How to Add Contact TAGS and Company TAGS to CRM

written by Jude Campbell | October 30, 2023

In Selling Lane CRM, adding contact tags is like highlighting your customers or companies. It helps you group them by something special or important, making it easier to find them easily. Company tags work the same way, with one advantage, by categorizing the whole company, all of the contacts within the company will also display.

Tags allow you to categorize, highlight, and quickly identify specific attributes or interactions with your customers or the companies you do business with.

Adding Contacts Tags

- Search for the contact and click into the contacts details
- Click + Tag
- Add a new tag or pick from the pull down
- You can add as many tags as needed to a Contact
- When you search for that tag, it will bring up all contacts and companies with that tag.

Adding Companies Tags

- Search for the Company and click into the companies details
- Click + Tag
- Add a new tag or pick from the pull down
- You can add as many tags as needed to a company
- When you search for a company tag it will bring up all contacts in that company.

Here are some specific tag suggestions for contacts and companies:

Contact Tags:

- **Lead type:** Lead, prospect, customer, partner, vendor, etc.
- **Industry:** Finance, healthcare, technology, retail, etc.
- **Company size:** Small business, medium-sized business, enterprise
- **Job title:** CEO, CFO, CTO, VP of sales, VP of marketing, etc.
- **Location:** City, state, country
- **Engagement level:** Active, inactive, engaged, disengaged
- **Source:** Website, referral, event, social media, etc.
- **Interest:** Product A, product B, product C, etc.
- **Purchase history:** Product purchased, date of purchase, amount spent

Company Tags:

- **Industry:** Finance, healthcare, technology, retail, etc.
- **Company size:** Small business, medium-sized business, enterprise
- **Location:** City, state, country
- **Revenue:** $1M-$10M, $10M-$100M, $100M-$1B, etc.
- **Number of employees:** 10-50 employees, 50-250 employees, 250+ employees
- **Growth rate:** High growth, medium growth, low growth
- **Customer segment:** Small business, medium-sized business, enterprise
- **Products or services:** Product A, product B, product C, etc.
- **Competitors:** Company A, company B, company C, etc.

Short explanation video, how to add contact tags and company tags

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[How to add additional contacts to a company]

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- Search for the company
- Once found, click on the company or added it from scratch
- Then click add contact on the right-hand side
- Add the additional contact and you're good to go

below is a brief video explaining the process mentioned above.

Short explanation video, how to add additional context to a company

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[How to Add a Customer and Company to Selling Lane CRM]

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- First step is always to search for the customer first to make sure that you already haven't added him or her into the CRM.
- After you've searched and found the customer, the software will automatically allow you to add first name last name, etc.

- Once the basic details are in, go back in and tweak the customer, adding details like cell phones, additional email, addresses, physical addresses company, names, and titles at the company.
- Once you've added the company, you can edit that information and add more details such as business address, business URL, etc.

below is a brief video explaining the process mentioned above.

Short explanation video, on how to add a company and customer