Creating tags

Syeda Khadija Phool - 2024-04-15 - Tags

Table of contents

1. 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 Tagging contacts.

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 Tagging contacts.

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.