



**Together we will ignite
your congregation.**

™ REAL TIME STRATEGY 2021

USING TAGS

A tag is simply a group of people labeled under a common thread. “Sisterhood Members 2021, Families Interested in Tot Shabbat, or B Mitzvah Class of 2025 would be common examples.

What can I use a tag for?

Tags are extremely useful for many tasks in ShulCloud.

- Directed Emails (Can be one tag or multiple)
- Batch Billing (All Brotherhood Members need to be billed \$50)
- Reporting (Which members of the B Mitzvah Class have outstanding balances?)
- Engagement (Which families are interested in travel opportunities?)

- Tags can be set up to appear in congregant profiles.
- Web Pages and forms can be limited by tag (Board Member Information, Members-Only High Holy Day Form)

What should I NOT use a tag for?

Tags should NOT be used for:

- Anything that changes so regularly that it would be difficult to maintain the integrity of the data. (‘People With Outstanding Balances’ would change daily, but ‘People With Outstanding Balances As Of May 2021’ might be useful in a particular circumstance.)
- Membership Info. All Member/NonMember/Resigned Member info should be kept in the “Accounts/Account Billing Types” functionality of ShulCloud.

How do I create a tag?

Click “Admin Menu”

-My Lists (top left)

-Change “Administer” to “Tags” (not Mail Tags)

-Click “Add New”

How do I add people to a tag?

There are five ways to add people to a tag. For all of these methods except for number 1, you will need to have the tag already created in order to add people to it. This means that you will need to think ahead to what tags you will need before you begin to create the form or report of people you want tagged. You can always go back and make a tag, but you won’t be able to make one in the moment you need one in any screen except My Lists.

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- 1) Add people manually in My Lists while creating the tag. Type in the name of the person you wish to add and select them. You can also delete them off by double clicking.
- 2) Automatically add people through Forms. When creating a Form and editing the settings, you can have everyone who fills out that form be tagged.
- 3) Using a “Tag Field” in a Form. This functionality allows people to check a box and be added to a tag that you set up.
- 4) Using the People Menu, run a report of any info you want. When you’ve filtered your list, you can click “Add To Tag” and select a tag you’ve created already.
- 5) There is an excel hack for adding people to a tag based on information from a report or exported list. For this method, you will need a list of people you want to tag with their Account ID numbers. This is an item that can be pulled in most reports. You will also need a basic working knowledge of using a spreadsheet. Find those instructions and a sample Google Sheet [here](#).

Best Practices For Tags

- Complete a “Tag Audit” semi regularly - we recommend twice a year. Archive (Delete) any old tags that are not used or not accurate any longer.
- Tag specifically, using year or date when applicable, so you know when it’s accurate.
- Put tags under “Parent Headers” to better organize them. All of your Adult Learning Classes can be under one header, for example.
- Always make the tag first! It’s hard to remember, but essential. For this reason, RTS recommends creating a couple empty tags (labeled and created, but with nobody in them) in case you need one in the moment and didn’t remember to create one.



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