Should you use a tag, a custom field or a category? Here are some guidelines, but you may find that you need to deviate at times:

Tags

- If the information is intended to be for "internal use" only and is used to segment records into groups. For example: Minority owned, Hot Prospect, Ice-cream lovers
- If you wish to track information "temporarily". For example: You may have a tag called "Hot Prospect", but would remove this tag if the contact because a member.

Custom Fields

- If the information is **unique** to a particular record. For example: number of employees, organization license number, established date, birthdate.
- If you wish to merge the fields into documents, emails etc.
- If you wish to create membership types with pricing based on formula. For example: Number of employees, annual revenue heads of cattle
- If you wish to display the information publicly, in the Info Hub, and/or allow members to edit this information
- If you wish to allow for advanced filtering on your directories

Categories

- Is intended for public or internal use and is used to segment records into groups
- If you wish to allow visitors to your directory, web content, events, etc. ability to filter to specific categories
- If you wish to display the information publicly, in the Info Hub, and/or editable in the Info Hub use a custom field.

See the table below for further comparison of tags, custom fields and categories

	Tags	Custom Fields – Individual & Organization	Categories
Membership			
Collect on Membership Application		Individual & Organization custom fields can be collected on the Membership Application	Category can be collected on the Membership Application
Membership Types		Can be used to calculate formula based pricing	
Membership Invoices		Can be included on membership invoices	
Reporting			
Contact/Member	All contact member reports can pull tags	All contact member reports can pull tags	All contact member reports can pull tags
Billing	Some Billing reports can pull tags	All Billing reports can pull tags	Some Billing reports can pull tags
Event		Some Event reports can pull Individual and Organization custom fields	
Directory			
Public Display on Website		Can be used as a filtering option in the Directory If Directory Listing is using Advanced Search Options	May displayed for filtering purposes on public website
Member Only Directory		Can be viewed on Info Hub Directory	Can be viewed on Info Hub Directory
Visibility			
Visible to Staff	Can be viewed in the back office	Can be viewed in the back office	Can be viewed in the back office
Visible in Info Hub		Can be viewed in the Info Hub, if configured as Member Viewable	Can be used as a filtering option if the directory is using the Advanced Search Options
Visible to Public		Must be set to be added to a directory display setting	Categories whose category lists are set to be public are visible on a member's directory listing
Ease of Access	Can be viewed and created on the top of profile tab	On a separate tab (More Info)	On the profile tab, but lower on the screen

	Tags	Custom Fields – Individual & Organization	Categories
Creation/Deletion Control	Any staff member can create tags	Staff are able to control restrictions on who of their staff can create/delete custom fields	Staff are able to control restrictions on who of their staff can create/delete categories
Events			
Event Registration		Visible on Event registration pages or can be staff only fields (i.e. table numbers	
Forms/Survey			
Visibility		Can be included in forms, and responses can automatically update a contacts record	
Continuing Education			
Available for Certificates		As a merge field can be included on certificates	
Available for Roster		As a merge field can be included on the roster	