

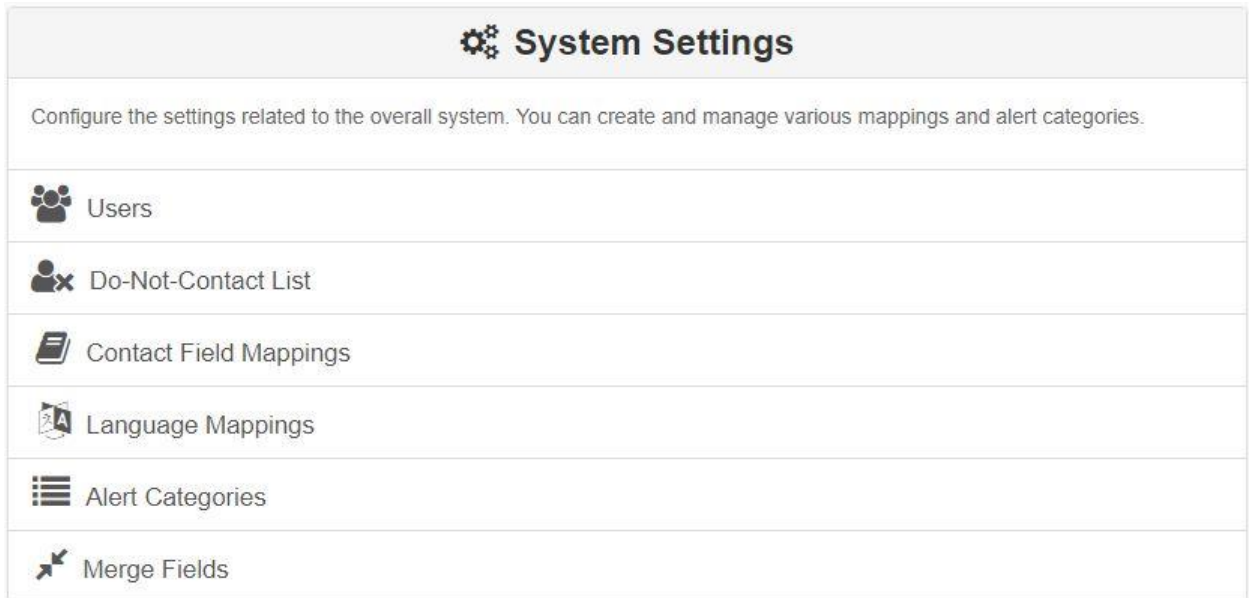
## Creating a Dynamic Staff List

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**



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



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



- 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**.

**+ Add Field**
✕

**i** Select an **Entity Type**, a **Source Table**, a **Source Field** and **Contact Method**. Enter a **Label Name** and click the **Save** button to save it.

**Entity Type:**

**Source Table:**

**Source Field:**

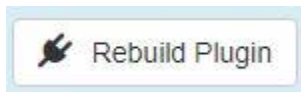
**Label Name:**

**w** When you make any changes to **Merge Fields**, you **must** rebuild the plugin and replace the plugin in PowerSchool.

Save

Cancel

**\*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 **Staff** link in the top right navigation menu



- Once you are in the **Staff** 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**

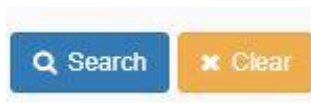
## Q Advanced Search

Field  Equals

**\*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   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**.



- 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**.

