



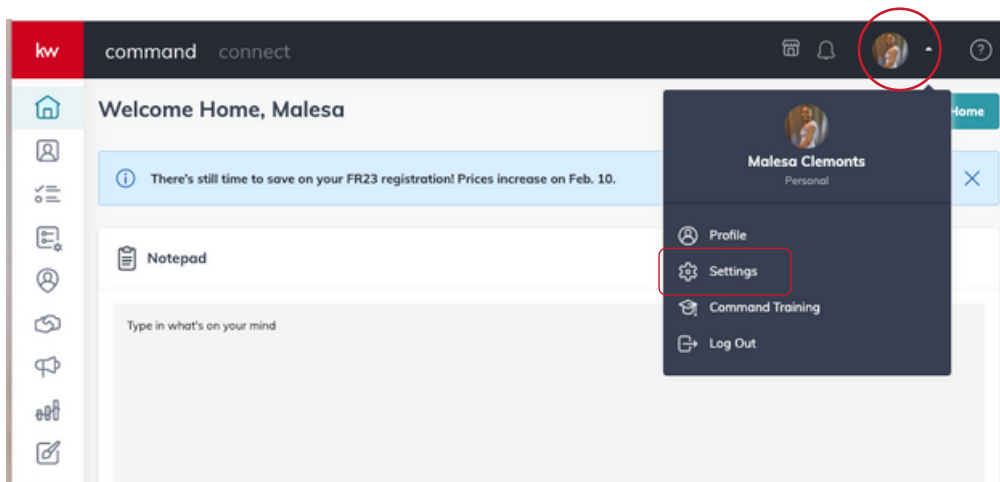
Command Quick Guides

**Your Guide to Command:
Tags**

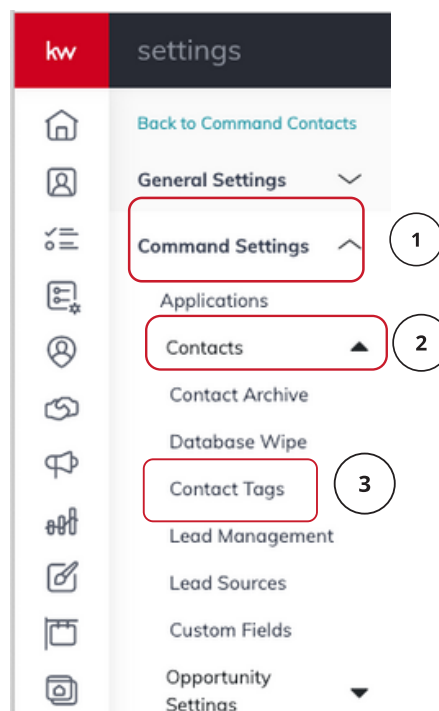


Tag Library

1. Log in to <https://agent.kw.com> with your Keller Williams login credentials.
2. Click on your photo at the top of the page.
3. Click **Settings** from the drop-down menu.



4. From the settings select **Command Settings**, then select **Contacts**, then select **Contact Tags**.





5. Click **Create Tag** in the top right corner.

The screenshot shows the 'Contact Tags' interface. At the top right, there is a teal 'Create Tag' button highlighted with a red box. Below it is a search bar with the placeholder text 'Search Tags'. The main area contains a table with the following columns: TAG NAME, CREATED BY, and CREATED ON. The table lists various tags such as 'Agent', 'Allied Resource', 'Bought', 'Buyer', 'Buyers', 'collaborator', 'Downline', 'Invalid Email Address', 'KPSS', and 'KW Agent'. Each row includes edit and delete icons. At the bottom of the table, there is a pagination link that says '< Viewing 1-10 of 22 >'. The background of the interface is light gray.

6. Name your custom tag and choose the tag appearance (color). Click **Create**.

The screenshot shows the 'Create Tag' dialog box. The title is 'Create Tag' with a close button (X) in the top right corner. Below the title, it says 'Create a custom tag for Malesa Clemonts' and 'This tag will be accessible for any contact that is owned by Malesa Clemonts'. There is a 'Tag Name' field with the text 'DEMO'. Below that is the 'Tag Appearance' section, which shows a row of color swatches: light blue, red, orange, yellow (selected), green, blue, purple, and gray. At the bottom right, there are two buttons: 'Cancel' and 'Create', with the 'Create' button highlighted by a red box.



Managing Your Tags

1. Edit or delete your custom tags by using the pencil or trash can icons.

The screenshot shows a 'Contact Tags' management interface. At the top, there is a search bar labeled 'Search Tags' and a 'Create Tag' button. Below is a table with columns for 'TAG NAME', 'CREATED BY', and 'CREATED ON'. Each row represents a tag and includes edit (pencil) and delete (trash) icons. The 'Bought' tag row has a red box around its edit and delete icons.

TAG NAME	CREATED BY	CREATED ON	
Agent	System	December 19, 2018	
Allied Resource	System	December 19, 2018	
Bought	System	February 15, 2019	
Buyer	System	February 15, 2019	
Buyers	System	January 5, 2021	
collaborator	System	January 6, 2021	
DEMO	Malesa Clemonts	March 3, 2023	

2. Click the pencil icon to Edit. Rename your custom tag or change the tag appearance and click **Save**.

The 'Edit Tag' dialog box shows the tag name 'DEMO' and a 'Tag Appearance' section with color selection options. The 'Save' button is highlighted with a red box.

Edit Tag [Close]

Edit a custom tag for Malesa Clemonts
This tag will be accessible for any contact that is owned by Malesa Clemonts

Tag Name
DEMO

Tag Appearance
Aa Aa Aa Aa Aa Aa Aa

Cancel Save



2. Click the trash can icon to Delete a custom tag. If the tag is assigned to a contact, you will not be able to delete it until you no longer have any contacts assigned to that tag.

A confirmation dialog box with a white background and a grey border. The title bar says 'Are you sure?' with a close 'X' icon on the right. Below the title bar, the text reads 'This data will be completely removed from the system'. A red error message below that says 'Tag is linked to a contact and can't be deleted'. At the bottom, there are two buttons: a teal 'OK' button and a white 'Cancel' button with a teal border.

Adding Tags to Contacts

1. From the Contacts Dashboard, create a new contact or select the contact you want to edit. Then click the drop-down menu to select the tag(s) you want to use.

A form titled 'Add to Contacts' with a close 'X' icon in the top right corner. The form contains several fields: 'Full Name*' with the value 'Demo Test'; 'Add Relationship' link; 'Primary Email' with a dropdown set to 'Personal' and the value 'demotest@gmail.com'; 'Primary Phone' with a dropdown set to 'Personal', a country dropdown set to 'US', and a phone number field containing '(234) 567-8901'; 'Lead Source Type' with radio buttons for 'Select From List' (selected) and 'Select From Contacts'; 'Lead Source' dropdown menu; 'Mark as Lead' checkbox; 'Tags' dropdown menu with 'Select' and a red circle around the dropdown arrow; and 'Add More Information' link. At the bottom are 'Cancel' and 'Create' buttons.



2. Use the checkboxes to select the tags you want to apply. Click outside of the box to close the drop-down menu and click [Save](#).

The screenshot shows two stages of the 'Tags' selection process. The top stage shows a search bar with 'test' and 'Agent' tags. Below it, a list of tags is displayed with checkboxes: 'Agent' (checked), 'Allied Resource' (unchecked), and 'Bought' (unchecked). The bottom stage shows the same search bar with 'test' and 'Agent' tags, and a '+ Add More Information' button. At the bottom of the interface are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

3. You can also create a custom tag by typing in the Tags search bar and clicking [Create Custom Tag](#). Choose your tag color and click [Add](#).

The screenshot shows two stages of creating a custom tag. The top stage shows a search bar with 'test' and 'NEPA' tags. Below it, a '+ Create Custom Tag' button is highlighted with a red box. The bottom stage shows the search bar with 'NEPA' and an 'Add' button highlighted with a red box. Below the search bar is a 'Tag Color' section with eight color swatches: light blue, pink, orange, yellow, green, light blue, purple, and grey.



2. Once you have added your new tag, click **Save** to save the changes made to your contact.

A screenshot of a 'Edit Contact' form. The form is titled 'Edit Contact' and has a close button (X) in the top right corner. It contains several input fields: 'Full Name*' with the value 'Demo Test'; 'Primary Email' with a dropdown set to 'Personal' and the value 'demotest@gmail.com'; 'Primary Phone' with a dropdown set to 'Personal', a country dropdown set to 'USA', and the value '(234) 567-8901'. Below these are radio buttons for 'Lead Source Type' with 'Select From List' selected. A 'Lead Source' dropdown menu is set to 'Select Lead Source'. There is a checkbox for 'Mark as Lead' which is unchecked. A 'Tags' field contains two tags: 'test' and 'NEPA'. At the bottom of the form are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red rectangular border.



Bulk Tagging

1. If you want to tag multiple contacts at once, select all of the contacts you wish to tag. Then select the **Select Bulk Action** drop-down menu and choose **Add Tags**.

The screenshot shows the 'Malesa Clemons's Contacts' page. At the top, there are buttons for 'Import', 'Add Contact', and a menu icon. Below that is a search bar and a 'Filters' button. The main area shows a list of 10 selected contacts. A red box highlights the 'Select Bulk Action' dropdown menu, which is open, showing various actions. A red arrow points to the 'Add Tags' option. The table below has columns for 'RECENTLY ACTIVE', 'LAST CONTACTED', 'TAGS', and 'PRIM'. The 'TAGS' column shows various tags like 'KW Pocono' and 'KW Scranton'.

RECENTLY ACTIVE	LAST CONTACTED	TAGS	PRIM
	Feb 14, 2023 (20 days ago)	KW Pocono	+1 2 ***
	Feb 14, 2023 (20 days ago)	KW Pocono	+1 5 ***
	Feb 14, 2023 (20 days ago)	KW Scranton	+1 9 ***
	Feb 14, 2023 (20 days ago)	KW Pocono	+1 5 ***
	Feb 14, 2023 (20 days ago)	KW Pocono	+1 5 ***
	Feb 14, 2023 (20 days ago)	KW Pocono	+1 5 ***
	Feb 14, 2023 (20 days ago)	KW Pocono	+1 6 ***
	Feb 14, 2023 (20 days ago)	KW Scranton	+1 5 ***
	Feb 14, 2023 (20 days ago)	KW Pocono	+1 5 ***
	Feb 14, 2023 (20 days ago)	KW Scranton	+1 5 ***

3. Use the checkboxes to select the tags you want to add and then click **Add Selected**.

The 'Add Tags' dialog box is shown. It has a title bar with a close button. Below the title is a search bar with the placeholder text 'Search tags...'. Below the search bar is a list of tags with checkboxes. The 'Agent' tag is checked. The other tags are 'Allied Resource', 'Bought', 'Buyer', 'Buyers', 'collaborator', and 'DEMO'. At the bottom of the dialog, it says '1 selected' and has 'Cancel' and 'Add Selected' buttons.