

How to Create and Manage Tags

Introduction

Tags in MortarStone allow you to assign specific attributes to households, helping your church segment and identify groups more effectively. You can create tags manually or upload them in bulk from your Church Management System (ChMS).

Prerequisites

- (Optional) CSV file exported from your ChMS containing household IDs and tag names
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Creating a Tag

1. Log in to your MortarStone account.
 2. Go to the **Tags** section under **Giver Development** in the left-hand navigation.
 3. Click the **Add Tag** button.
 4. Enter the **Tag Name** (e.g., *Volunteer, New Member, Youth Ministry*).
 5. Enter **description** of the tag
 6. Leave the **External ID** field blank.
 7. Click the **Create Tag** button to create your new tag.
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Assign Tags to a Household

1. Go to the **Households** section under **Giver Development**.
2. Find the household you want to tag and click the household name.
3. In the individual household view, click the **Edit Tags** button.

Evelyn . Evelyn		Active ✓	Band 2	TFM Score 56.9	⋮
🏠 [Redacted]		📅 [Redacted]			
📞 Phone [Redacted] View All →	✉ Email [Redacted] View All →	🏠 Address [Redacted] View All →			
🏠 Attender Regular Attender		Edit tags			

4. Select the tag you want to assign. *You may assign more than one tag to a household.*
5. Click the **Update Tags** button.

Searching for Households by Tag

1. Navigate to the **Search** tool in MortarStone under **Giver Development**.
2. Click the **New Search** button.
3. Click **Add A Filter**. The filter options window should slide in.
4. Select **Tags** under **Household Attributes**.

Filter Options

Household Attributes

Age
Find households by the age of the head-of-household

Address
Find households by city, state, or zip code

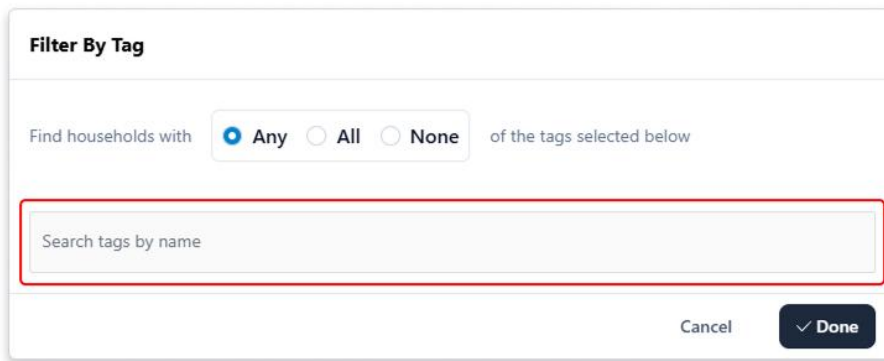
Median Income
Find households by median income (based on US Census data)

Missing or Present Attribute
Find households who do or don't have certain data (address, email, etc.)

Tags
Find households that have (or don't have) certain tags

Location Distance
Find households by distance from one or more locations

- Click the field that says **Search Tags by Name** to select one or more tags to filter your results.



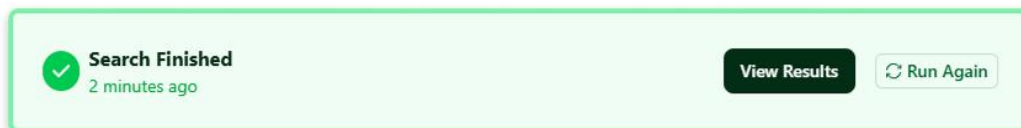
The 'Filter By Tag' dialog box has a title bar. Below it, the text 'Find households with' is followed by three radio buttons: 'Any' (selected), 'All', and 'None'. To the right of these buttons is the text 'of the tags selected below'. Below this is a large text input field with the placeholder text 'Search tags by name'. At the bottom right of the dialog are two buttons: 'Cancel' and 'Done' (with a checkmark icon).

- Click the **Done** button.
- You will then see a bar appear at the bottom- click **Run Search**.



A light blue horizontal bar with a circular loading icon on the left. To its right is the text 'Search Pending' and 'Run this Search to generate results.' On the far right is a dark blue button with the text 'Run Search'.

- Finally, click **View Results** to see the resulting list of households.



A light green horizontal bar with a green checkmark icon on the left. To its right is the text 'Search Finished' and '2 minutes ago'. On the far right are two buttons: 'View Results' (dark green) and 'Run Again' (light green with a refresh icon).

Uploading Tags in Bulk

If your church uses tags extensively, it's faster to upload them in bulk.

- Export a **CSV file** from your Church Management System containing:
 - Household ID
 - Tag Name (as you want it to appear in MortarStone)
- In MortarStone, go to **Settings** → **Data Uploads** → **New Upload** button.
- Click the **Choose File** button and select the CSV file to upload.
- Click the **Create Upload** button.

 **Tip:** Most churches update tags quarterly to keep their data accurate.

Need Help?

If you have questions or need assistance, contact support@mortarstone.com.