

Adding & Removing Tags to Contacts

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Donor Management System

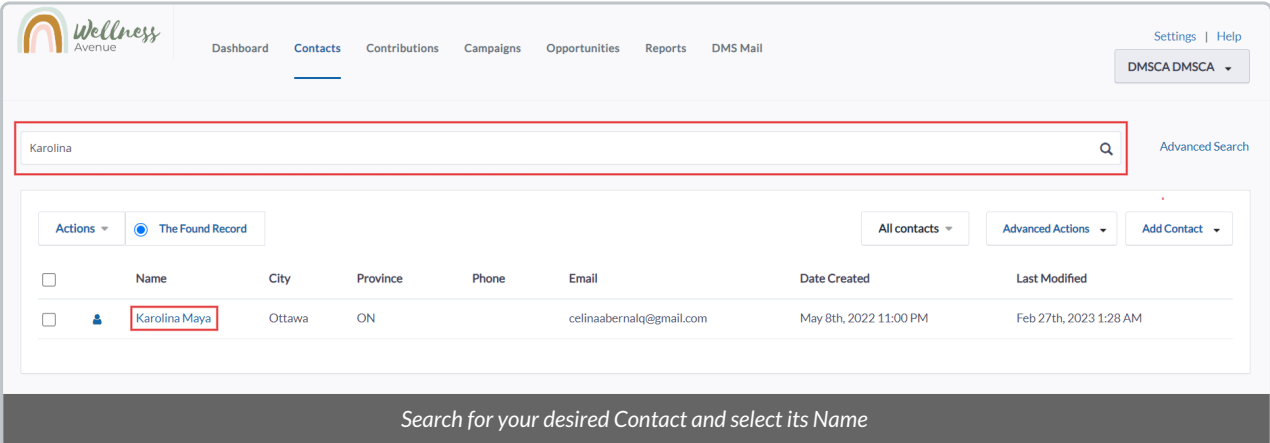
After [creating new Tags](#), you can associate them with your Contacts.

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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



The screenshot displays the 'Wellness Avenue' Donor Management System interface. The 'Contacts' tab is selected in the navigation menu. A search bar at the top contains the text 'Karolina'. Below the search bar, a table lists the search results. The first result is 'Karolina Maya', with her name highlighted in a red box. The table columns include Name, City, Province, Phone, Email, Date Created, and Last Modified. At the bottom of the interface, a dark grey bar contains the text: 'Search for your desired Contact and select its Name'.

	Name	City	Province	Phone	Email	Date Created	Last Modified
<input type="checkbox"/>	Karolina Maya	Ottawa	ON		celinaabernalq@gmail.com	May 8th, 2022 11:00 PM	Feb 27th, 2023 1:28 AM

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

Wellness Avenue

Dashboard **Contacts** Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Karolina Maya

Actions Edit

Summary Contributions 34 Activities 91 Relationships 1 Groups 7 Notes 0 **Tags 1** Opportunities

Home Address: 45 Sweetland St, Ottawa, ON K1N 6G1, Canada

Billing Address: Karolina Maya, 45 Sweetland St, Ottawa, ON K1N 6G1, Canada

Home Email: celinaabernalq@gmail.com

Billing Email: celinaabernalq@gmail.com

Phone:

Summary Fields

- Total Lifetime Contributions: 638.44
- Amount of last contribution: 1.23
- Date of Last Contribution: 02/27/2023 1:28AM
- Date of First Contribution: 05/09/2022 3:40PM
- Largest Contribution: 400.00
- Count of Contributions: 34

Tags: **Gold Donor**

Contact Type: Individual

Contact ID: 333

External ID:

Gender: She/Her

Date of Birth:

Age:

Employer: CanadaHelps

Job Title:

Recognition Name:

Source:

On their Contact Profile, select Tags

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

Wellness Avenue

Dashboard **Contacts** Contributions Campaigns Opportunities Reports DMS Mail

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DMSCA DMSCA

Karolina Maya

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Summary Contributions 34 Activities 91 Relationships 1 Groups 7 Notes 0 **Tags 2** Opportunities

Tag Tree

Filter List

- 50/50
- Board Members
- Child Sponsorship
- Donor Levels
 - Gold Donor
 - Platinum Donor
 - Silver Donor
- Event Attendees
- Event Sponsor
- Fundraisers

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

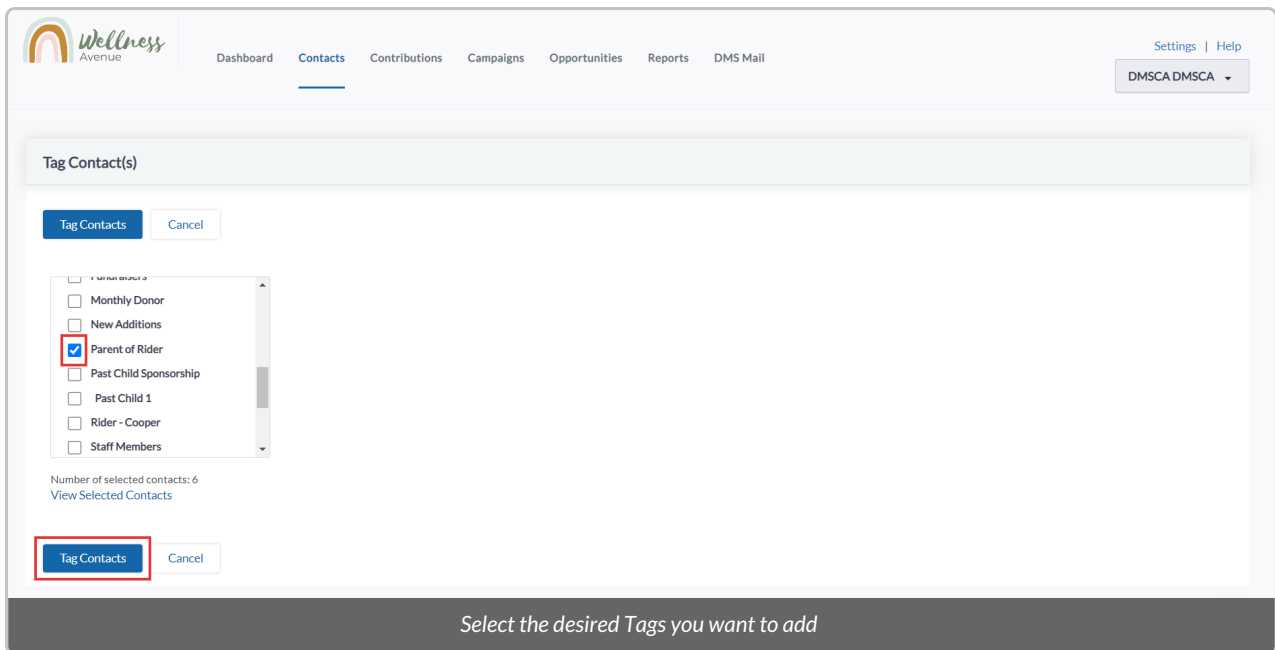
The screenshot shows the Wellness Avenue interface with the 'Contacts' tab selected. At the top, there is a navigation bar with 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. A search bar is present with the text 'Search by contact name or email'. Below the search bar, there are radio buttons for '4 Selected Records Only' (selected) and 'All 174 Records'. A red box labeled '3' highlights the 'All 174 Records' option. To the right, there are buttons for 'All contacts', 'Advanced Actions', and 'Add Contact'. The main content is a table of contacts with columns: Name, City, Province, Phone, Email, Date Created, and Last Modified. A red box labeled '2' highlights the 'Actions' menu icon in the top left of the table. A red box labeled '1' highlights the 'Add Tag' option in the 'Actions' dropdown menu. The table contains several rows of contact information, including A. Amadu, A. L. Kostenko, Alex Fergie, and Alicia Mitre. A dark grey banner at the bottom of the screenshot contains the text '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.

This screenshot shows the same Wellness Avenue interface as the previous one, but with the 'Actions' menu open. The 'Actions' menu is highlighted with a red box. Inside the menu, there is a search bar and a list of options: 'Add Activity', 'Add Contacts to Group', 'Add Contacts to Smart Group', 'Add Tag', and 'Create Mail Merge'. The 'Add Tag' option is highlighted with a red box. The table below the menu shows the same contact list, but now with 6 records selected. A dark grey banner at the bottom of the screenshot contains the text 'Select Actions > Tag - add to contacts'.

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



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.
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