Creating a Dynamic Student List
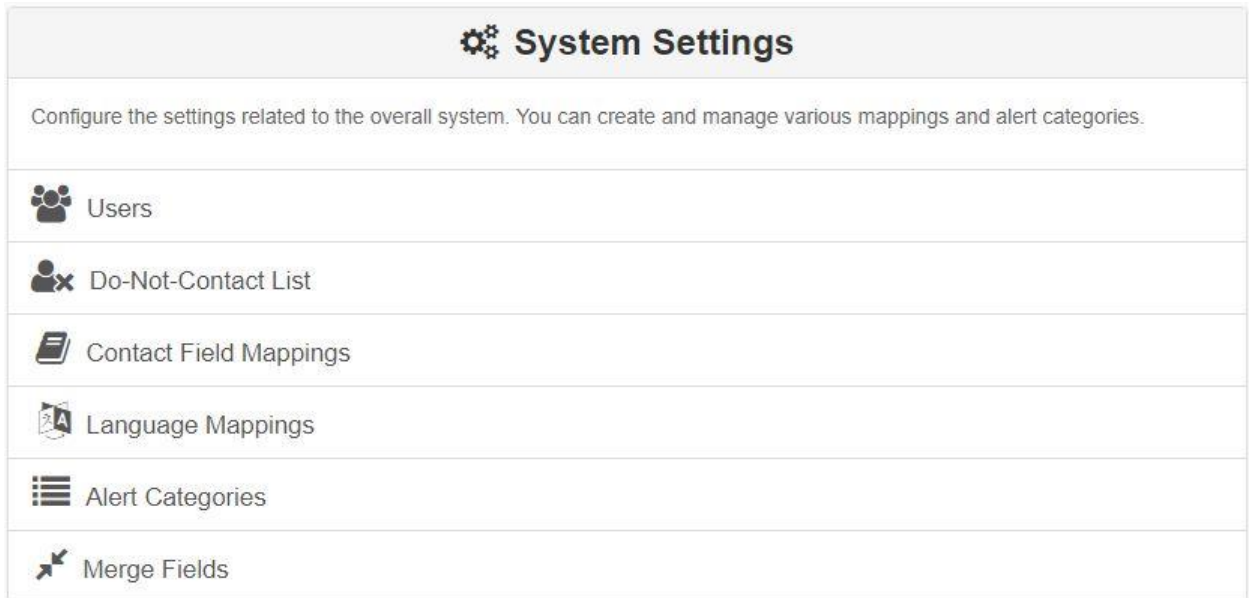
With SwiftK12's new **Dynamic List** feature, you have the ability to search for students by using dynamic criteria. This guide goes over how to add **merge fields** to use as filters for **Dynamic Lists**, and how to create **Dynamic Lists**.

- First, go to **Settings**

⚙ Settings

- Next, choose **Merge Fields** from **System Settings** in the bottom left-hand corner of the **Settings** page

⚙ System Settings

Configure the settings related to the overall system. You can create and manage various mappings and alert categories.

👥	Users
👤✕	Do-Not-Contact List
📖	Contact Field Mappings
🈂	Language Mappings
☰	Alert Categories
✗	Merge Fields

- To add a merge field, press Add **Merge Field** in the top right corner.

➕ Add Merge Field

- The following popup will appear. You will have to pick the **Entity Type** of the **merge field**, the **Source Table** that the merge field is on, the **Source Field** you will be using (which is the **merge field**), and the **Label Name**.

*Note: You will have to rebuild your plugin after adding the **merge field(s)** you want to use. To do so, press **Rebuild Plugin** in the top right corner, and then reinstall the plugin.
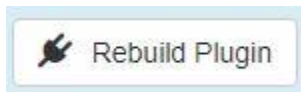
After finishing those steps, you can move onto making a **Dynamic List**!

- Start by clicking on **Students** link in the top right navigation menu

- Once you are in the **Students** section, click on **Advanced Search**

- Choose the **field** you want to use as the filter

- Choose the **value** you want the filter to equal to, then press **Add**

Q Advanced Search

Field Bus_Route ▾ **Equals** 202 ▾ **+ Add**

*Note: You can add **multiple dynamic searches**. You can filter **multiple dynamic searches** by using the operators **AND** or **OR**. You can switch between the two by pressing the dropdown that appears to the right of **Multiple Selection Operator**.

Multiple Selection Operator AND ▾ ⓘ Use this operator when selecting multiple criteria

- After you have added the criteria you would like to use, press **Search**. If you would like to remove the criteria you have added, press **Clear**.

Q Search **✖ Clear**
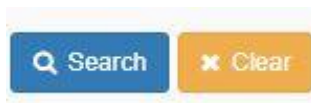
- After pressing **Search**, you will have your **Dynamic List**! You can now either save it as a list by pressing **Create Contact List**, or you can send an alert with the **Dynamic List** by pressing **Create Alert**.

+ Create Contact List **+ Create Alert**