Tags and Segments to filter email criteria

Tags are the equivalent of adding a new field to your contact database

Segments allow you to filter your mailing according to tagged records

You will want to set up your tags in advance in a consistent format

Example of Tags:

Hair – Red

Hair – Black

Hair – Brunette

Volunteer – Bandfest

Volunteer – Oktoberfest

Volunteer – Mardi Gras

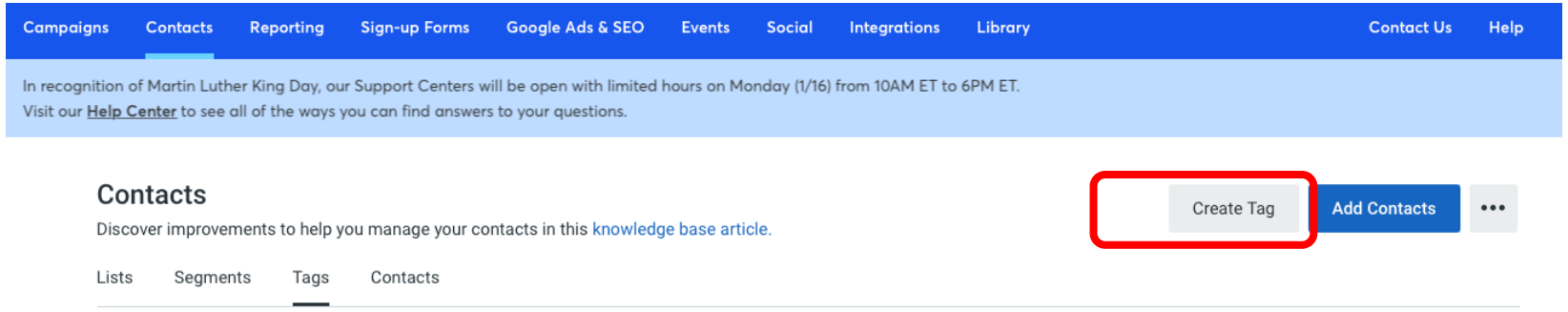
Donor 2021

Donor 2022

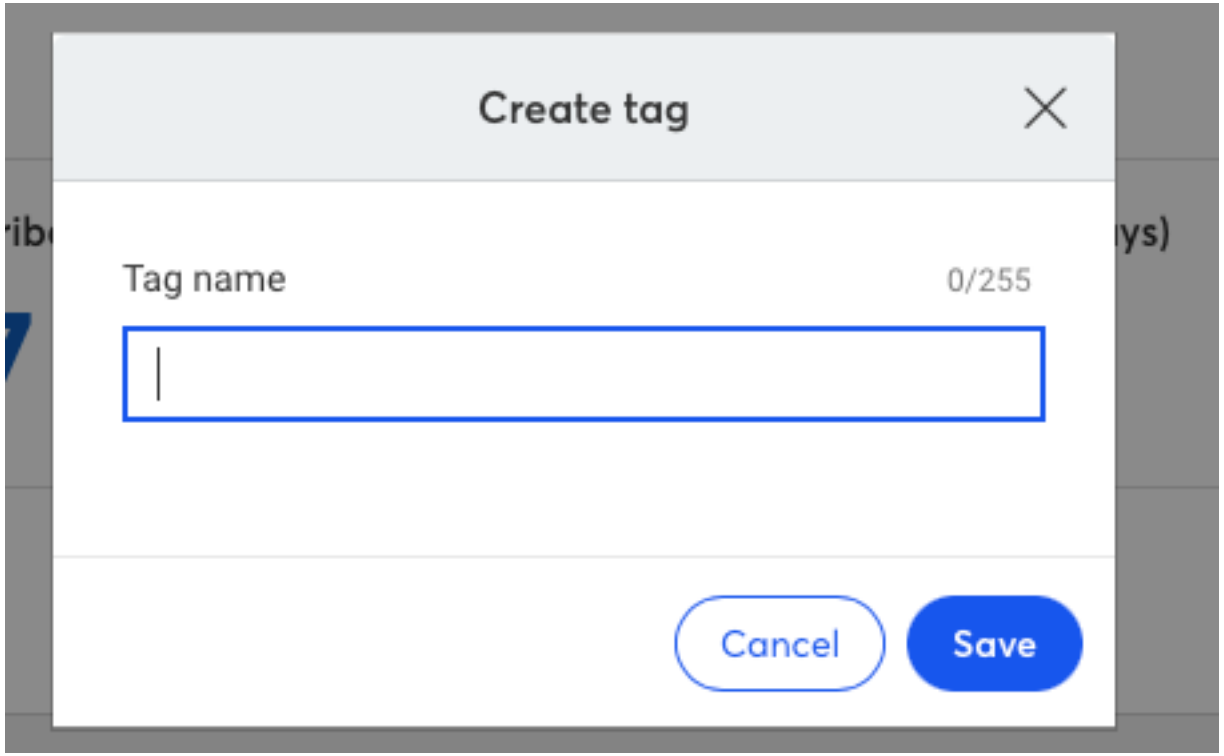
Donor 2023

CREATING TAGS

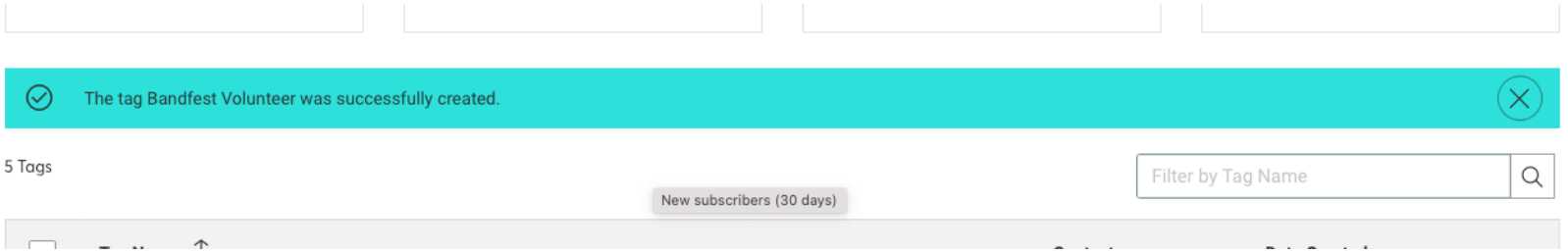
CREATING TAGS



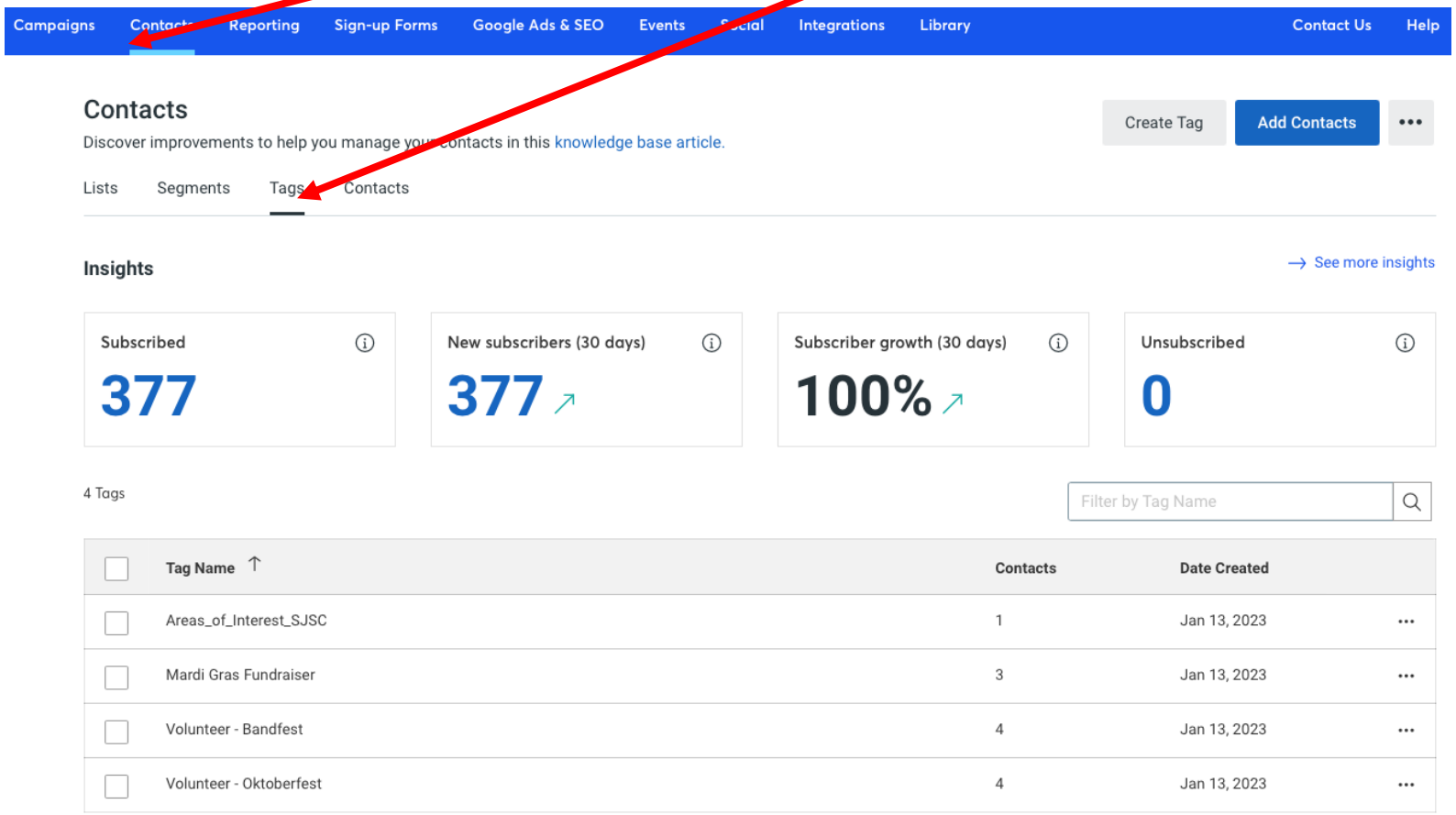
TYPE IN NAME OF TAG



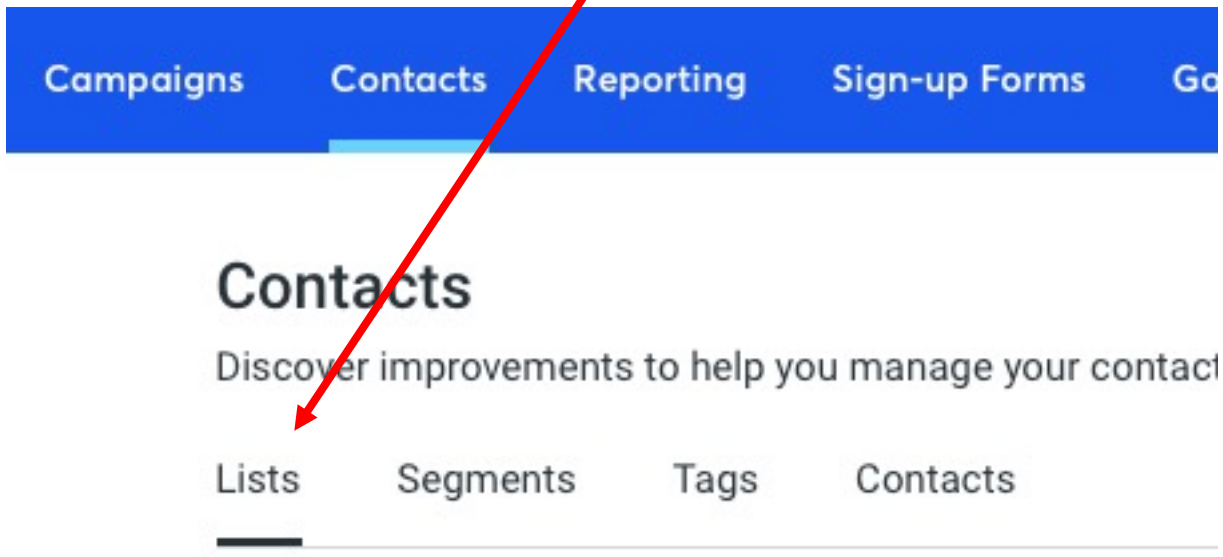
See Newly-Created Tag in green box



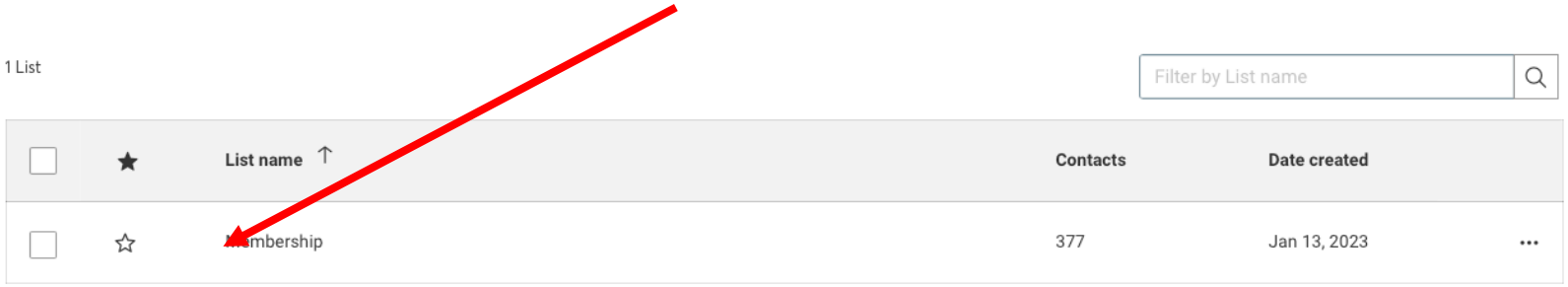
Add Tags to individual contacts by Clicking Contacts, then Tags



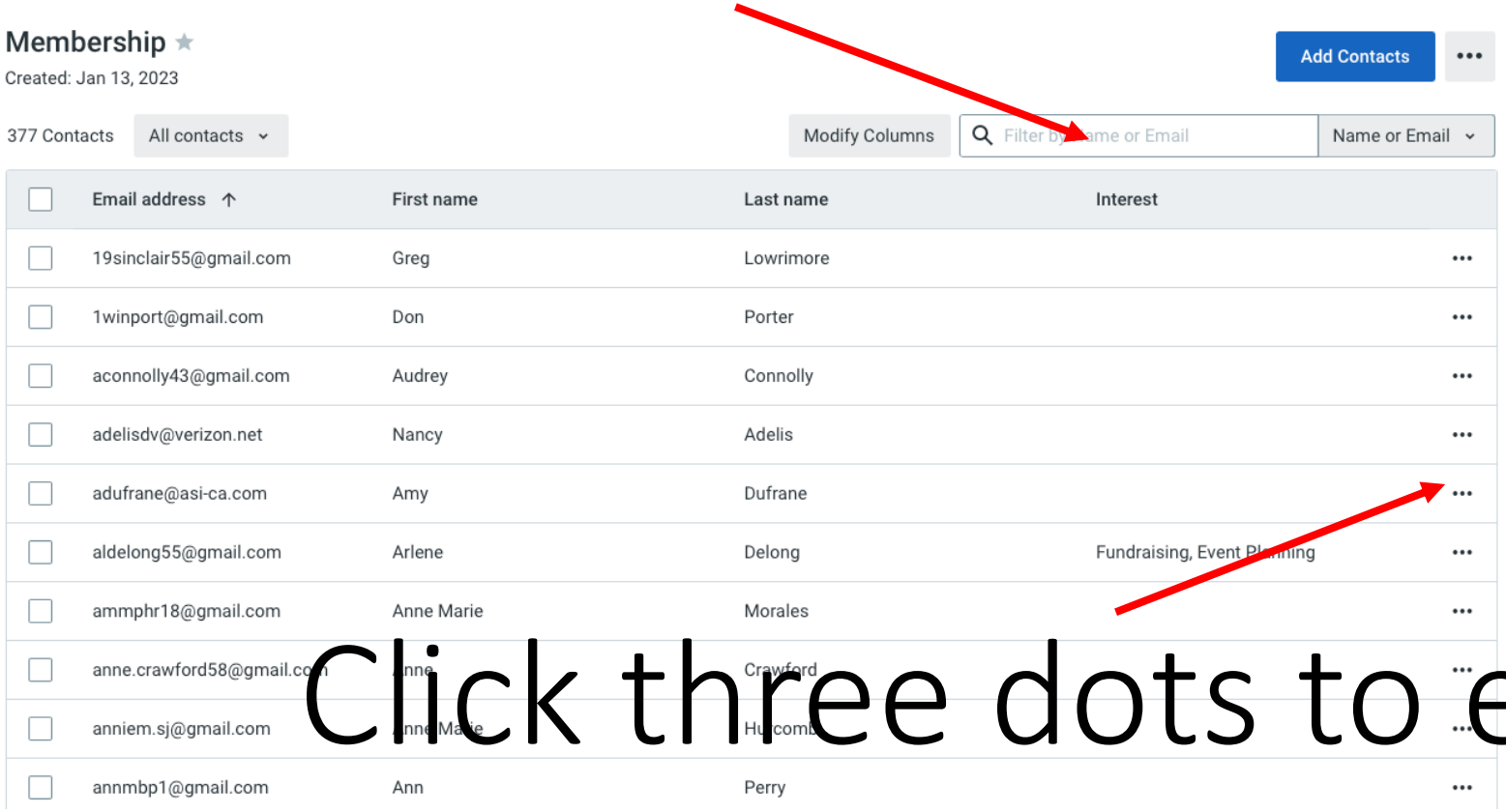
Click on Lists



Click on Membership List Name

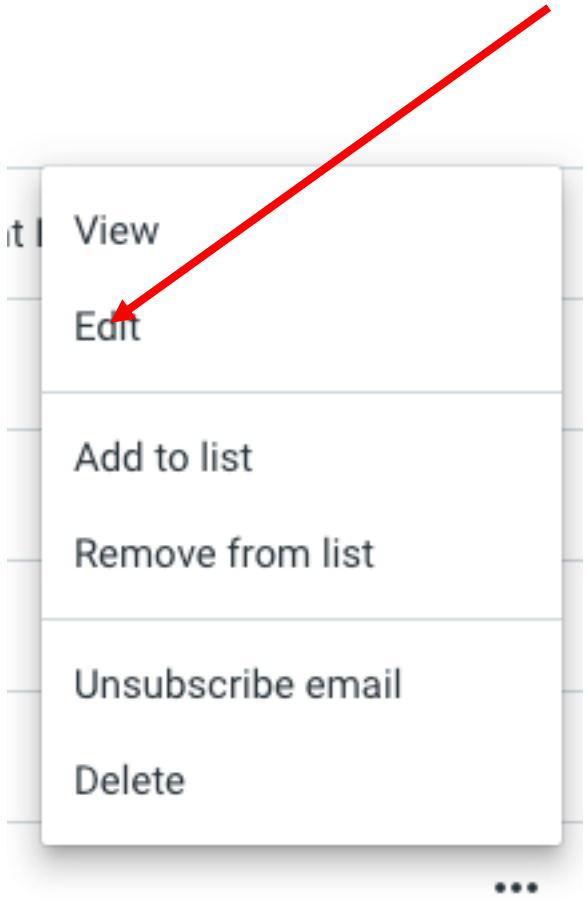


Edit individual names
Use search to find

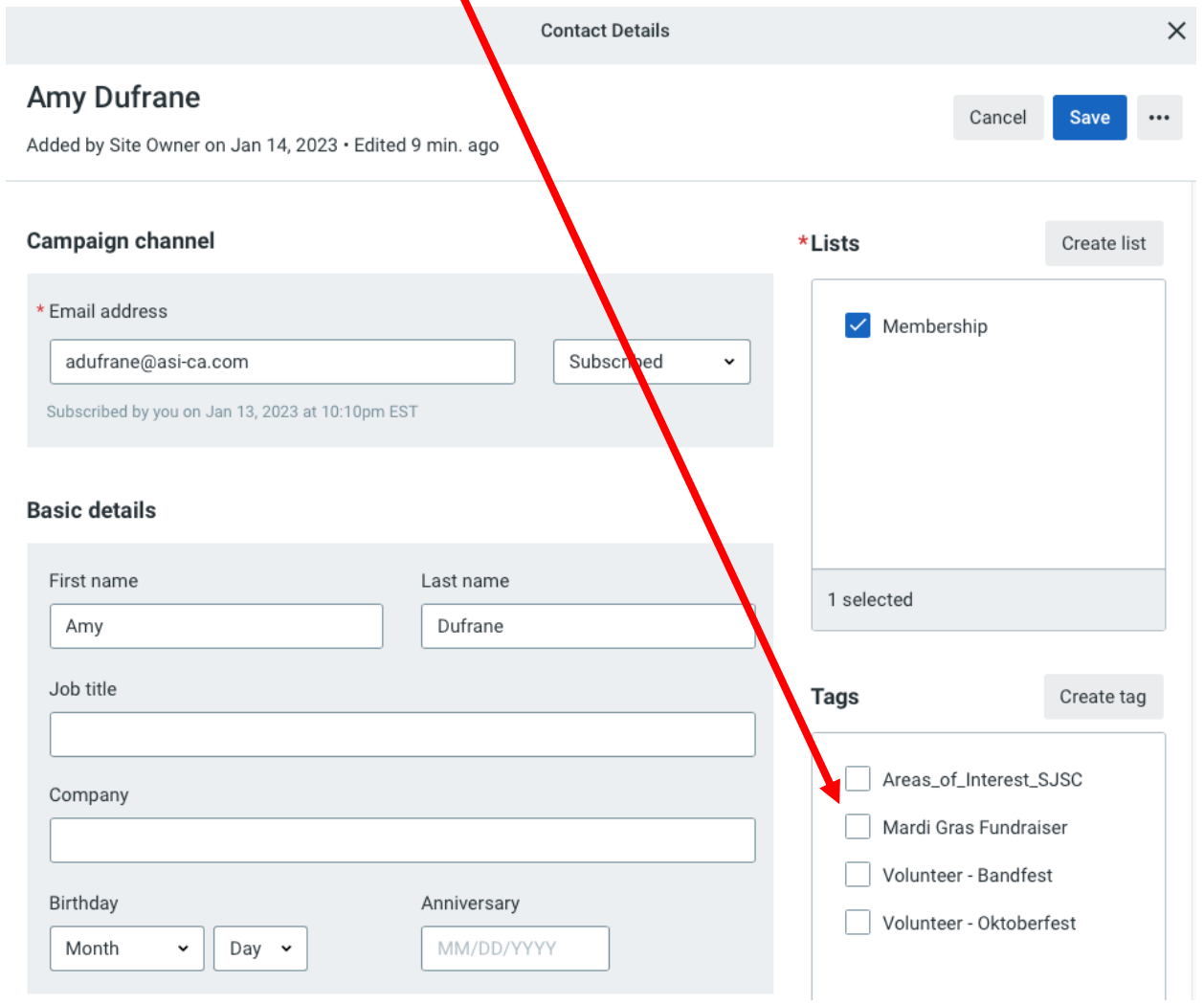


Click three dots to edit

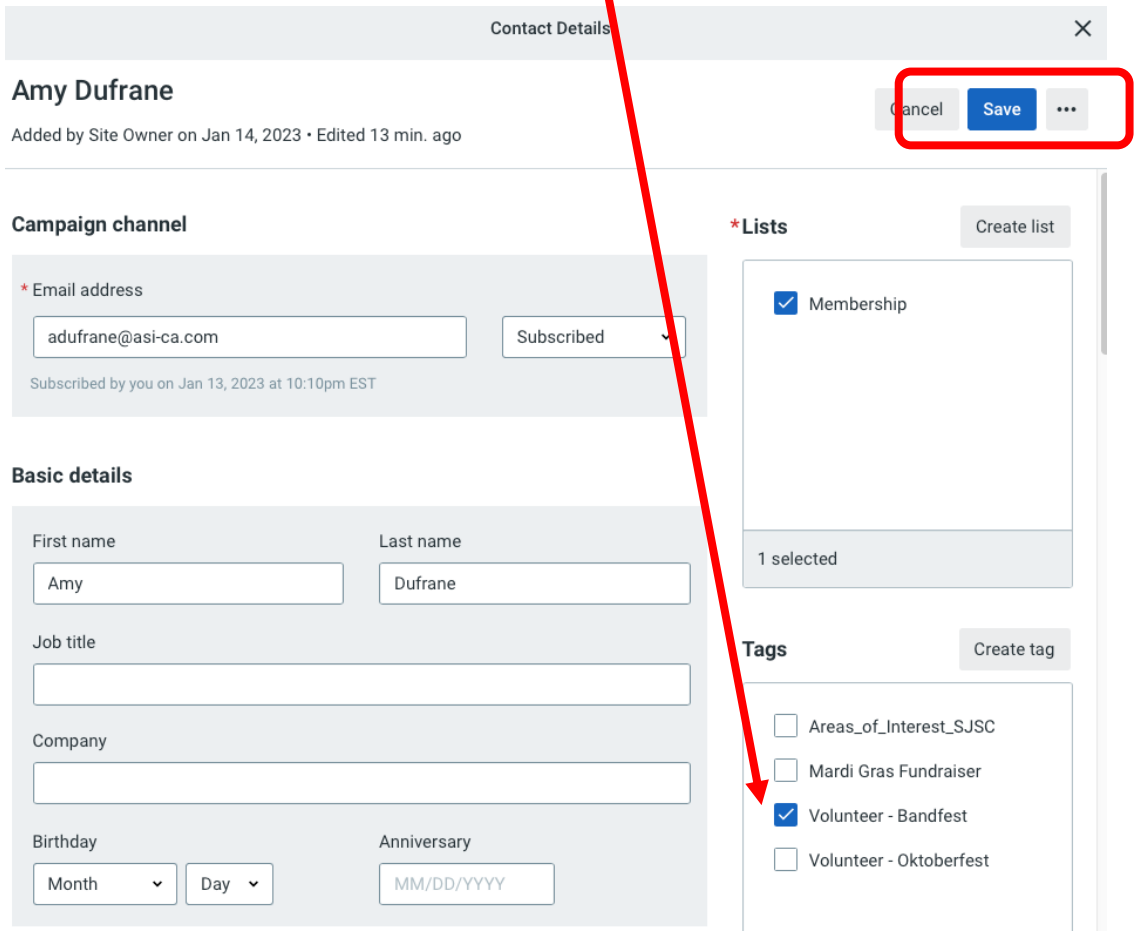
Click on Edit



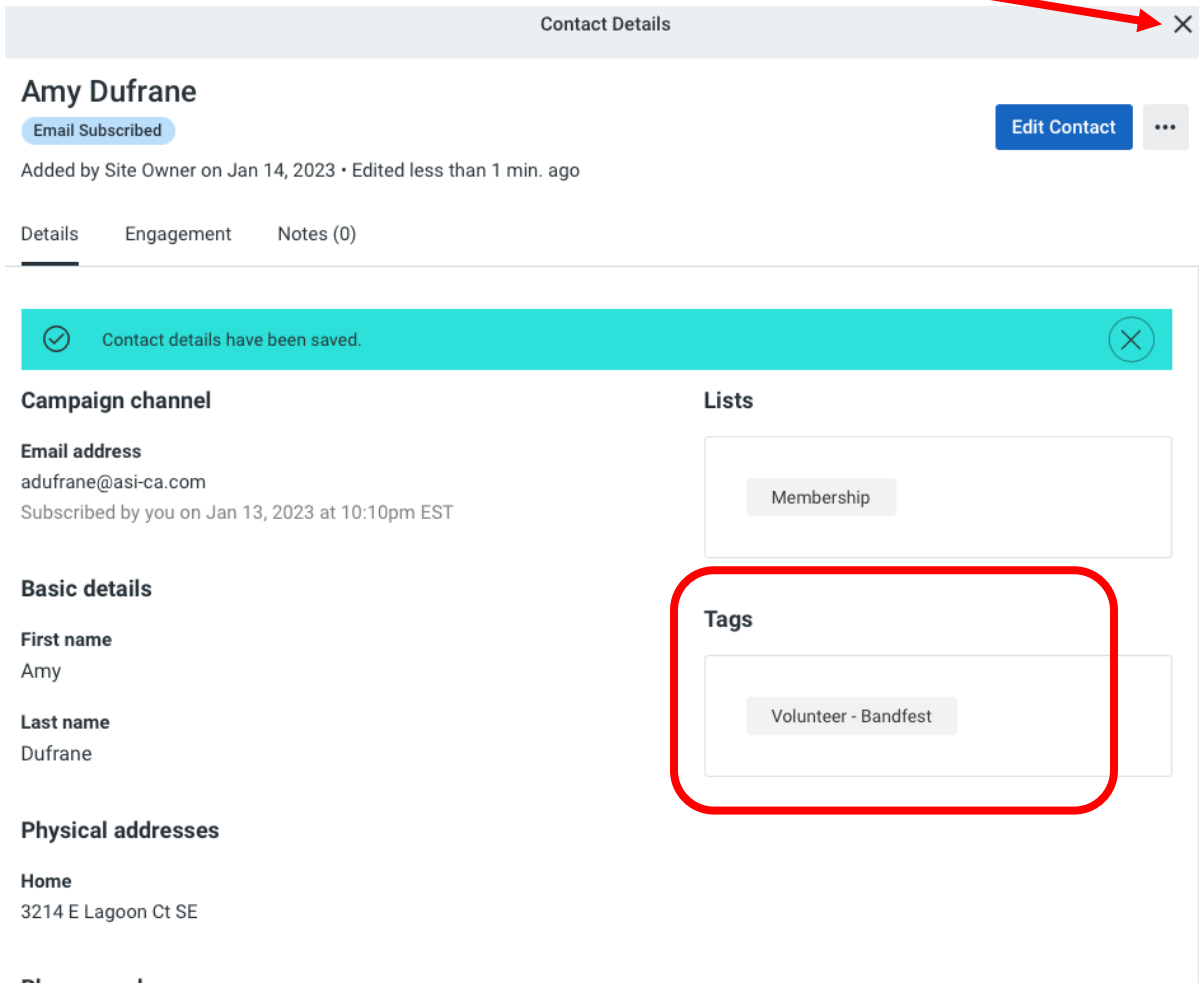
Click on Tag Field(s) of Interest



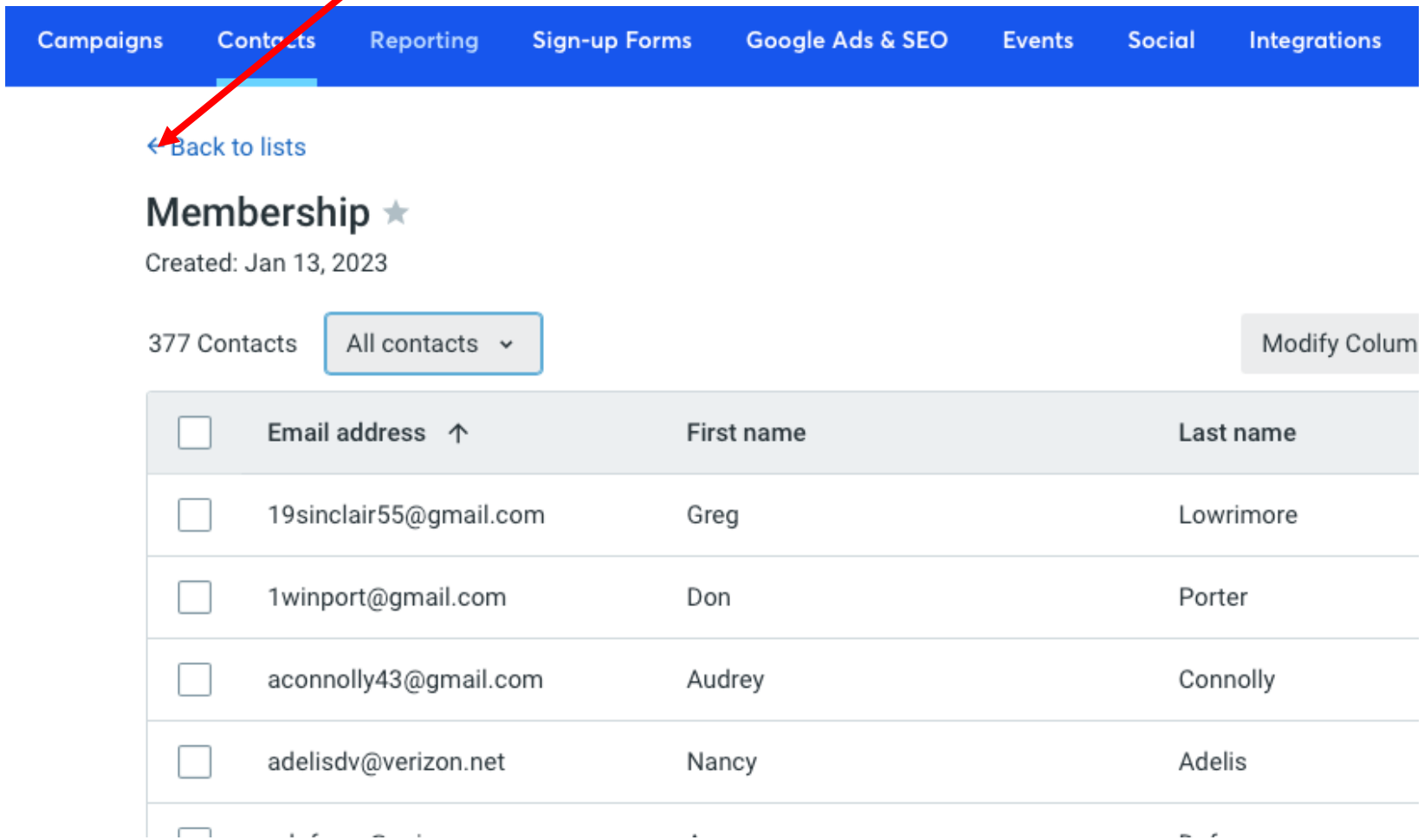
Click on Tag Field of Interest, then Save



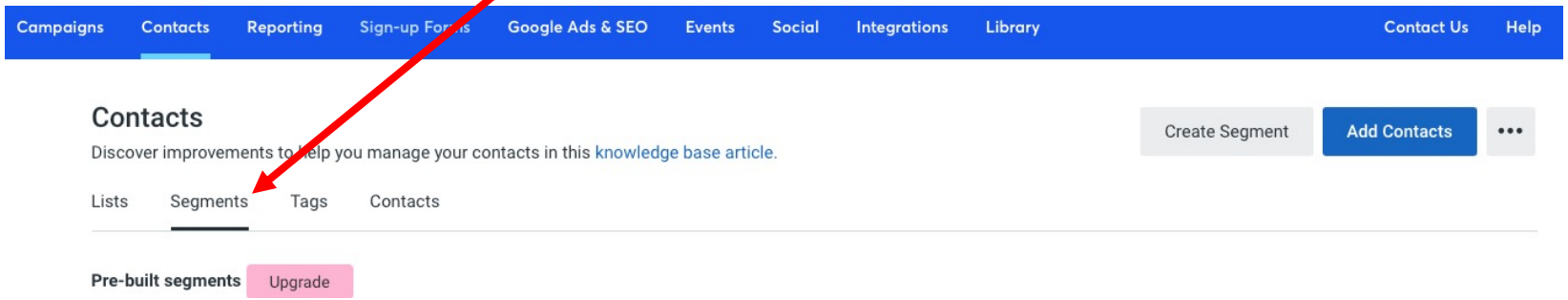
Click on x to close window



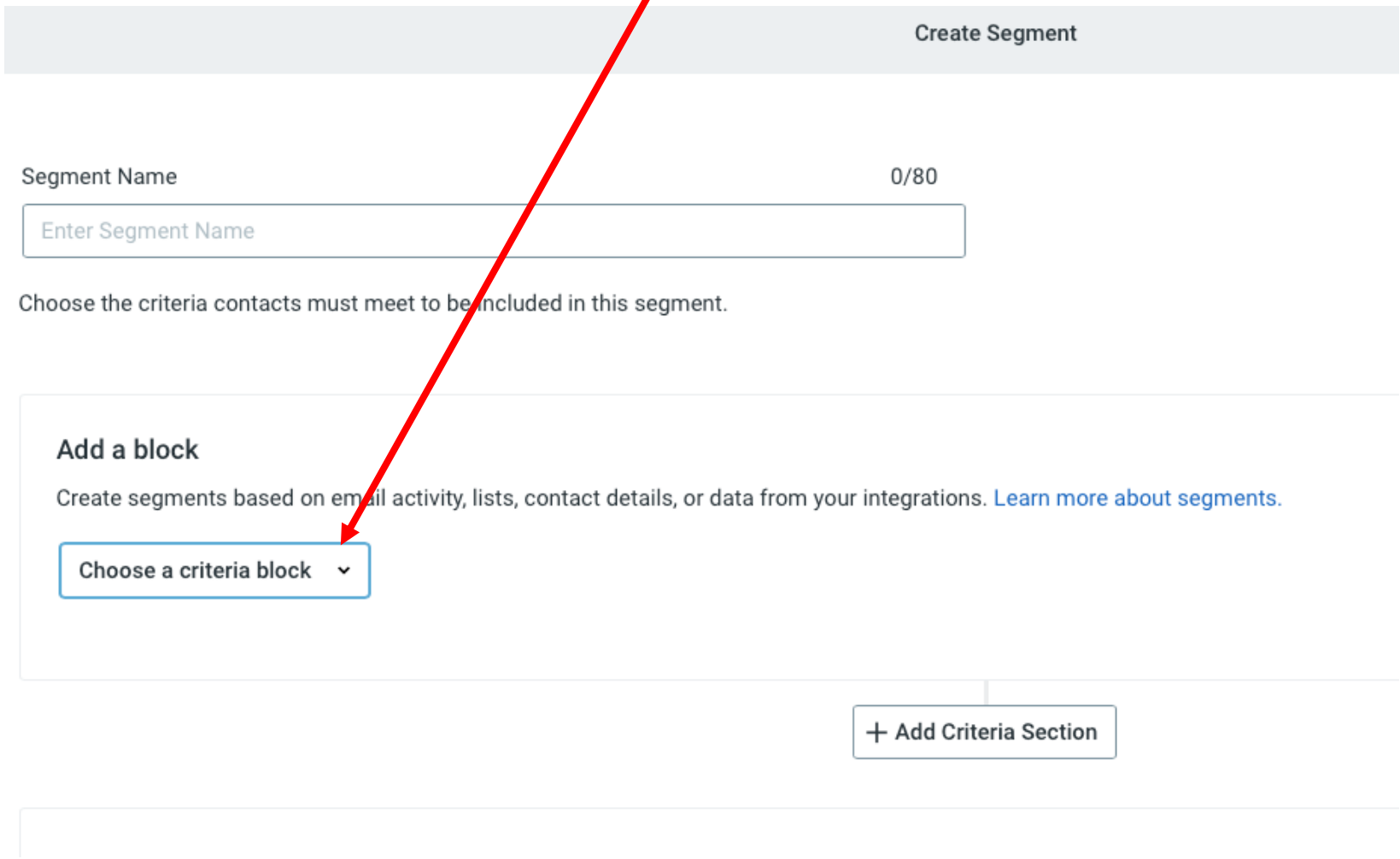
Click on Back to Lists



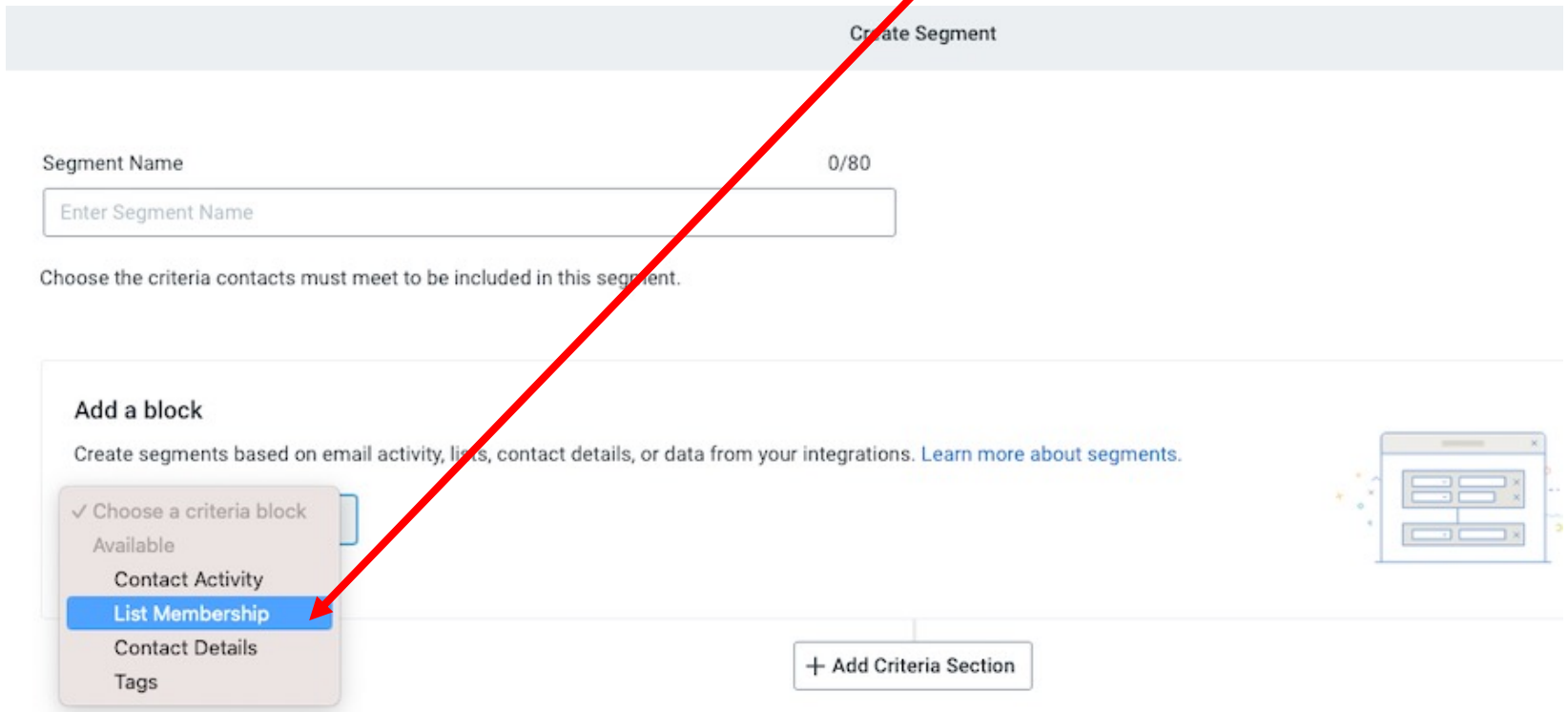
Click on Segments



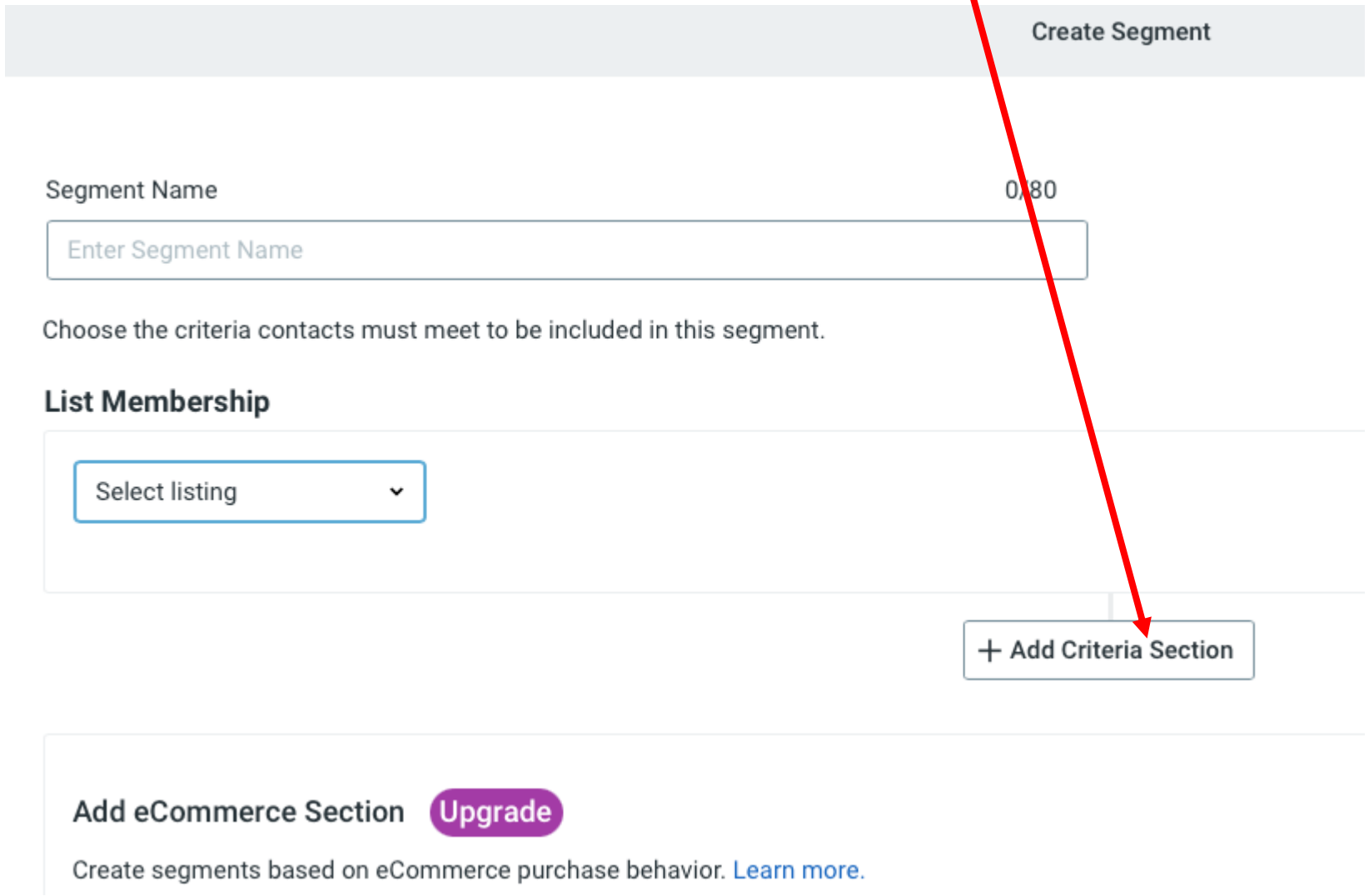
Click on Choose a criteria block



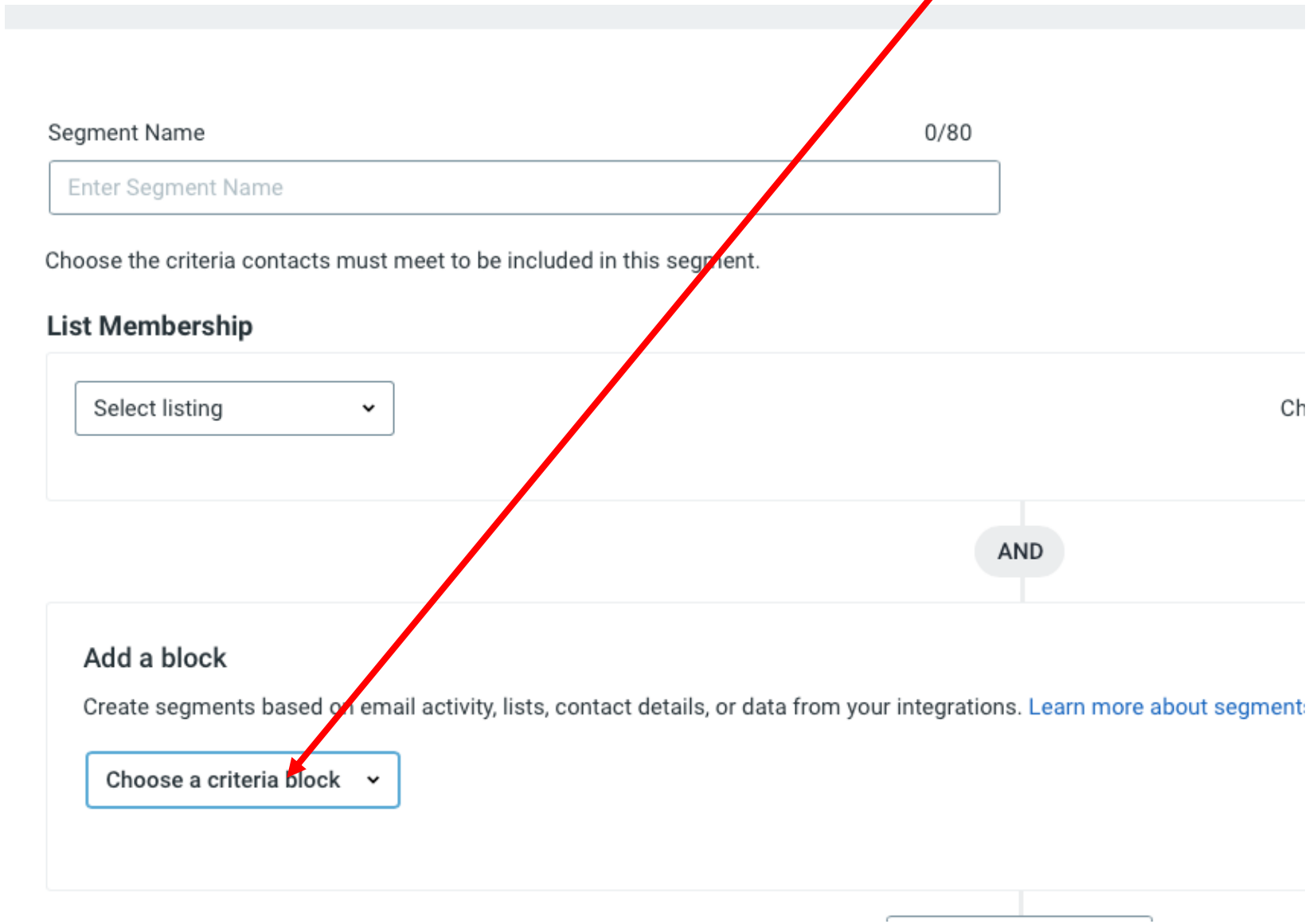
Click on List Membership



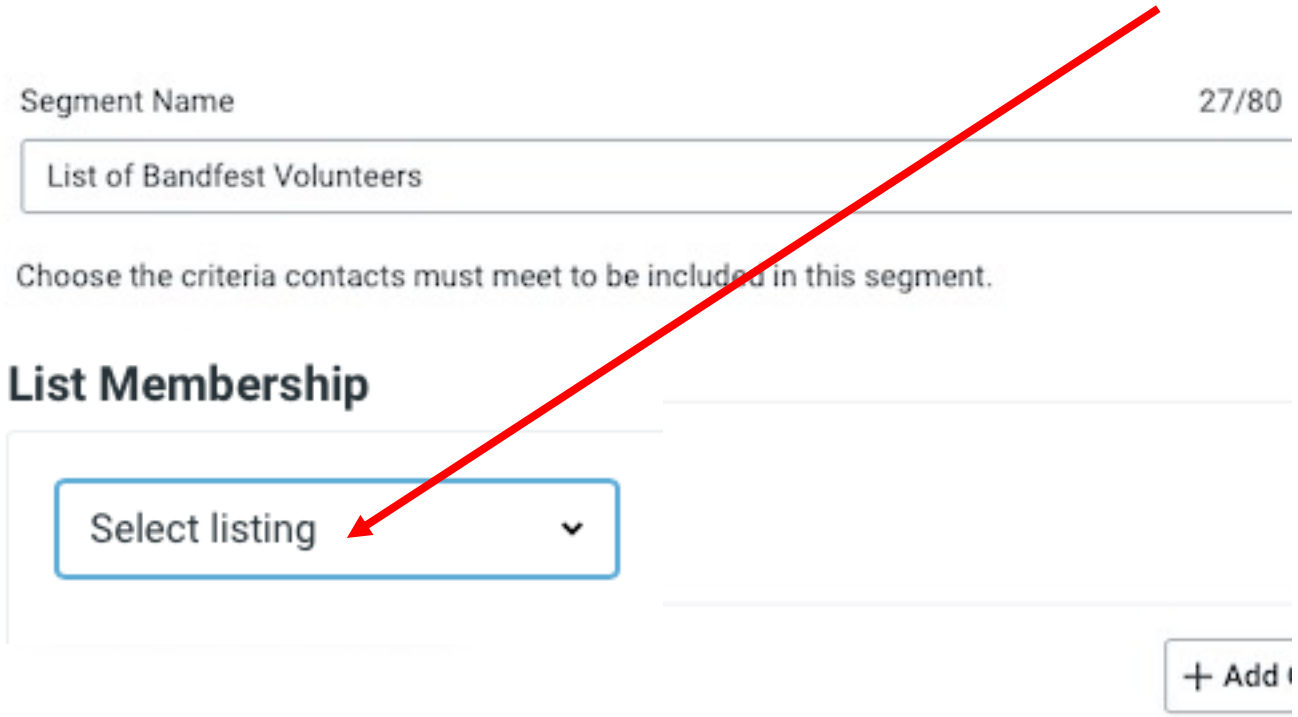
Click on +Add Criteria Section



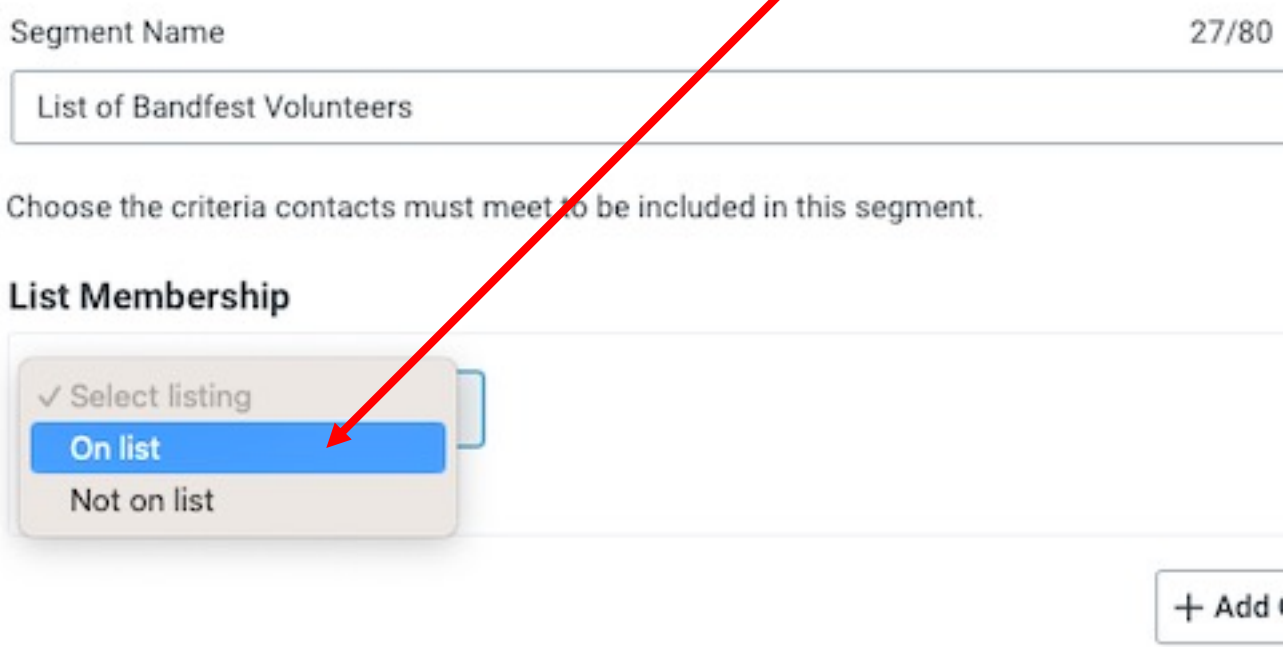
Click on Choose a criteria block



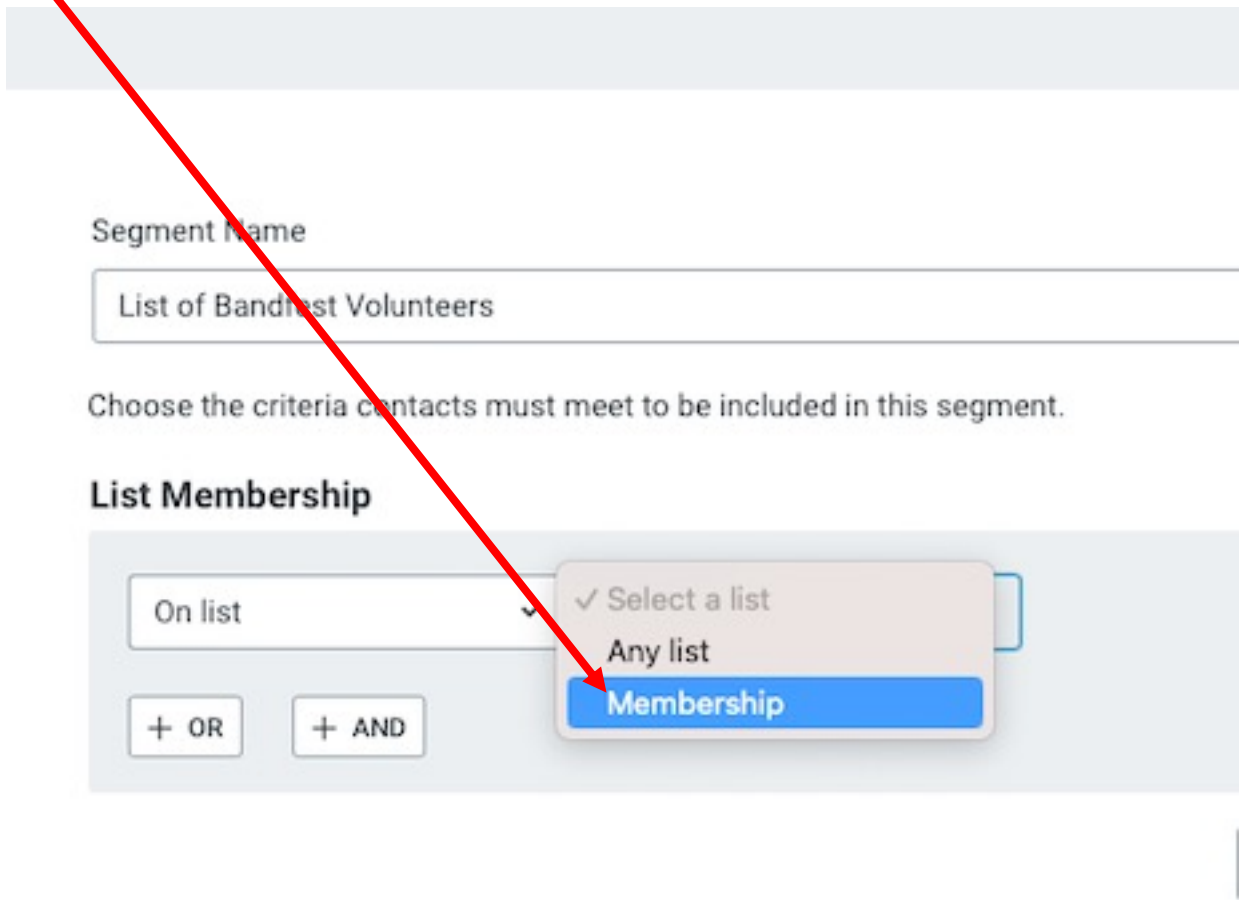
Type in Segment Name, then click on Select Listing



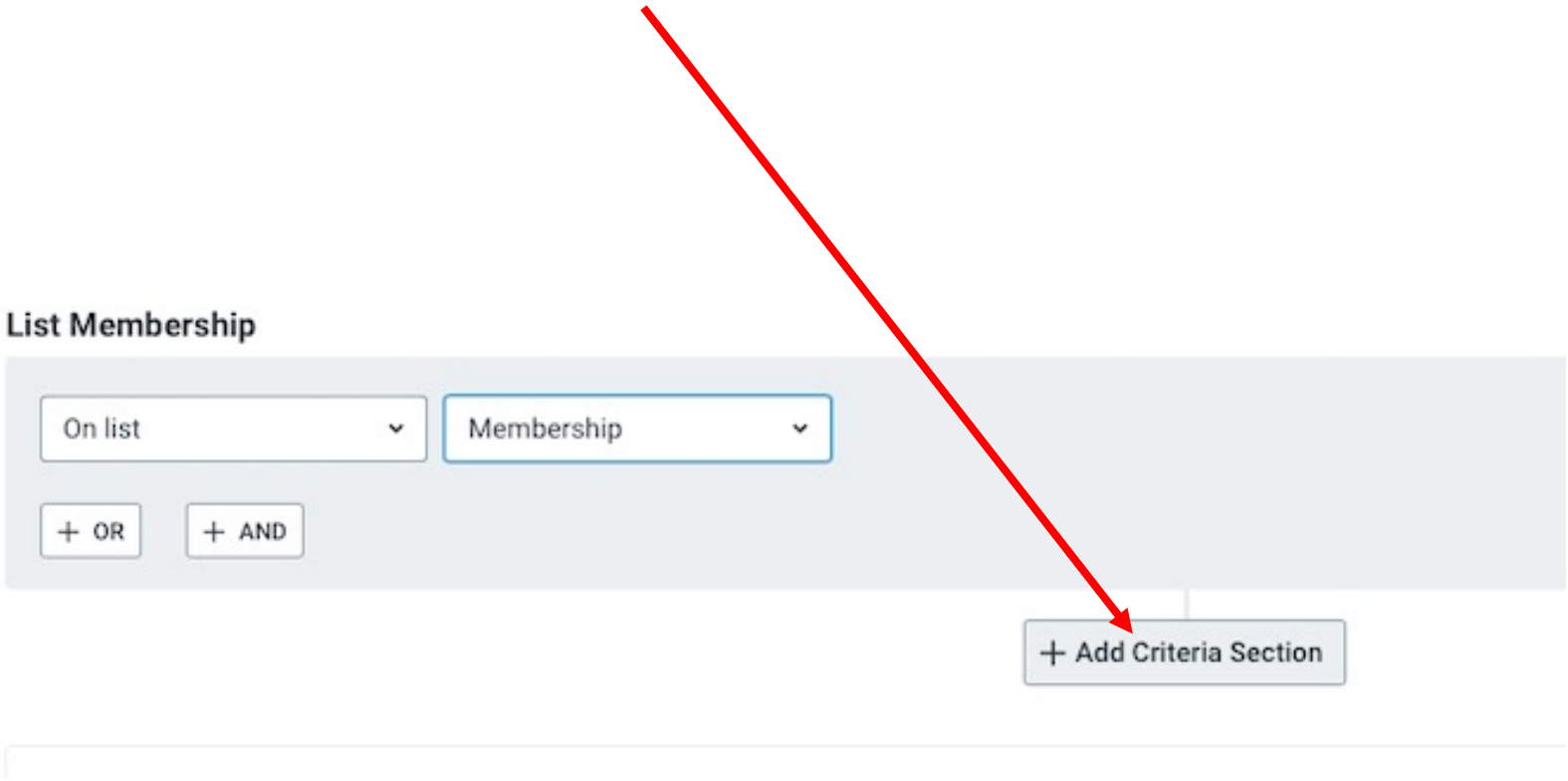
Click on On List



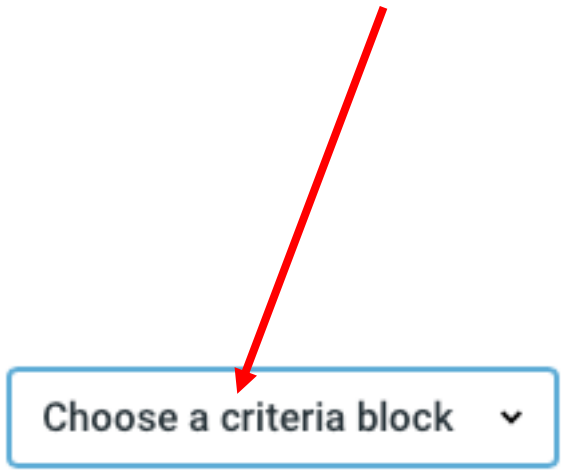
Click on Membership



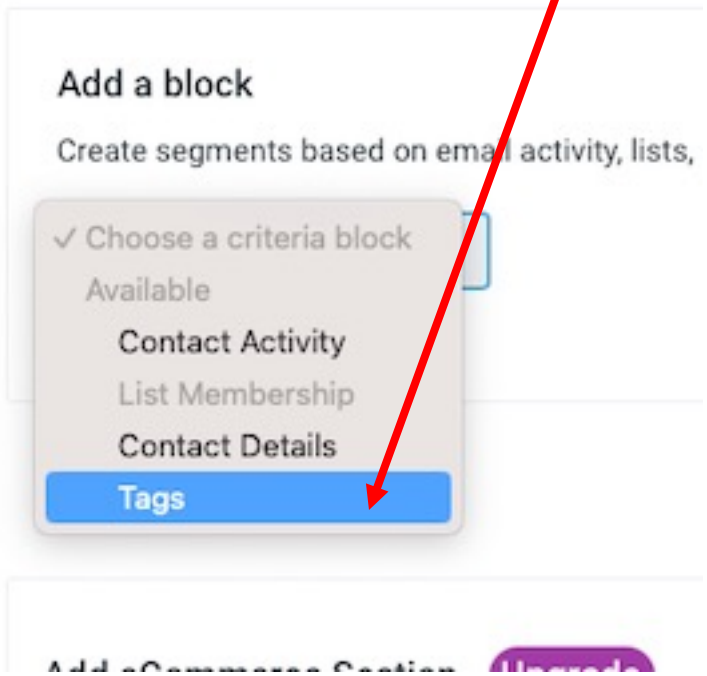
Click on +Add Criteria Section



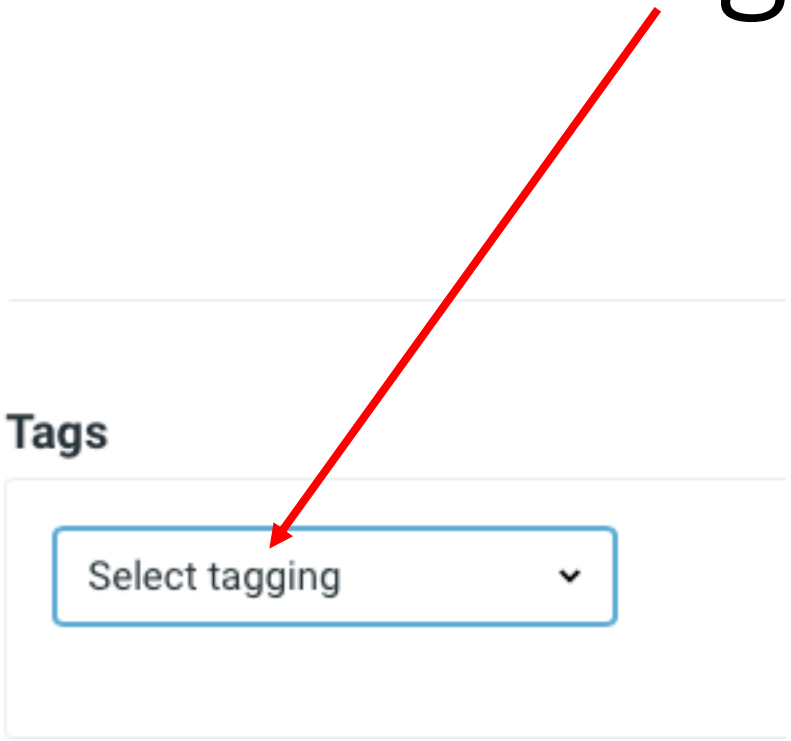
Click on
Choose a criteria block



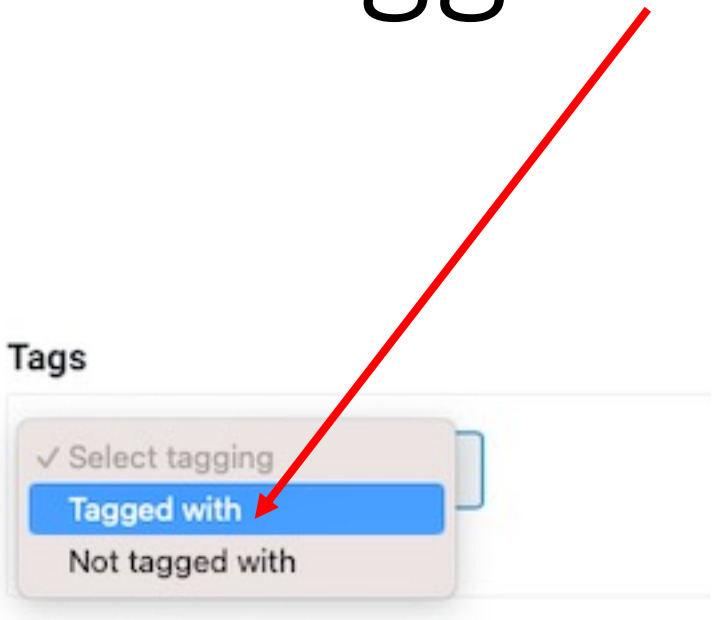
Click on Tags



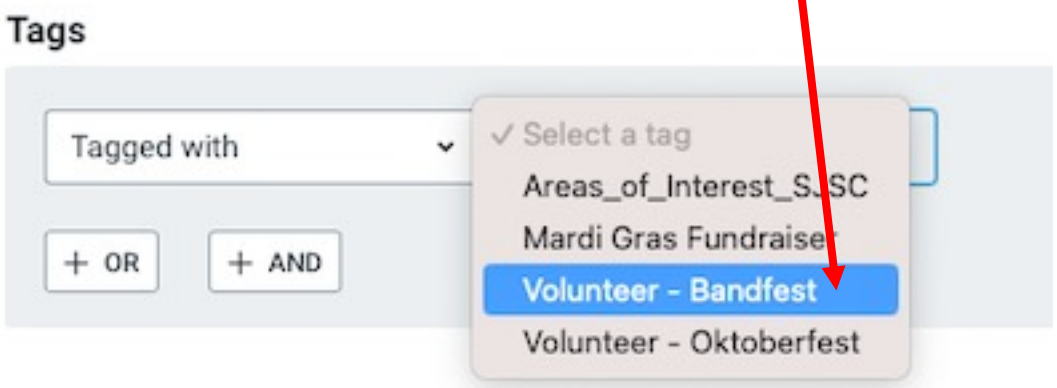
Click on Select tagging



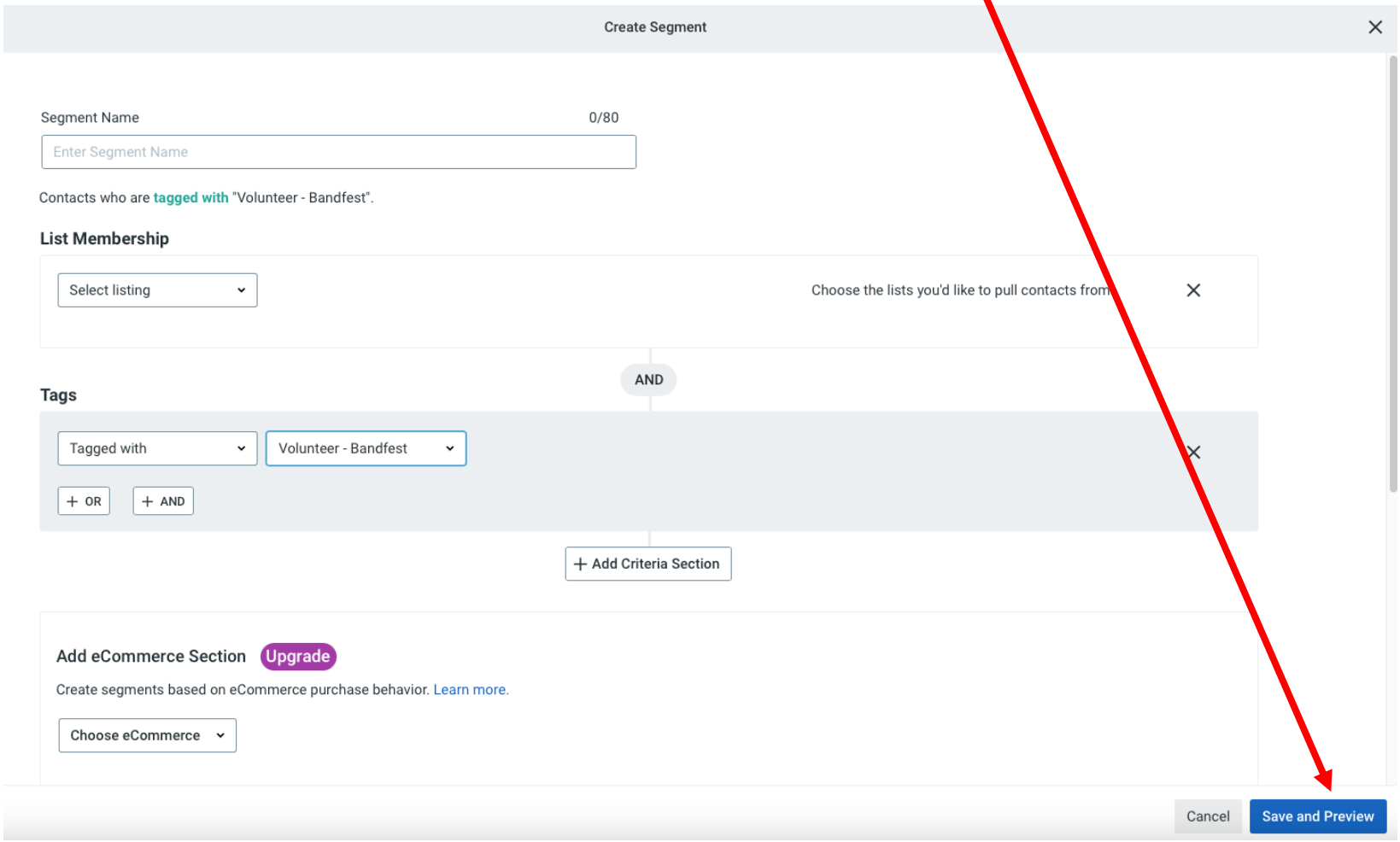
Click on Tagged with



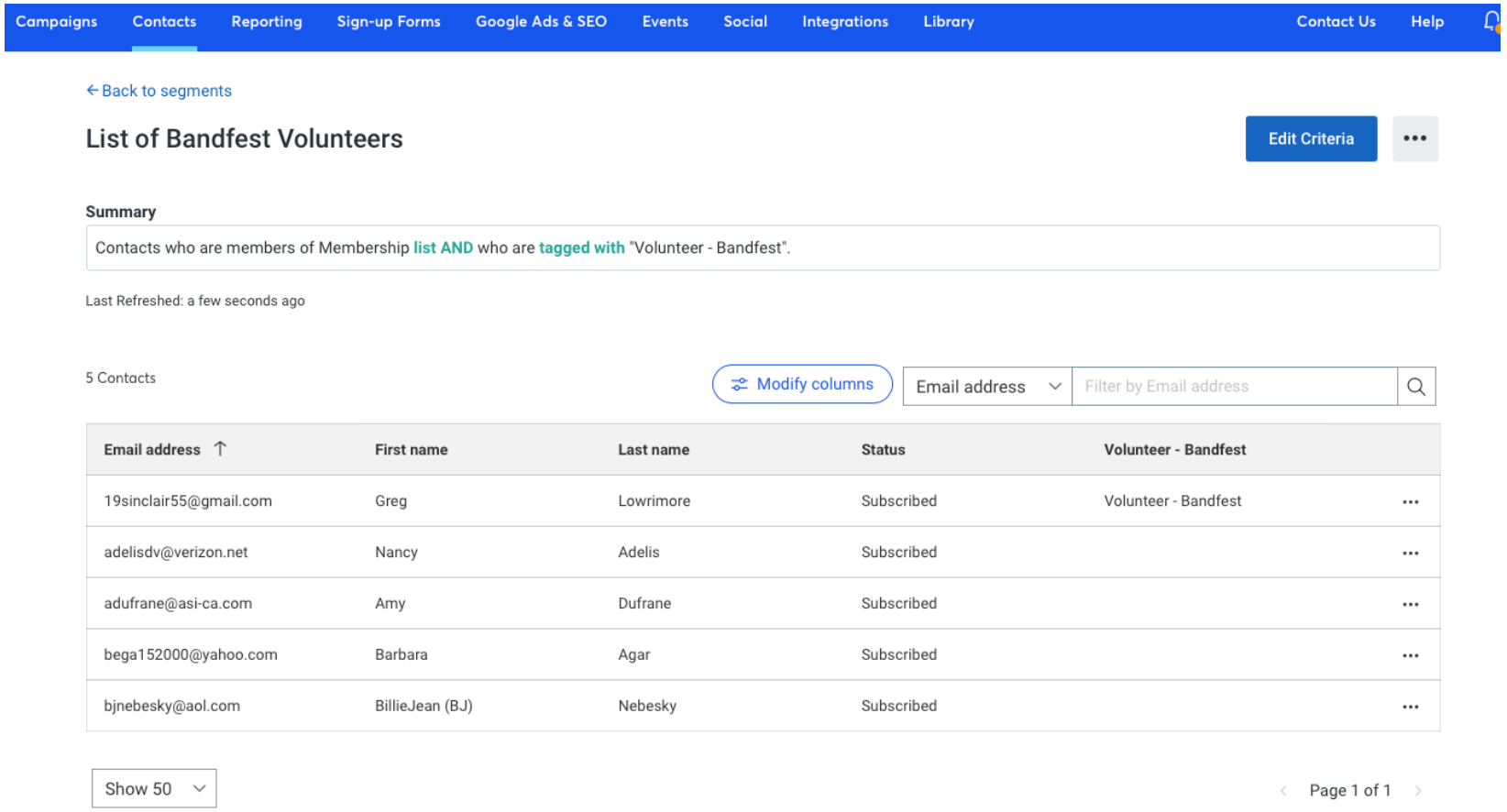
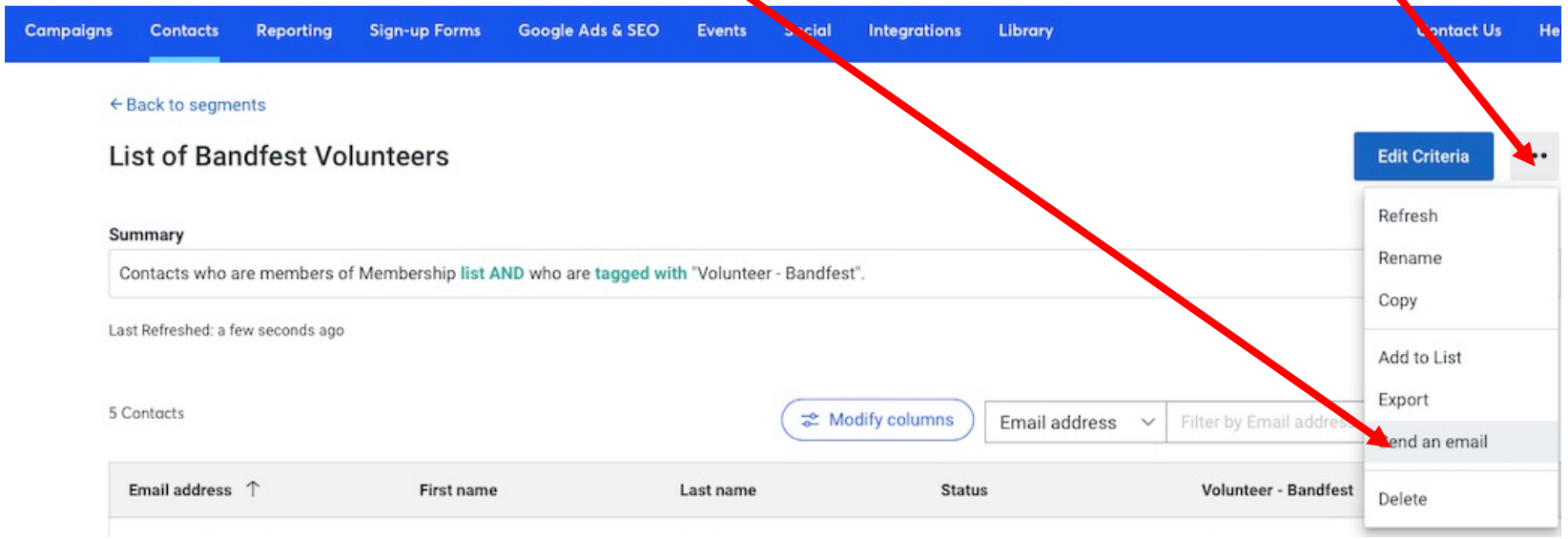
Click on Tagged with



Click on Save and Preview



Filtered list based on criteria seen below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