Apply a tag to a contact record@

This article applies to: Pro Max

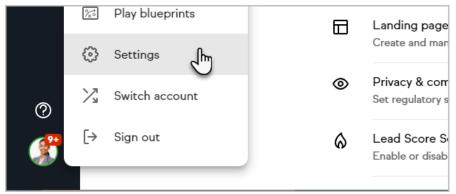
- 1. Create a Tag
- 2. Manage tags on a contact record
- 3. Manage tags via Settings

Use Tags to organize and group your contact records. With Tags you can filter your contacts, create customized segmentation and lists, and track the metrics of your custom segments over time.

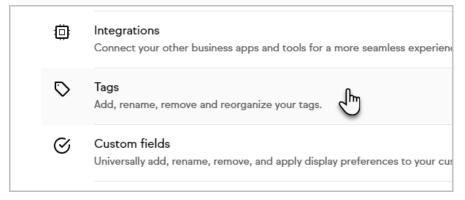
There is no limit to the amount of tags you can create, however you may notice some performance issues in tag-related menus after creating more than 1,000 tags.

Create a Tag

1. Click your avatar and click Settings



2. Click Tags



3. Click Add a tag or the + button



4. Enter a tag name, category, and description

Tag name*		
Tag category	~	
Tag description		

5. Click Save

Q Sea	rch contacts	New ~
	X Add new tag	Save
	Tag name* Interested in subscription	
	Tag category Customer Feedback	~

Manage tags on a contact record

1. Navigate to the contact you want to edit and click the Tag card

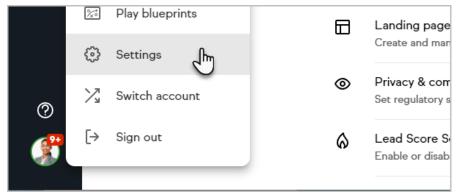
Appointment conf	irmation	
Tags Added: Oct. 8		\Diamond
Imported by Jack	Tue Oct 08 11:56:18 EDT 2019	Ŀ
Money		\$1

2. You can search for tags applied to the contact, add a new or existing tag, or delete tags.

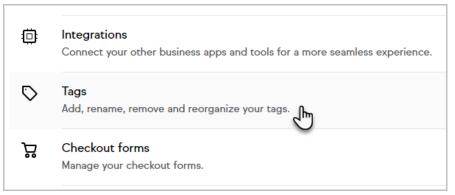
÷	Tags Jack Linette	Manage all tags 🕂
٩	Search tags	
\bigcirc	Tue Oct 08 11:56:18 EDT 2019 Added Tue, Oct 8	団
\Diamond	Imported by Jack Added Tue, Oct 8	団

Manage tags via Settings

1. Click your avatar and click Settings



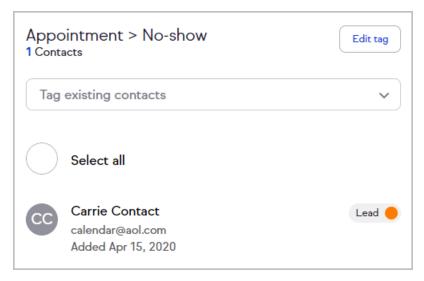
2. Click Tags



3. Select your desired tag from the list on the left side of the screen.

New Customer Customer Tags
S Appointment > No-show
Invite Lead to Schedule Appointment Uncategorized

4. This will display a list of contacts with the selected tag.



 Click the Tag existing contacts drop-down to add the selected tag to additional contacts. Once the contact is selected from the list, the tag will be applied.

Appointment > No-show 1 Contacts	Edit tag
- Tag existing contacts	~
Rick Sanchez ricksanchez@rickmail.com	
George Michael Bluth gmbluth@bluthbananas.com	