OnBoard Day 4 - What are Tags?

Welcome to day 4 of your realvolve training... Yesterday's session covered entering new contacts into the database, today I will discuss how to organize those contacts using TAGS.

What is a TAG?

A Tag is nothing more than a **Label** or **Classification** that you assign to a contact. Each contact in your database can have an number of tags.   Assign each contact with "**Newsletter**" that will receive your monthly newsletter or you can assign specific job related tags like "**Agent**", "**Plumber**", "**Lender**", "**Appraiser**" in order to quickly find a "**Plumbe**r" in your area. Most agents will assign tags like "**Current Buyer**", "**Current Seller**", "**Past Buyer**", "**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**", "**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.
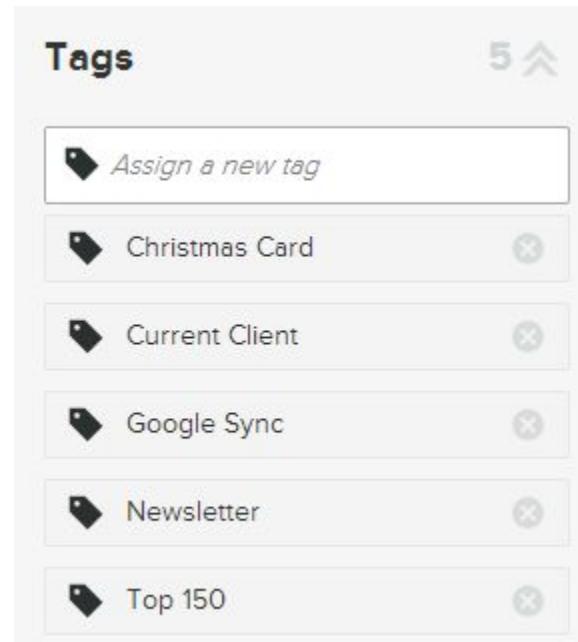
TIP: To speed up that process, you can use the "Add Tag" button in the View All screen. If you click on the double chevron " **>>** " next to the Contact count, Realvolve will show all the contacts from the

list view in more detail.   This includes Name, Company,
format. Each name in the list has a box to the left that c
processing in some way. Above the table of names is a
specific tag to each selected contact in the list. This allo
apply the tag with less effort than doing them one by one

Contacts   577 »

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.

Current Client
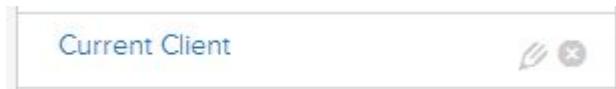
The pencil icon allows you to edit the tag name and the ✖ icon
allows you to delete that tag. (SEE VIDEO)

Your job for today is to continue entering names into the
database and begin the process of assigning tags to those
contacts. You can add them individually or as a group using the View All > Add Tags feature for
marked records.

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