

Use tags to create contact lists

This article applies to:

[Max](#)

[Max Classic](#)

Tags are marketing labels that are applied to contact records. Tags are one of the most powerful segmentation tools in Infusionsoft. Tags segment your contacts into very specific lists so that you can send more targeted marketing messages to those contacts.

You can [apply tags to contact records manually](#). Most of the time, tags will be applied or removed with campaign automation. You can keep your tags organized and make them easier to manage by assigning them to tag categories.

You can create new tags through **CRM > Settings > Tags** or you can create them "on the fly" when you are on a contact record or creating an automated [campaign sequence](#) or [sending a broadcast](#). Tag names can correspond to information requested, events attended, membership programs, relationship status, and more. They should be descriptive because they track prospect and customer engagement history and serve as powerful search criteria.

TAG CATEGORY	TAG NAME
Prospect	10 Tips to Facebook Success eBook
Prospect	Facebook for Businesses Webinar
Prospect	Online Business Reputation Workshop
Customer	B2B Online Marketing Coaching Program

When searching for specific contacts, tags give you powerful segmentation options. You can set very specific search criteria **CRM > Contacts** for tags using the following parameters:

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- *With ANY of these Tags:* This is an "or" statement. You will use this if you want a list of people who have at least one of the tags you've selected as search criteria.
- *With ALL of these Tags:* This is an "and" statement. You will use this if you want a list of people who have ALL of the tags you've selected as search criteria.
- *Doesn't have ANY of these Tags:* This is an "or" statement. You will use this if you want a list of people who do not have even one of the tags you've selected as search criteria.
- *Doesn't have ALL of these Tags:* This is an "and" statement. You will use this if you want a list of people who do not have ALL of the tags you've selected as search criteria.

Sometimes you may need a combination of logic shown above. For these situations, you will notice that there are two tag search fields in Infusionsoft. Using the table above, here is how one might find the right contacts to send a special offer for the B2B Online Marketing Coaching Program.

To find the list of people that are interested, but who are not customers you might use the following tags search criteria:

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
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