Adding & Removing Tags to Contacts

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Donor Management System
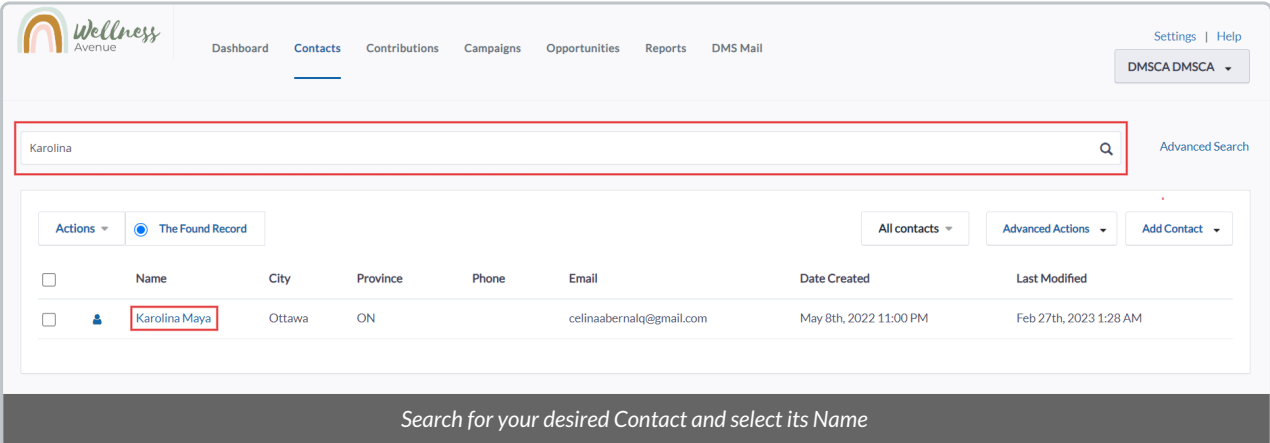
After creating new Tags, you can associate them with your Contacts.

Adding & Removing Tags to a Single Contact

1. Go to the **Contacts Tab**

2. Search for the Contact you wish to add a Tag to and click on its Name

Search for your desired Contact and select its Name

3. On the Contact Profile, navigate to the *Tags* section

On their Contact Profile, select **Tags**

4. You will see a list of all the created Tags in the DMS

See a list of all of the current Tags in your DMS

5. Check the box next to the desired Tag to add it to the Contact. And to remove the Tag from the Contact, you can simply uncheck the Tag box.

Adding & Removing Tags to Multiple Contacts at Once

1. Go to the **Contacts Tab**

2. Either:

- Select specific Contacts you wish to label with a Tag
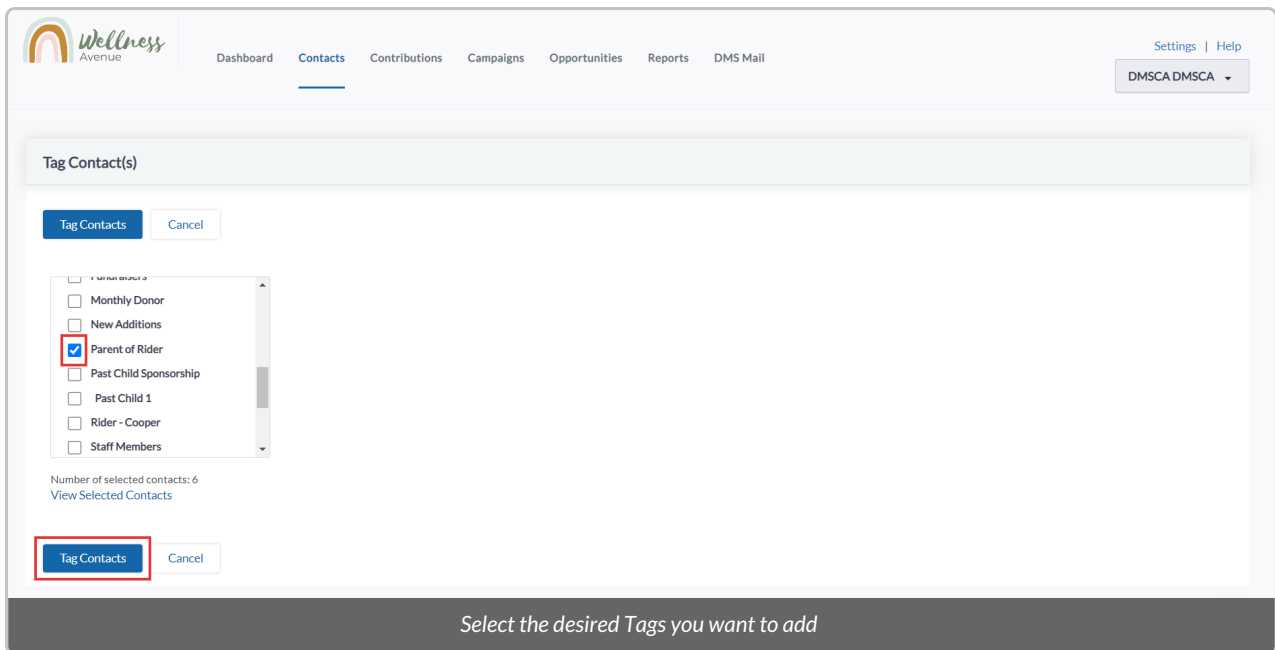- Select all listed Contacts on the page
- Select all Records

Select Contacts in 3 different ways

3. Select the *Actions* menu at the upper-left side of the Contact list

4. Either type "tag" in the *Actions* search bar or scroll the list to find the ***Tag – add to contacts*** option.

Select Actions > Tag - add to contacts

5. On the next page, **choose the Tags** that you want to apply to the selected Contacts.

Select the desired Tags you want to add

6. Then select *Tag Contacts* on either bottom or top of the page to associate the Tags to your selected Contacts.

7. Alternatively, to **remove Tags from Contacts,** choose your desired Contacts on the Contacts Tab and select the *Tag – remove from contacts* option from the Actions menu

8. Follow similar steps as adding Tags to remove Tags from your selected Contacts.