

Custom Fields Vs Tags 🗝️

When do I use custom fields and when do I use tags?

There has always been ambiguity surrounding this question, with vague definitions and unique use cases, and a long list of exceptions. I hope this helps.

What do Fields and Tags have in common?

- Both are great ways to store information about a contact.
- Both are easily searchable, and can make filtering to find a targeted audience much easier.
- Both can be used in campaign decision diamonds to route contacts and create a customized experience for customers.

Key Differences

First, there are no limits to the number of tags you can create. There are limits on custom fields. You can create up to 150 custom fields for each of the different types of records. You can also apply an unlimited number of tags to a contact record. Generally you can only store one piece of information in a custom field (the exception being list box fields). This means tags accumulate over time, but custom fields only retain the most recent piece of information supplied.

Another key difference is that Tags can be used to trigger automation. By applying a tag, you can trigger a campaign builder goal. If a custom field is filled out via a web-form, or [internal form](#), either of those can achieve campaign goals, but simply populating a custom field on a record cannot inherently fire off a campaign builder sequence.

Values placed in custom fields can be merged into emails and tasks to personalize the email content or task details on a per contact basis. Tag information can be used to route contacts to send the appropriate email or task, but cannot be used to personalize the content itself like the other [merge fields](#).

Guidelines to design an efficient CRM

These are guidelines because you may find that the need to deviate for a one-off scenario; and that's okay.

- If the information is unique to that particular contact record, then use a custom field; i.e., dog's name, license plate number, favorite ice cream flavor. However, if the information segments records into a group of like individuals, use a tag; i.e., Dog Owners, BMW Drivers, Ice Cream Fans.
- If you need to merge this information into an email at some point, use a custom field. For example, if you tag them as "ice cream fan", you won't be able to start your email "For an 'ice cream fan' like you...". However, if you have a custom field that lists their favorite ice cream flavor, you can start your email "Since I know you love 'mint chocolate chip' ice cream, I thought you'd enjoy this...".
- If more than one piece of information can be true, use a tag. This one can be tricky to wrap your head

around, but if you're creating a custom field for "Supporter of" and you list Liverpool, Manchester U, and Arsenal, they can only be a supporter of one of those teams. However, if you use tags, then you open the possibility that someone can support more than one club.

- If you want to trigger automation as a result, use a tag. If you want something to happen based on new knowledge, create a campaign starting when a specific tag is applied.
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