

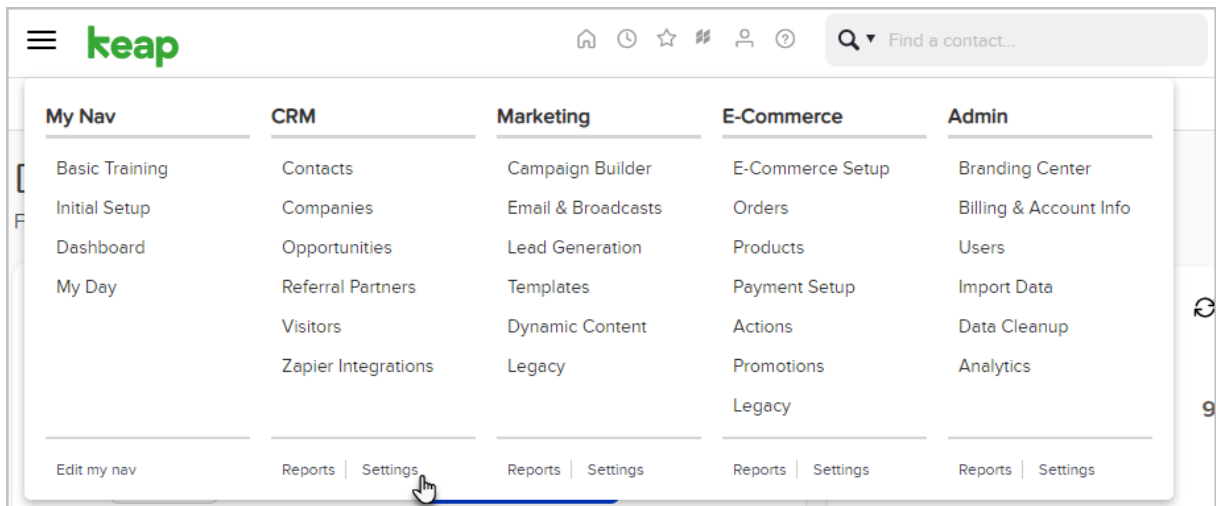
Create a Tag

This article applies to:

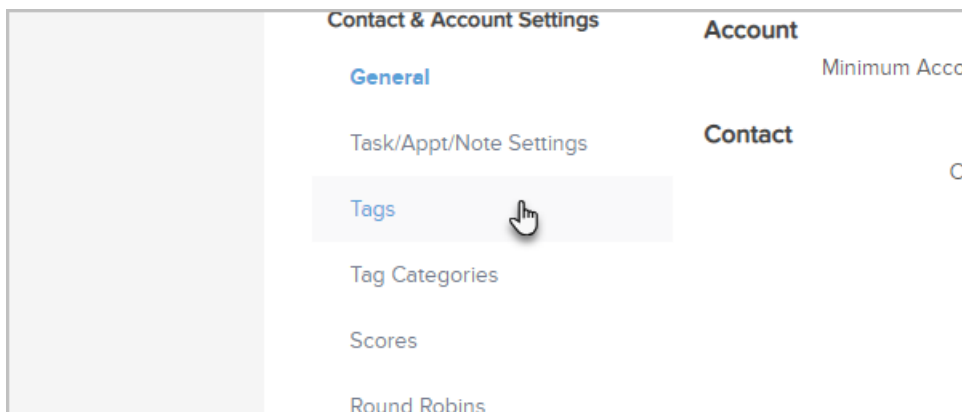
There are several ways to create tags in Max Classic. Often, you will create them on-the-fly while creating campaigns, contact records, emails, landing pages, etc. You can also go to CRM > Settings > Tags and create new tags or manage existing tags.

Create a Tag

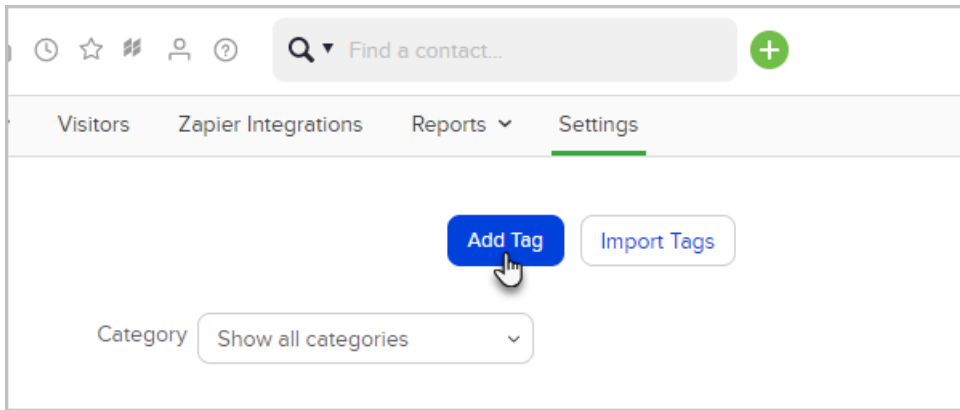
1. Go to CRM > Settings in the main navigation menu



2. Click Tags



3. Click Add Tag

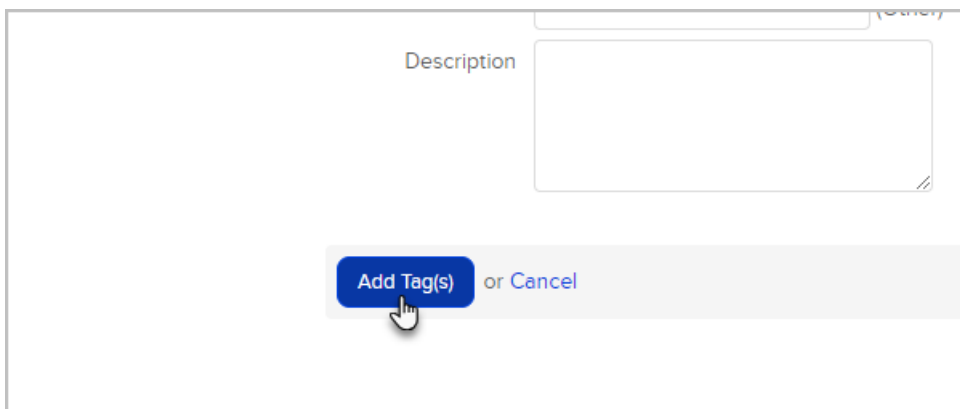


4. Setup your tag:

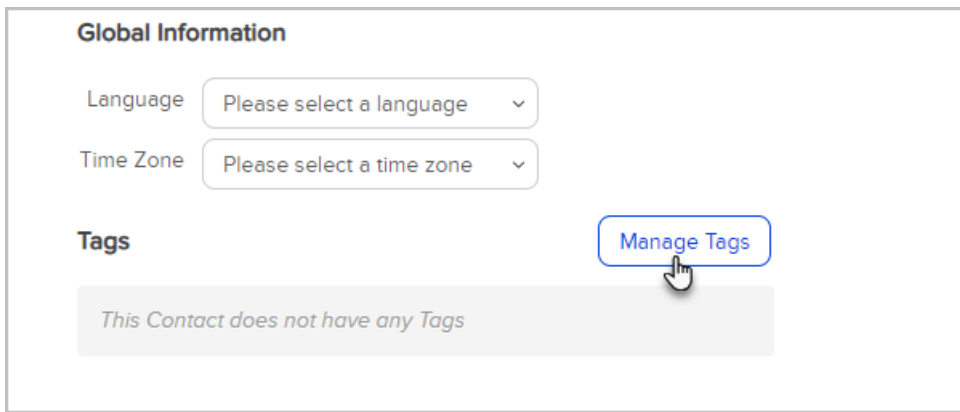
- a. Enter a name.
- b. Choose a category or create a new category by entering it into the (Other) field.
- c. Add a description to remind you and other users of the purpose of the tag (optional).

A screenshot of the tag setup form. It contains three main sections: 'Tag Name' with a text input field containing 'Silver Level' (annotated with 'a'), 'Category' with a dropdown menu showing 'Customer' and an '(Other)' field (annotated with 'b'), and '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.' (annotated with 'c').

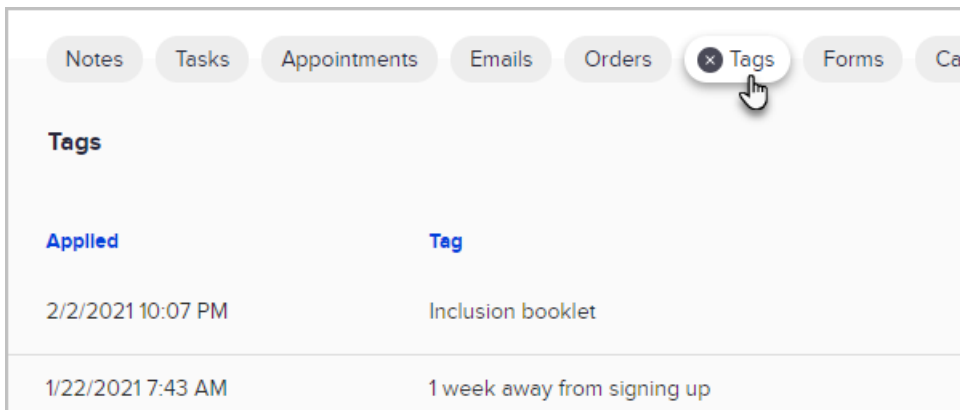
5. Click Add Tag(s)



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
