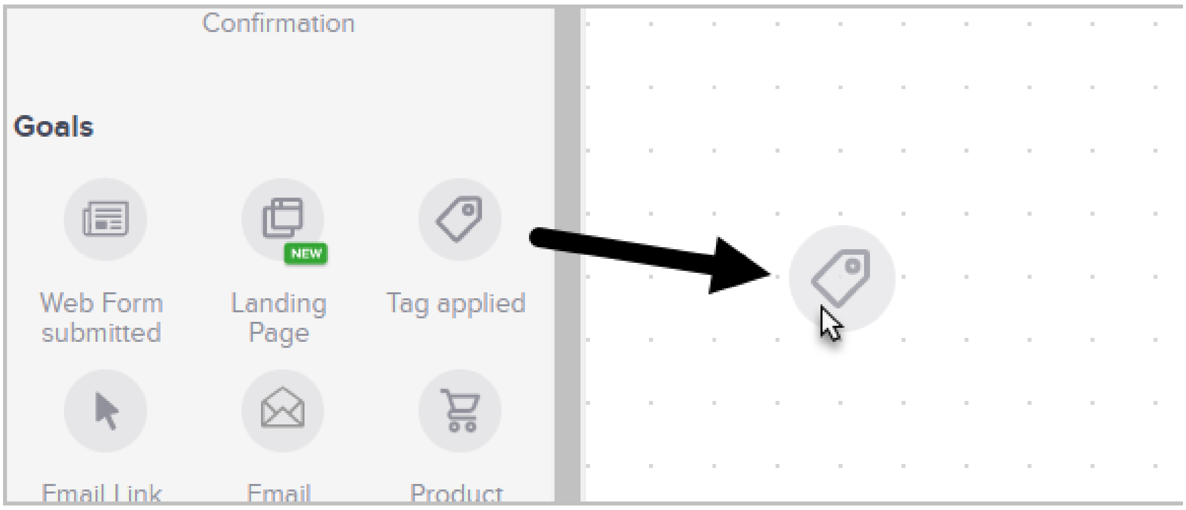
Create a Tag Goal

Tags are searchable labels that are used to segment contacts. They can be updated automatically as part of a campaign sequence or be manually updated by an Infusionsoft user. Tags can be applied to individual contact records or through a batch action on a list of contacts.

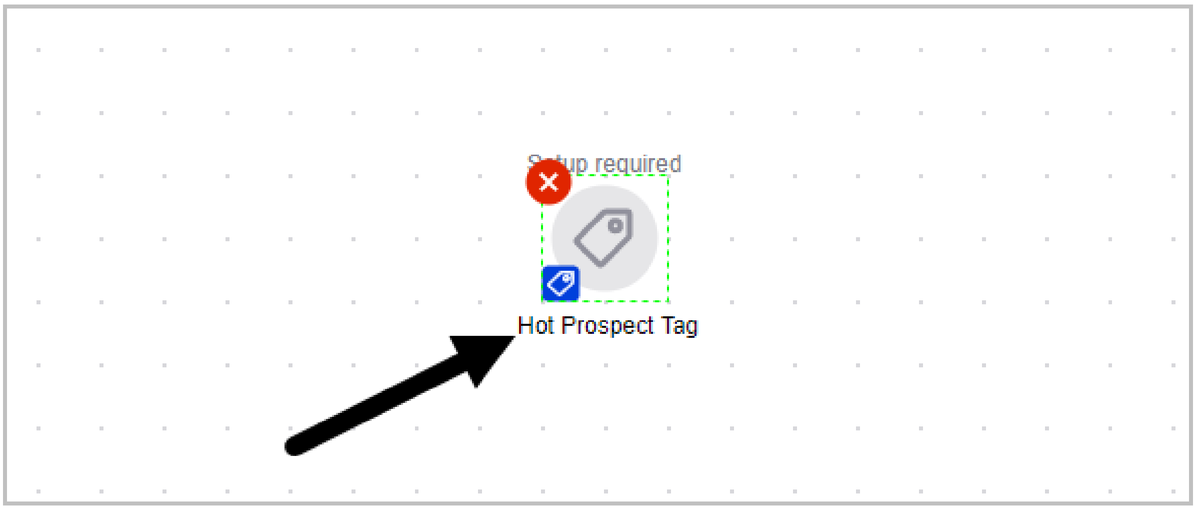
Be Careful! The goals based on tag updates are considered satisfied whenever a tag is applied: by a user, by the system, or by the API. The related sequence(s) will begin even if the contact was not in in any previous part of the campaign. Make sure your users can easily identify the tags you use as goal methods by assigning them to a unique tag category and be sure to train them so they know what happens when the tag is used. The tag is applied goal is not retroactive; previous contacts with the tag will not satisfy the goal.

When a tag is used to satisfy a goal, the related sequence begins as soon as the tag is applied and the sequence does not stop when the tag is removed due to user error.

1. Click and Drag a goal onto the campaign canvas

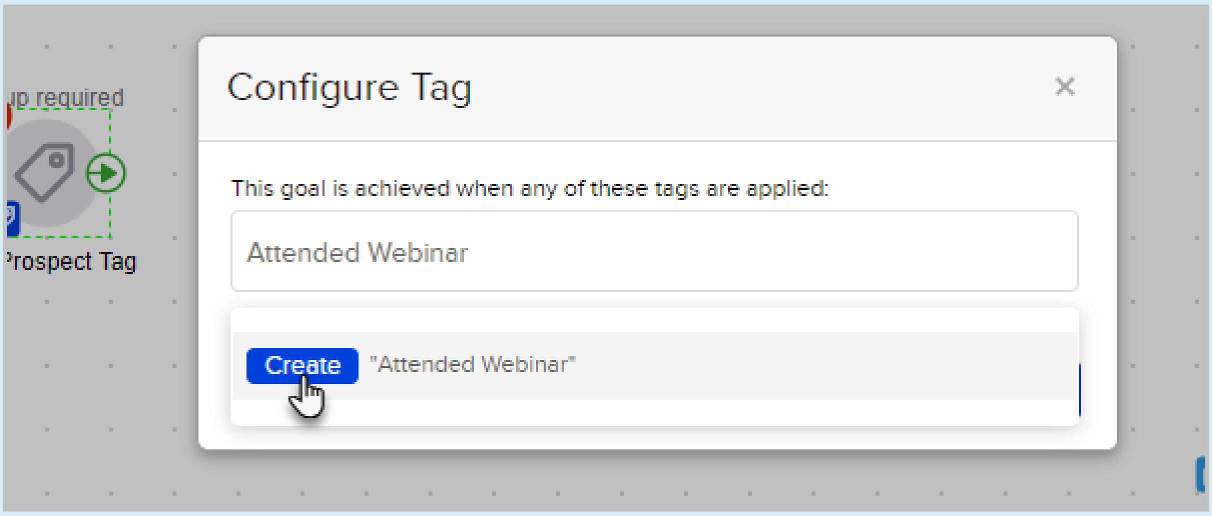


2. Double-click the name below the tag goal icon and rename it if you wish



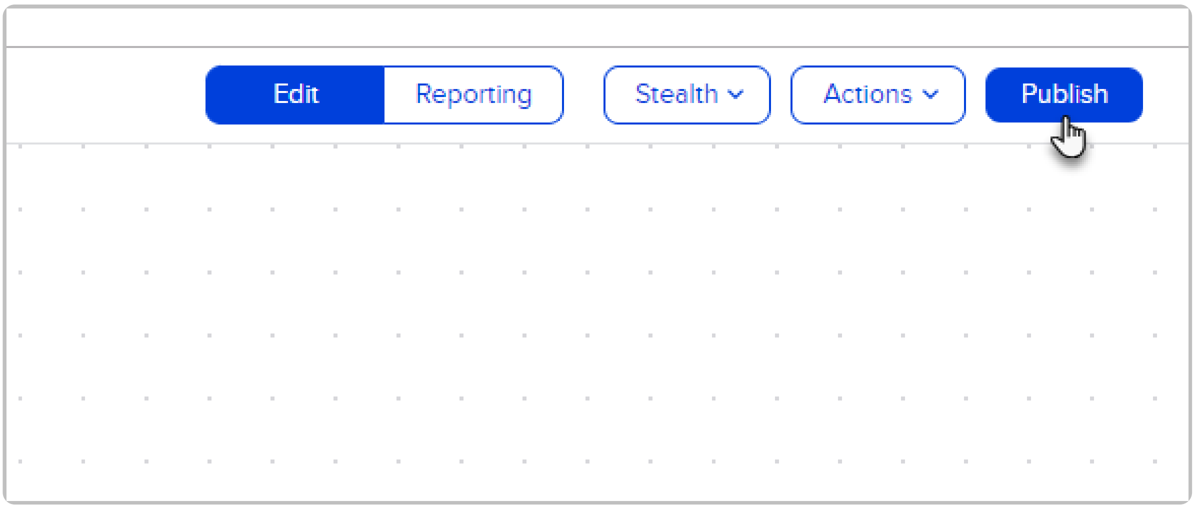
3. Double-click the icon to choose which tag(s) satisfy the goal and move the contact onto the next sequence.

Pro Tip! If you assign more than one tag to this goal, the goal is considered satisfied when ANY ONE of the tags is applied to a contact. You can also create a tag on the fly; just type the name of the tag and click **Create**.



4. Click "**Save**"

5. Be sure to publish your changes


Edit
Reporting
Stealth
Actions
Publish