

Custom Fields Vs Tags🔗

I'd like to address an issue that has plagued Infusionsoft users since the dawn of time (I suspect it has anyways.) "When do I use a custom field, and when do I use a tag?" There has always been an air of ambiguity surrounding this question, with vague definitions and unique use cases and a long list of exceptions; but today I'd like to provide some information that will help you decide which is appropriate for your specific scenarios.

First, I'll discuss what each of these have in common, and then I'll outline a few of their key differences and lastly I'll leave you with a few guidelines for deciding what you need.

Tags and Custom fields are both great ways to store information about a contact. Tags and Custom fields are both easily searchable, and can make filtering through your list to find a targeted audience much easier. Both can also be used in a campaign decision diamond to route contacts down the appropriate path and create a more customizable experience for that customer.

Now, where do they differ? Well, first and foremost there are no limits to the number of tags you can create. There are however limits on custom fields. You can create up to 100 Custom Fields for each of the different types of records. You can also apply an unlimited number of tags to a contact record. Whereas, generally you can only store one piece of information in a custom field (the exception being list box fields.) This means, tags will accumulate over time, but a custom field will only retain the most recent piece of information supplied.

Another key difference is that Tags can be used to trigger automation. By applying a tag, you can trigger a campaign builder goal, therefore firing off automation. Yes, if a custom field is filled out via a webform, or [internal form](#), either of those can also achieve campaign goals, but simply populating a custom field on a record cannot inherently fire off a campaign builder sequence.

The last difference to discuss here is that values placed in custom fields can be merged into emails and tasks to personalize the email content or task details on a per contact basis. Tag information can be used to route contacts to send the appropriate email or task, but cannot be used to personalize the content itself like the other [merge fields](#).

So, those are the similarities and differences, but how do I decide which one to use?

Well, the hard truth is it's going to be a unique case by case decision for you; but let me give you some guidelines to help make that decision easier.

After reading the steps below, hopefully you'll get a good foundation of information to arm you in making decisions as you set up, or refine your CRM. These are primarily

suggestions to give you some guidance, but you may find that you need to deviate from one of these rules for a one-off type scenario and that's okay.

Remember, each business is unique, but using these guidelines will give you a head start in designing an efficient CRM that is easy to search, grow, and scale!

- If the information is unique to that particular contact record, then you should use a custom field. (i.e. Dog's name, license plate number, favorite ice cream flavor) However, if the information helps segment them into a group of like individuals, you should can use a tag. (i.e. Dog Owners, BMW Drivers, Ice Cream Fans.)
 - If you will need to merge this information into an email at some point, you'll want it in a custom field. For example, if you tag them as "ice cream fan", you won't be able to start your email "For an 'ice cream fan' like you...". However, if you have a custom field that lists their favorite ice cream flavor, you can start your email "Since I know you love 'mint chocolate chip' ice cream, I thought you'd enjoy this...".
 - If more than one piece of information can be true, you will want a tag. This one can be tricky to wrap your head around, but if you're creating a custom field for "Supporter of" and you list Liverpool, Manchester U and Arsenal, they can only be a supporter of one of those teams. However, if you use tags, then you open the possibility that someone might support more than one club (in this scenario it's probably less than likely, but you get the idea.)
 - If you need to trigger automation as a result, you'll want a tag. If you need something to happen based on the new knowledge you have, you will likely want to create a campaign starting when a specific tag is applied.
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