

Groups, smart groups and tags

Using the Healthwatch CiviCRM

About this resource

Groups, smart groups and tags are all different ways of managing your data on the CiviCRM.

You might want to use these functions to help you keep track of things such as:

- Your volunteers
- Staff members
- Key stakeholders
- Mailing lists

This resource talks through the differences between groups, smart groups and tags, and explains ways to use them to help you use your CRM efficiently.

Groups

One common reason to create a group is to create a mailing list for your organisation.

- To do this, search for all the contacts you wish to include in the newsletter. In this example, we use a very simple search of Individuals.
- When you have the results, look at the drop-down list of options at the top.

The screenshot shows the 'Find Contacts' interface in CiviCRM. At the top, there is a search bar with a dropdown menu for 'Edit Search Criteria'. Below the search bar, it displays '1031 Contacts' and 'Contact Type IN 'Individual''. There are two radio buttons for 'Select Records': 'All 1031 records' (selected) and '0 Selected records only'. A dropdown menu for 'Actions' is open, showing a search bar and a list of options: 'Add Contacts to Event', 'Add Contacts to Group', 'Add Contacts to Household', 'Add Contacts to Organization', 'Alter Contact Communication Preferences', 'Batch Update via Profile', 'Delete Contacts', 'Delete Permanently', and 'Export Contacts'. Below the dropdown menu, a table of contacts is visible with columns for 'City', 'State', 'Postal', 'Email', and 'PI'. The table contains several rows of contact information, including 'Alexander, Kathleen' and 'Alexander, Rachel'.

- The second option is 'Add Contacts to Group'. If you are happy with the contacts you have selected, choose this option.
- You can then either add to an existing group or create a new group.

Add Contacts to A Group

Add Contact To Existing Group
 Create New Group

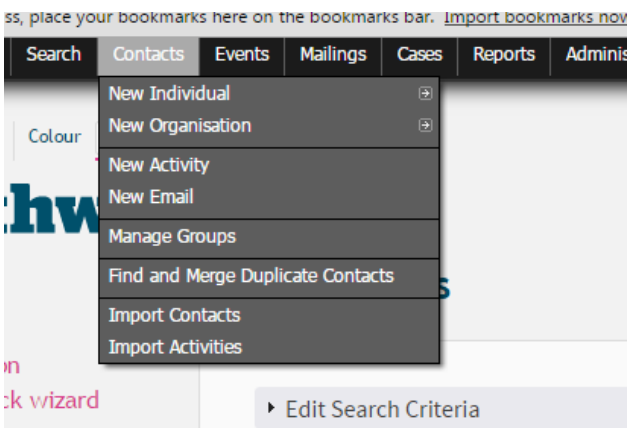
Group Name: *

Description:

Group Type Access Control Mailing List

Number of selected contacts: 1032

- As this is going to be a mailing list, check the box Mailing List so that you can use it for the functions you will need, such as bulk mail. Then click Add to Group and your group will be created.
- A message will appear at the top right-hand corner of your screen to let you know that your group has been created, and you will be taken back to your list of contacts.
- To go to your newly-created group, on your menu at the top of the screen go to the Contacts section, and then down to Manage Groups:



- This will then take you to a page where you have an alternative way of adding a new group, searching for a group by name, and also a list of all the groups you have on the system.

Manage Groups

Use Groups to organize contacts (e.g. these contacts are part of our 'Steering Committee'). You can also create 'smart' groups based on contact characteristics (e.g. the group consists of all people in our database who live in a specific locality).

Find Groups

Find Created By Type Access Control Mailing List Visibility Status Enabled Disabled

Complete OR partial group name. Complete OR partial creator name. Filter search by group type(s). Filter search by visibility.

Show entries Update Smart Group Count

Name	Count	Created By	Description	Group Type	Visibility	
20 miles of N1	2			Mailing List	User and User Admin Only	Contacts Settings more ▶
Mockaroo Data	995	Demo, Demo		, Mailing List,	User and User Admin Only	Contacts Settings more ▶
Newsletter	1	Gibson, Oliver		Mailing List	User and User Admin Only	Contacts Settings more ▶
Newsletter 2	1032	Demo, Demo		, Mailing List,	User and User Admin Only	Contacts Settings more ▶

This screen shows you:

- How many contacts are in each group in the second column under 'Count'
- What type of list it is under 'Group Type'.
- Who is in the group - click 'Contacts' to be taken to the list of contacts in the group
- In 'Settings' you can change the name, the group type and add a description.
- Under 'more' you can disable or delete the group: please be aware that once deleted a group cannot be recovered.

As well as sending mailings, there are many other ways you might want to use your group.

If you look at the actions in the drop-down list you will see that, among other actions, you can:

- print PDF letters,
- alter communication preferences,
- export contacts,
- create mailing labels,
- add contacts to events.
- you can also add the contacts to another group, or create a new smart group with them.

Using Smart groups

Smart groups are often described as saved searches.

For example, if you search for all individuals on your CRM who live in Bristol so that you can send them an area-specific newsletter, you can then create a new smart group with these contacts, so that not only will they be made into a group but also that whenever a new individual who lives in Bristol is added to the CRM they will also automatically be added to the smart group.

From the original search, 20 contacts were selected:

20 Contacts City = 'Bristol' ...AND...
Contact Type IN 'Individual'

Select Records: All 20 records 0 Selected records only

Bristol Newsletter (smart group) - 21
Contacts City = 'Bristol' ...AND...
Contact Type IN 'Individual'

Select Records: All 21 records 0 Selected records only

✕ Reset all selections

<input type="checkbox"/>	Name	Address	City	State	Postal	Email	Phone
<input type="checkbox"/>	Apple, Andrew	5 Rydings Close	Bristol		BS1	andrew@apple.com	
<input type="checkbox"/>	Armstrong, Angela	2 Manufacturers Place	Bristol			aarmstrongb9@d...	44-(328)383-4320
<input type="checkbox"/>	Bell, Jane	36768 Prentice Center	Bristol			jbellpu@smugmu...	44-(943)389-1876

If another individual with an address in Bristol is added, they will automatically be added to the smart group.

As you can see, Andrew Apple has been added as his address is in Bristol. He is then placed automatically in the Bristol Newsletter group.

All groups, both regular and smart, will be shown on the contact's record under the Groups tab: in this tab the contact can also be added to and removed from groups:

Summary Consumer Feedback Events 0 Activities 0 Cases 0 Relationships 1 Groups 2 Notes 0 Tags 0 Change Log

Add to a group Add

Regular Groups

Angela Armstrong has joined or been added to these group(s).

Group	Status	Date Added	
Mockaroo Data	Added (by Admin)	13th January, 2017 1:25 PM	Remove Delete
Newsletter 2	Added (by Admin)	15th May, 2017 12:26 PM	Remove Delete

Smart Groups

Angela Armstrong is currently included in these Smart group(s) (e.g. saved searches).

Group	Description
Bristol Newsletter	

Smart groups can be as simple as the one above, or as complicated as you wish them to be. By using Advanced Search, the smart group criteria can be complex, with several different categories needed to be matched before a contact joins the smart group.

For example, a contact could need to have attended a specific event as a volunteer, received regular newsletters, have a relationship with a specific organisation and have a certain tag before they meet the smart group criteria.

Tags

Tags are usually used in a more simplistic way to categorise data. They are easy to add to a contact's record, and show on the summary page.

Unlike groups they do not have a joined or removed date but they can be searched for in the Advanced Search.

It is possible to search for a specific tag in the same way you can search for a specific group, using the 'Find Contacts' search.

Find Contacts

▼ Edit Search Criteria

Name or Email

is...

in

with

Search

Creating tags

To create a tag, you need to be the site administrator and go to the Administer menu and then Custom Fields. If you then click into the Tags section, the following screen will appear:

New Tag

Name *

Description

Parent Tag

Used For What types of record(s) can this tag be used for?

Reserved? Reserved tags can not be deleted. Users with 'administer reserved tags' permission can set or unset the reserved flag. You must uncheck 'Reserved' (and delete any child tags) before you can delete a tag.

Selectable? Defines if you can select this tag.

- The Name is mandatory, but none of the other fields are.
- It is a good idea to have a description of the tag so that everyone knows what it is for, but it is not compulsory.
- If you are using certain tags for certain records, such as using one only for contacts, then you can select that when you create the tag.
- If you wish to use the tag for any kind of record, leave the 'Used For' field blank.
- Tags are very easy to add to a contact's record: simply go into the Tag tab and the available ones will be displayed to you.

Nader Group

Actions ▾ Edit Delete Contact

Summary Consumer Feedback Events 0 Activities 0 Cases 0 Relationships 1 Groups 0 Tags 0

Tags

Charity

Private Company

- Tick the tag that you wish to categorise your contact (or case or activity) as, and then you can see that the data appears on the contact summary record.

Nader Group

Actions ▾ Edit Delete Contact

Summary Consumer Feedback Events 0 Activities 0 Cases 0 Relationships 1 Groups 0 Tags 1

Nickname		Tags	Private Company
Legal Name		Contact Type	Organization
SIC Code		CiviCRM ID	991

The Tags tab now has that the contact has one tag, and the tag is displayed on the summary page.

There are no limits to how many tags a contact can have - but, as with groups, remember not to create too many and ensure that every tag has a separate function.

Both tags and groups are useful ways to categorise and organise your data, but it's necessary to ensure that you and your team use them in a consistent way with a clear process for both to prevent any overlap and maximise their effectiveness.

Try it for yourself

- Create a group with a name and description that indicates what contacts it will hold
- Search for those contacts and add them to the group
- Create a smart group for contacts with an active relationship with your Healthwatch.
- Create a new record with an active relationship with your Healthwatch to check your smart group works.