COMMAND CENTRAL

Command Quick Guides

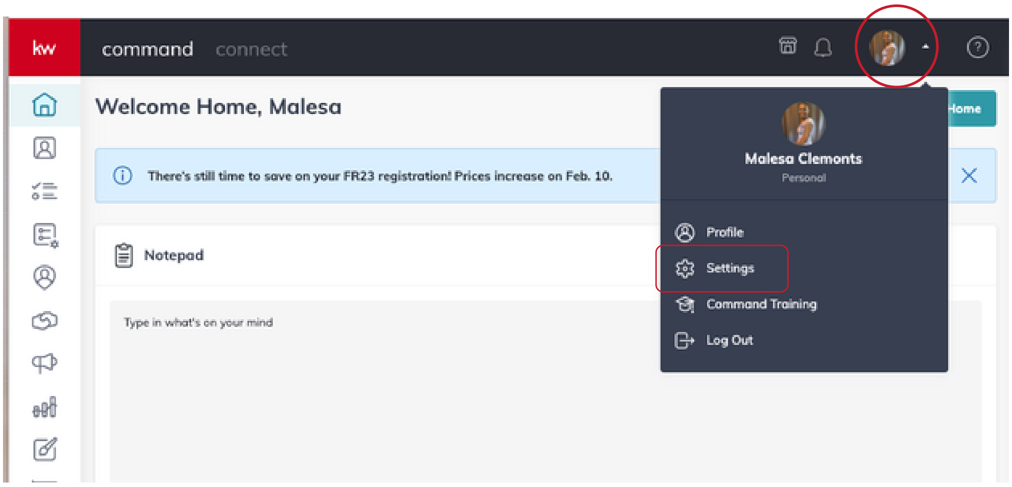
Your Guide to Command: Tags

Tag Library

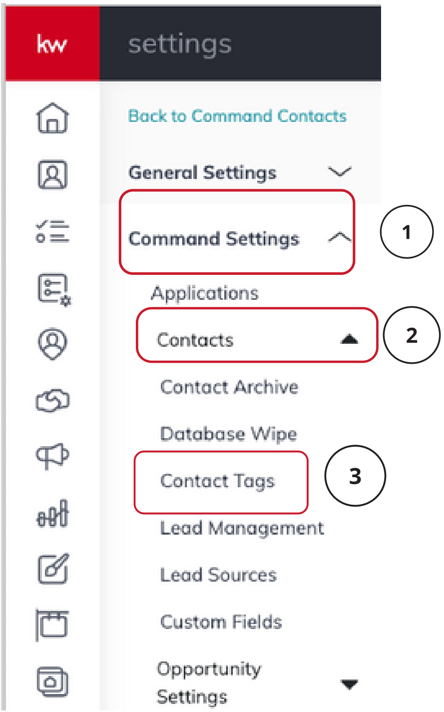
1. Log in to https://agent.kw.com with your Keller Williams login credentials.

2. Click on your photo at the top of the page.

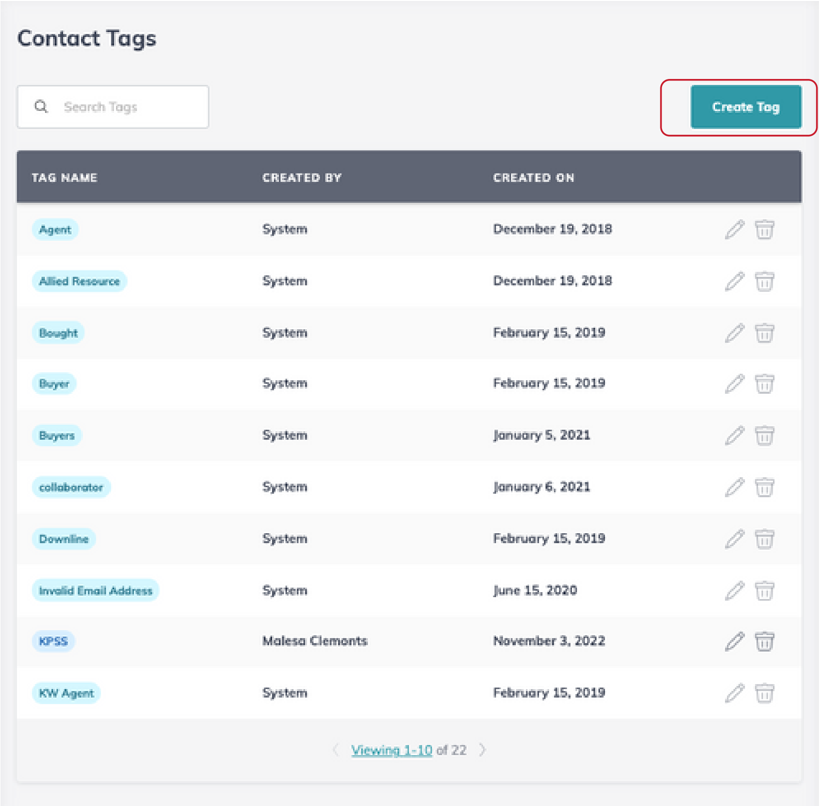
3. Click Settings from the drop-down menu.



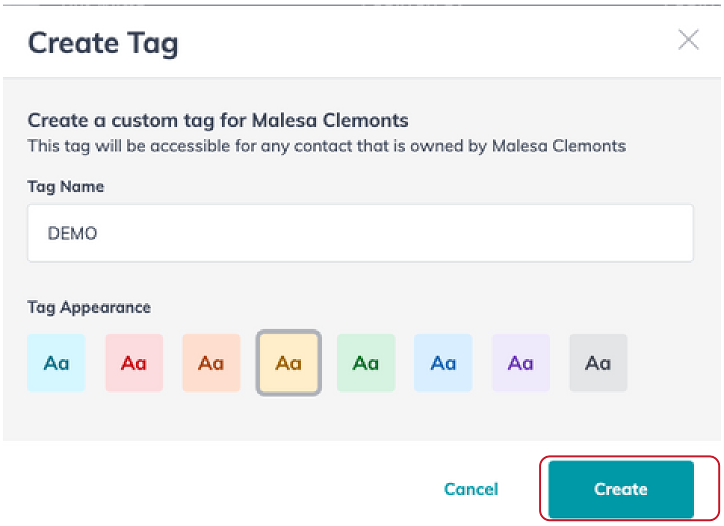
4. From the settings select Command Settings, then select Contacts, then select Contact Tags.



5. Click Create Tag in the top right corner.

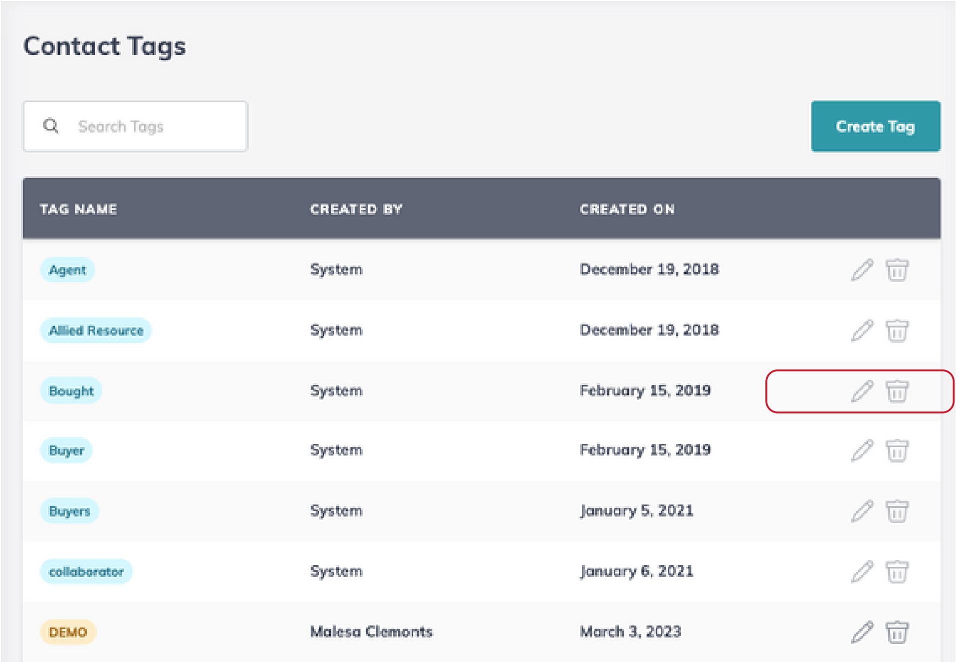


6. Name your custom tag and choose the tag appearance (color). Click Create.

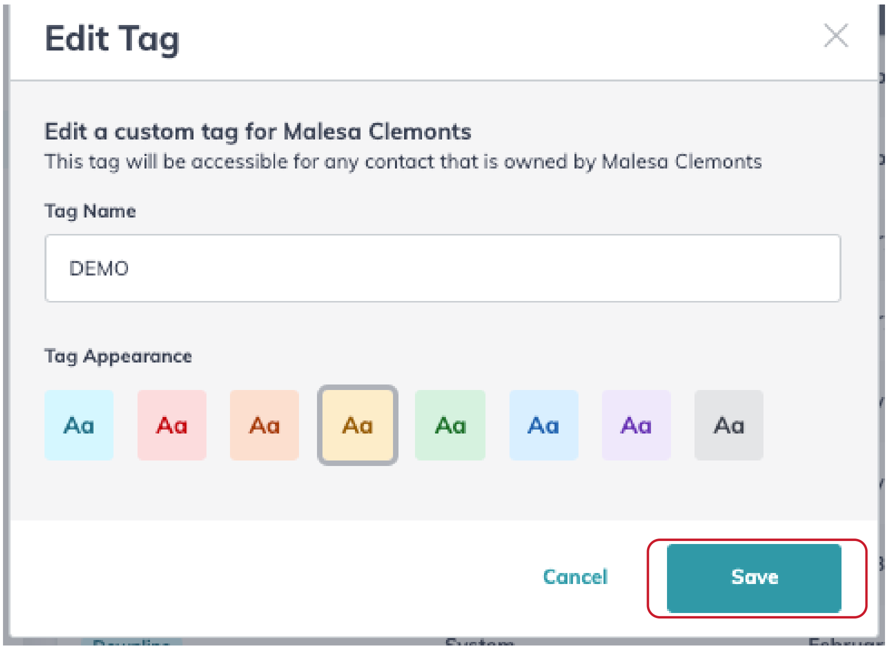


Managing Your Tags

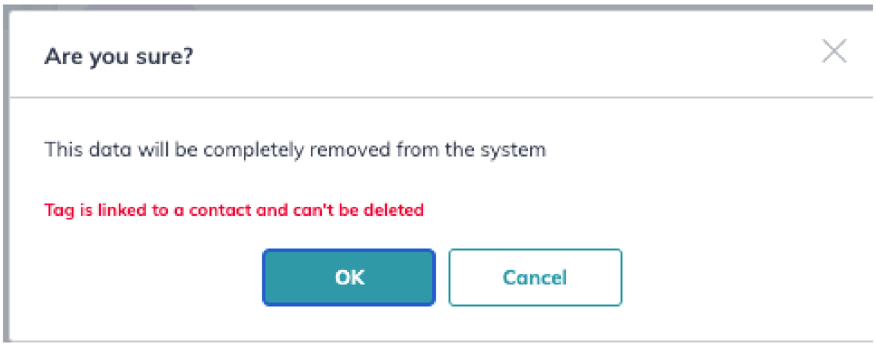
1. Edit or delete your custom tags by using the pencil or trash can icons.



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

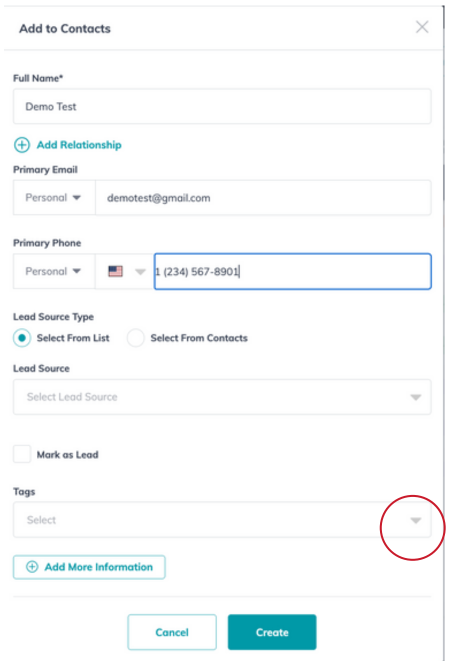


2. Click the trash can icon to Delete a custom tag. If the tag is assigned to a contact, you will not be able to delete it until you no longer have any contacts assigned to that tag.

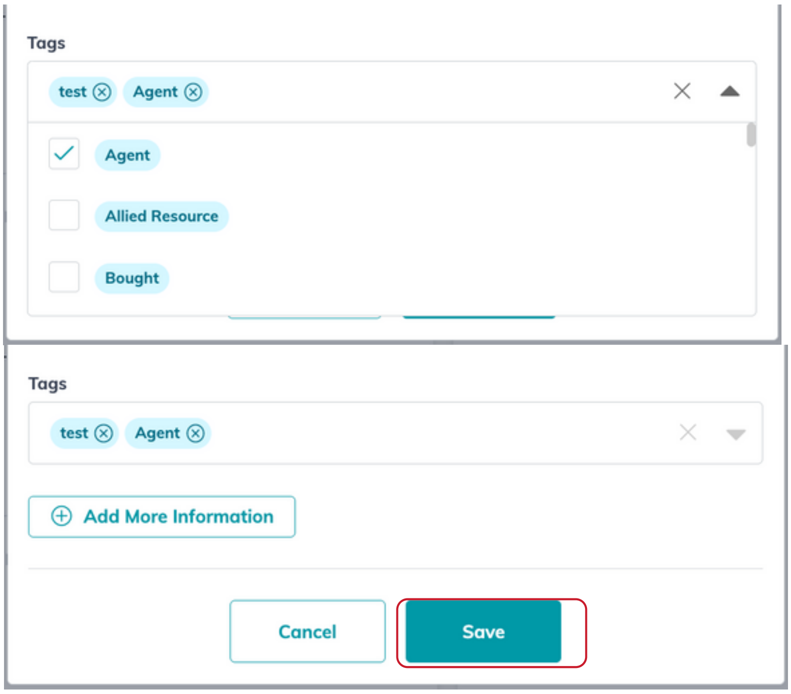


Adding Tags to Contacts

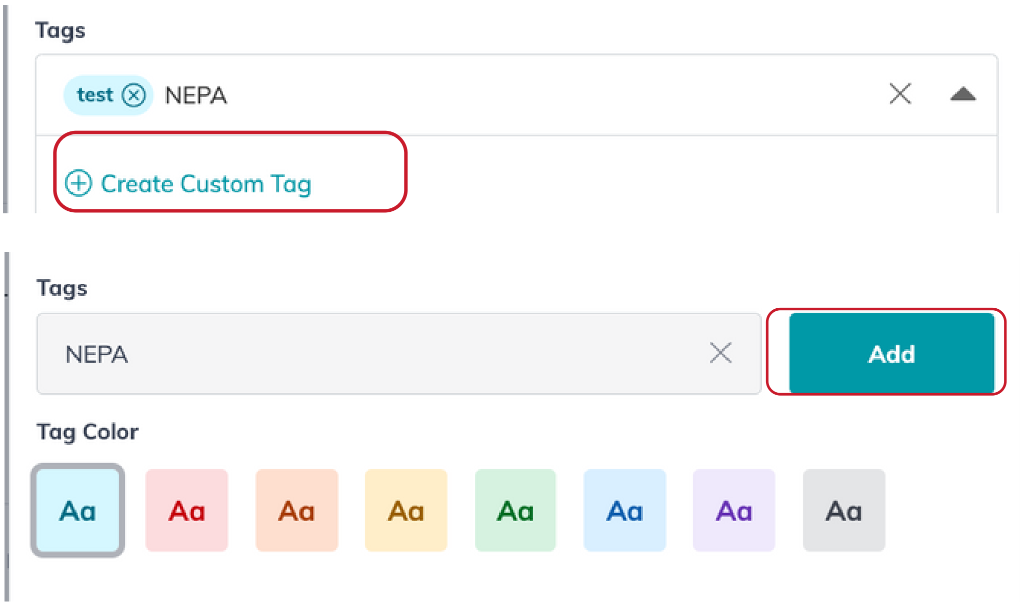
1. From the Contacts Dashboard, create a new contact or select the contact you want to edit. Then click the drop-down menu to select the tag(s) you want to use.



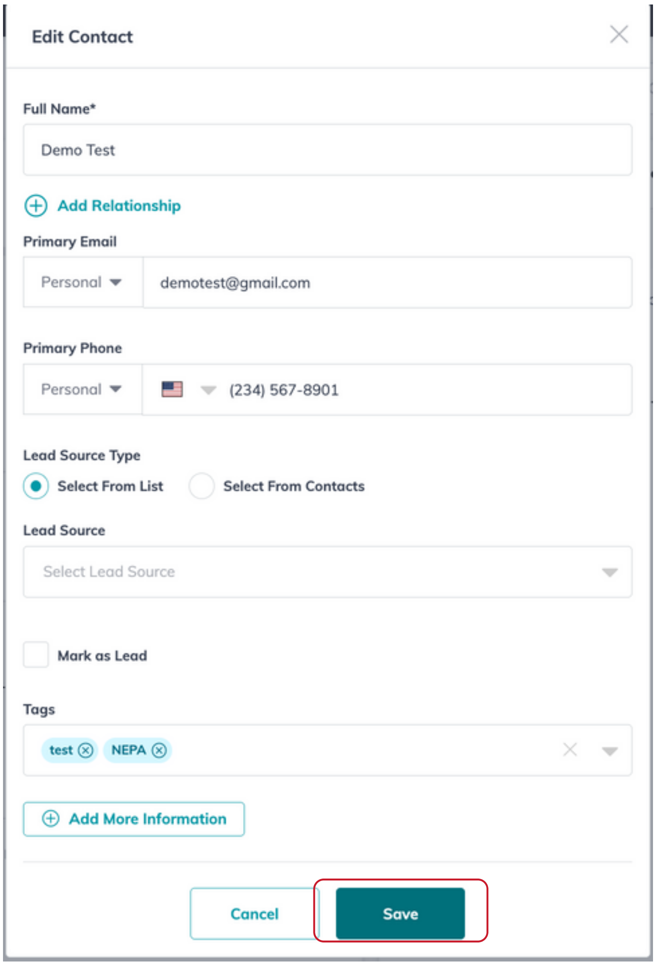
2. Use the checkboxes to select the tags you want to apply. Click outside of the box to close the drop-down menu and click Save.



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.

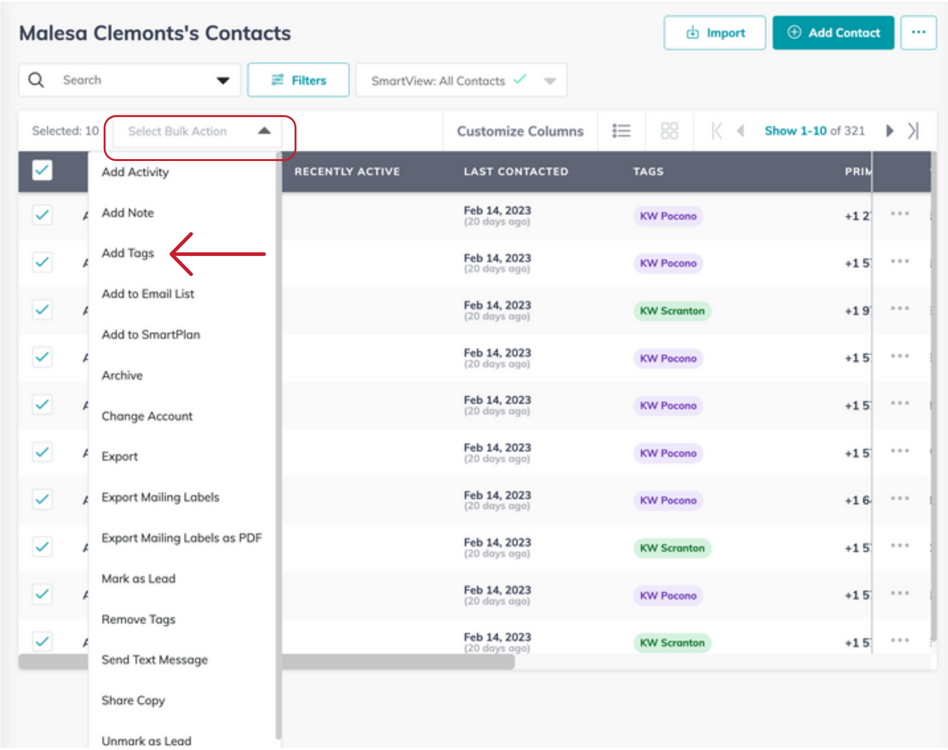


2. Once you have added your new tag, click Save to save the changes made to your contact.



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.



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