# Assigning Tags

Basics: All Users

A Tag is nothing more than a **Label** or **Classification** that allows you to segment your contacts into different groups. Each contact in your database can have an number of tags. Assign each contact that you send a monthly newsletter to the "**Newsletter**" tag or assign specific job related tags like "**Agent**", "**Plumber**", "**Lender**", or "**Appraiser**" in order to quickly find a "**Plumbe**r" in your area. Most agents will assign tags like "**Current Buyer**," "**Current Seller**," "**Past Buyer**," or "**Past Seller**" to quickly view lists of people you are working with or have worked with. One unique feature of realvolve is the ability to automate the tag assignments in workflow actions to indicate the current status of a contact, property or transaction. An example would be to automate the tag assignment as your client moves through the sales process of "**Suspect**," "**Prospect**," "**Lead**," "**Client**," and "**Past Client**."

To view or assign tags to a contact, click on the **Radar** tab and scroll down to the lower right. Here you will see the Tags area which shows the number of tags assigned to the contact as well as the full list. To add a tag to a contact, simply click into the "Assign a new tag" box and start typing the tag name. If the tag already exists, you will see it display in a list under the entry area and you can pick it. If it is a new tag then press TAB or ENTER to apply that tag to the contact and it will be added to the list of available tags for the next time.
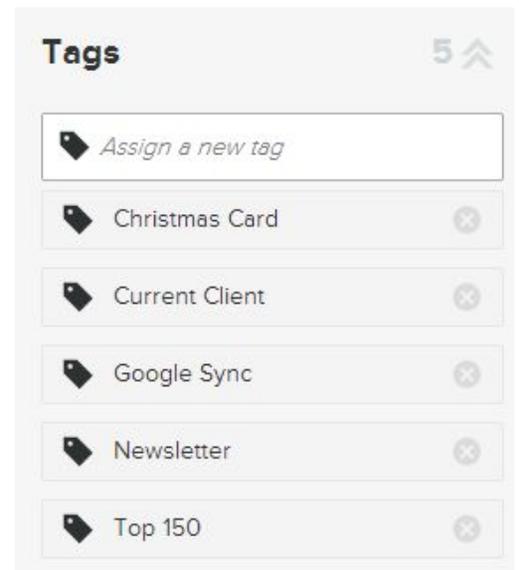
Use the ⊗ button next to any tag to remove it from the contact.

Assigning tags individually as you enter new contacts is important but can be time consuming when adding tags to several contacts that have already been entered.

TIP: To speed up that process, you can use the "Add Tag" menu in "More Menu" of the **View All** screen . If you click on the double chevron " **>>** " next to the Contact count, Realvolve will show all the contacts from the list view in more

detail. This includes Name, Company, Address, Phones, and Emails in a table format. Each name in the list has a box to the left that can be used to select that contact for processing in some way. Above the table of names in the upper right corner is a "More Menu" which looks like 3 horizontal lines. Click on the menu and choose **Add Tags** to add tags to each selected contact in the list. This allows you to quickly mark several names and apply the tag with less effort than doing them one by one in the radar tab.
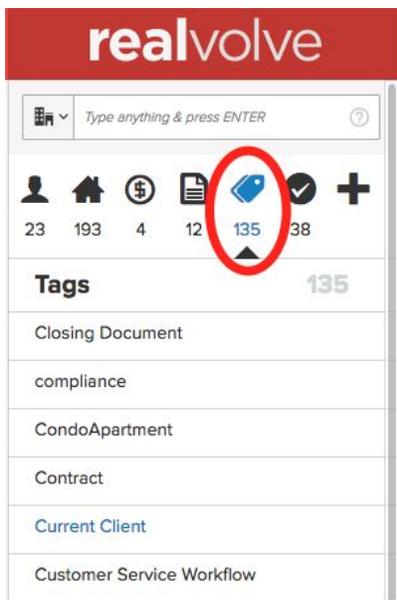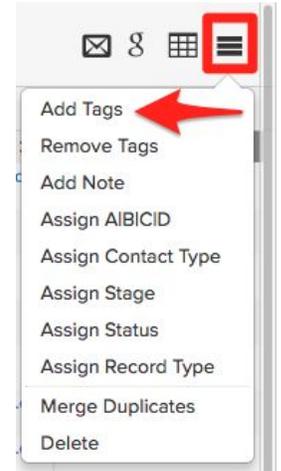
To quickly view a full list of contacts by a specific tag, you can click on the **Tags** list view. This will display all records in the work pane that contain a specific tag. While it has limitations, if offers quick access to names with very little effort. Using the "Search for anything..." box to find keywords can also limit the number of tags displayed in the list view.

Each tag in the list can be edited or deleted as needed. Simply move the mouse over the tag to display the edit and delete icons and select as needed.
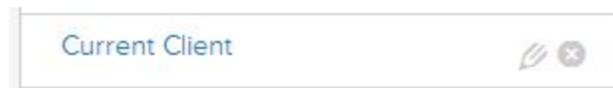
The pencil icon allows you to edit the tag name and the ⊗ icon allows you to delete that tag. (SEE VIDEO)   If you have more than one tag with a similar name you can combine them "Newsletter" and "newsletter". Edit the tag named "newsletter" (lower 'n') by clicking on the pencil icon and retype the name to "Newsletter" (capital 'N') and call contacts that are tagged with "newsletter" will be combined with the contacts that have "Newsletter".

Your job for today is to continue entering names into the database and begin the process of assigning tags to those contacts.

If you have any questions, please contact us at: support@realvolve.com