

# **Understanding Tags**

Tags are labels that you add to a group of <u>contacts</u> so that you can sort, search, categorize, filter, and segment them efficiently. You can add tags to contacts based on demographics such as location, revenue, age or company size, scores etc. When you click on any tag, you can view all the records associated with it.

## To create a tag

ଟ Marketing Automation						(	2 0 🕸 🕕
	Hello Patricia!					Entire duration Mar 20, 2024 to Jul 01, 2024	7 C
් Contacts >							
🔆 Lead Generation > 🕅	OVERALL						
品 Journeys >	Contact Captured	Raw leads	Marketing read	dy	Marketing qualified	l	Sales ready
Marketing Planner >	4	0	2		1		0
$\mathfrak{K}$ Marketing Campaigns $>$							
☑ Website Analytics >	CONTACTS LIFECYC	E STAGE					
🖽 Library >			Raw leads				
			0	Next stage conversion	Average conversion time	Average engagements	
			Marketing ready	100%	84 Days	0	
			2				
		M	1arketing engaged	33.33%	84 Days	0	
			1				
		М	larketing qualified	0%	0 Days	0	
			1				
				00/	0 Dava	^	

- 1. Under **Contacts** menu in the *Navigation Toolbar* to the left, select **Lead Qualification**.
- 2. Click on the **Tags** tab at the top.
- 3. Click **Create tag**.

Bashboard	Contacts
පී Contacts	LEADS QUALIFICATION
Contacts Dashboard	LEAD SCORE CONFIGURATION LEAD STAGE CONFIGURATION TAGS
View Contacts	· · · · · · · · · · · · · · · · · · ·
Lists	
Segments	
Topics	
Lead Qualification	
Lead Attribution	
🔆 Lead Generation	
品 Journeys	
🔄 Marketing Planner	Tag
🕼 Marketing Campaigns	Create and assign tags to classify contacts as per your requirements. Learn more
🗁 Website Analytics	Create tag
🖳 Library	

- 4. Provide the **Tag Name** for your reference in the tag creation slide-in.
- 5. Select a **color** from the color box to be associated with this tag
- 6. Provide a short **Description** for the tag.
- 7. Enable **Additional Condition** toggle switch and add criteria for tags, if needed.

Create tag			×
Tag Name*			
Purchased customers			
Description			
The list of customers who	e purchased from us.		
Additional Condition Criteria*	Modifier*	Value	
Deal name	is not empty	∽ Select	× +
	(+	ADD NEW GROUP	
Create			

8. Click **Create**.

**Note:** It is possible to <u>assign more than one tag</u> to a single contact.

## To view contacts associated with a tag

- 1. Under **Contacts** menu in the *Navigation Toolbar* to the left, select **Lead Qualification**.
- 2. Click on the **Tags** tab at the top. List of tags created will be displayed.
- 3. Click on the tag for which you want to see the associated contacts.

③ You can perform various <u>bulk operations on contacts</u> here similar to View Contacts tab.

# To edit a tag

- 1. Under **Contacts** menu in the *Navigation Toolbar* to the left, select **Lead Qualification**.
- 2. Click on the **Tags** tab at the top. List of tags created will be displayed.

3. Click on **More Actions** button at far right of the required tag.

LEAD SCORE CONFIGURATION LEAD STAGE CONFIGURATION TAGS	; -		
18 tags created		Q What are you searching for?	Create tag
TAGS ^	CONTACTS ASSOCIATED	LAST UPDATED ON	
IN_Social Created On Aug 31, 2023 at 04:51 AM by Jim Zylker	24,438	Aug 31, 2023	:
Asset 1 Created On Jan 08, 2024 at 05:55 PM by Jim Zylker	38	Jan 08, 2024	Edit Delete Clone

4. Click Edit. Make necessary changes.

Edit Tag	×
Tag Name*	
IN_Social	
Description	
Test Description	
Additional Condition	
Save	

#### 5. Click Save.

#### To clone a tag

- 1. Under **Contacts** menu in the *Navigation Toolbar* to the left, select **Lead Qualification**.
- 2. Click on the **Tags** tab at the top. List of tags created will be displayed.
- 3. Click on **More Actions** button at far right of the required tag.

LEAD SCORE CONFIGURATION LEAD STAGE CONFIGURATION	TAGS		
18 tags created	*	Q. What are you searching	for? Create tag
TAGS ^	CONTACTS ASSOCIAT	ED LAST UPDATED ON	
IN_Social Created On Aug 31, 2023 at 04:51 AM by Jim Zylker	24,4	38 Aug 31, 2023	:
Asset 1 Created On Jan 08, 2024 at 05:55 PM by Jim Zylker		38 Jan 08, 2024	Edit Delete Clone

4. Click **Clone.** A clone of the tag will be created.

# To delete a tag

- 1. Under **Contacts** menu in the *Navigation Toolbar* to the left, select **Lead Qualification**.
- 2. Click on the **Tags** tab at the top. List of tags created will be displayed.

LEAD SCORE CONFIGURATION LEAD STAGE CONFIGURATION TAGS			
18 tags created		Q What are you searching for?	Create tag
TAGS ^	CONTACTS ASSOCIATED	LAST UPDATED ON	
IN_Social Created On Aug 31, 2023 at 04:51 AM by Jim Zylker	24,438	Aug 31, 2023	:
Asset 1 Created On Jan 08, 2024 at 05:55 PM by Jim Zylker	38	Jan 08, 2024	Edit Delete Clone

- 3. Click on **More Actions** button at far right of the required tag.
- 4. Click Delete. Check Delete associated contacts option to delete contacts associated to this tag.
- 5. Click **Delete**.