Applying Personal Tags to IQ Records

Market: House, Senate

Description: Tag are able to be applied to records and are visible only to you. This enables you to further sort and analyze records or files based on your specific needs.
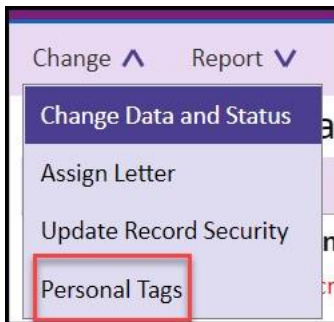
These instructions teach users how to create and apply personal tags.

Click the following link to be brought straight to the topic:

[Filtering Records Based on a Personal Tag](#)
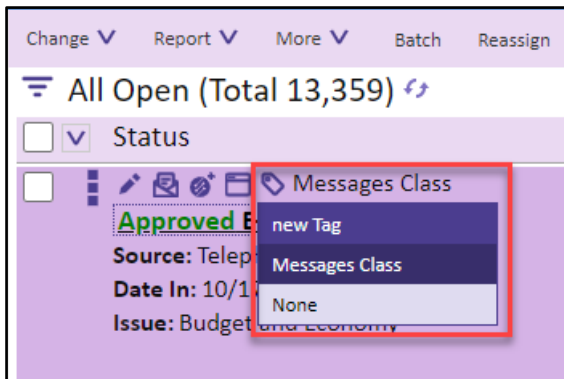
Creating and Applying Personal Tags

1. From any list of records, select the appropriate Message records. Then, click **Change**.
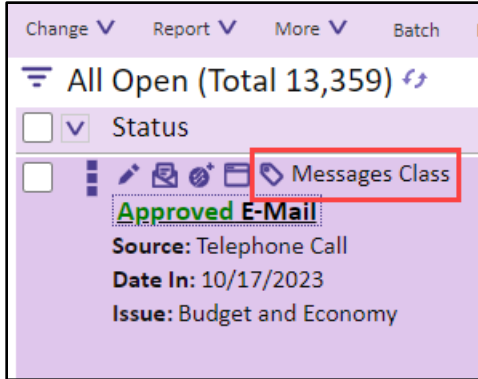
2. Select **Personal Tags**.

3. In the **Change Personal Tags** window, select an existing tag or choose to remove/add a tag. You can edit tags by selecting the **Configure**.
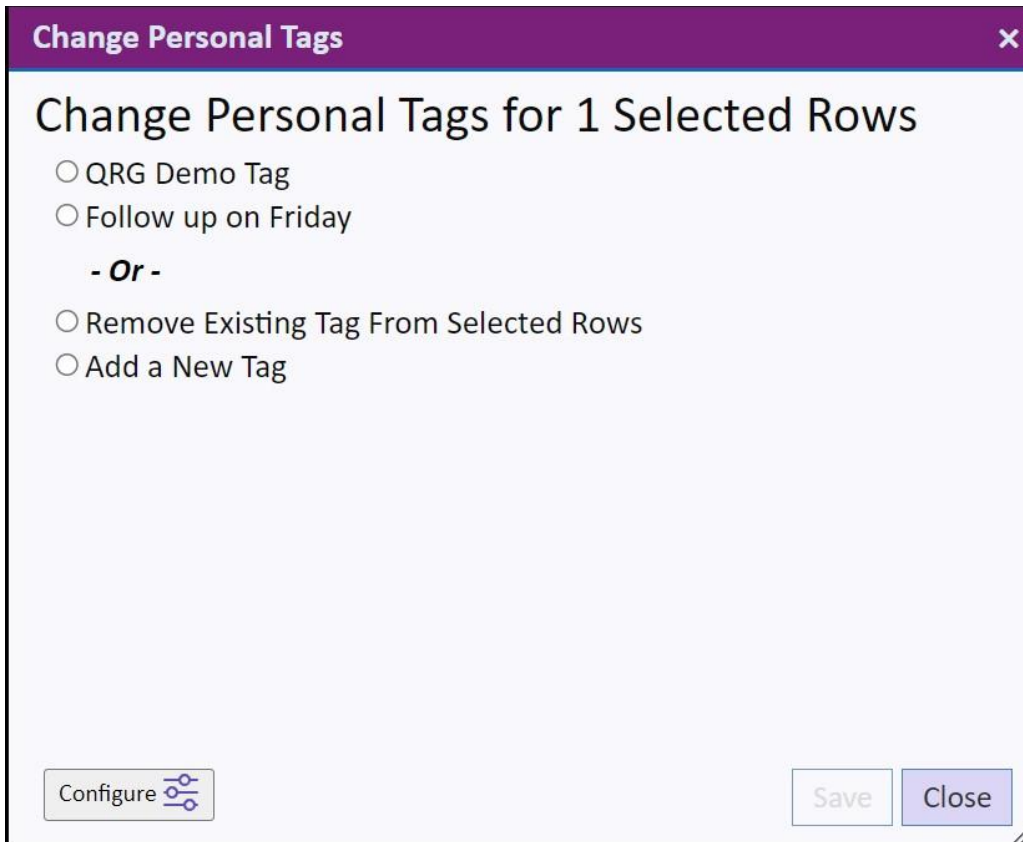
4. Click **Save**.

5. To select existing tags, click the **Tag** icon for the record and select a tag.

6. The record will reflect the selected personal tag.

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Filtering Records Based on a Personal Tag

1. Navigate to the appropriate list of records.

2. Click [icon] and navigate to the **Personal Tag** option in the Filter List. Expand **Personal Tags**. If the Personal Tag option is not displayed, click on the [icon] to add it as a view.

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Filter List ✏

> Has Bill
> Has Batch
> Mail to Email Domain
> Status
> Affiliation Code
> Affiliation Popup
> Issue Code
> Service Related
> Batch
> Mail to Name
> ZIP Code
> County
> City
> State
> District
∧ Personal Tag ✓ 🥧
  ☐ QRG Demo Tag (1)
  ☐ None (6,451)
> Selected

3. Select a tag and the results will display in the list.

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