Tags can be managed from the **Tag Manager** area of your CRM. Go to **Contacts > Tag Manager** from here you can

- Add New Tags
- Edit Tags
- Merge Tags
- Delete Tags
- View a list of associated Contacts
- Remove Tag from associated Contact(s)
- View a list of associated Groups
- Remove Tag from associated Group(s)

**How to Add a New Tag**

- Go to **Contacts > Tag Manager**
- Click "Add New Tag"

- Type the name of your tag and click Add
How to Edit Tags

- Go to Contacts > Tag Manager
- Find the tag you would like to edit and click Edit Tag
  
  ![Add a New Tag](image)

  - Make the edit to your tag then click Save.
  
  ![Edit Tag](image)

  - The edit will apply to all CIDs associated with this tag.

How to Merge Tags

- Go to Contacts > Tag Manager
- Click the checkbox next to the tags you would like to Merge then click Merge Tags
• You will have the option to
  ○ (1) Select one of the existing tag names
    ▪ Select this option then choose an existing tag name and click Merge Tags
  ○ (2) Create New Tag Name
    ▪ Select this option then write in the name of your new tag

How to Delete Tags

• Go to Contacts > Tag Manager
• Click the checkbox next to the tags you would like to delete then click Delete.

• An overlay will appear to confirm you would like to delete the tag(s). Click Delete
Tag(s). All associated CIDs will no longer be linked to these tags.

View Contacts
To view what contacts are associated with each tag:

- Go to Contacts > Tag Manager
- Find the name of the Tag and click View Contacts

From the View Contacts page you can see the

- Associated CID
- First & Last Name of the associated contact
- Business/Organization Name of the associated contact
- The date the tag was added to the associated contact
To remove a tag from an associated contact:

- Click the check box in the Action column of the associated contact then click **Remove Tag**. An overlay will appear to confirm you would like to remove the tag(s). Click **Remove Tag(s)**. All associated CIDs will no longer be linked to this tags.

**View Groups**

To view what groups are associated with each tag:

- Go to **Contacts > Tag Manager**
- Find the name of the Tag and click **View Groups**
From the View Groups page you can see the

- Associated GPID
- Group Name
- The date the tag was added to the associated group

To remove a tag from an associated group:

- Click the check box in the Action column of the associated contact then click Remove Tag

An overlay will appear to confirm you would like to remove the tag(s). Click Remove Tag(s). All associated GPIIDs will no longer be linked to this tags.
Remove Tag from Group Record(s)

Are you sure you want to remove this tag from group record(s)?
All associated GPID(s) will no longer be linked to this tag

Cancel Remove Tag