

User Manual



Manage Global Tags



Adding or Deleting a Tag for Multiple Records at One Time

With this feature you are able to add and remove Tags for multiple people with one easy to use feature. To use this feature follow the 5 simple steps.

Step 1



The screenshot displays the MARKET ACCESS DIRECT dashboard interface. At the top, a navigation bar contains five tabs: Dashboard, Attract, Communicate, Manage, and Success. The 'Communicate' tab is highlighted with a yellow background and a blue border, and a blue arrow points from a callout box to it. The callout box contains the text 'Click on Communicate and Contact Manager'. Below the navigation bar, the main content area is divided into three columns. The first column is labeled '1 Attract' and features an icon of three people. The second column is labeled '2 Communicate' and features a dollar sign icon. The third column is labeled '3 Manage' and features a folder icon. To the right of these columns, there is a 'What Next?' section with two buttons: 'Membership' and 'Add New Contact'. Below that is a 'Need Help?' section with a 'Submit Help Request' button. In the top right corner, there is a user profile icon labeled 'agent'. At the bottom center, the MARKET ACCESS DIRECT logo is displayed.

Step 2

Select the names you want to add or remove Tags from by clicking the check box in front of the name or by selecting the whole list by clicking the check box above the word "Temp".

Contact Manager			
183 Results			
<input type="checkbox"/>	First Last	Last Contact	Next Contact
Temp	Phone	Last Updated	Status : Actions Taken
	Email		
	City Zip		
	County		
<input checked="" type="checkbox"/>	Bob Jones 43 Spring Lane Wall, NJ 08012 Bjones@yahoo.com (666)123-4567 6/5/2013	4 days ago 4 days ago Default : Contract	next week
	import contract t65 fishing updated		
<input checked="" type="checkbox"/>	Tom Smith 1234 Test Lane Wall, NJ 08012 Tom@gmail.com (555)666-1234 6/5/2013	4 days ago 4 days ago Default : Email	16 minutes
	email client january 2013 newsletter life review updated		

Step 3

<input checked="" type="checkbox"/>	Bob Jones 43 Spring Lane Wall, NJ 08012 Bjones@yahoo.com (666)123-4567 6/5/2013	4 days ago 4 days ago	next week	New: Lead transferred from Demo Wilson to Agent Fake
import contract t65 fishing updated				
<input checked="" type="checkbox"/>	Tom Smith 1234 Test Lane Wall, NJ 08012 Tom@gmail.com (555)666-1234 6/5/2013	4 days ago 4 days ago	16 minutes	New: Lead transferred from Demo Wilson to Agent Fake
email client january 2013 newsletter life review updated				

Take Action

-  Add New Contact
-  Invite Contacts
-  Search Contacts
-  Search "Mail Leads"

Actions for Selected

-  Broadcast Email
-  Email Lists / Drip Emails
-  Delete Contacts
-  Manage Tags

Once you have the names selected, scroll down and on the right hand side under Actions for Selected and click on Manage Tags.

Step 4

Dashboard | Attract | Communicate | Manage | Success

Contact Manager

Add New Tag to Selected Contacts:

Add Tag Cancel

Remove Tag from Selected Contacts:

Remove Tag Cancel

Tag Stats

Tag	Contacts With Tag
import	170

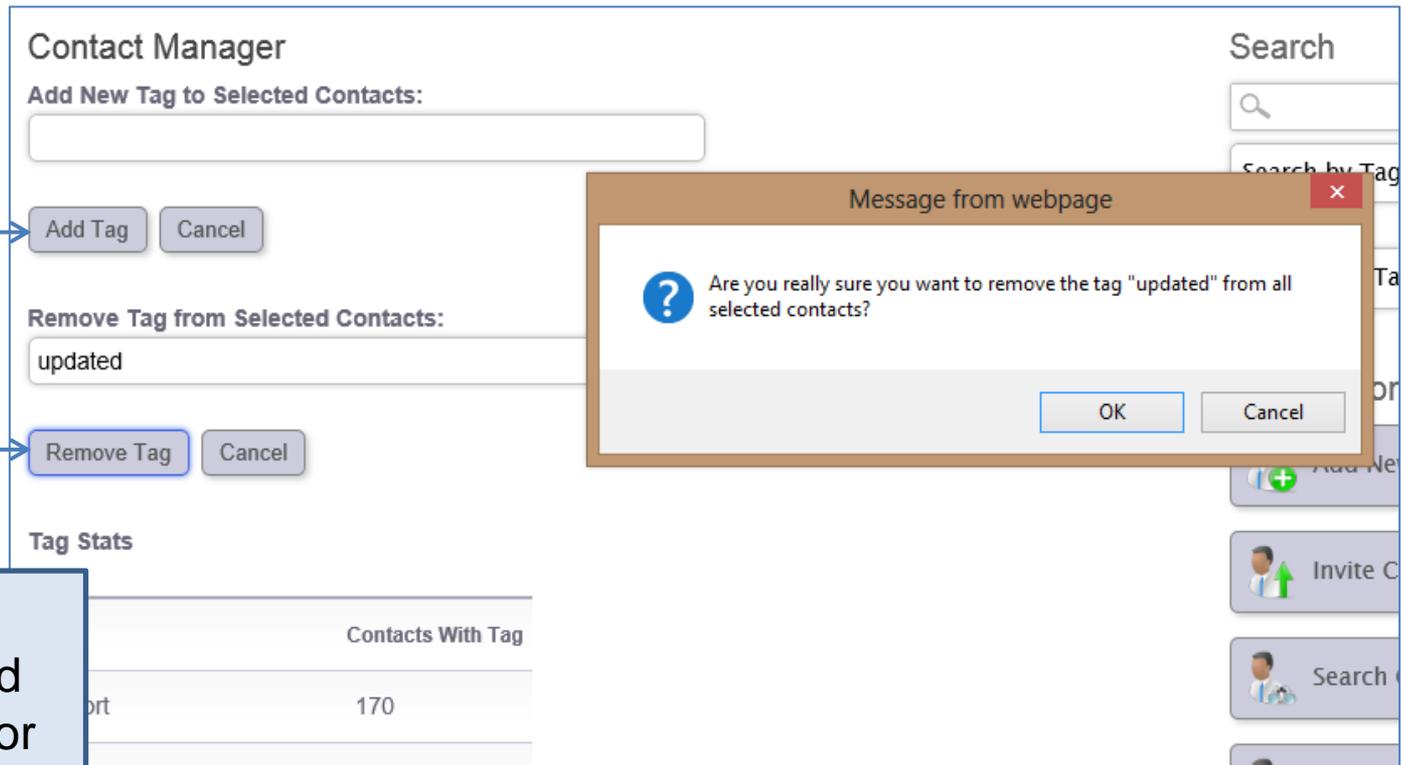
Search

Invite Contacts

Search Contacts

Here you can Add or Remove any Tags assigned to your names. You just need to click on the Add or Remove line and select the Tag you want. You can also key in a new Tag if the one you want to add is not listed. Here I want to remove the Tag “updated” from my first 2 records so I keyed in “updated”.

Step 5



Contact Manager

Add New Tag to Selected Contacts:

Add Tag Cancel

Remove Tag from Selected Contacts:

Remove Tag Cancel

Tag Stats

	Contacts With Tag
ort	170

Search

Search by Tag

Message from webpage

Are you really sure you want to remove the tag "updated" from all selected contacts?

OK Cancel

Once selected click Add Tag or Remove Tag. Confirm your change and it will be completed.