

Classification and Tagging

Purpose

Assign one (classification) or more (tagging) values to any record that matches the filtering criteria.

Field Description for Classification

- **Set** - Field to hold classification value
- **To** - Classification value (will replace existing value)

Field Description for Tagging

- **Tag** - Field to hold tagging value
- **To** - Tag value (will append to existing value)

Tips

- When writing a single value (classification), the new value will replace the existing value.
- When writing multiple values (tagging), the new tags will be added to existing tags.
- You can do multiple classification and tagging actions in one task.

Examples

1. Classify and route leads by company size.
 - Filter for lead records with Company Revenue < \$100M and Country = US or Canada
 - Set attribute Account Type = "Inside Sales" and Territory = "North America"
2. Tag customer for upsell campaigns.
 - Filter for customers that have purchased product A
 - Tag attribute Upsell Products = "Product B, Accessory A1, Accessory A2".

Support Contacts

If you have any additional questions, please feel free to contact us at support@openprisetech.com.