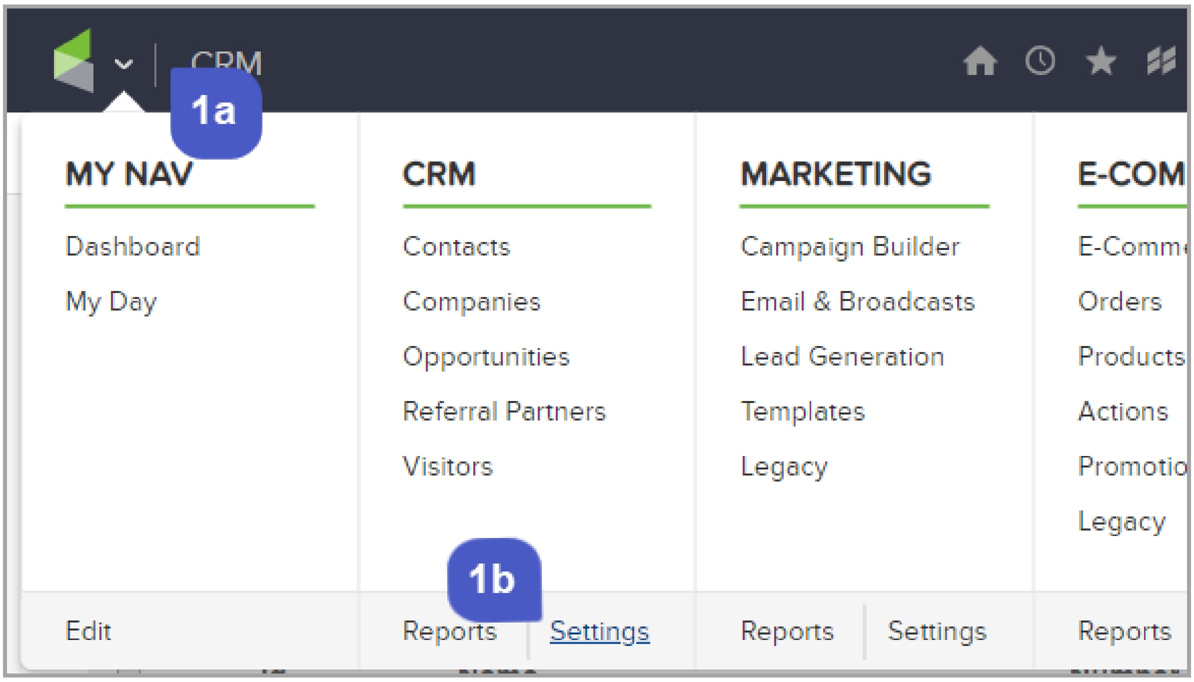
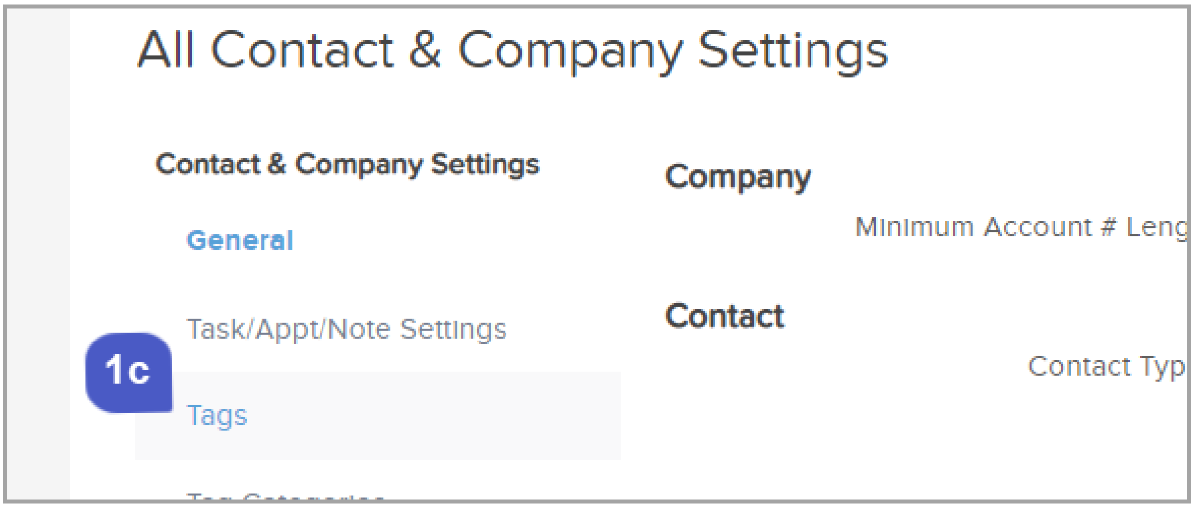
Create a Tag

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.

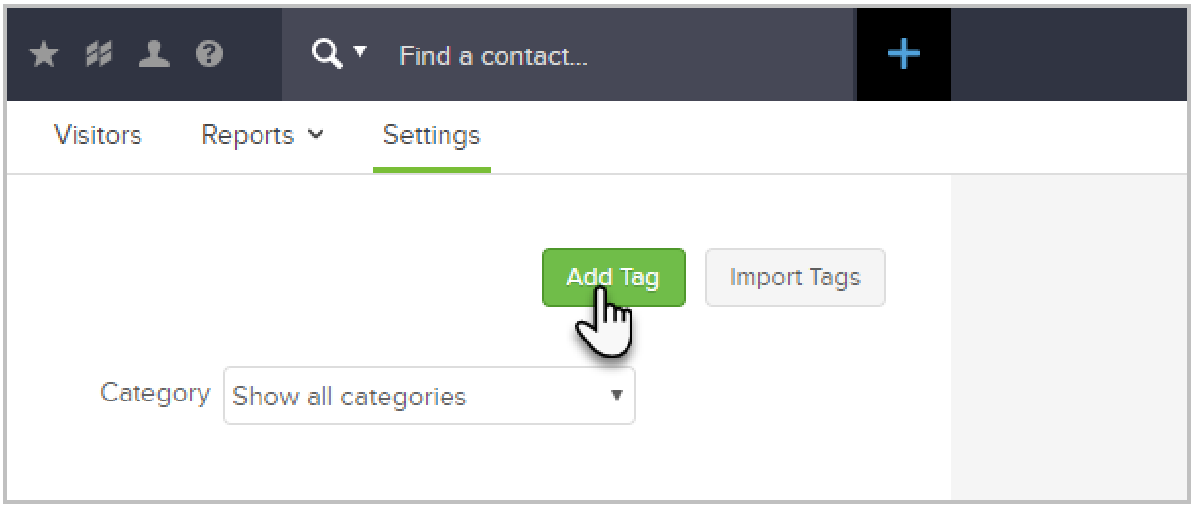
Create a Tag

1. Go to CRM > Settings > Tags.



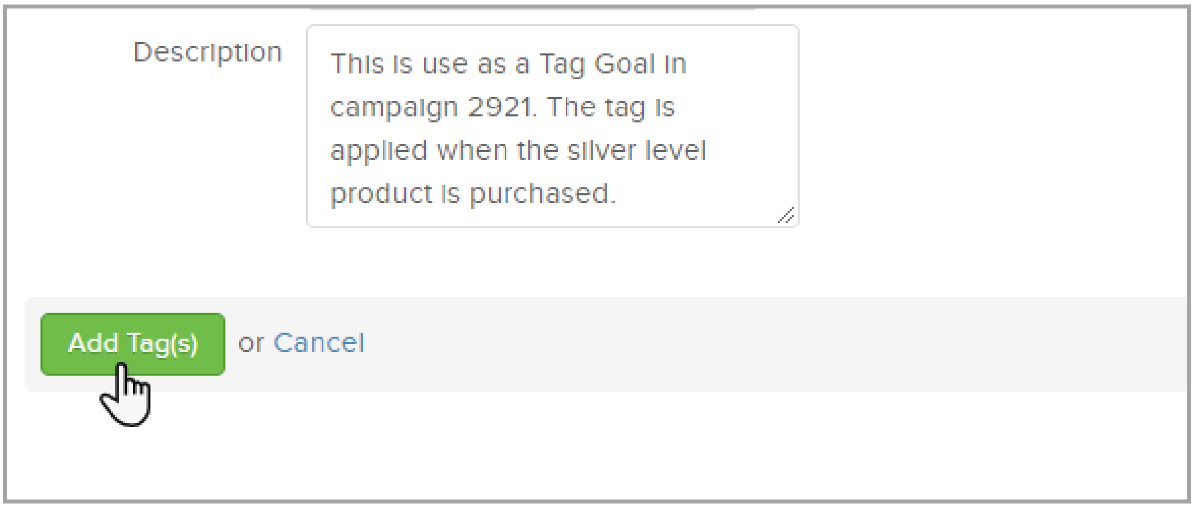


2. Click **Add Tag.**

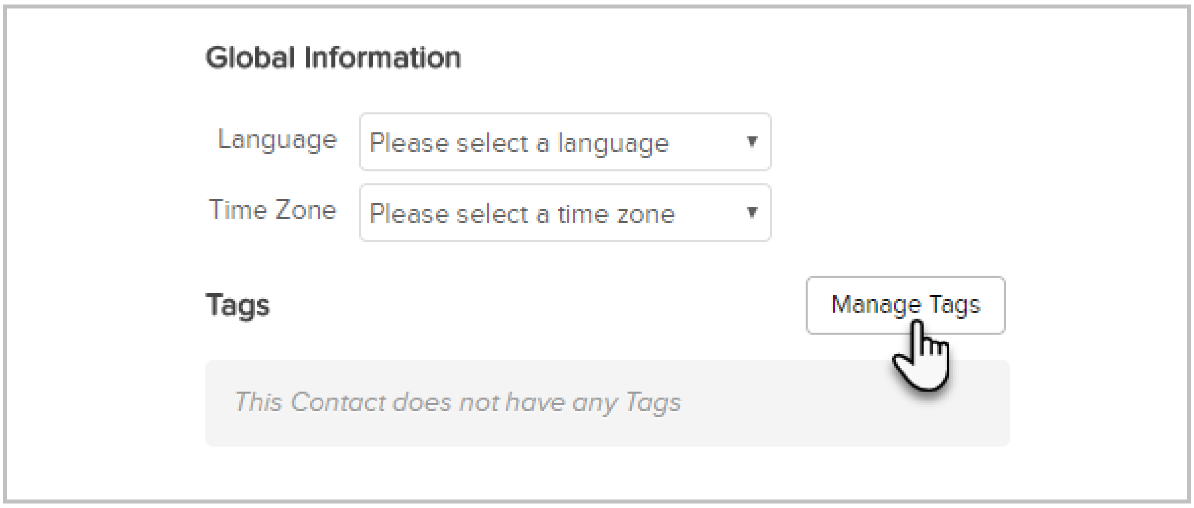


3. Setup your tag:
    a. Enter a name.
    b. Choose a category or create a new category by entering it into the (Other) field.
    c. Add a description to remind you and other users of the purpose of the tag (optional).

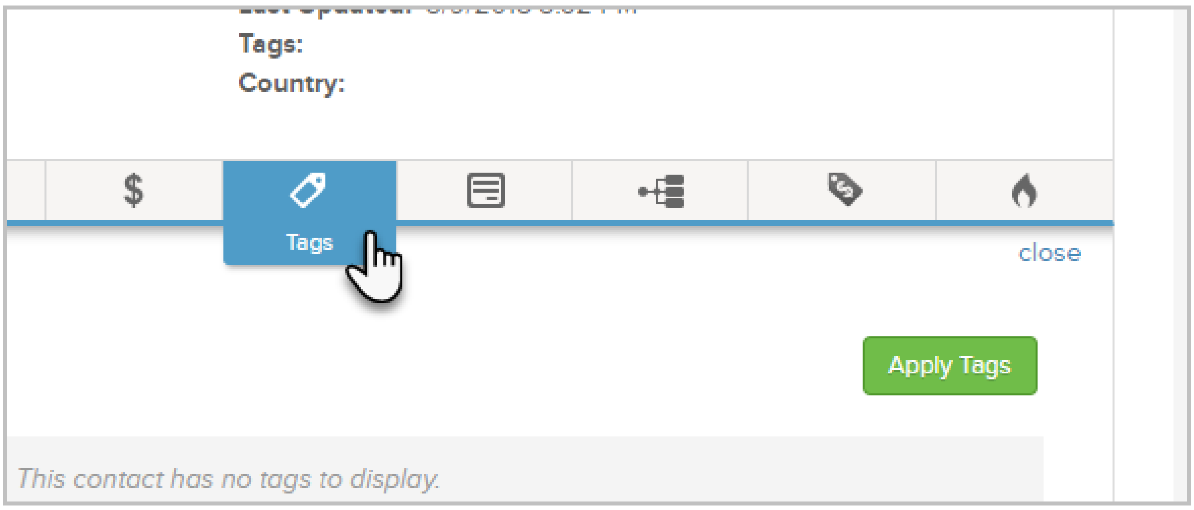
4. Click **Add Tag(s).**



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.