

<u>Knowledgebase</u> > <u>Features</u> > <u>Tags</u> > <u>Creating tags</u>

### **Creating tags**

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#### Table of contents

- Creating Tag(s)
  Tag Details Panel
- 2. Deleting a Tag

## **Creating Tag(s)**

Tags are applied at the individual contact level to categorize and organize C=contacts based on specific criteria. To create a Tag, follow these steps:

- 1. Navigate to "Audience" on the left panel, and click "Tags" under it, as illustrated in the image below.
- 2. On the main Tags page, click the "Add Tag" button from the top right to create a new tag.
- 3. A "Create a New Tag" popup form will appear, prompting you to fill in the following mandatory field:
  - Tag Name: Enter the name of the tag that you will later add to the contacts. For example, "Non Active Customer" is being entered in the image below. Learn more about <u>Tagging contacts</u>.
- 4. After filling in the Tag Name, click Create.



- 5. Upon successfully creating a new tag, the following will occur:
  - The new tag will be created, and a success notification popup will appear at the top-right corner of the page, as shown in the image below.
  - The main **Tags** page will automatically refresh to display the newly created tag.



#### Tag Details Panel

To view the details of the newly created tag, follow these steps:

- 1. On the main **Tags** page, navigate to the desired tag name, for example, '*Non Active customer*,' as shown in the image below.
- 2. Click the **arrow symbol (>)** located on the right side of the desired tag name to open its detail panel.



3. The **Tag Detail** panel displays the tag name at the top, accompanied by a pencil icon for renaming if desired. Additionally, under the tag name is a **"Contacts"** section indicating whether this tag has been added to contact(s). Learn more about <u>Tagging contacts</u>.



# **Deleting a Tag**

In case a tag is no longer needed, it can easily be deleted. To delete a tag, follow these steps:

- 1. On the main Tags page, navigate to the desired tag name, for example, 'Non Active customer,' as shown in the image below.
- 2. Click the arrow symbol (>) located on the right side of the desired tag name to open its detail panel.



- 3. On the tag detail panel, click the 'bin' [] button.
- 4. A "Delete Tag" popup window will appear to confirm the deletion action. Click the "Delete" button to confirm your intention.



5. After successfully deleting the tag, a success notification popup will appear at the top-right corner of the page. The main **Tags** page will automatically refresh and the deleted tag will be permanently removed from the system.

To remove a tag from a contact, use the **Contact Details** page of that contact. Learn more about removing tag(s) from a contact.

