

Tag categories

This article applies to:

- [Max](#)
- [Max Classic](#)

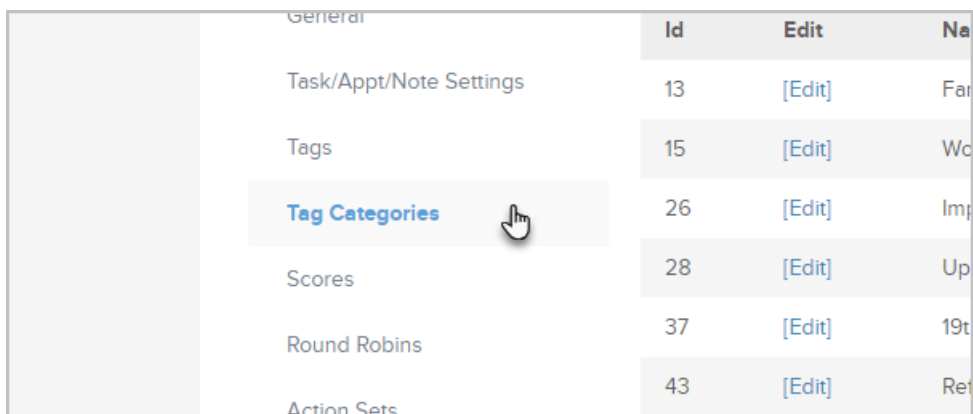
- [1. Add Tag Categories](#)
- [2. Change Tag Categories](#)
- [3. View Tags within Tag Category](#)

Use tag categories to organize your tags. Example of some tag category names:

- Customers
- Prospects
- Members
- Events

Add Tag Categories

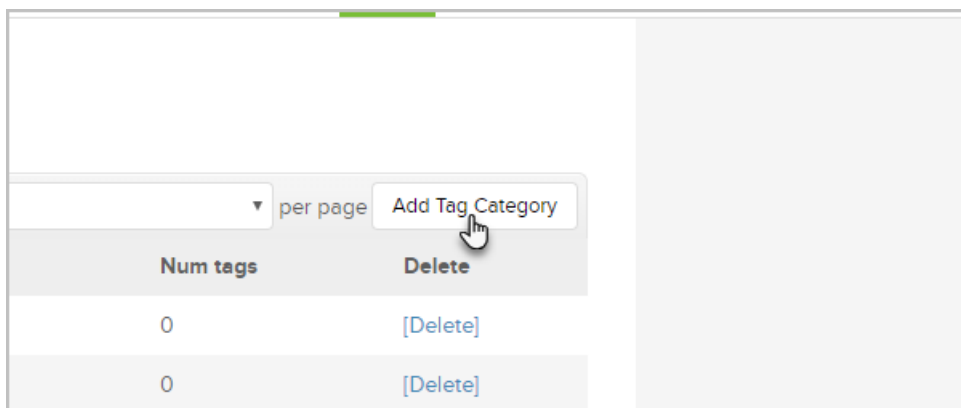
- Go to CRM > Settings > Tag Categories.



The screenshot shows the 'Tag Categories' page in the CRM settings. It features a table with columns for 'Id', 'Edit', and 'Name'. The 'Tag Categories' row is highlighted, and a mouse cursor is pointing at it.

General	Id	Edit	Na
Task/Appt/Note Settings	13	[Edit]	Far
Tags	15	[Edit]	Wc
Tag Categories	26	[Edit]	Imp
Scores	28	[Edit]	Up
Round Robins	37	[Edit]	19t
Action Sets	43	[Edit]	Ret

- Click on the **Add Tag Category** button. Note: You can also create a new tag category "on the fly" when adding a new tag.



The screenshot shows the 'Add Tag Category' dialog box. It has a dropdown menu for 'per page' and an 'Add Tag Category' button. Below the dialog, there is a table with columns for 'Num tags' and 'Delete'.

Num tags	Delete
0	[Delete]
0	[Delete]

- Enter the category name and description and click on the **Save** button.

□

Change Tag Categories

1. To change a tag to a different tag category, find the tag and select a new category from the **Category** dropdown.

□

View Tags within Tag Category

1. Go to CRM > Settings > Tag Categories
2. Click on a value **greater than 0**.
3. View the list of tags with the given tag category.

Be Careful! When you delete a tag category, it is permanent. The tags assigned to it will be reassigned to the "Unnamed Category." You may want to update existing tags before you delete a tag category.
