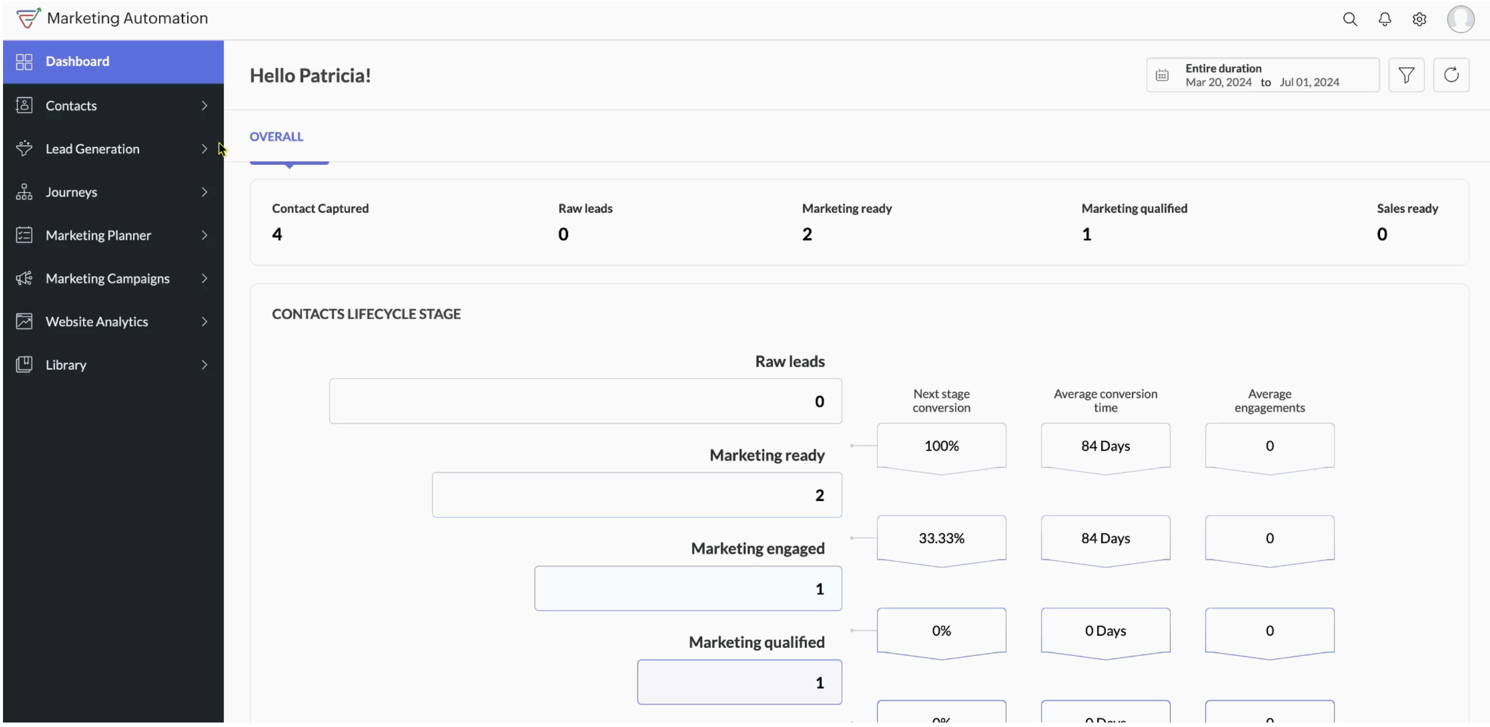
Zoho Corporation

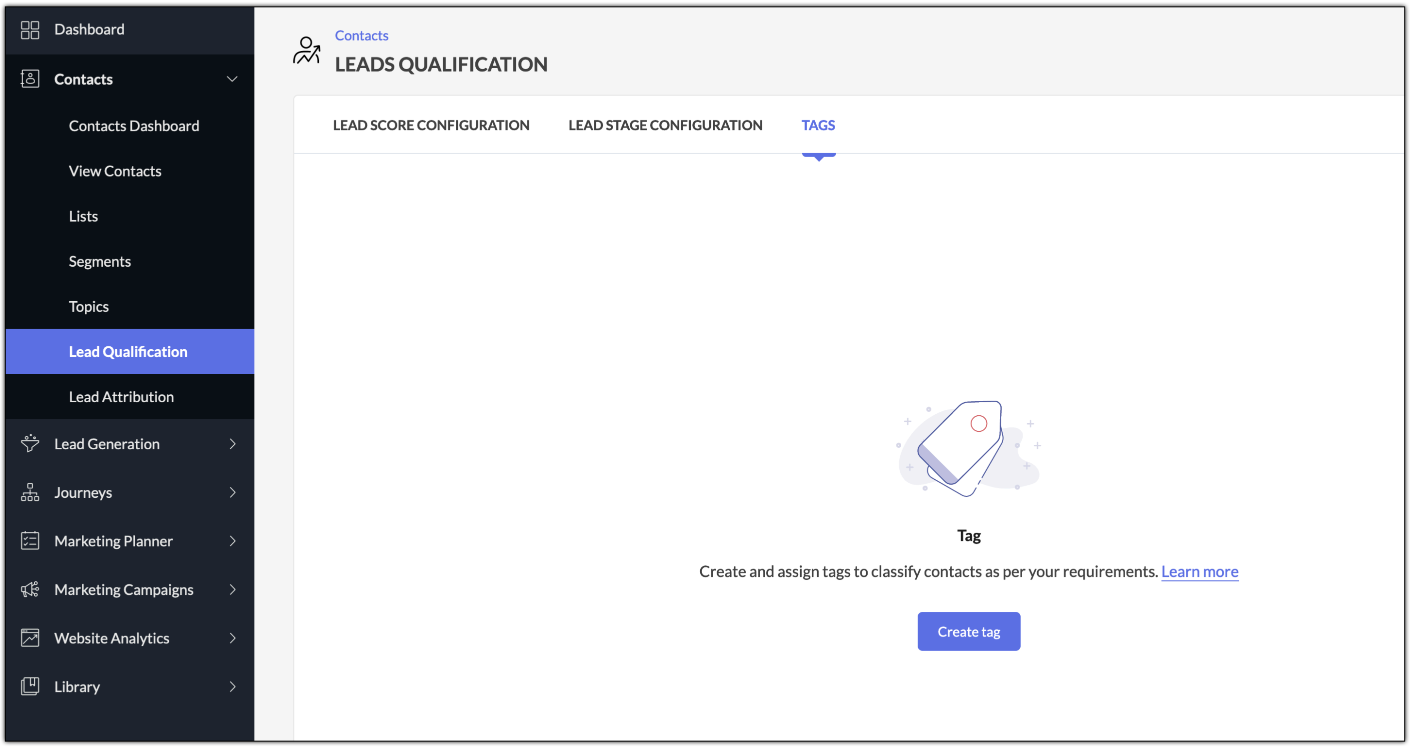
Understanding Tags

Tags are labels that you add to a group of contacts so that you can sort, search, categorize, filter, and segment them efficiently. You can add tags to contacts based on demographics such as location, revenue, age or company size, scores etc. When you click on any tag, you can view all the records associated with it.

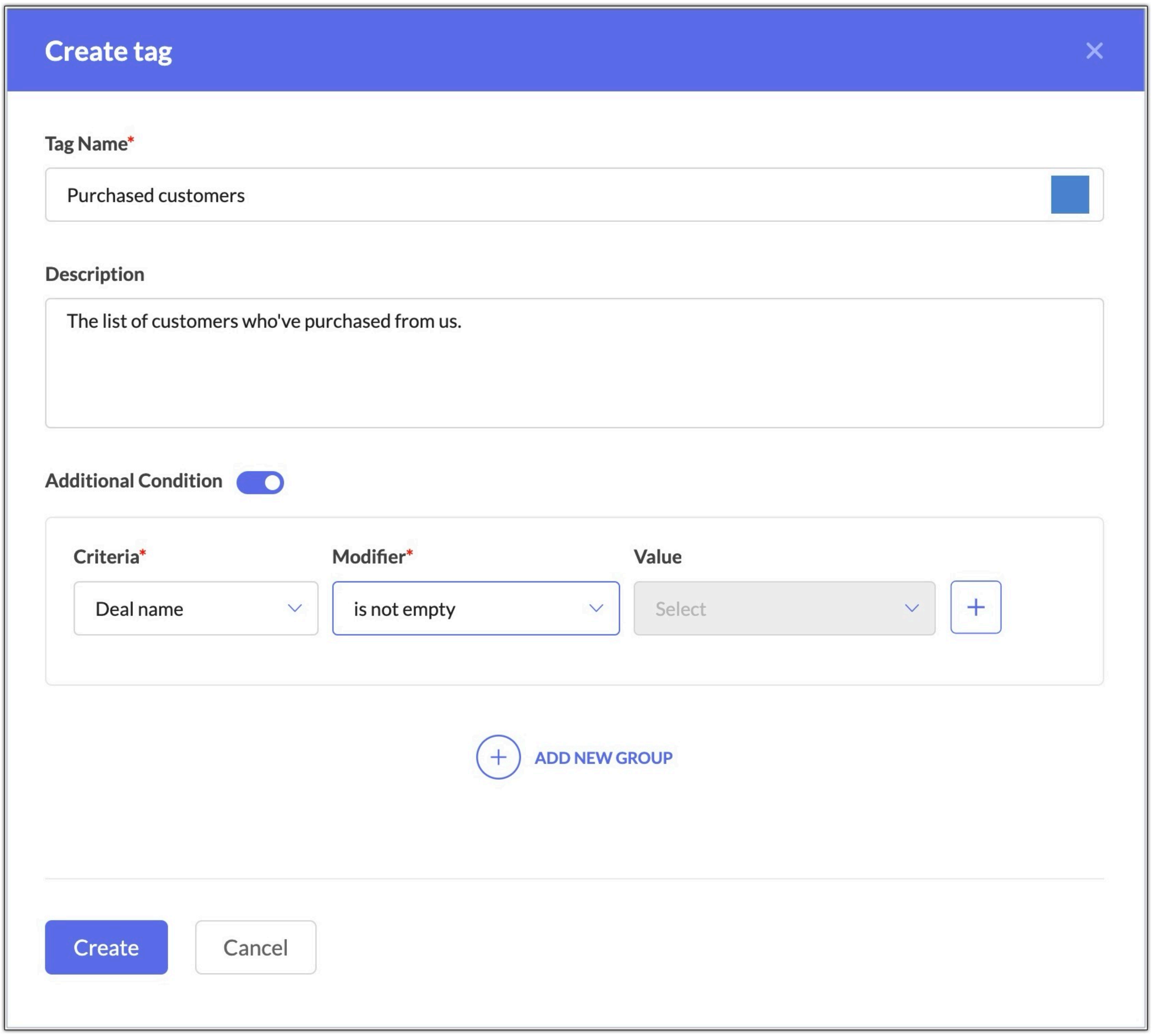
To create a tag



1. Under **Contacts** menu in the *Navigation Toolbar* to the left, select **Lead Qualification**.
2. Click on the **Tags** tab at the top.
3. Click **Create tag**.



4. Provide the **Tag Name** for your reference in the tag creation slide-in.
5. Select a **color** from the color box to be associated with this tag
6. Provide a short **Description** for the tag.
7. Enable **Additional Condition** toggle switch and add criteria for tags, if needed.



8. Click **Create**.

Note: It is possible to assign more than one tag to a single contact.

To view contacts associated with a tag

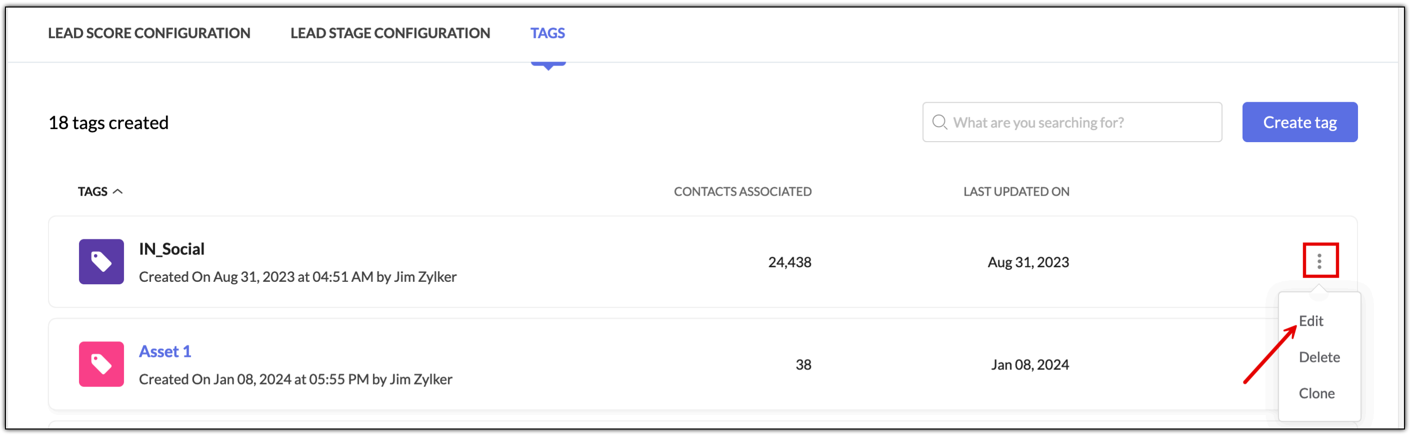
1. Under **Contacts** menu in the *Navigation Toolbar* to the left, select **Lead Qualification**.
2. Click on the **Tags** tab at the top. List of tags created will be displayed.
3. Click on the tag for which you want to see the associated contacts.

You can perform various bulk operations on contacts here similar to View Contacts tab.

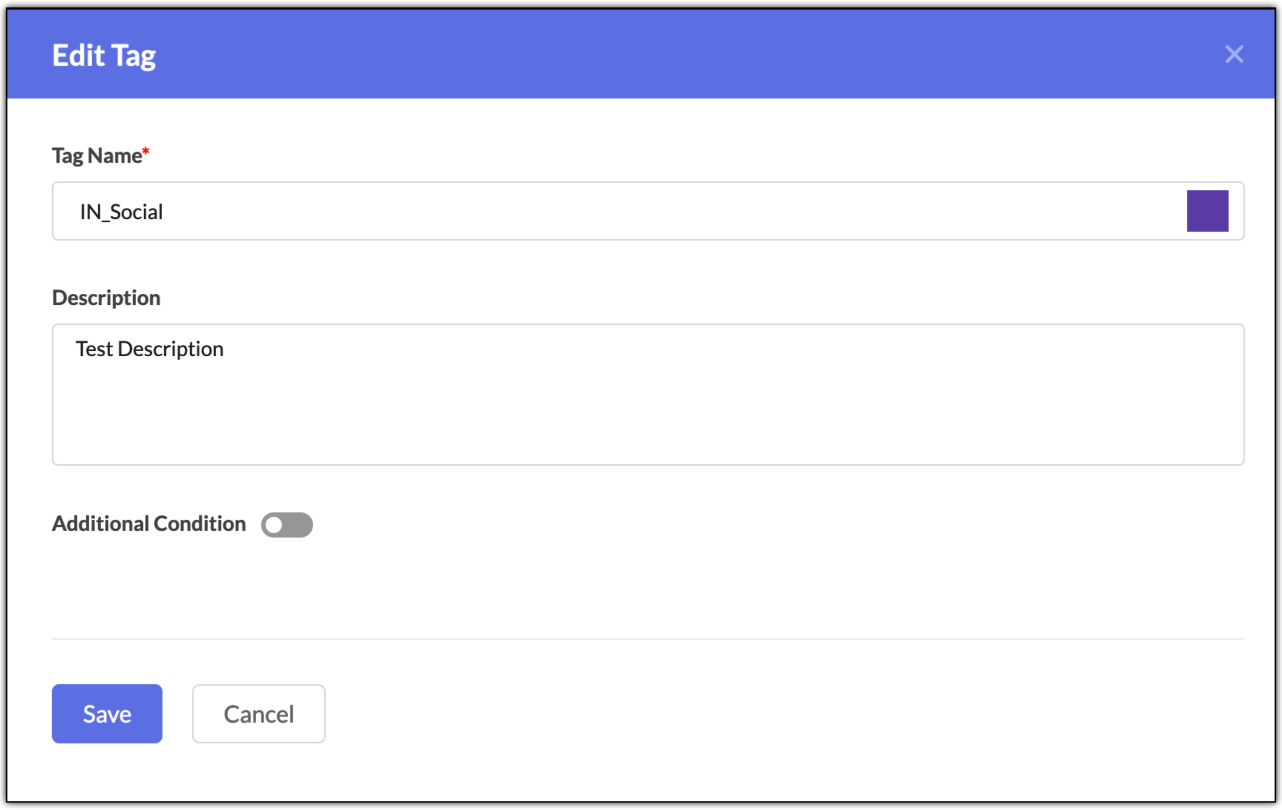
To edit a tag

1. Under **Contacts** menu in the *Navigation Toolbar* to the left, select **Lead Qualification**.
2. Click on the **Tags** tab at the top. List of tags created will be displayed.

3. Click on **More Actions** button at far right of the required tag.



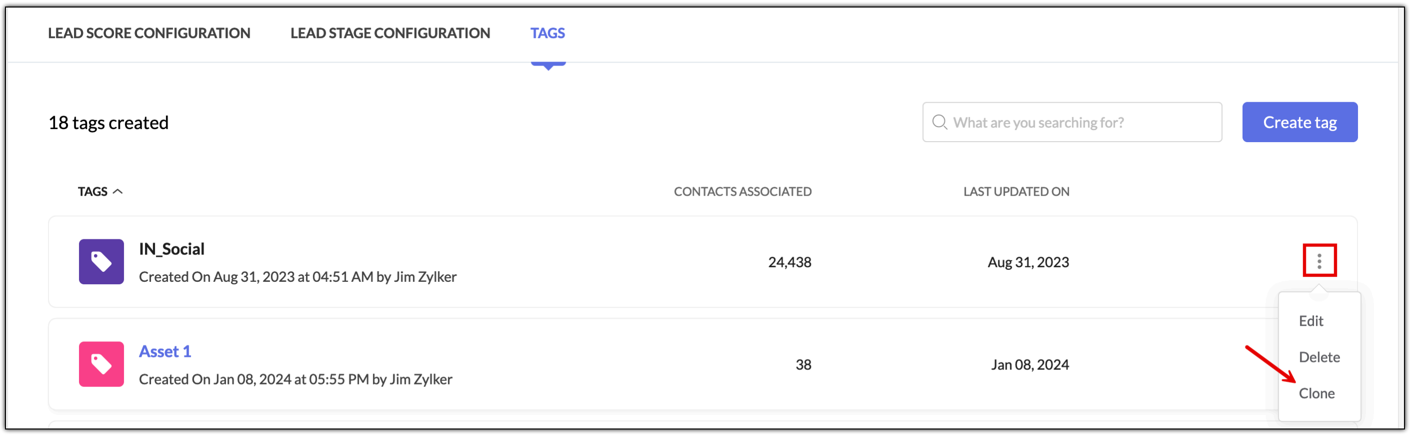
4. Click **Edit.** Make necessary changes.



5. Click **Save.**

To clone a tag

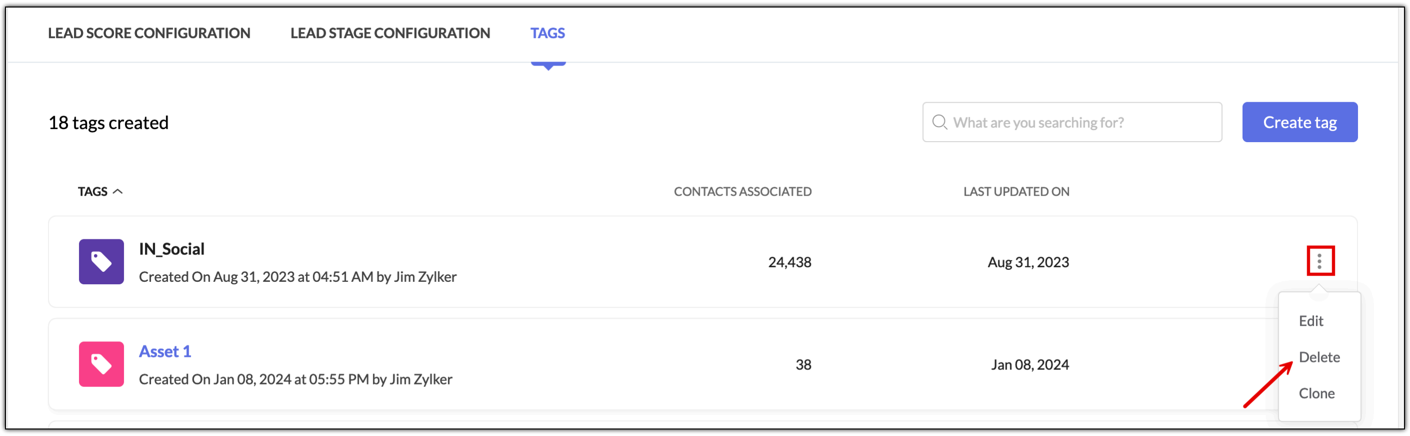
1. Under **Contacts** menu in the *Navigation Toolbar* to the left, select **Lead Qualification**.
2. Click on the **Tags** tab at the top. List of tags created will be displayed.
3. Click on **More Actions** button at far right of the required tag.



4. Click **Clone.** A clone of the tag will be created.

To delete a tag

1. Under **Contacts** menu in the *Navigation Toolbar* to the left, select **Lead Qualification**.
2. Click on the **Tags** tab at the top. List of tags created will be displayed.



3. Click on **More Actions** button at far right of the required tag.
4. Click **Delete.** Check **Delete associated contacts** option to delete contacts associated to this tag.
5. Click **Delete**.