

Create a Tag

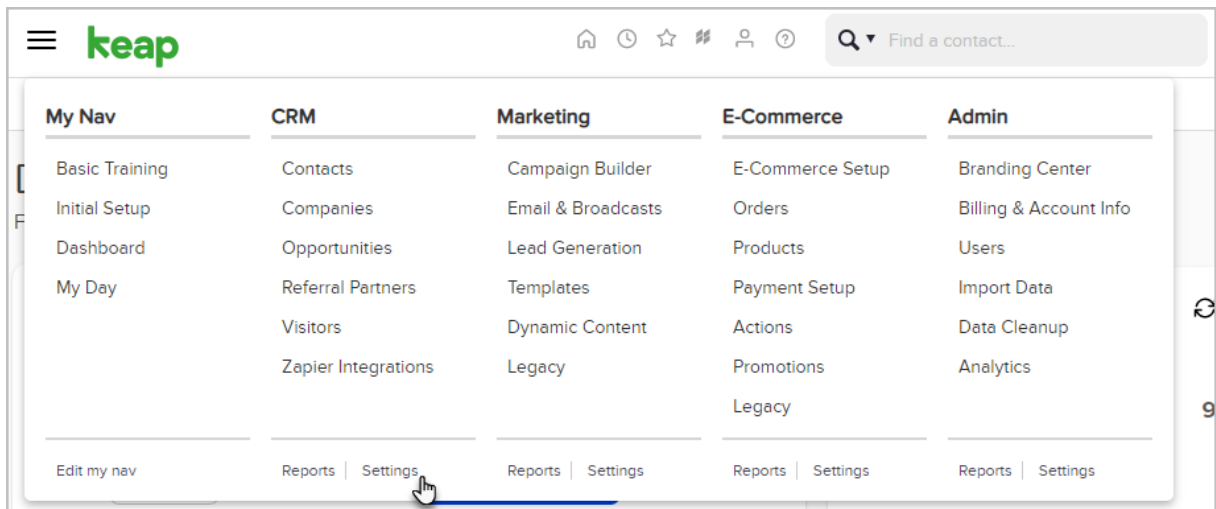
This article applies to:

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

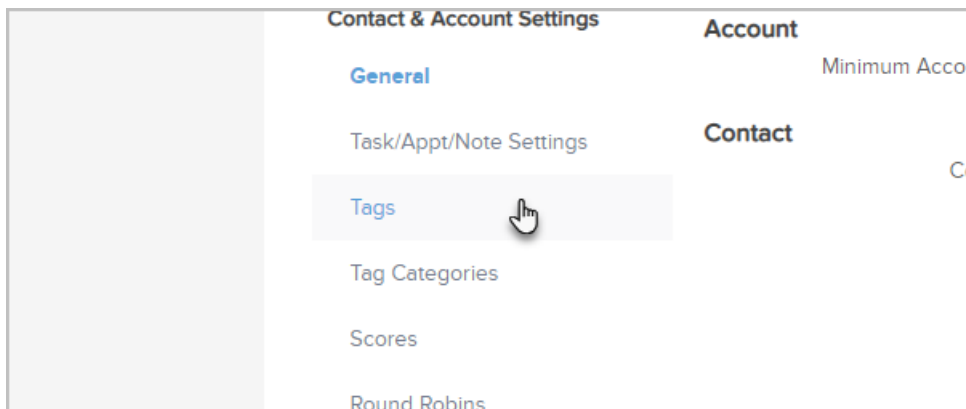
There are several ways to create tags in Max Classic. Often, you will create them on-the-fly while creating campaigns, contact records, emails, landing pages, etc. You can also go to CRM > Settings > Tags and create new tags or manage existing tags.

Create a Tag

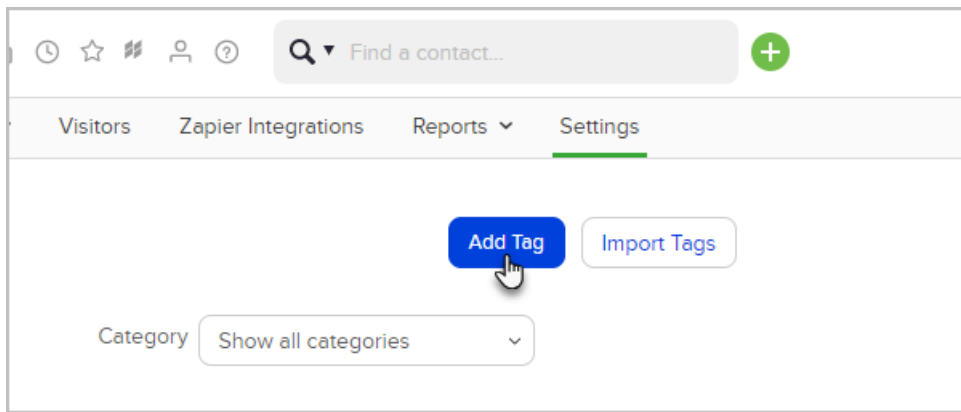
1. Go to CRM > Settings in the main navigation menu



2. Click Tags



3. Click Add Tag

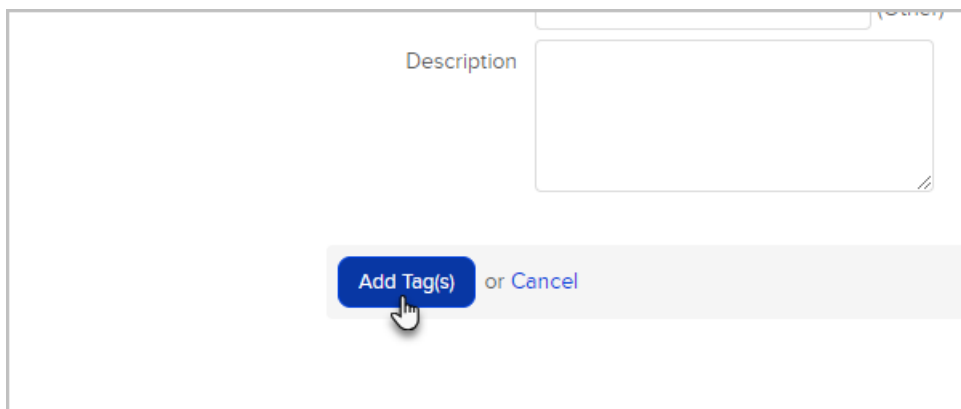


4. Setup your tag:

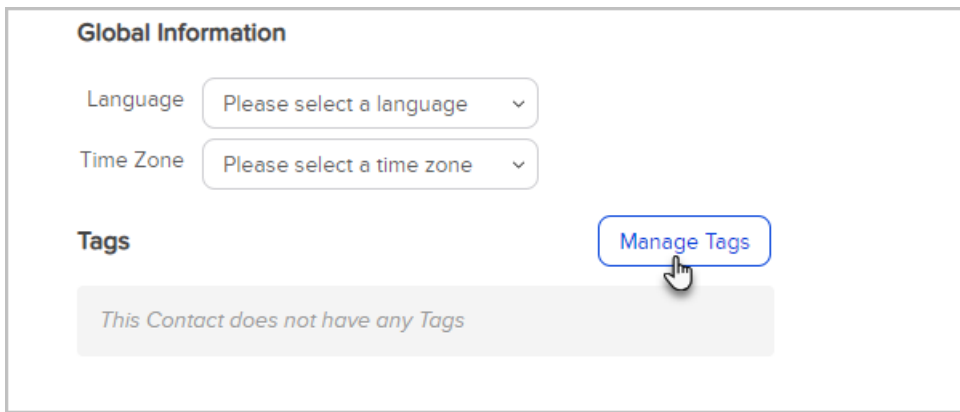
- a. Enter a name.
- b. Choose a category or create a new category by entering it into the (Other) field.
- c. Add a description to remind you and other users of the purpose of the tag (optional).

A screenshot of the 'Add Tag' form. It contains three main sections: 1. 'Tag Name' with a text input field containing 'Silver Level', labeled with a blue 'a' in a teardrop shape. 2. 'Category' with a dropdown menu showing 'Customer', labeled with a blue 'b' in a teardrop shape. Below the dropdown is an '(Other)' field. 3. 'Description' with a text area containing the text: 'This is use as a Tag Goal in campaign 2921. The tag is applied when the silver level product is purchased.', labeled with a blue 'c' in a teardrop shape.

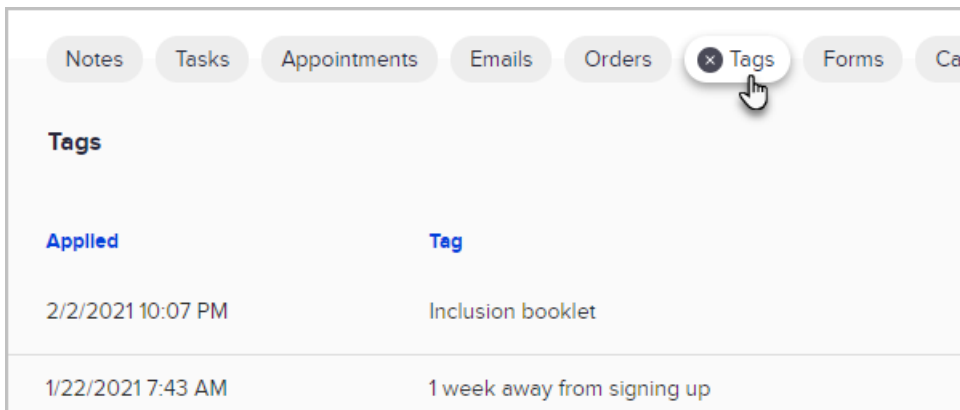
5. Click Add Tag(s)



6. The tag is now available in any area of Max Classic that allows you to apply a tag. For example, while on a contact record, you can click the **Manage Tags** button located to the right of the contact record.



7. If you are looking at a list of contacts, quickly manage tags by clicking the **Tags** icon.



View a list of contacts with a given tag applied

1. Go to CRM > Settings > Tags
2. The Number located under the "Number of People" column is how many contacts have the tag applied to their record.

<input type="checkbox"/>	Id	Name	Number of people
<input type="checkbox"/>	2475	Test - list box	5
<input type="checkbox"/>	2473	Credit card Expiration 5 days	5
<input type="checkbox"/>	2471	Multi click test	8
<input type="checkbox"/>	2469	report test	106
<input type="checkbox"/>	2467	challenge response	0
<input type="checkbox"/>	2465	auto reply	0

3. You will be redirected to CRM > **Contacts** with the list of contacts that have the tag applied.

Contacts

Criteria

With ANY of these Tags: Inclusion booklet

Actions ▾

New Search

Edit Criteria/Columns

Save

Print

1 results
