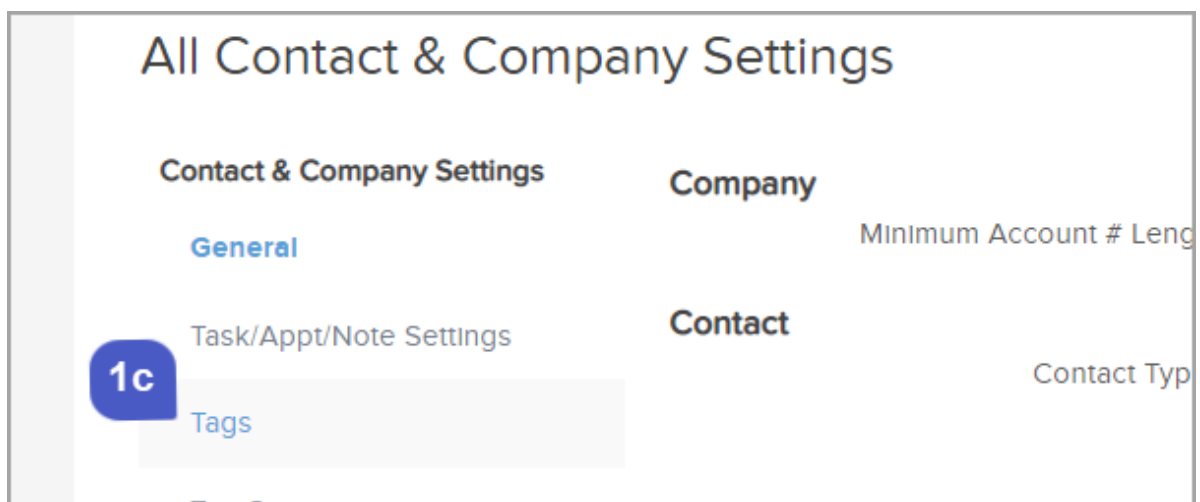
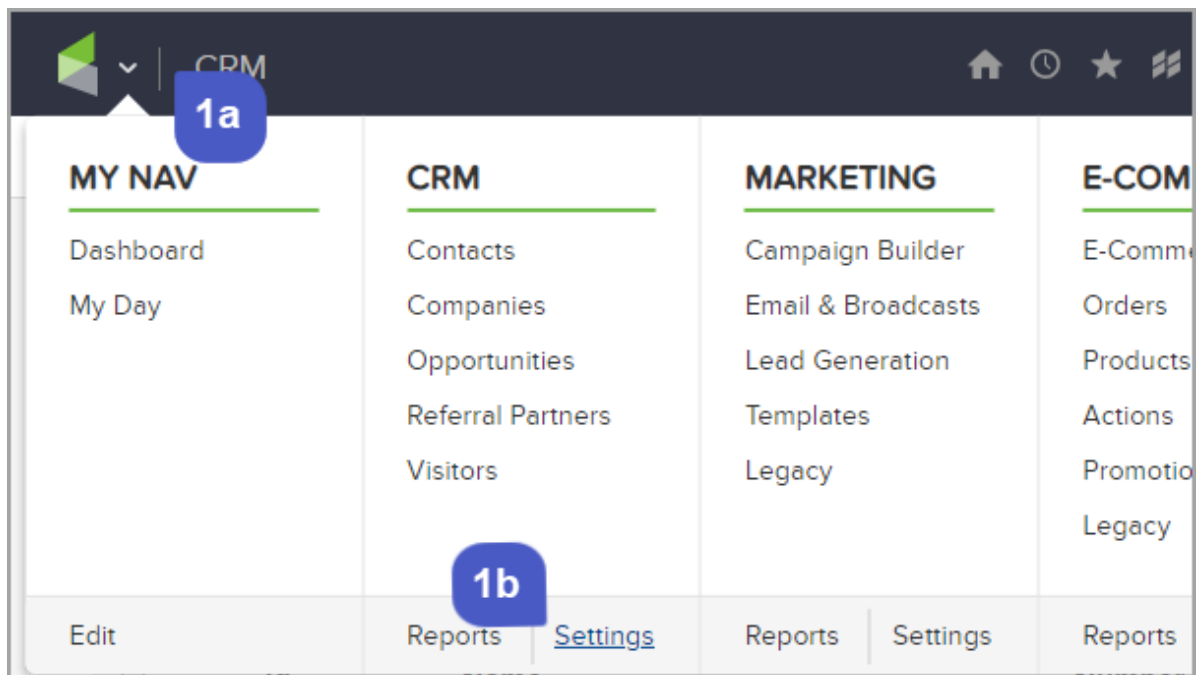


Create a Tag

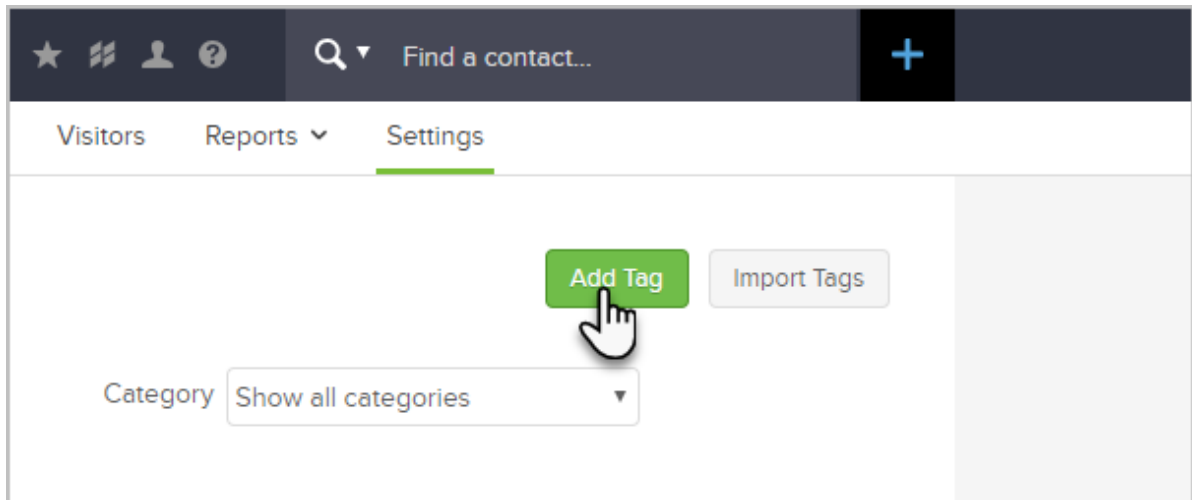
There are several ways to create tags in Infusionsoft. Often, you will create them on-the-fly while creating campaigns, contact records, emails, landing pages, etc... You can also go to CRM > Settings > Tags and create new tags or manage existing tags.

Create a Tag

1. Go to CRM > Settings > Tags.



2. Click Add Tag.

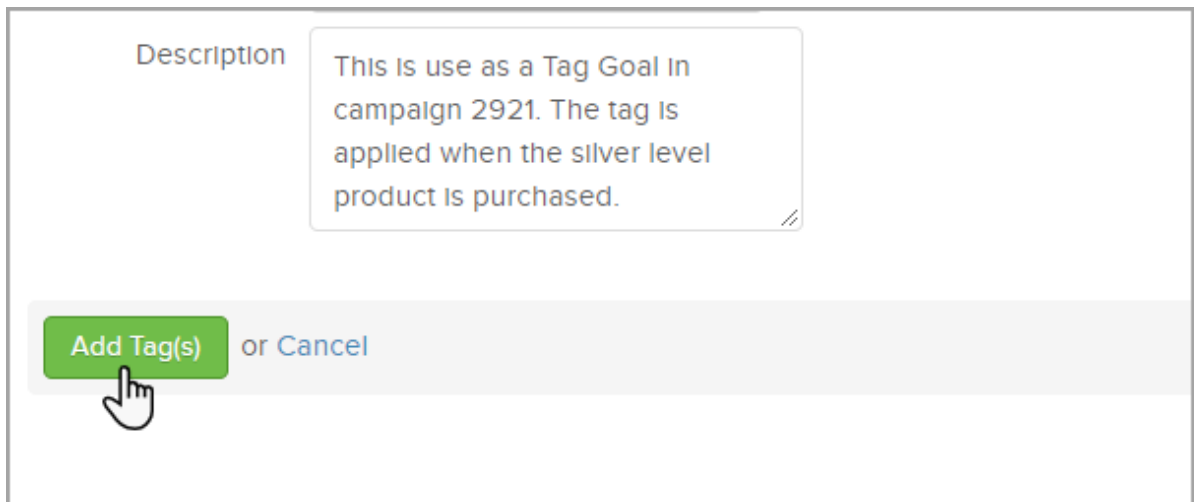


3. Setup your tag:

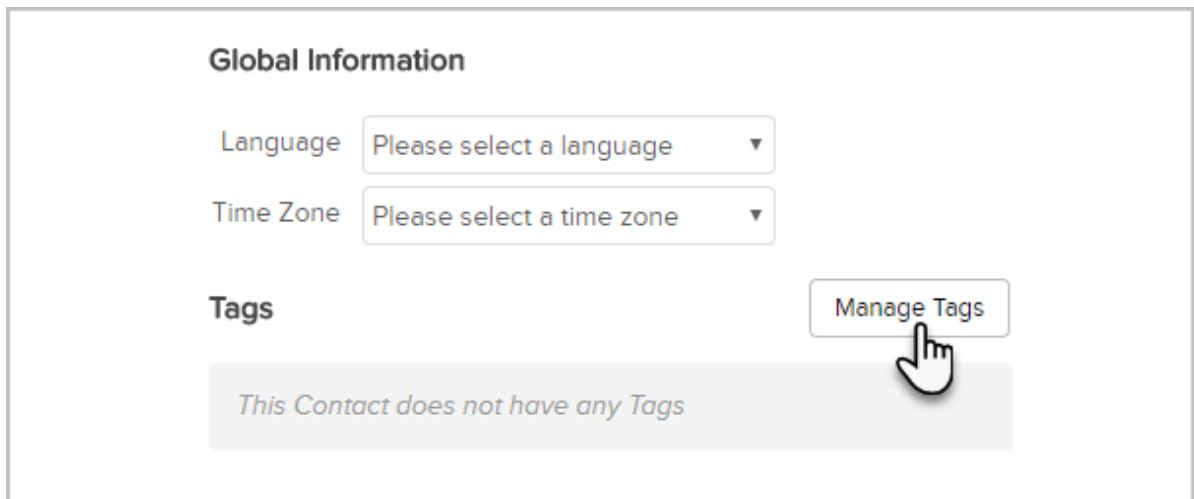
- a. Enter a name.
- b. Choose a category or create a new category by entering it into the (Other) field.
- c. Add a description to remind you and other users of the purpose of the tag (optional).

A screenshot of a form for creating a tag. The form has three main sections. The first section is labeled 'a' and contains a 'Tag Name' text input field with 'Silver Level' entered. The second section is labeled 'b' and contains a 'Category' dropdown menu with 'Customer' selected, and an empty text input field labeled '(Other)'. The third section is labeled 'c' and contains a 'Description' text area with the text: 'This is use as a Tag Goal In campaign 2921. The tag is applied when the silver level product is purchased.'

4. Click Add Tag(s).



5. The tag is now available in any area of Infusionsoft that allows you to apply a tag. For example, while on a contact record, you can click the **Manage Tags** button located to the right of the contact record.



6. If you are looking at a list of contacts, quickly manage tags by clicking the **Tags** icon.



View a list of contacts with a given tag applied

1. Go to CRM > Settings > Tags.
2. Click the number under the **Number of people** column.



3. You will be redirected to CRM > Contacts with the list of contacts that have the tag applied.

