TAGS:

Commonly used on the Internet, TAGS are special codes you can create to group information in our Velvet systems. By assigning a record a code of multiple codes the user can later call back those records that share a single or multiple codes.

In Velvet, these codes can be used to designate any group of the user's design, such as a holiday card list, a business development target or even a function tag that describes the person's experience.

TAGS in Velvet are located within a person's record and within a company's record. Users can create codes that encompass people, companies or both.

When a TAG is created by one user that TAG appears on the list of TAGS for all users of the system. This helps all users assign TAGS, but more importantly it shows all users that the particular TAG has already been assigned.

PEOPLE TAGS

People TAGS can be found in the lower left corner of the contact section of the user screen. In the view above, existing TAGS assigned to this person are listed and underlined.

ADD OR EDIT A TAG

Click on the EDIT link to open the TAGS field. Listed in the field, separated by commas, is the TAGS designated for this person.

To remove a TAG simply highlight and delete the TAG in the field. Be sure to leave a comma separating any remaining TAGS.

To ADD a TAG you have two options:

EXISTING TAG: If a TAG is already being used, you will see it listed under the TAG field in red, underlined. Simply click that link and the TAG will be auto-entered into the TAG field. Press Save button to complete the entry.

Tags (Edit)

| 123, abc, CIO | Save | (Separate tags by commas) |

123, abc, BD-SC, CIO, FS, RCXMAS

CREATE NEW TAG: To create a new TAG, simply enter the new TAG by typing it into the TAG field (be sure to separate existing TAGS with a comma). Click Save Button when finished.

Tags (Edit)

| 123, abc, CIO, SMPLE | Save | (Separate tags by commas) |

123, abc, BD-SC, CIO, FS, RCXMAS

Going forward, this new TAG will appear as a red underlined TAG beneath the TAG field in all people and company TAG fields as a "quick-select" option.

Tags (Edit)

| 123, abc, CIO, SMPLE | Save | (Separate tags by commas) |

123, abc, BD-SC, CIO, FS, RCXMAS, SMPLE

RETRIEVE TAGGED INDIVIDUALS OR COMPANIES

To retrieve a list of people or companies tagged with specific TAG, you may click TAGS on the right-side menu. This will produce a master list of all TAGS being used.

All Tags

123
abc
BD-SC
CIO
FS
RCXMAS
SMPLE

Home

Views
People
Companies
Projects
Tags

Actions
New Person
New Company
New Project

Settings
My Profile

Contact Support

Logout

To see the results, simply click on a TAG from the list.

Tagged with "123"

Secondary Tag Filter: [▼]

People

☐	Last Name ▼	First Name	Current Title	Current Company	Last Updated
☐	Green	Stan	President	Consulting Company (Owned)	126 days ago
☐	Potocki	Richard	VP, IT Operations & Support	Erie Insurance Group	4 minutes ago
☐	Stout	Michael	EVP, IT	Sprint Nextel Corporation	64 days ago

Add Selected People to Project

Download Selected People as CSV

Companies

Name ▼		City	State	Created	Last Updated
Orbitz, LLC		Chicago	IL	January 23, 2006	364 days ago

In our example above, the results indicate three people and one company were tagged with "123".

You may cross-reference using a second TAG by selecting the secondary TAG from the drop-down in the upper right corner. The results will list any individuals and companies who have BOTH TAGS assigned to them.

Tagged with "123"

Secondary Tag Filter: [▼]

abc
BD-SC
CIO
FS
RCXMAS
SMPLE

People

☐	Last Name ▼	First Name	Current Title	Current Company	Last Updated
☐	Green	Stan	President	Consulting Company (Owned)	126 days ago
☐	Potocki	Richard	VP, IT Operations & Support	Erie Insurance Group	4 minutes ago
☐	Stout	Michael	EVP, IT	Sprint Nextel Corporation	64 days ago

Add Selected People to Project

Download Selected People as CSV

Companies

Name ▼		City	State	Created	Last Updated
Orbitz, LLC		Chicago	IL	January 23, 2006	364 days ago

WHAT CAN I DO WITH THE TAGGED RESULTS?

DOWNLOAD LIST

Tagged with "123"

Secondary Tag Filter: [   ] ▼

People

☐	Last Name ▼	First Name	Current Title		Current Company	Last Updated
☐	Green	Stan	President		Consulting Company (Owned)	126 days ago
☐	Potocki	Richard	VP, IT Operations & Support		Erie Insurance Group	4 minutes ago
☐	Stout	Michael	EVP, IT		Sprint Nextel Corporation	64 days ago

Add Selected People to Project

Download Selected People as CSV

Companies

Name ▼	City	State	Created	Last Updated
Orbitz, LLC	Chicago	IL	January 23, 2006	364 days ago

Users can download the records into a spreadsheet for further manipulation, such as an email list, a merge into WORD or other program. To do this, check the records you want to include in the download and click the link.

ASSIGN TO A SEARCH PROJECT

Users can assign people on the list to a specific project. For example, if I wanted to assign two of these individuals to a specific project, click "Add Selected People to a Project".

Tagged with "123"

Secondary Tag Filter: [   ] ▼

People

☐	Last Name ▼	First Name	Current Title		Current Company	Last Updated
☐	Green	Stan	President		Consulting Company (Owned)	126 days ago
☑	Potocki	Richard	VP, IT Operations & Support		Erie Insurance Group	4 minutes ago
☑	Stout	Michael	EVP, IT		Sprint Nextel Corporation	64 days ago

Add Selected People to Project

Project: [123-ABCD-CIO ▼]
Status: [Successful Candidate ▼]

| Successful Candidate |
| Presented |
| Client |
| Candidate |
| Prospect |
| Source |
| Ex-Prospect |

[Add]

Download ____ CSV

Companies

Name ▼	City	State	Created	Last Updated
Orbitz, LLC	Chicago	IL	January 23, 2006	364 days ago

Then check the people records (as shown below), select the project on which you want to assign them and the status in which they are placed in the people pipeline.

When complete, click the ADD BUTTON.

HOW DO I REMOVE A TAG FROM OUR SYSTEM?

TAGS are automatically removed when all individuals or companies TAGGED have those TAGS cleared. To do this there are two options:

To <u>manually</u> remove a TAG, view the list of tagged people and companies by selecting it form the TAG list (menu).

While viewing the list, manually go into each person or company record and delete this TAG from their record by editing and erasing the TAG.

To automatically clear a TAG (usually if the list is large), please contact Prospect City Support at support@prospectcity.com and we will remove it for you.

TIPS

1. KEEP YOUR TAG DESIGNATIONS SHORT, AS THE ACCUMULATED LIST CAN QUICKLY GET LONG. FOR EXAMPLE: BD IS BETTER THAN BUSINESS DEVELOPMENT, OR RCX07 IS BETTER THAN RICH CARLSON CHRISTMAS LIST.

2. YOU CAN USE TAGS AS A MEANS OF FUNCTION CODING PEOPLE OR INDUSTRY CODING COMPANIES TOO.

VELVETPLUS ONLY

FUNCTION TAGS

In addition to TAGS listed in the previous section, Function TAGS are an exclusive feature of the VELVETPLUS SYSTEM and address a larger firm's need to assign specific function TAGS to people. VELVETPLUS incorporates a master lookup screen for these codes, since the list is typically much larger.

TO ASSIGN A TAG

Within a person's job history section, FUNCTION TAGS are available for designation.

User-based TAGS frequently used by you are listed under the FUNCTION TAG field. To select one of these TAGS, simply click on it and it will be automatically added.

A Master Lookup is available by clicking "Lookup".

From the lookup list, select a category to expand the list and select a TAG to automatically add it to the field.