

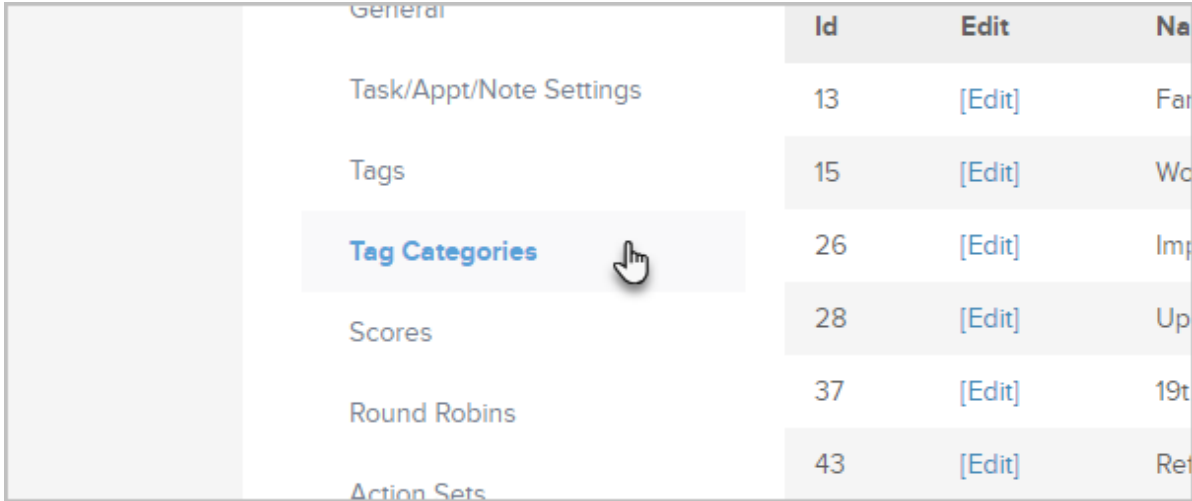
Tag categories

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

- Customers
- Prospects
- Members
- Events

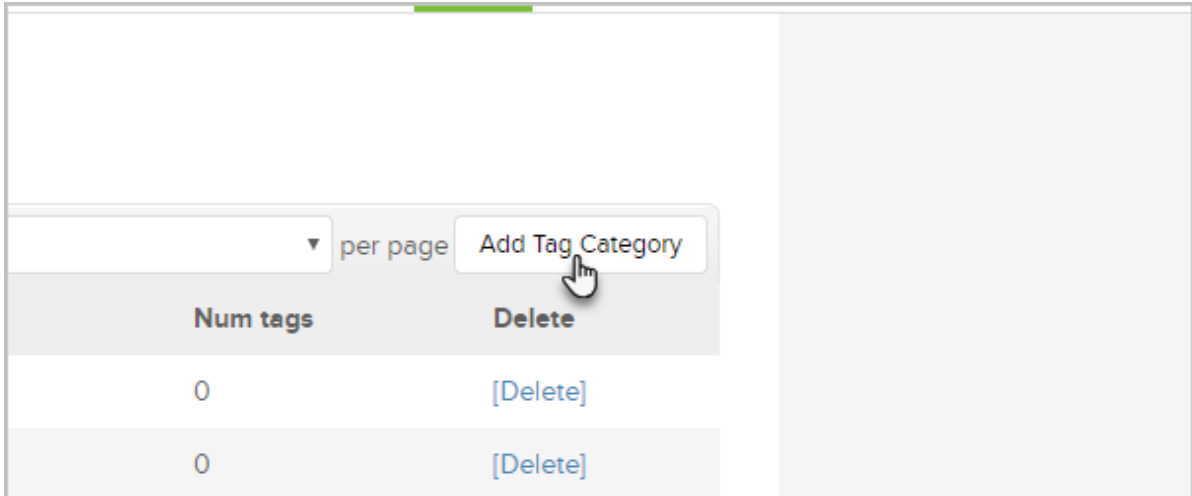
Add Tag Categories

1. Go to CRM > Settings > Tag Categories.



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Task/Appt/Note Settings	13	[Edit]	Far
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Tag Categories	26	[Edit]	Imp
Scores	28	[Edit]	Up
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Action Sets	43	[Edit]	Ret

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



Num tags	Delete
0	[Delete]
0	[Delete]

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

Manage Tag Category

Category Name: V-Lead Prospects

Category Description: All Prospects coming through V-Lead

Save or Cancel

Change Tag Categories

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

Add/Edit Tag ([back to search results](#))

Tag Name: Newsletter Subscriber

Category: Prospect Tags

Description:

- Please select a category
- Customer Tags
- iContact Lists
- Imported
- New Category
- Nurture Tags**
- Prospect Tags
- Purchase Based Interest, Sales Promotion

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.

