

Creating & Modifying Tags

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Donor Management System

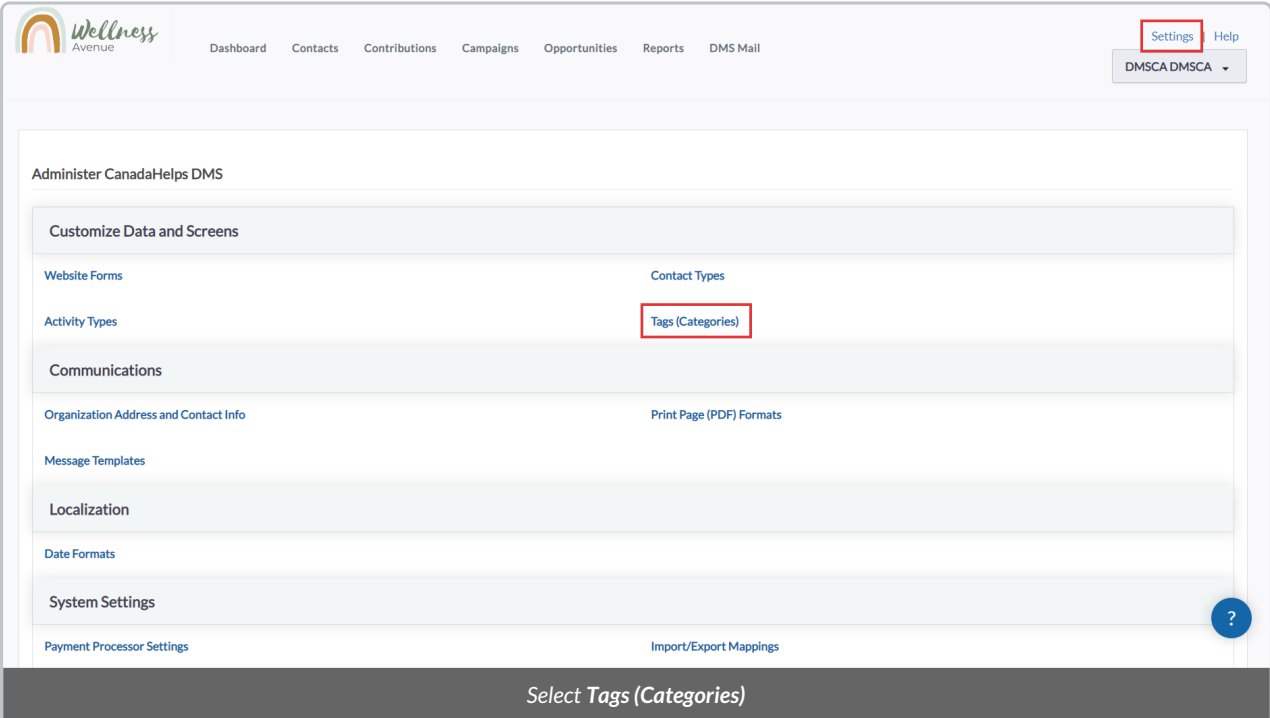
After [learning about Tags](#), you can easily create new Tags for selection in the DMS.

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Adding a Tag

1. Visit your **administrative Settings**
2. Under **Customize Data and Screens**, select **Tags (Categories)**



The screenshot displays the administrative interface for the Donor Management System (DMS). At the top left is the 'Wellness Avenue' logo. The navigation menu includes 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. On the top right, there are 'Settings' and 'Help' links, with 'Settings' highlighted by a red box. Below the navigation is a dropdown menu for 'DMSCA DMSCA'. The main content area is titled 'Administer CanadaHelps DMS' and contains a 'Customize Data and Screens' section. This section lists various administrative options: 'Website Forms', 'Activity Types', 'Communications', 'Organization Address and Contact Info', 'Message Templates', 'Localization', 'Date Formats', and 'System Settings'. The 'Tags (Categories)' option is highlighted with a red box. At the bottom of the screen, there is a dark grey bar with the text 'Select Tags (Categories)' and a blue circular help icon with a question mark.

3. Select **Add Tag** at the bottom right corner of the screen

Wellness Avenue

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

Settings | Help

DMSCA DMSCA

Tags

Tags are a convenient way to categorize data (Contact, Activity, Case, File, SavedSearch).
Create predefined tags in the main tree, or click the + to add a set for free tagging. (Learn more...)

Tag Tree

Organize the tag hierarchy by clicking and dragging. Shift-click to select multiple tags to merge/move/delete.

Filter List

- So/Sp
- Board Members *
- Child Sponsorship
- Donor Levels
- Event Attendees *
- Event Sponsor
- Fundraisers *
- Monthly Donor
- New Additions
- Parent of Rider

None Selected
Select one or more tags for details.

+ Add Tag

Select Add Tag

4. A **New Tag** popup will appear with the following information:

New Tag

Name *

Description

Parent Tag - select -

Colour

Reserved?

Reserved tags can not be deleted. Users with 'administer reserved tags' permission can set or unset the reserved flag. You must uncheck 'Reserved' (and delete any child tags) before you can delete a tag.

Selectable?

Defines if you can select this tag.

Cancel Save

Fill out the necessary information to add the new Tag

Fields:

- **Name:** the name of the Tag.
- **Description:** optional description of the Tag.
- **Parent Tag:** add this new Tag to be under an existing Tag to help organize your Tag Tree (e.g. Volunteer > Part-Time).
- **Used For:** legacy field currently not active. Please leave it as is.
- **Colour:** change the colour of the Tag for easier visualising.
- **Reserved?:** please leave this box blank. Reserved Tags cannot be deleted.

- **Selectable?:** please leave this box checked.

5. After adding all the necessary information, select **Save** to add the Tag.

Modifying a Tag

1. Visit your **administrative Settings**

2. Under **Customize Data and Screens**, select **Tags (Categories)**

The screenshot displays the Wellness Avenue administrative dashboard. The top navigation bar includes the logo, a menu with 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail', and user options for 'Settings' (highlighted with a red box) and 'Help'. Below the navigation is a 'DMSCA DMSCA' dropdown. The main content area is titled 'Administer CanadaHelps DMS' and contains a 'Customize Data and Screens' section. This section lists various administrative options: 'Website Forms', 'Activity Types', 'Communications', 'Organization Address and Contact Info', 'Message Templates', 'Localization', 'Date Formats', 'System Settings', 'Payment Processor Settings', 'Contact Types', 'Tags (Categories)' (highlighted with a red box), 'Print Page (PDF) Formats', and 'Import/Export Mappings'. A blue question mark icon is visible in the bottom right corner of the main content area. A dark grey footer bar at the bottom contains the text 'Select Tags (Categories)'.

2. Select the Tag you wish to modify under the **Tag Tree**

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

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Create predefined tags in the main tree, or click the + to add a set for free tagging. (Learn more...)

Tag Tree

Organize the tag hierarchy by clicking and dragging. Shift-click to select multiple tags to merge/move/delete.

Filter List

- 50/50
- Board Members *
- Child Sponsorship
- Donor Levels
- Event Attendees *
- Event Sponsor
- Fundraisers *
- Monthly Donor
- New Additions
- Parent of Rider

None Selected

Select one or more tags for details.

+ Add Tag

Select your desired Tag

3. On the right, you'll see a box with information about the selected Tag. Select what you wish to modify:

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

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Tag Tree

Organize the tag hierarchy by clicking and dragging. Shift-click to select multiple tags to merge/move/delete.

Filter List

- 50/50
- Board Members *
- Child Sponsorship
- Donor Levels
- Event Attendees *
- Event Sponsor
- Fundraisers *
- Monthly Donor
- New Additions
- Parent of Rider
- Past Child Sponsorship

Board Members

Description: Board

Selectable: Yes

Reserved: Yes

Used For: Contact

Usage Count: 10

+ Add Child Clone Tag Delete

Select what you'd like to modify

a. Select this little box icon to change the Tag's colour.

b. Hover your cursor on and select each piece of information to edit them.

c. Select each button to launch an Action:

- **Add Child:** create a new Tag to be under this existing Tag to help organize your Tag Tree (e.g. Volunteer > Part-Time). **this feature is currently being fixed so please do not create Parent or Child Tags**

- **Clone Tag:** add a copy of the same Tag.
- **Move Tag:** move this Tag to a new Tag Tree.
- **Delete:** delete this Tag.