

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

In recognition of Martin Luther King Day, our Support Centers will be open with limited hours on Monday (1/16) from 10AM ET to 6PM ET. Visit our [Help Center](#) to see all of the ways you can find answers to your questions.

Contacts

Discover improvements to help you manage your contacts in this [knowledge base article](#).

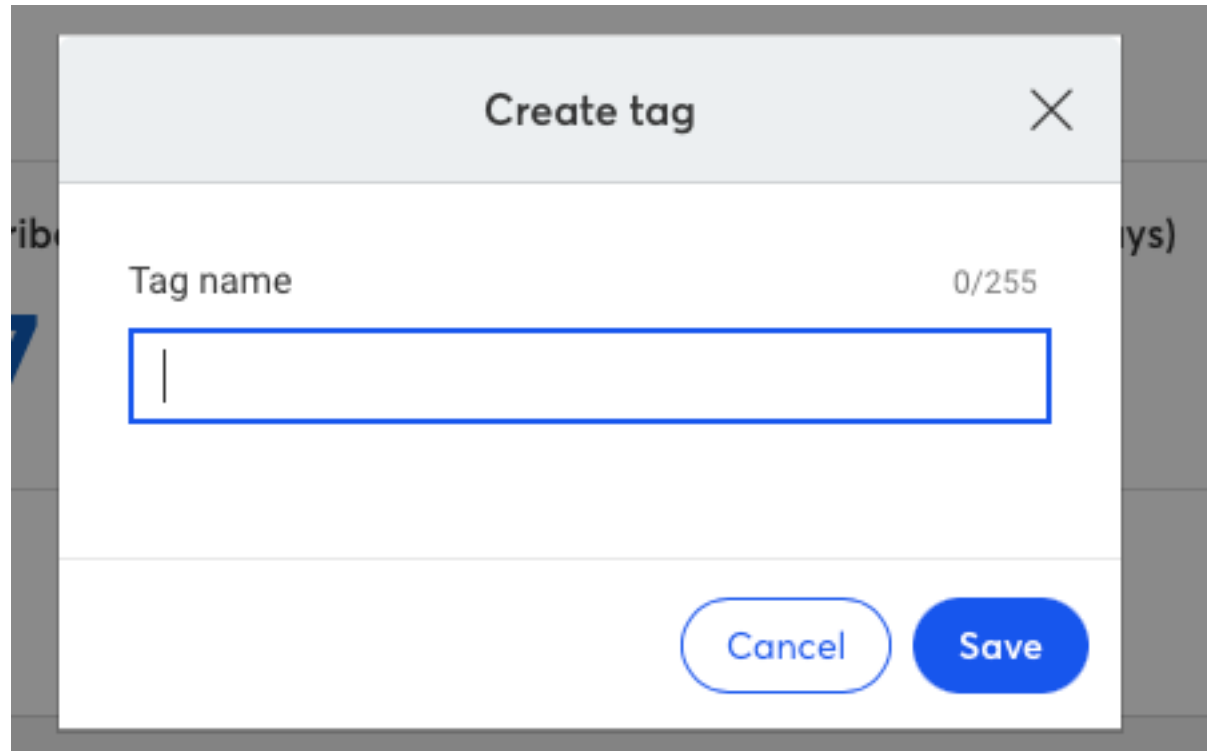
Lists Segments **Tags** Contacts

Create Tag

Add Contacts

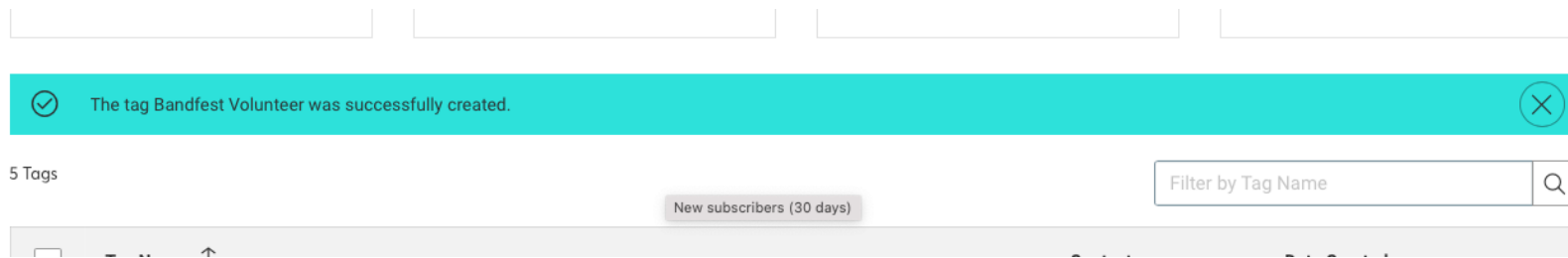


TYPE IN NAME OF TAG



The image shows a 'Create tag' dialog box. At the top, the title 'Create tag' is centered, with a close button (an 'X' icon) on the right. Below the title bar, the text 'Tag name' is on the left and '0/255' is on the right. A text input field with a blue border and a vertical cursor is positioned below the 'Tag name' label. At the bottom of the dialog, there are two buttons: 'Cancel' (a white button with a blue border) and 'Save' (a solid blue button with white text).

See Newly-Created Tag in green box



Add Tags to individual contacts by Clicking Contacts, then Tags

The screenshot shows a CRM interface with a blue navigation bar at the top containing links for Campaigns, Contacts, Reporting, Sign-up Forms, Google Ads & SEO, Events, Social, Integrations, Library, Contact Us, and Help. The 'Contacts' section is active, displaying a sub-navigation bar with 'Lists', 'Segments', 'Tags', and 'Contacts'. Below this is an 'Insights' section with four metrics: Subscribed (377), New subscribers (30 days) (377), Subscriber growth (30 days) (100%), and Unsubscribed (0). At the bottom, there is a '4 Tags' section with a search filter and a table listing tags: Areas_of_Interest_SJSC, Mardi Gras Fundraiser, Volunteer - Bandfest, and Volunteer - Oktoberfest.

Contacts
Discover improvements to help you manage your contacts in this [knowledge base article](#).
Create Tag Add Contacts

Lists Segments **Tags** Contacts

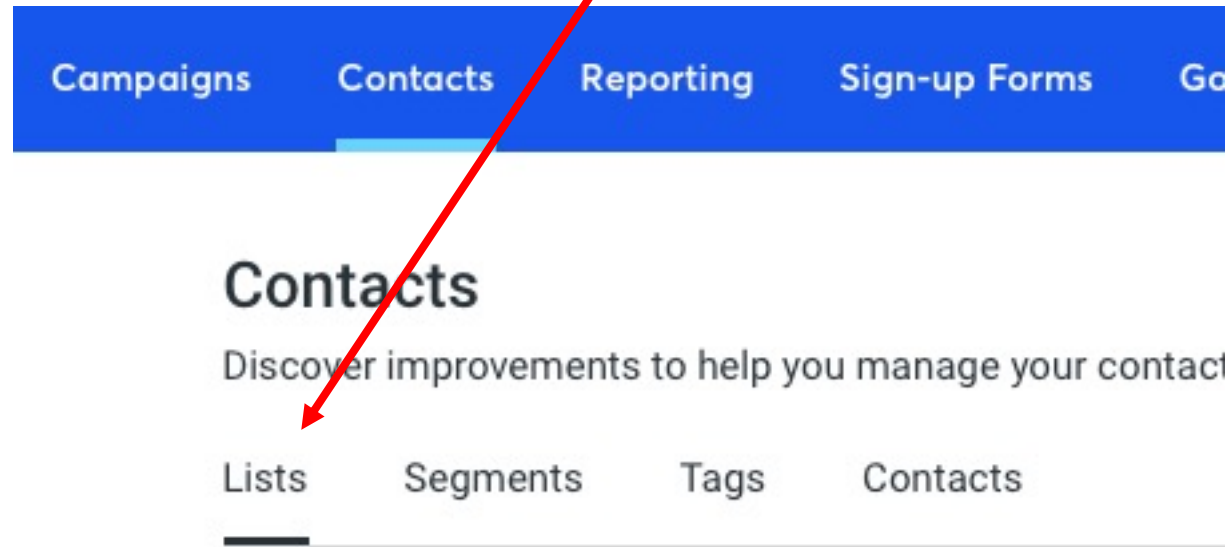
Insights → See more insights

Subscribed 377
New subscribers (30 days) 377
Subscriber growth (30 days) 100%
Unsubscribed 0

4 Tags Filter by Tag Name

<input type="checkbox"/> Tag Name ↑	Contacts	Date Created	
<input type="checkbox"/> Areas_of_Interest_SJSC	1	Jan 13, 2023	...
<input type="checkbox"/> Mardi Gras Fundraiser	3	Jan 13, 2023	...
<input type="checkbox"/> Volunteer - Bandfest	4	Jan 13, 2023	...
<input type="checkbox"/> Volunteer - Oktoberfest	4	Jan 13, 2023	...

Click on Lists



Click on Membership List Name

1 List

Filter by List name



<input type="checkbox"/>	★	List name ↑	Contacts	Date created
<input type="checkbox"/>	☆	Membership	377	Jan 13, 2023

Edit individual names

Use search to find

Membership ★
Created: Jan 13, 2023

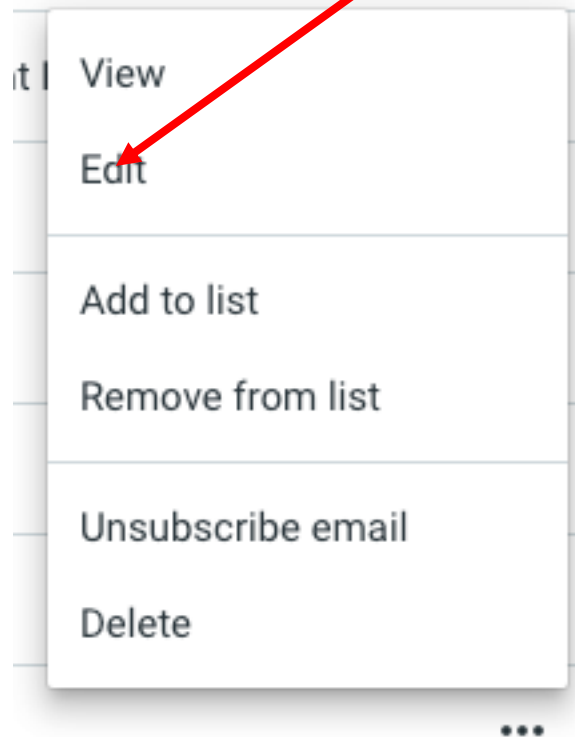
377 Contacts All contacts ▾

Modify Columns Filter by Name or Email Name or Email ▾

<input type="checkbox"/>	Email address ↑	First name	Last name	Interest	
<input type="checkbox"/>	19sinclair55@gmail.com	Greg	Lowrimore		...
<input type="checkbox"/>	1winport@gmail.com	Don	Porter		...
<input type="checkbox"/>	aconnolly43@gmail.com	Audrey	Connolly		...
<input type="checkbox"/>	adelisdv@verizon.net	Nancy	Adelis		...
<input type="checkbox"/>	adufrane@asi-ca.com	Amy	Dufrane		...
<input type="checkbox"/>	aldelong55@gmail.com	Arlene	Delong	Fundraising, Event Planning	...
<input type="checkbox"/>	ammphr18@gmail.com	Anne Marie	Morales		...
<input type="checkbox"/>	anne.crawford58@gmail.com	Anne	Crawford		...
<input type="checkbox"/>	anniem.sj@gmail.com	Anne Marie	Hucomb		...
<input type="checkbox"/>	annmbp1@gmail.com	Ann	Perry		...

Click three dots to edit

Click on Edit



Click on Tag Field(s) of Interest

Contact Details ✕

Amy Dufrane Cancel Save ...

Added by Site Owner on Jan 14, 2023 · Edited 9 min. ago

Campaign channel

* Email address

Subscribed by you on Jan 13, 2023 at 10:10pm EST

Basic details

First name Last name

Job title

Company

Birthday Anniversary

***Lists** Create list

Membership

1 selected

Tags Create tag

Areas_of_Interest_SJSC

Mardi Gras Fundraiser

Volunteer - Bandfest

Volunteer - Oktoberfest

Click on Tag Field of Interest, then Save

Contact Details ✕

Amy Dufrane Cancel Save ...

Added by Site Owner on Jan 14, 2023 • Edited 13 min. ago

Campaign channel

* Email address

Subscribed by you on Jan 13, 2023 at 10:10pm EST

Basic details

First name Last name

Job title

Company

Birthday Anniversary

*** Lists** Create list

Membership

1 selected

Tags Create tag

Areas_of_Interest_SJSC

Mardi Gras Fundraiser

Volunteer - Bandfest

Volunteer - Oktoberfest

Click on x to close window

Contact Details

Amy Dufrane
Email Subscribed [Edit Contact](#) ⋮

Added by Site Owner on Jan 14, 2023 · Edited less than 1 min. ago

Details Engagement Notes (0)

✔ Contact details have been saved. ✕

Campaign channel

Email address
adufrane@asi-ca.com
Subscribed by you on Jan 13, 2023 at 10:10pm EST

Basic details

First name
Amy

Last name
Dufrane

Physical addresses

Home
3214 E Lagoon Ct SE

Lists

Membership

Tags

Volunteer - Bandfest

Click on Back to Lists



[← Back to lists](#)

Membership ★

Created: Jan 13, 2023

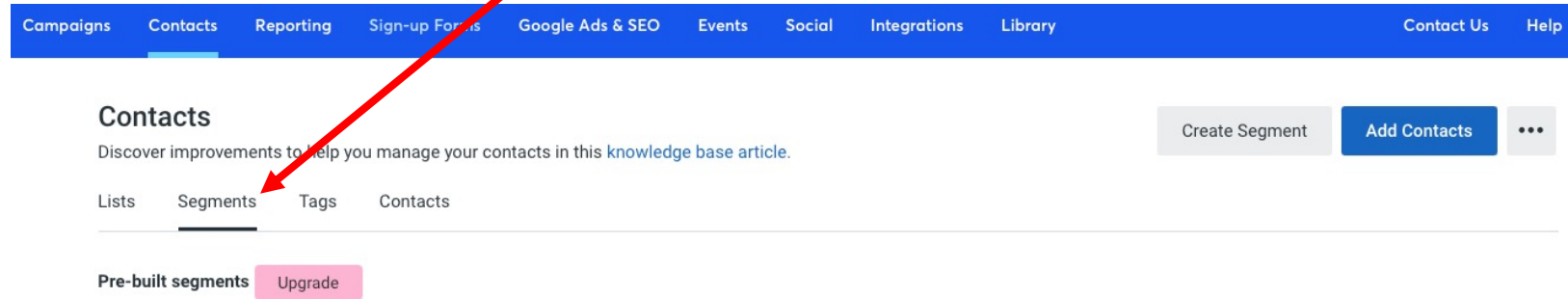
377 Contacts

All contacts ▾

Modify Colum

<input type="checkbox"/>	Email address ↑	First name	Last name
<input type="checkbox"/>	19sinclair55@gmail.com	Greg	Lowrimore
<input type="checkbox"/>	1winport@gmail.com	Don	Porter
<input type="checkbox"/>	aconnolly43@gmail.com	Audrey	Connolly
<input type="checkbox"/>	adelisdv@verizon.net	Nancy	Adelis
<input type="checkbox"/>			

Click on Segments



The screenshot shows a software interface with a blue navigation bar at the top containing the following items: Campaigns, Contacts, Reporting, Sign-up Forms, Google Ads & SEO, Events, Social, Integrations, Library, Contact Us, and Help. Below the navigation bar, the 'Contacts' section is active. It features a sub-header 'Contacts' and a link to a knowledge base article. To the right of the sub-header are three buttons: 'Create Segment', 'Add Contacts', and a three-dot menu icon. Below the sub-header is a horizontal menu with four tabs: 'Lists', 'Segments', 'Tags', and 'Contacts'. A red arrow points from the top of the page to the 'Segments' tab. Below the tabs, there is a section titled 'Pre-built segments' with an 'Upgrade' button.

Campaigns Contacts Reporting Sign-up Forms Google Ads & SEO Events Social Integrations Library Contact Us Help

Contacts

Discover improvements to help you manage your contacts in this [knowledge base article](#).

Create Segment Add Contacts ...

Lists Segments Tags Contacts

Pre-built segments Upgrade

Click on Choose a criteria block

Create Segment

Segment Name 0/80

Choose the criteria contacts must meet to be included in this segment.

Add a block
Create segments based on email activity, lists, contact details, or data from your integrations. [Learn more about segments.](#)

Click on List Membership

Create Segment

Segment Name 0/80

Enter Segment Name

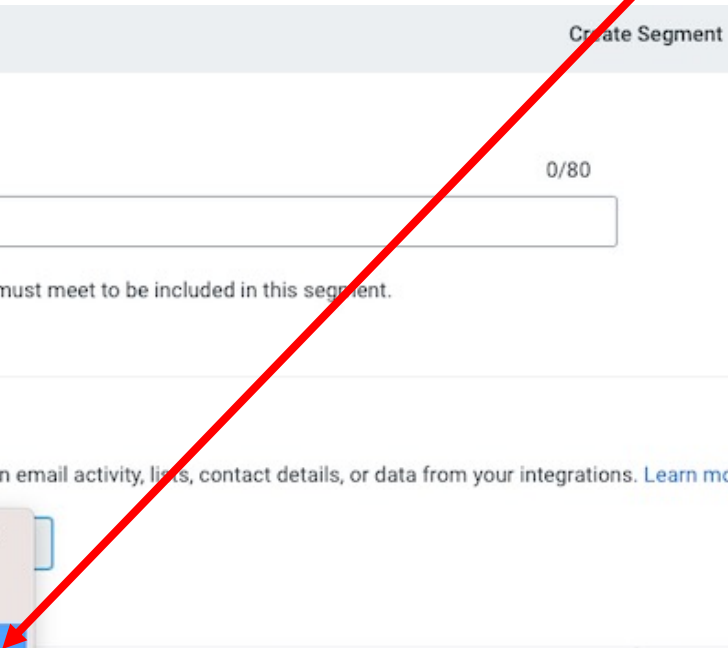
Choose the criteria contacts must meet to be included in this segment.

Add a block

Create segments based on email activity, lists, contact details, or data from your integrations. [Learn more about segments.](#)

- ✓ Choose a criteria block
- Available
- Contact Activity
- List Membership**
- Contact Details
- Tags

+ Add Criteria Section



Click on +Add Criteria Section

Create Segment

Segment Name 0/80

Enter Segment Name

Choose the criteria contacts must meet to be included in this segment.

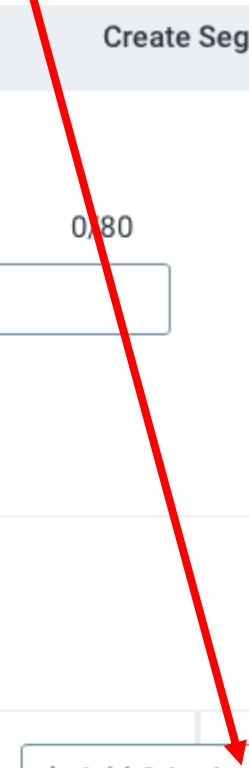
List Membership

Select listing ▼

+ Add Criteria Section

Add eCommerce Section Upgrade

Create segments based on eCommerce purchase behavior. [Learn more.](#)



Click on Choose a criteria block

Segment Name

0/80

Enter Segment Name

Choose the criteria contacts must meet to be included in this segment.

List Membership

Select listing



Ch

AND

Add a block

Create segments based on email activity, lists, contact details, or data from your integrations. [Learn more about segment](#)

Choose a criteria block



Type in Segment Name, then click on Select Listing

Segment Name

27/80

List of Bandfest Volunteers

Choose the criteria contacts must meet to be included in this segment.

List Membership

Select listing



+ Add

Click on On List

Segment Name

27/80

List of Bandfest Volunteers

Choose the criteria contacts must meet to be included in this segment.

List Membership

✓ Select listing

On list

Not on list

+ Add

Click on Membership

Segment Name

List of Bandrest Volunteers

Choose the criteria contacts must meet to be included in this segment.

List Membership

On list

✓ Select a list

Any list

Membership

+ OR

+ AND

Click on +Add Criteria Section

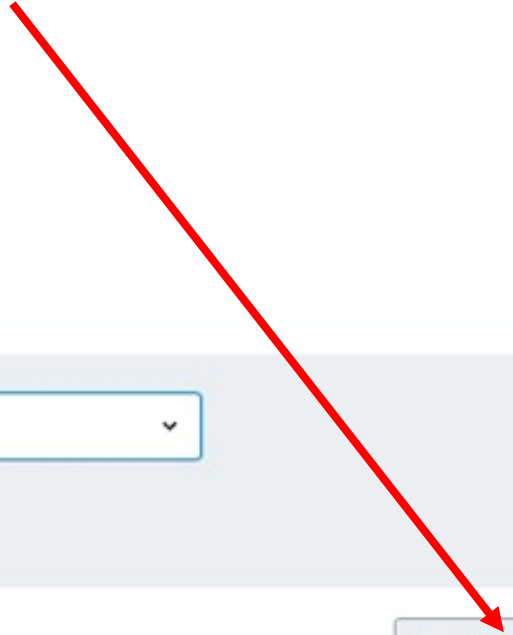
List Membership

On list Membership

+ OR

+ AND

+ Add Criteria Section



Click on
Choose a criteria block



Choose a criteria block ▾

Click on Tags

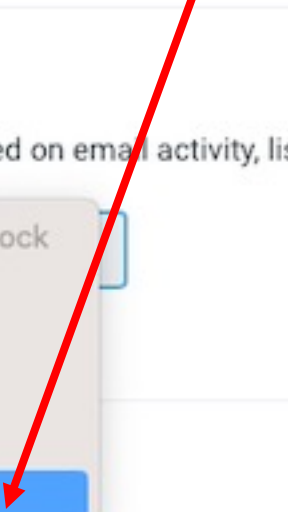
Add a block
Create segments based on email activity, lists,

✓ Choose a criteria block

Available

- Contact Activity
- List Membership
- Contact Details
- Tags**

Add Commerce Section [Upgrade](#)



Click on Select tagging

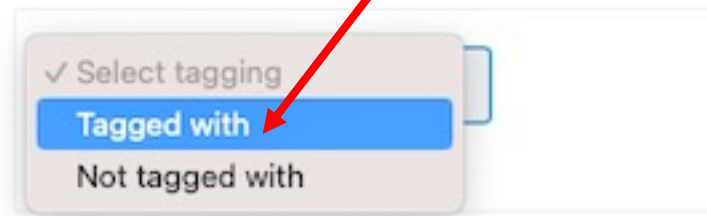
Tags

Select tagging




Click on Tagged with

Tags




Click on Tagged with

Tags

Tagged with 

- ✓ Select a tag
- Areas_of_Interest_S...SC
- Mardi Gras Fundraise
- Volunteer - Bandfest**
- Volunteer - Oktoberfest



Click on Save and Preview

Create Segment ×

Segment Name 0/80

Contacts who are **tagged with** "Volunteer - Bandfest".

List Membership

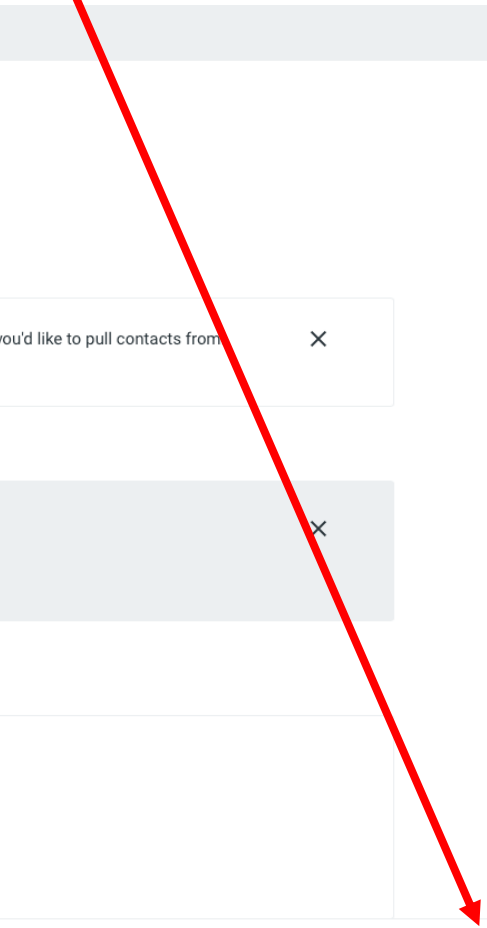
Choose the lists you'd like to pull contacts from ×

Tags

AND

Tagged with ×

Add eCommerce Section Upgrade
Create segments based on eCommerce purchase behavior. [Learn more.](#)



Filtered list based on criteria seen below

Campaigns Contacts Reporting Sign-up Forms Google Ads & SEO Events Social Integrations Library Contact Us Help

[← Back to segments](#)

List of Bandfest Volunteers Edit Criteria ⋮

Summary

Contacts who are members of Membership list AND who are tagged with "Volunteer - Bandfest".

Last Refreshed: a few seconds ago

5 Contacts Modify columns Email address Filter by Email address Q

Email address ↑	First name	Last name	Status	Volunteer - Bandfest	
19sinclair55@gmail.com	Greg	Lowrimore	Subscribed	Volunteer - Bandfest	⋮
adelisdv@verizon.net	Nancy	Adelis	Subscribed		⋮
adufrane@asi-ca.com	Amy	Dufrane	Subscribed		⋮
bega152000@yahoo.com	Barbara	Agar	Subscribed		⋮
bjnebesky@aol.com	BillieJean (BJ)	Nebesky	Subscribed		⋮

Show 50 ▾

< Page 1 of 1 >

To send an email to this group,
click on the three dots, then
Send an email

The screenshot shows a CRM interface with a blue navigation bar at the top containing links for Campaigns, Contacts, Reporting, Sign-up Forms, Google Ads & SEO, Events, Social, Integrations, Library, Contact Us, and Help. Below the navigation bar, there is a link for '← Back to segments' and a title 'List of Bandfest Volunteers'. A blue 'Edit Criteria' button is next to a three-dot menu icon. The dropdown menu is open, showing options: Refresh, Rename, Copy, Add to List, Export, Send an email (highlighted), and Delete. Below the menu, there is a 'Summary' section with the text: 'Contacts who are members of Membership list AND who are tagged with "Volunteer - Bandfest".' Below the summary, it says 'Last Refreshed: a few seconds ago' and '5 Contacts'. There is a 'Modify columns' button and a filter dropdown set to 'Email address'. Below this is a table with columns: Email address (with an up arrow), First name, Last name, Status, and Volunteer - Bandfest.