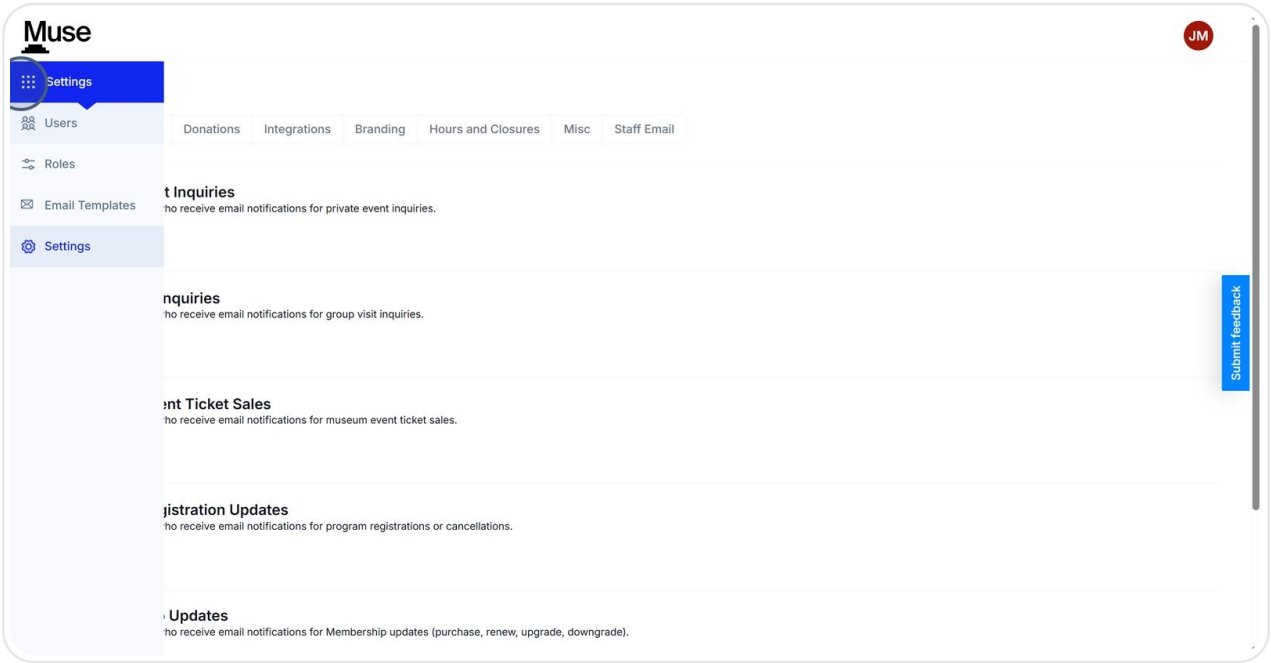


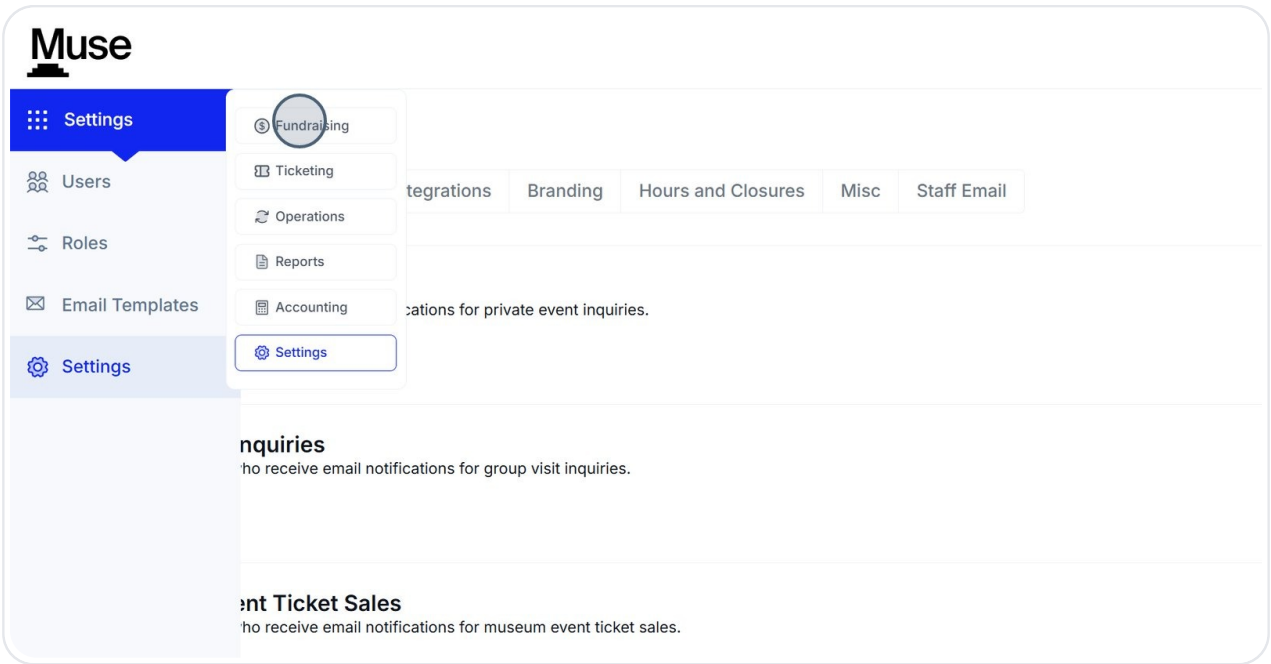


Constituent Tags

1. Click the blue North Star icon.



2. Click "Fundraising."



3. Open 'Settings' from the Fundraising navigation menu.

Muse Search for an individual or organization JM

Fundraising Dashboard

[Record a donation](#) [Create a contact](#) [Create a task](#) [Record a pledge](#)

Recent donations

Date	Donor Name	Campaign	Commitment Type	Payment Type	Frequency	Amount
8/21/26	The Rodgers Family Fund for the Arts	General Fund	Donation	Money	One-time	\$1,000.00
8/21/26	Corrine Bailey	2026 Capital Campaign	Donation	Money	One-time	\$500.00
8/24/26	Corrine Bailey	General Fund	Donation	Money	Monthly	\$25.00
8/22/26	Amanda Fraser	General Fund	Donation	Money	Monthly	\$25.00
8/26/26	Lula Adams	2026 Capital Campaign	Donation	Money	Monthly	\$5.00

Today's tasks

There are no incomplete tasks due today

Favored campaigns

30th Anniversary ★ 27.97%

2026 Capital Campaign ★ 0.60%

Submit feedback

4. To create your list of constituent tags, click on the "Tags" tab.

Muse Search for an individual or organization JM

Fundraising Settings

[Acknowledgement Letters](#) [Tags](#)

Acknowledgement Letter Threshold

Global Threshold

\$250.00 ✓

Template Management

No-Consideration Template ⓘ

Dear *CONSTITUENTTITLE* *CONSTITUENTFIRSTNAME* *CONSTITUENTLASTNAME*,

Thank you for your generous contribution of *AMOUNT* made to the The Muse Collective on *DATEOFCONTRIBUTION*. Your support plays a vital role in the success of our educational programs, exhibition and preservation efforts. We are incredibly grateful for your generosity and commitment to our mission.

As required for tax purposes, please note that no goods or services were provided in exchange for your contribution.

Please retain this letter for your records. Should you have any questions or need additional documentation, feel free to contact us.

With sincere appreciation,

Save changes

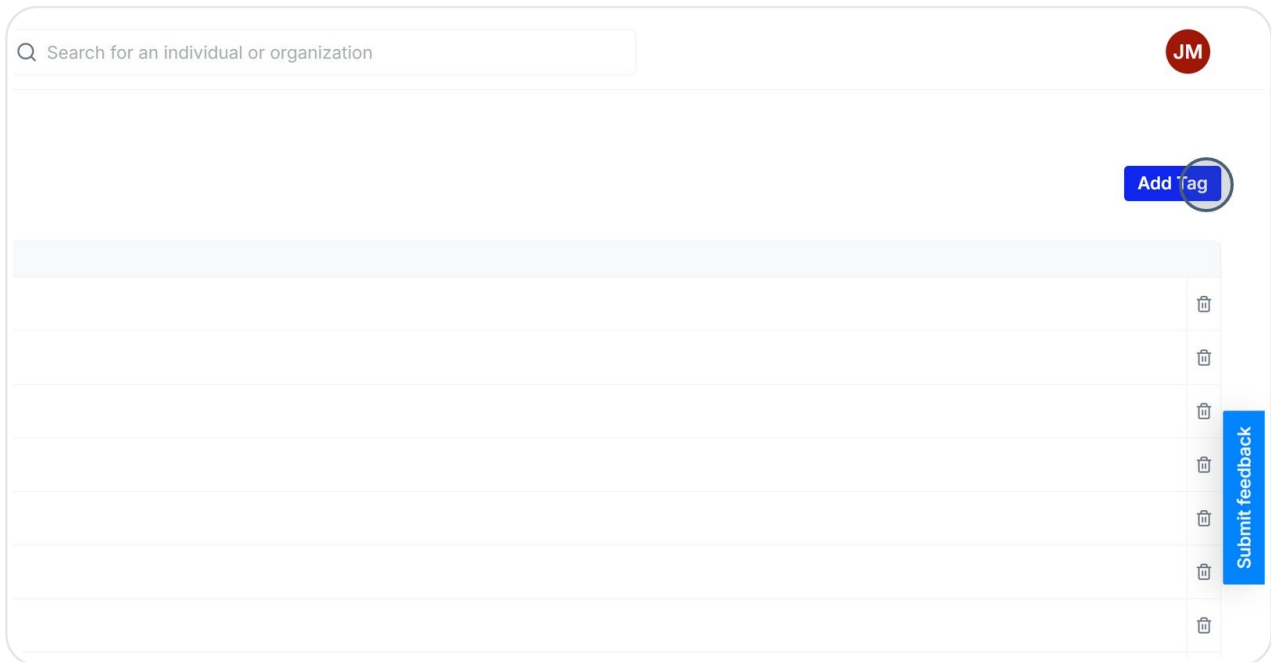
In-Kind Template ⓘ

Dear *CONSTITUENTTITLE* *CONSTITUENTFIRSTNAME* *CONSTITUENTLASTNAME*,

Thank you for your generous contribution of the following on *DATEOFCONTRIBUTION*:

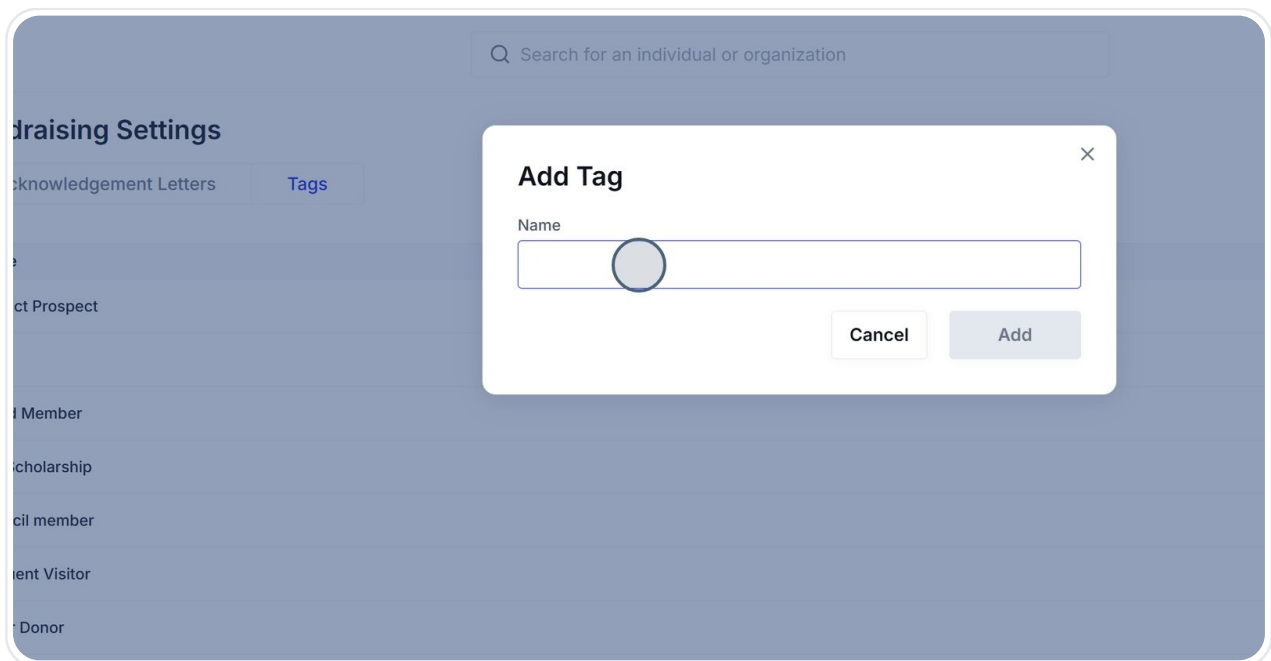
Submit feedback

5. Click 'Add Tag'



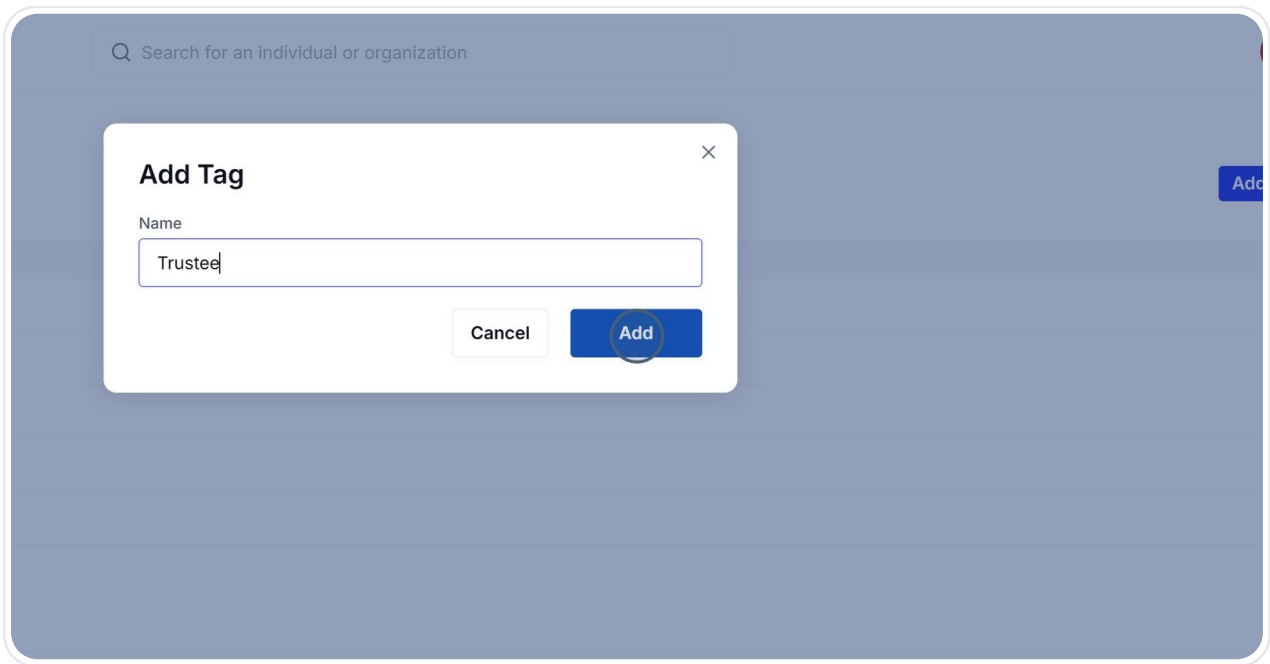
A screenshot of a web interface for adding tags. At the top, there is a search bar with the placeholder text "Search for an individual or organization". In the top right corner, there is a red circular profile icon with the initials "JM". Below the search bar, there is a large, empty rectangular area for listing tags. On the right side of this area, there is a vertical column of trash icons. To the right of the trash icons is a blue button labeled "Submit feedback". In the top right corner of the main content area, there is a blue button labeled "Add Tag", which is circled with a blue ring.

6. From here, you can build your list of constituent tags. Common tags include Artist, Board Member, Frequent Visitor, VIP, and Volunteer, among many other creative ways to segment your constituents.



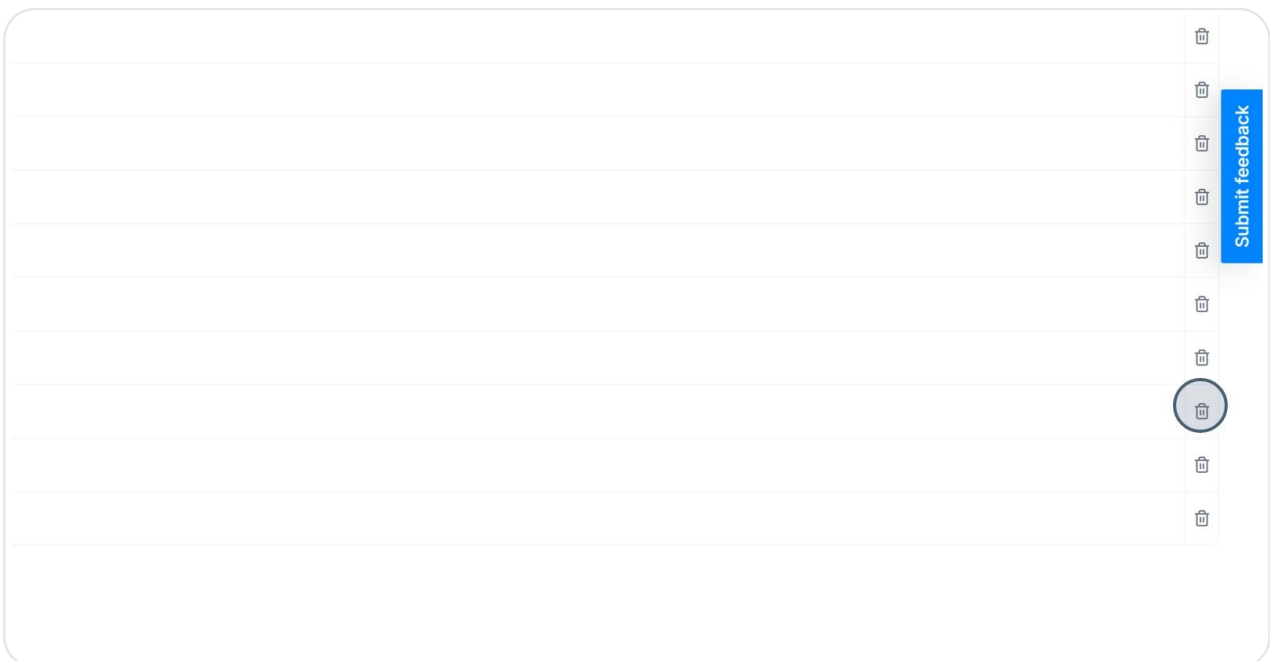
A screenshot of a web interface showing the "Add Tag" modal. The background is a dark blue-grey color. On the left, there is a sidebar with the heading "Fundraising Settings" and a list of items: "Acknowledgement Letters", "Tags" (highlighted in blue), "Direct Prospect", "Board Member", "Scholarship", "Council member", "Frequent Visitor", and "Donor". In the center, there is a white modal box titled "Add Tag" with a close button (X) in the top right corner. Inside the modal, there is a label "Name" above a text input field. Below the input field, there are two buttons: "Cancel" and "Add".

7. Click "Add" to build out your list of tags.



A screenshot of a web application interface. At the top, there is a search bar with the placeholder text "Search for an individual or organization". Below the search bar, a modal dialog box titled "Add Tag" is open. The dialog has a close button (X) in the top right corner. Inside the dialog, there is a label "Name" above a text input field containing the word "Trustee". At the bottom of the dialog, there are two buttons: "Cancel" and "Add". The "Add" button is highlighted with a red circle. In the background, a blue button labeled "Add" is partially visible on the right side.

8. To remove a tag from the list, click the trash can icon to the right of the listed tag.



A screenshot of a web application interface showing a list of tags. The list is represented by a table with 10 empty rows. To the right of the table, there is a vertical column of trash can icons. The trash can icon in the 8th row is highlighted with a red circle. To the right of the trash can icons, there is a blue button labeled "Submit feedback".

9. You'll be asked to confirm the deletion as doing so cannot be undone and removes the tag from any constituent where it was already applied. Click "Delete" to confirm.

