CRM Agent Exercise 4
Tagging

In the booj CRM, tags are how you organize contact and leads. Tags are important because they allow you to organize your sphere of influence for marketing campaigns and reporting. Tags can be added or removed from the CRM through the Tags Manager and tags can be associated to leads and contacts within the contact record or upon addition to the system.

**This exercise can only be completed once you have access to the booj CRM.*

Accessing your Tags Manager

1. Log on to MAX/Center (www.remax.net) using your @remax.net email address and password
2. Within MAX/Center, click on the **booj** tile
3. Click on the **Person icon** located in the upper right
4. Click on Settings
5. Use the Setting Pages dropdown menu in the upper right to select **Contacts & Leads**
6. Click on the **Tags**

Creating New Tags

1. From the Contact Manager, click on the **Add Tag** button
2. Enter in a name for your tag in the **Tag Name** field
3. Select a color from the **Color** dropdown
4. Click **Add Tag**

Adding a Tag to a Contact

1. In the **CRM** tab dropdown menu, click on **Contacts & Leads**
2. Select a contact by clicking on their name
3. On the Contact Dashboard, click on the **+Add Tag button** at the top of the contact record
4. Select appropriate tag(s) from the dropdown menu and click **Add Tag**

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Editing Columns in Your Tags Manager

1. Click on the **Edit Columns** button on the right of the Tags Manager
2. Under **Columns to Show,** click on a few items to add these columns to your view or uncheck the items already checked to remove the column from your view.
3. Under **Column Order**, rearrange the order of columns by dragging and dropping the bars into the order you want to see.
4. Click **Done** once finished.

Filtering and Sorting your Tags

1. Once inside of your booj Tags Manager, click on the **Manage Filters** button at the top of the page.
2. Select one (or more) of the filter options that appear in the **Manage Filters** pop-up to add additional filters such as **Color** and **Tag Creation Date** to help further organize your tags
3. Use the **Name** and **Type** fields to refine your search
4. Click on the **column headers** located in the results below sort the filter results.
5. Use the **Results** dropdown to change the view from seeing 25 results to up to 100 results.
6. Once you filter your tags to fit your viewing needs, select **Save or Load View** to save the filtered view for a later use.

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Let's practice!

Adding a Tag to a Contact

Tags drive campaigns and categorize your contact database, allow you to easily search for contacts, send campaigns to targeting groups, and identify the sales stage of a contact. Answer the questions below to help create tags personalized to your business. Once all questions are answered, add the answers as tags in the Tags Manager.

- How did you meet each of your contacts? ***(Open house, kids school event, PTA, etc.)***
- In what capacity are you working with the contact? ***(Client, lender, attorney, etc.)***
- What are your client's hobbies? ***(Water sports, running, biking, etc.)***
- What types of information is important to your client? ***(School or zoning restrictions, etc.)***
- Does the client need additional services? ***(Mortgage, title, insurance, etc.)***
- Would your clients be interested in community events? ***(Tag for each area or neighborhood, etc.)***

Tagging
Check List

- ❑ Identify what tag groups you want to add to the system
- ❑ Add custom tags to CRM within the Tags page
- ❑ Add tags to your contact list so that your contacts and leads are tagged upon import into the CRM
- ❑ Filter, Edit Columns and Save Views for each tag view that you want to use in the future