Use tags to create contact lists

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This article applies to:

Max Classic

Tags are labels you can apply to contact records to segment your audience. They're one of the most powerful tools in Max Classic for creating highly targeted marketing campaigns.

Why Use Tags?

Tags allow you to:

- Segment contacts into precise groups
- Send targeted messages based on behavior or attributes
- Track engagement history over time
- Quickly search and filter contacts

Creating and Managing Tags

- **Manual tagging**: Add or remove tags directly on a contact record.
- **Automation**: Most tags are applied or removed automatically through campaigns, sequences, or broadcasts.
- **Organization**: Group related tags into **tag categories** for easier management.

How to Create Tags

- Navigate to **CRM > Settings > Tags**, or
- Create them "on the fly" while working on a contact record, campaign, or broadcast.

Tip: Use descriptive names (e.g., "Attended Webinar – Facebook for Business" or "Member – Gold Plan") so tags clearly reflect engagement or status.

Tag Categories & Examples

Category	Tag Example
Prospect	10 Tips to Facebook Success eBook
Prospect	Facebook for Businesses Webinar
Prospect	Online Business Reputation Workshop
Customer	B2B Online Marketing Coaching Program

Searching with Tags

When filtering contacts (**CRM > Contacts**), you can use tag-based search logic:

- **With ANY of these tags** → "OR" logic; returns contacts who have *at least one* of the selected tags.

- **With ALL of these tags** → "AND" logic; returns contacts who have *all* selected tags.
- **Doesn't have ANY of these tags** → "OR" logic; returns contacts who lack *all* of the selected tags.
- **Doesn't have ALL of these tags** → "AND" logic; returns contacts who are missing *all* selected tags.

Example: Finding Prospects, Not Customers

Let's say you want to send a special offer for the **B2B Online Marketing Coaching Program**.

Your search criteria could be:

- **With ANY of these tags** :
  - Prospect – 10 Tips to Facebook Success eBook
  - Prospect – Online Business Reputation Workshop
- **AND Doesn't have ANY of these tags** :
  - Customer – B2B Online Marketing Coaching Program

This gives you a list of prospects who have shown interest but haven't yet become customers.

Key Takeaway: Tags are flexible, powerful segmentation tools. By using them strategically, you can deliver more relevant content, improve engagement, and better manage your contact database.