

How to...
CUSTOM TAGS



How to... Custom Tags

Custom Tags allow you to go off-piste and import your own style of data into your NewZapp account.

NewZapp offers a wide range of commonly used Data Tags but by creating your own Custom Tags you will be able to import your unique types of data into the system and then personalise your sending and your email campaigns with this information.

For example you could use employee number, account number, account manager or other similar types of information you know about, or have collected from, your subscribers. This might be useful when creating reports and feedback on campaign effectiveness for your team members. Similarly storing purchasing or other preferences that you have learned about your Subscribers, will help you create targeted email campaigns.

Once you start creating Custom Tags, these can be used to filter data in your account just like regular Data Tags can. This may be as a means to search for specific Subscribers, or as part of the process of creating a Group or Segment based on certain criteria.


In this guide we will show you how to create, rename and delete a Custom Tag.

First up, we need to know when you create a Custom Tag, what type of data you want to save in it. This will be useful for you to consider before creating your Custom Tags.

The following choices of Data Type are available:

- **Text:** any combination of numbers and letters.
- **Number:** any number, including decimal numbers.
Note: You cannot use spaces in number fields.
- **Telephone Number:** any telephone number, including spaces and symbols.
Note: This is type has a label purely for your convenience; behind the scenes this is stored as a 'Text' type.
- **Date/Time:** any date and / or time in the format *dd/mm/yyyy* or *dd/mm/yyyy hh:mm*.
Note: Your data does not have to include a time, it can be date only
- **Yes/No:** saving data for this type you need to use yes or no, true or false, 0 or 1.

How to create a Custom Tag – Option 1 of 2 – via the Settings screen

1. Hover over the cog symbol top right of any screen 
2. Choose 'Custom Tags' from the dropdown menu.
3. On the next screen, click on the option 'Add Custom Tag' on the left hand side of the screen
4. In the dialog box which opens, you can now give the new Custom Tag a name
5. You also need to select the data type (see above), from the drop down box option
6. Click the 'Add Tag' button
7. Your new Custom Tag will now be available as a data tag choice when importing data, as a filter name in the Groups and Segments tabs, and as a personalisation tag when you are personalising content in your email campaigns.

Add Custom Tag ✕

You are about to create a custom tag. You can use these tags in your Subscribers section and for personalising your email campaigns. Custom tags can also be created in your Subscribers section during the Import process when using the Upload File option.

To create your custom tag, complete the form below & click 'Add Tag'!

Tag Name: Data-type:

Key to Data-types

Text: any combination of numbers and letters.

Number: any number, including decimal numbers. You cannot use spaces in number fields.

Telephone Number: any telephone number, including spaces and symbols. This is for your convenience; behind the scenes this is the Text type.

Date/Time: any date and or time in the format **dd/mm/yyyy** or **dd/mm/yyyy hh:mm**.


Yes/No: field can only be yes or no, true or false or 0 or 1.

How to create a Custom Tag - Option 2 of 2 - via the Import process


1. Click the 'Add Subscriber' icon on the Groups tab of the Subscriber section
2. Click 'Upload a File'
3. Select which file you would like to upload. Only .csv, .xls, and .xlsx files are accepted
4. Click 'Next: Tag Detection'
5. Ensure all your columns have the correct Tag Name by using the drop down menu
6. At this point If you are uploading data which requires a new Custom Tag in your account, you will need to do this by giving it a name. Select 'Define New Tag' from the drop down
7. In the space provided give your Custom Tag a new name
8. You'll also need to select what kind of data type your Custom Tag is. The options are: Text, Telephone Number, Number, Date / Time and Yes / No. If unsure please refer to the guide above.
9. Tick the check box above all the columns you wish to import
10. Click 'Next: Confirmation' and proceed with the import process

See also: [How to... Import Subscribers](#)

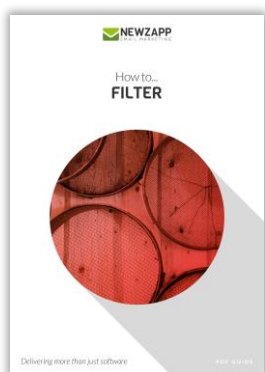
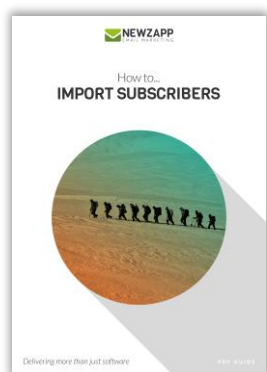
How to rename a Custom Tag

1. Hover over the cog symbol top right of any screen 
2. Choose 'Custom Tags' from the dropdown menu.
3. On the next screen, click on the Custom Tag you wish to rename. An 'Edit Tag' panel will load at the bottom of your screen.
4. Here you will be able to edit the tag and choose from a check box whether you wish this field to be displayed – this setting controls whether the fields is visible in other areas of your account, e.g. in the personalisation tag in Create & Send, and in the Subscribers section of your account.
5. Click the 'Save' button, top right of this panel.
6. To discard changes, simply move away from this screen without clicking the Save button.

How to delete a Custom Tag

1. Hover over the cog symbol top right of any screen 
2. Choose 'Custom Tags' from the dropdown menu.
3. On the next screen, click on the Custom Tag you wish to rename. An 'Edit Field panel' will load at the bottom of your screen.
4. Click the 'Delete' button, top right of this panel.
5. To discard changes, simply move away from this screen without clicking the Save button.

Related Resources



For more information on getting the most from your NewZapp account, visit our [Knowledge Base](#) or contact us on support@newzapp.co.uk.