Categories, Tags, and Labels

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Overview

Tags and Categories allow you to separate your contacts into various groups. Each contact only has one Category, but can be assigned multiple Tags. You can change a contact's tags and categories as needed.

Think of Categories like your largest buckets. All your contacts will be in one bucket at a time. Categories are mandatory, so that each contact must be assigned to a category.

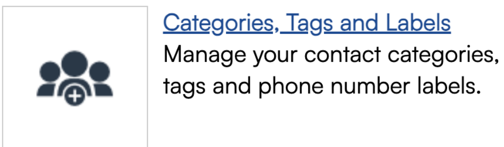
Tags are not mandatory. These are for segmenting larger buckets into smaller, most specific targets such as taking all Contacts labeled "Customer" and further refining that group to "Spring Cleaning customers" or "Fall HVAC Maintenance Outreach".

There is no limit to how many tags or categories you create; however, we strongly recommend to be deliberate when creating them. It can quickly increase to a number that makes it too difficult to find what you are looking for. Start small and expand as you grow more confident in the tool.

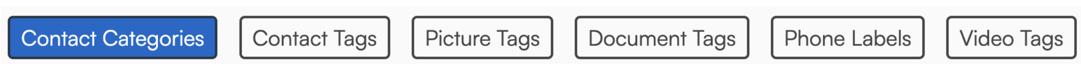
This article will review:

Settings and Navigation

Go to **Control Panel > Categories, Tags and Labels**.



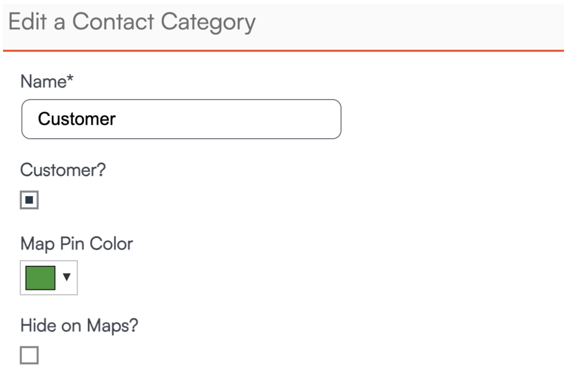
Here you will have a top menu bar allowing you to switch between options.



Contact Categories

By default service**minder** sets up three contact categories: Prospect, Partner, Customer. A contact category is your way of labeling the status of a client in relation to your business. For example, when they come in as a lead you might label them as Prospect and when they "buy" are invoiced they move to the Customer category. You can add more Categories or edit existing ones to best match your workflow.

When adding or editing a Category, you designate whether or not contacts within the category are Customers. You can assign a Map Pin Color which can help you visualize your Contacts on the Map. You can also choose to hide Contacts from this Category on the Map. This would be useful for Contacts that are Partners or Inactive (a.k.a. a "dead lead" that will not be a customer in the future).



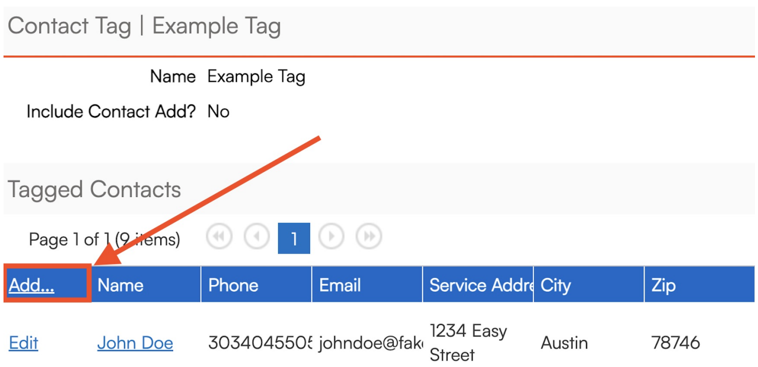
Contact Tags

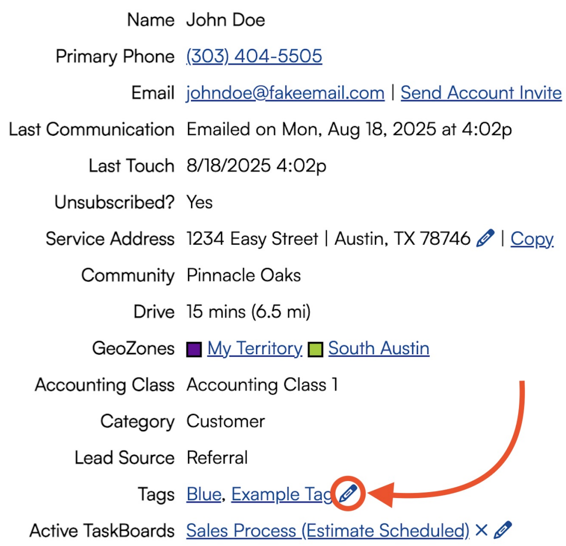
Tags are a way to build sub-lists of contacts. A contact can have any number of tags and within SM there are ways to filter by tags, which will show all contacts who have a particular tag (or a list of tags).

You can use tags in a variety of ways. Tags are commonly used to:

- Designate Service Type. or Frequency (i.e., Weekly, Monthly, Bi-Annually, etc)
- Group Contacts for a marketing Email Campaign (i.e., 2024 Labor Day Email Blast)

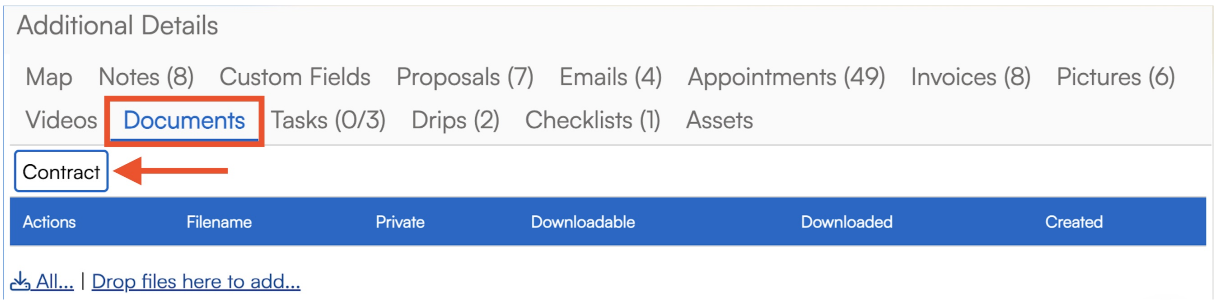
To create tags, go to **Contact Tags** in the upper menu on the **Categories, Tags and Labels** page. You can add a Tag to your Contacts on the Tag details page by clicking **Add** under Tagged Contacts. You can also add it on the Contact details page using the pencil icon next to Tags.



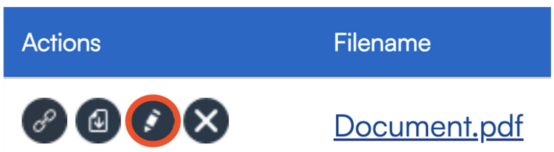


Document Tags

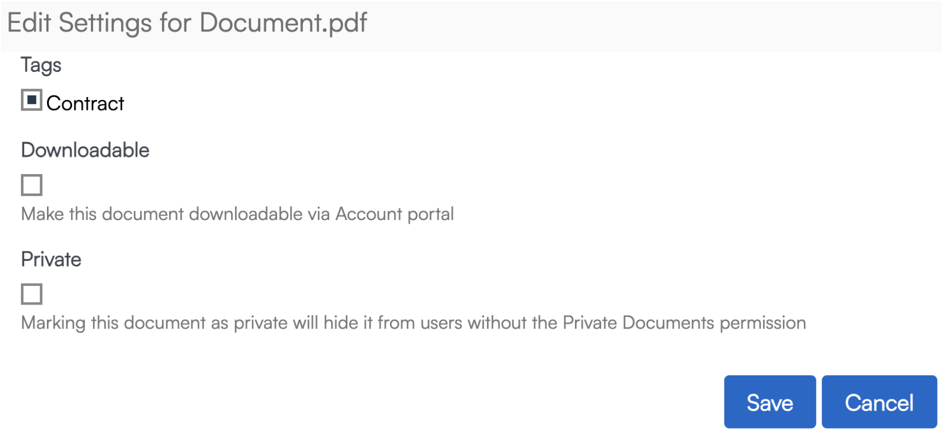
Document Tags are created in the same place as Contact and Photo tags: The Control Panel. Open "Categories and Tags" in the Control Panel. Click on "Documents" and add yor desired document tags, making sure they are marked as active. Once these tags are created, go to any contact, click on the Documents tab at the rignt, in the Additional Details section, and those tags will be visible.



Just as with photos, click on the pencil icon on your uploaded document to tag it.



Select the tag or tags desired, then hit save. At this point, a user can click on the tag name at the top of the documents tag to sort documents.



Contact Documents

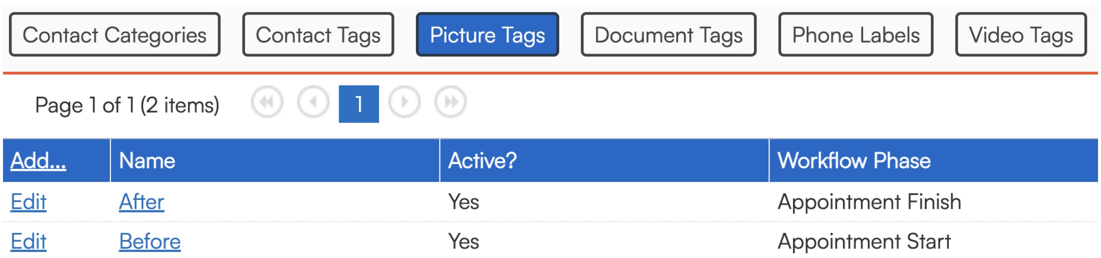
The Contact "Additional Details" section is where every bit of information and history for that contact lives. The "Documents" tab is where one can upload any kind of document related to that contact. These documents could be PDF's, spreadsheets, word files, etc. Imagine a long-time customer with multiple proposals and projects.

Any document-type attachments which are attached/uploaded to a contact proposal will also appear in this Documents section on the contact record. As one can imagine, over time this documents tab could become quite full. To that end, a user can employ Tags on documents for sorting and organizing.

Picture and Video Tags

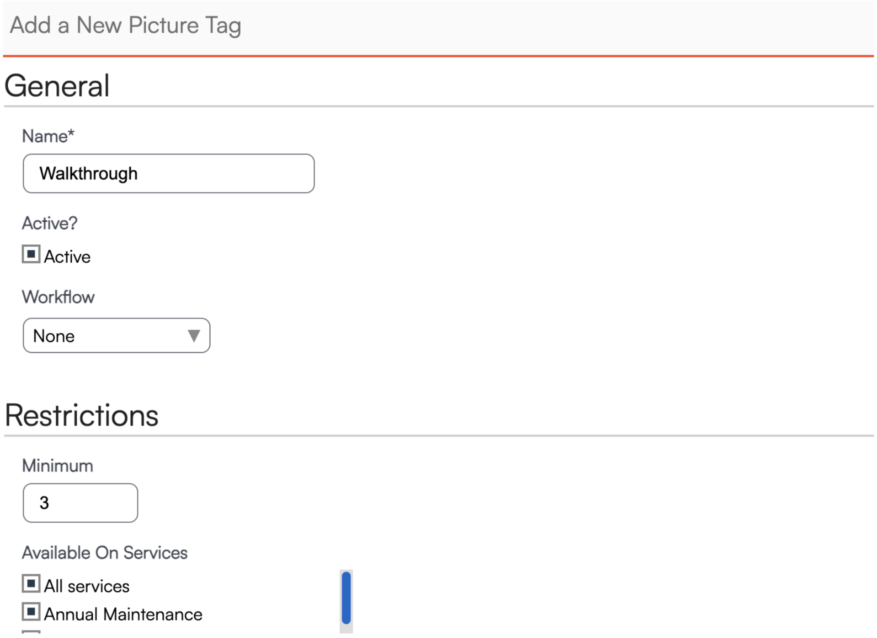
Picture Tags and **Video Tags** allow you to identify and group photos/videos that are added to the system (whether via upload or by taking pictures during an appointment). The also include configurations to determine when photos in that category are required during an appointment.

Click **Add** at the top of the grid to create a new tag. Common tags are "Before" and "After" so you can capture proof of completed work throughout the appointment.



When creating a new **Picture Tag** or **Video Tag**, you can configure the following options:

- **Name**: The name of the picture tag.
- **Active**: Is this picture tag currently in use?
- **Workflow**: Choose to include this picture tag option during the **Appointment Start** or **Appointment Finish** phase.
- **Minimum**: Set a required minimum number of pictures with this tag to make this picture type mandatory on appointments.
- **Available on Services**: Restrict which services this picture tag is available and/or required on.



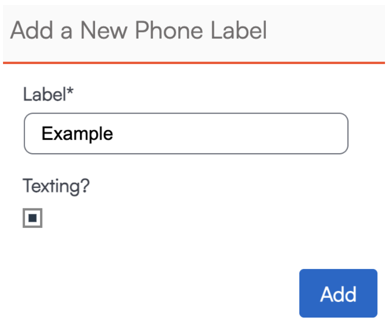
Phone Labels

Phone Labels allow you to categorize different contact phone numbers and control whether or not that phone number is available for texting.

Your account will come with three default Phone Labels:

- Home
- Mobile
- Office

Mobile is the only default phone label that is marked as available for texting. Phone numbers labeled as Home, Office, or any other label that does not have the "Texting" box checked on it will not allow you to send text messages to it.



Deploying Brand Tags and Categories

Brands can set tags and categories for cohesion across all locations. You can deploy these from the Brand level.

For owners that wish to make changes to tags or categories set at the brand level, you will be unable to. Likewise, if you ask for assistance from a SM team, we will need to consult and get approval from the Brand Administrator or someone from the brand operations team.

FAQs

How do I download a list of customers with a specific tag and also have their notes downloaded with it?

In **Reports > Downloads**, you can do one of two things:

1: **Download Contact Notes** and filter down to that tag (there's a **Tag** column in it and each note is it's own line).

2: **Download Contacts**, check the box to include **Notes**, then filter down to the **Tag** (notes are consolidated on the contact).

How do I connect a tag to a Drip Campaign?

1. Set up the tag first.
2. Go to **Drips** in the navigation bar and select **Triggers < Ad**d, You must provide a **Name** and a **Description**.
3. For the option **Trigger On** select **Contact Tag Added** in the dropdown.
4. Select the tag you just created. From there, build the campaign to your needs.

Why can't I add or edit any Tags for Contacts?

You may not have the proper user permissions. If you go to your **User > Permissions** tab and you cannot edit **Contacts** then you will not have that ability.

(or)

You may not be able to edit the tags because they are deployed to all locations from the brand account. Brands have some control over settings for cohesive Brand messaging or reporting. Tags fall into an area they may want to limit owner access to.

Why don't I see the Tag I created for Contacts?

Verify that you created a Contact Tag and not a Contact Category. Go to **Control Panel < Categories, Tags, Labels** and look at the top right buttons to select **Contact Tag**.