

Donor Management



HOW TO CREATE AND ADD CONTACTS TO GROUPS

Want an easier way to segment your contacts into actionable categories? Groups are the answer you've been looking for!

This feature allows you to group contacts who share a particular trait. For example, you may want to create a group for volunteers, or you may want a group for all donors who routinely give more than \$500 in a year. It's easy to do and will help you save time when you want to reach out to a specific segment of your list.

1

Choose the **Contacts** option from the main menu.

2

Filter your contacts to find the people you want to include in your group, then check **Select All**.

3

Once you've selected your contacts, click **Add To Group** to create a new group or add your contacts to an existing group.

4

To create a new group and manually add individuals to a group, click the **Contacts** on the main menu, then select **Groups**.

5

Click **Add Group** in the top right of your screen. Create a group name to clearly describe your group.

From this page, search for and add individual contacts to your group. Once you're done adding contacts, click **Save** and you're all set! Keep in mind that you can also add people to groups from their individual contact record.

Questions? We're here to help!

Email us at donormanagement@networkforgood.com and we'll help you get started with groups.