Make Bulk Category changes on Tags®

To save time you can quickly change multiple tag categories at once!

1. Go to CRM > Settings > Tags

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MY NAV	CRM	MARKETING	E-COM
Dashboard	Contacts	Campaign Builder	E-Comm
My Day	Companies	Email & Broadcasts	Orders
	Opportunities	Lead Generation	Products
	Referral Partners	Templates	Actions
	Visitors	Legacy	Promotio
	1b		Legacy
Edit	Reports <u>Settings</u>	Reports Settings	Reports

All Contact & Company Settings			
c	Contact & Company Settings	Company	
	General		Minimum Account # Leng
10	Task/Appt/Note Settings	Contact	Contact Typ
	Tags		
	Tee Coberentee		

2. Sort tags by clicking the Column Headers to sort tags to easily find the tags you want to update

Tags		Add Tag Import Tags
Name Actions 🔻	Search	Category Show all categories
1-50 of 57	50	v per page < 1 2 >
ld	Name	Number of people Category
1451	Updated Email Preference	0

Note! To locate your tags for updating, do not use the "**Name**" search field or the "**Category**" drop down above the list. Doing so will prevent the Bulk Category Change from working properly.

3. Check the box to the left of the tags



4. From the Actions drop down select "Update tag category"

	Name		Search	
4a	Actions 🔻	1		
-	Delete		50	
	Print	Name		Num
	Update tag category	b ^{ap end}		1
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- 5. Select either a current Category or enter a name of a new category next to (Other)
- 6. Click "Save and return to Tags"

Edit tags (back to search results)			
Tag names			
Category	Please select a category	(Other)	
6 Save and	return to Tags Cancel		