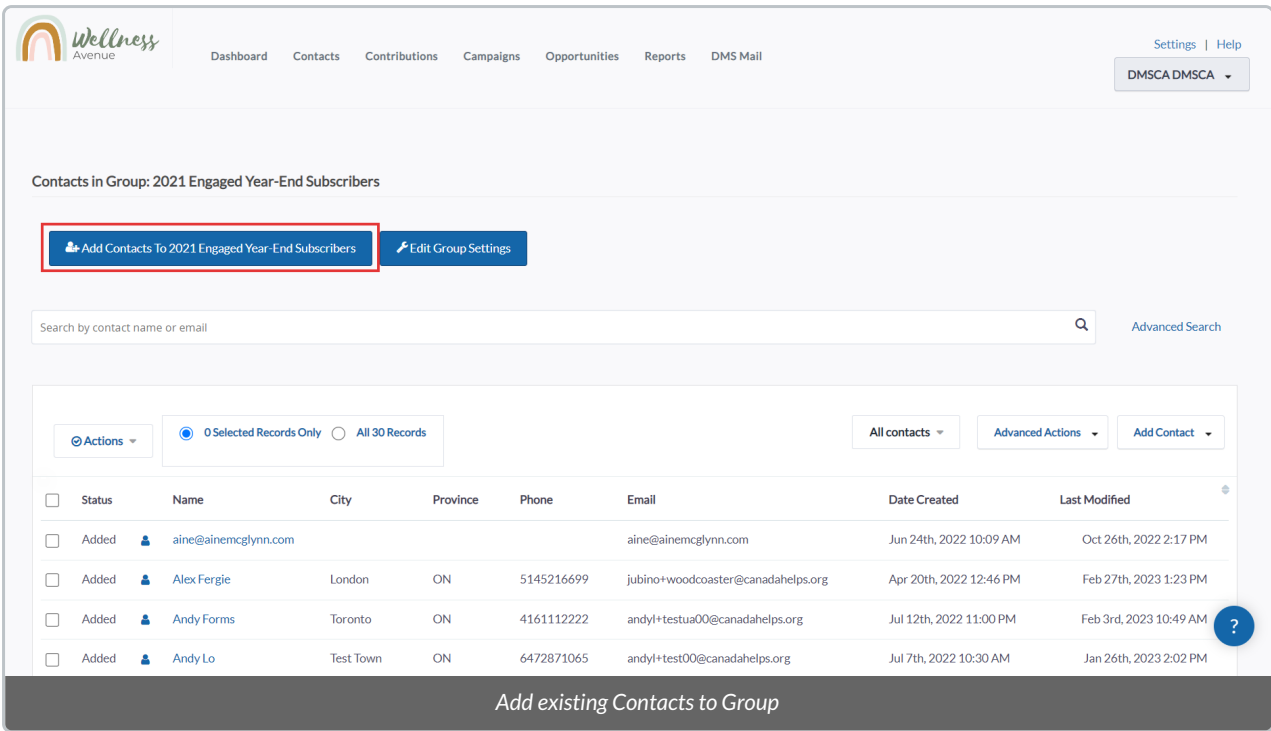
Phone  ext.  Phone Location  Phone Type

Add another phone number  Website Type

Add new Contact to Group

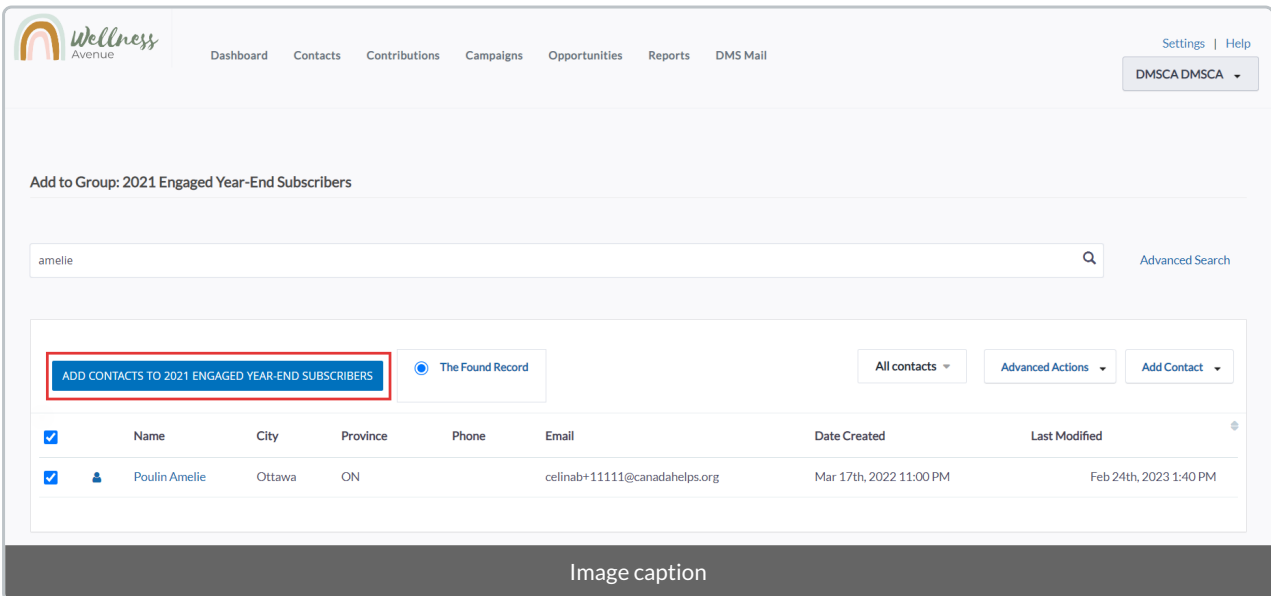
## Adding Existing Contacts via Search

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



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}**



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

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Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

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*.

<input type="checkbox"/>	Added 1	Amelie Poulin	Ottawa	ON		Mar 18th, 2022 12:00 AM	Jun 6th, 2022 12:11 PM
<input type="checkbox"/>	Smart 2	Ayya 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

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Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

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### Manage Groups

[+ Add Group](#)

Update Smart Group Counts

Show 25 entries

Name	Count	Created By	Description	Group Type	Visibility	Mailchimp Sync
<\$1000 Donors - All Time (Smart Group)	unknown	John Bonjovi			User and User Admin Only	
\$500 and Above (Smart Group)	28	John Bonjovi	Donors who have made donations more than \$500	Mailing List	User and User Admin Only	<a href="#">Contacts</a>
0-100 donors	unknown	DMSCA DMSCA	Contribution Amount - greater than "0"		User and	

[View Smart Group Contacts](#)

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

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Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

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### Contacts in Group: \$500 and Above

[Edit Smart Group Search Criteria For \\$500 And Above](#) [+ Add Contacts To \\$500 And Above](#) [Edit Group Settings](#)

Search by contact name or email

Advanced Search

Actions 0 Selected Records Only All 28 Records

All contacts Advanced Actions Add Contact

Status	Name	City	Province	Phone	Email	Date Created	Last Modified
Smart	Alex Fergie	London	ON	5145216699	jubino+woodcoaster@canadahelps.org	Apr 20th, 2022 12:46 PM	Feb 27th, 2023 1:23 PM
Smart	Anderson Ada	Burlington	ON	333-555-8888	anderson.a@test.com	Oct 21st, 2021 11:52 AM	Feb 24th, 2023 1:40 PM
Smart	Benjamin Franklin	Ottawa	ON		celinaabernalq_321@gmail.com	Jul 21st, 2022 11:00 PM	Feb 28th, 2023 1:38 AM
Smart	Bridget Jones	Ottawa	ON		celinaabernalq@gmail.com	Jul 27th, 2022 11:00 PM	Jan 1st, 2023 12:58 AM

[Edit Smart Group Search Criteria](#)

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

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

Settings | Help

DMSCADMSCA

^ Edit \$500 and Above Smart Group Criteria

**\$500 and Above Smart Group Criteria**

^ Display Settings

^ Contacts

^ Address Fields

STREET ADDRESS  
Street address

SUPPLEMENTAL ADDRESS 1  
Supplemental address 1

SUPPLEMENTAL ADDRESS 2  
Supplemental address 2

CITY  
Toronto

COUNTRY  
Canada

PROVINCE  
- select Province -

ADDRESS LOCATION  
Address Location

POSTAL CODE  
Postal Code

^ Custom Fields

^ Activities

^ Demographics

^ Notes

^ Change Log

^ Contributions

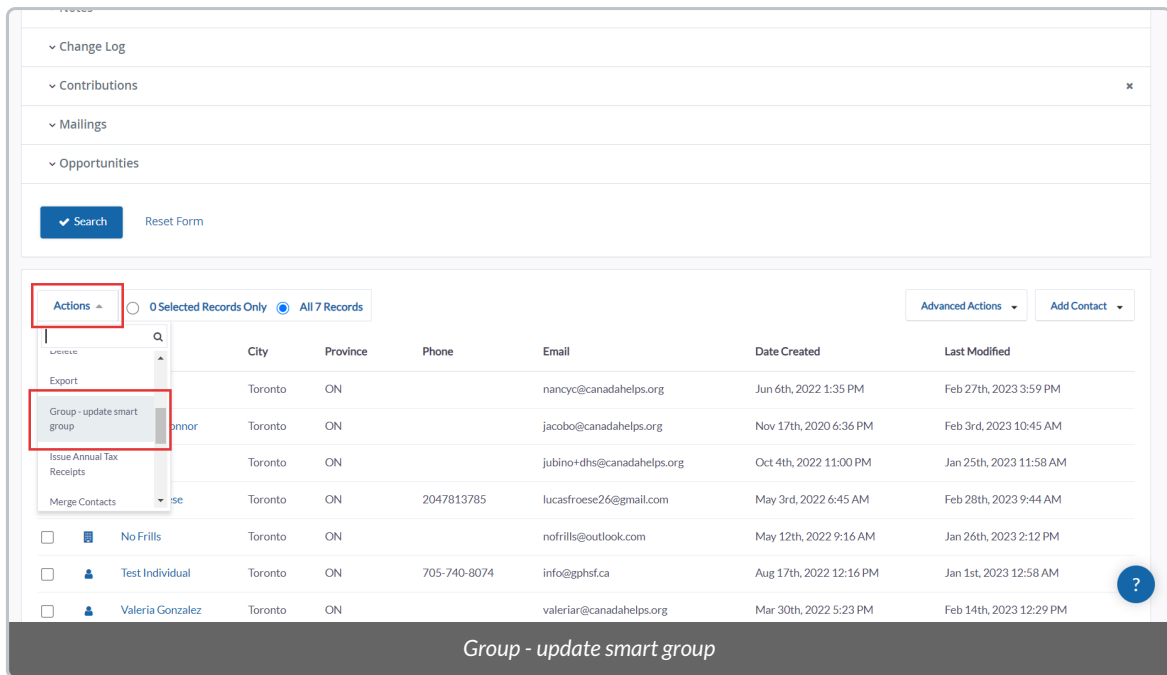
^ Mailings

^ Opportunities

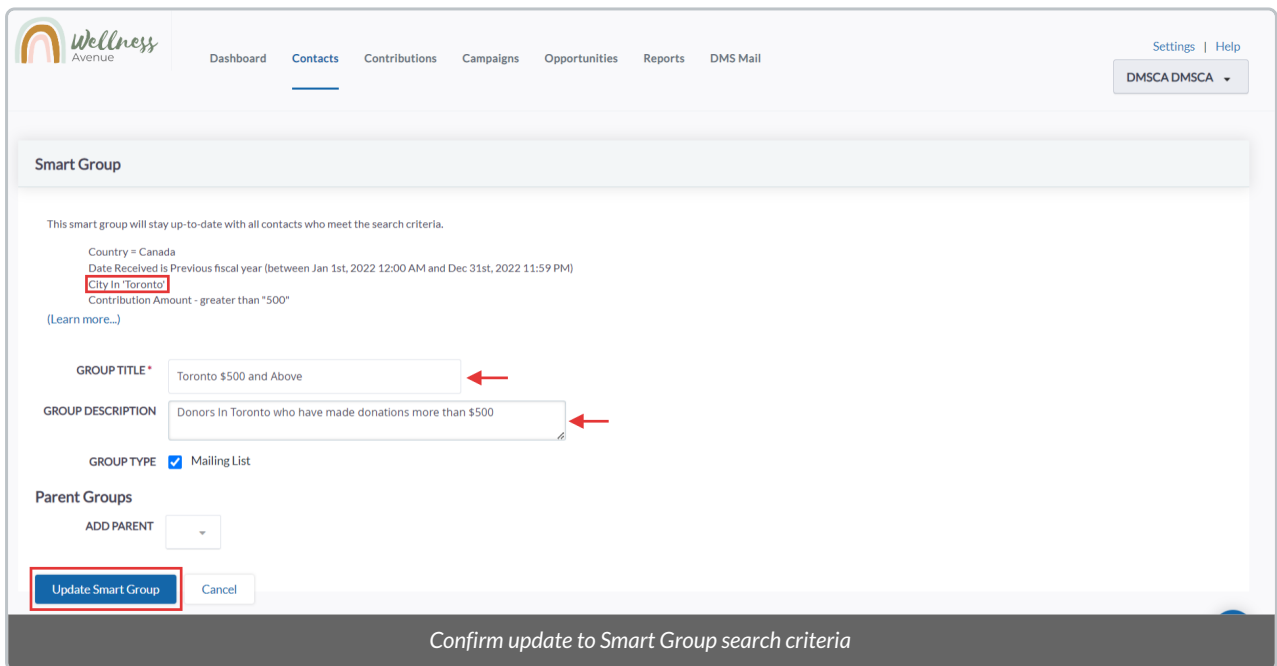
Search Reset Form

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**.



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



## 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

Wellness Avenue | Dashboard | Contacts | Contributions | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Contacts in Group: <\$1000 Donors - All Time

[Edit Smart Group Search Criteria For <\\$1000 Donors - All Time](#)
[Add Contacts To <\\$1000 Donors - All Time](#)
[Edit Group Settings](#)

Search by contact name or email Advanced Search

5 Selected Records Only  All 105 Records
 All contacts
Advanced Actions
Add Contact

<input type="checkbox"/>	Status	Name	City	Province	Phone	Email	Date Created	Last Modified
<input checked="" type="checkbox"/>	Smart	A Amadu	Toronto	ON		amadua@canadahelps.org	Jul 13th, 2022 5:12 PM	Feb 27th, 2023 3:59 PM
<input checked="" type="checkbox"/>	Smart	A. L. Kostenko	Toronto	ON		angelakostenko88@gmail.com	Jul 7th, 2022 11:53 AM	Feb 23rd, 2023 1:21 PM
<input type="checkbox"/>	Smart	Accessibility Foundation					Nov 24th, 2022 6:05 PM	Feb 14th, 2023 11:17 AM
<input checked="" type="checkbox"/>	Smart	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"/>	Smart	Alicia Mitre	Mississauga	ON		amitreetwell@outlook.com	Oct 19th, 2022 2:01 PM	Feb 24th, 2023 2:39 PM
<input checked="" type="checkbox"/>	Smart	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"/>	Smart	Andy Forms	Toronto	ON	4161112222	andy+testua00@canadahelps.org	Jul 12th, 2022 11:00 PM	Feb 3rd, 2023 10:49 AM
<input type="checkbox"/>	Smart	Andy Lo	Test Town	ON	6472871065	andy+test00@canadahelps.org	Jul 7th, 2022 10:30 AM	Jan 26th, 2023 2:02 PM
<input type="checkbox"/>	Smart	Andy Monthly	Toronto	ON		andy+test2022071301@canadahelps.org	Jul 12th, 2022 11:00 PM	Feb 13th, 2023 6:01 AM
<input type="checkbox"/>	Smart	Andy Wellness	Toronto	ON	4163334444	andy+test2022071300@canadahelps.org	Jul 12th, 2022 11:00 PM	Jan 1st, 2023 12:58 AM
<input type="checkbox"/>	Smart	Angela Kostenko	Toronto	ON		angelak@canadahelps.org	Dec 12th, 2022 2:27 PM	Feb 14th, 2023 1:32 PM

Select your Grouped contacts in 3 ways

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

Contacts in Group: <\$1000 Donors - All Time

[Edit Smart Group Search Criteria For <\\$1000 Donors - All Time](#)
[Add Contacts To <\\$1000 Donors - All Time](#)
[Edit Group Settings](#)

Search by contact name or email Advanced Search

50 Selected Records Only  All 105 Records
 All contacts
Advanced Actions
Add Contact

- Create Mail
- Merge
- Delete
- Export
- Issue Annual Tax Receipts

<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 27th, 2023 3:59 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 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"/>	Smart Alicia Mitre	Mississauga	ON		amitreetwell@outlook.com	Oct 19th, 2022 2:01 PM	Feb 24th, 2023 2:39 PM
<input checked="" type="checkbox"/>	Smart Anderson Ada	Burlington	ON	333-555-8888	anderson.a@test.com	Oct 21st, 2021 11:52 AM	Feb 24th, 2023 1:40 PM

Actions on Group Contacts