



# How To Tag Someone in i360

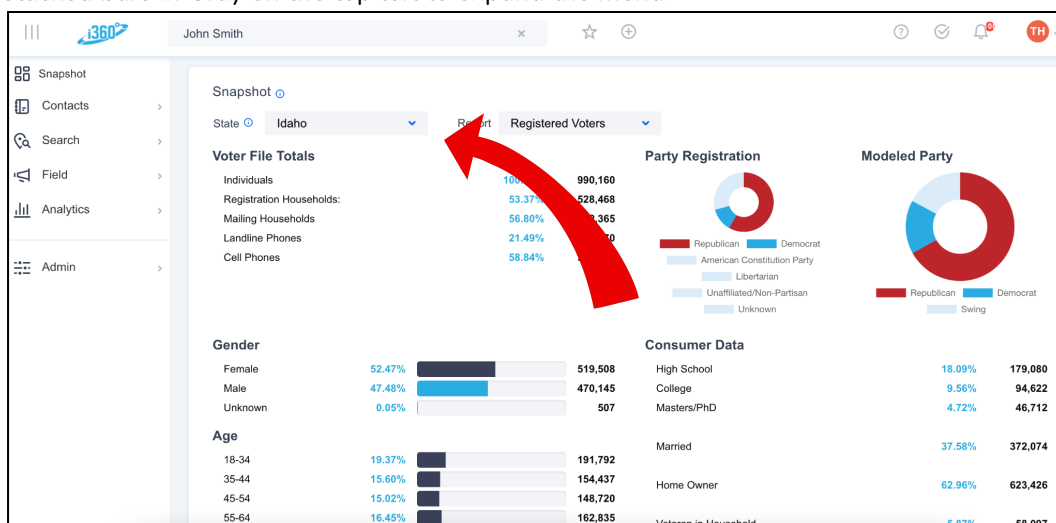
**Purpose:** Once we identify a person or “contact”, we may want to “tag” them so that in the future we or others can sort by that particular tag. Whether it's someone who might be on the other team or someone who has committed to be a Precinct Committee person or something else.

**Options:** We have pre-built some tags for everyone to use. Upon spending time in i-360, you will find that some “contacts” are already tagged. They may be tagged as a previous donor to a campaign, a previous party worker, a previous campaign co-chairman, and various others. For internal purposes to try and maintain confidentiality, we have created a color coding system for internal tags. This might include items like someone who has committed to be a PC person. Here is a list of our internal tags that are confidential:

|                                   |          |
|-----------------------------------|----------|
| Team Gem State County Captain     | ● RED    |
| Team Gem State, Committed to Run  | ● GREEN  |
| Team Gem State, County Volunteer  | ● YELLOW |
| Team Gem State, Potential PC      | ● PURPLE |
| Other Team Member                 | ● BLACK  |
| Other Team Member, Running for PC | ● ORANGE |

## How to Tag a Contact in i-360:

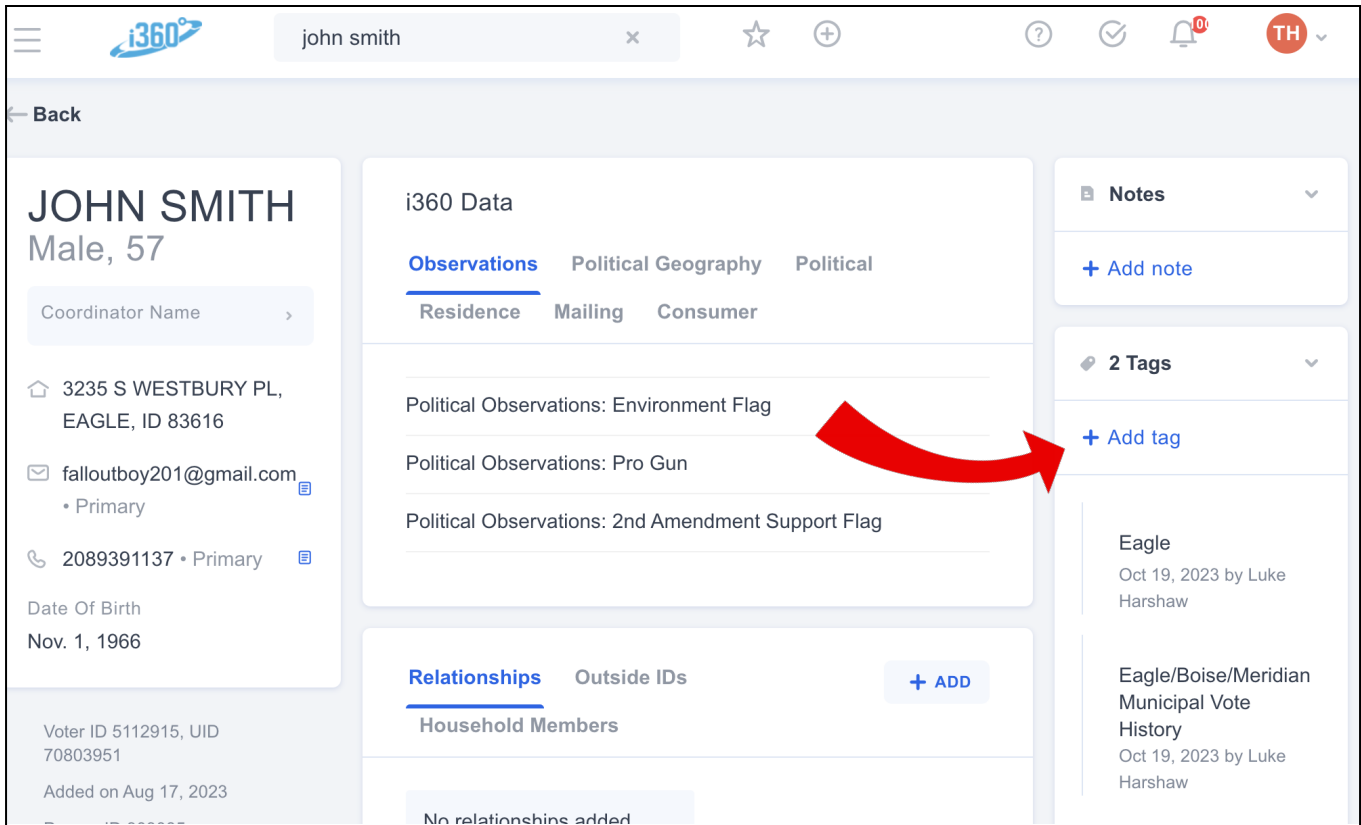
1- After Logging Into i-360, Make sure the menu on the top left is expanded, if it is not click the three stacked bars in Gray on the top left to expand the menu.



the one that you're thinking of, if you select the wrong one search again until you find the correct one paying attention to items like phone number and address and email will be helpful in making sure you have selected the right contact)



2- Once you have the right contact selected, and you have clicked on their name in the drop-down from the search bar, their contact profile will appear. On the right-hand side you will be able to click the button “add tag.”



3- After clicking “+ Add Tag” on the right-hand side, a menu on the right will then expand. In the top of the menu you will see a drop-down for category.

- a. Select “Gem State Conservatives”
- b. Once “Gem State Conservatives” is selected as the category, the proper tags will populate from the drop-down in the same panel on the right-hand side
- c. Select the “tag” you desire to use for that contact, and click the “Add Tag” button at the bottom.

