

Client Tags

Written by Marin Software | Last published at: June 28, 2023

Client Tags are similar to dimensions and can be used to segment your accounts in a variety of useful and interesting ways. They also allow you to [run reports](#) across multiple clients and can be viewed in the **Clients** tab or by drilling into a specific client's account settings in the **Admin** section.

How To Access This Feature

In order to create new **Client Tags**, you must have *Admin* level access to the account in question. Only users with Admin rights can provide other users with Admin access.

To learn more about user management in MarinOne, check out our [Managing Passwords and Users](#) article.

Creating Tags

1. The first step, as always, is to log into MarinOne.
2. Once logged in, navigate to the **Admin section ('gear' icon)** from the left-hand navigation.
3. You should land on the **Clients & Users** tab and **Clients** sub-tab by default, but if you don't, you can navigate there directly.
4. Select the client account where you would like to apply client tags. Once you've decided, double-click on the name of the client to launch the Side Panel.
5. From the Side Panel, navigate to the **Client Tags** tab.



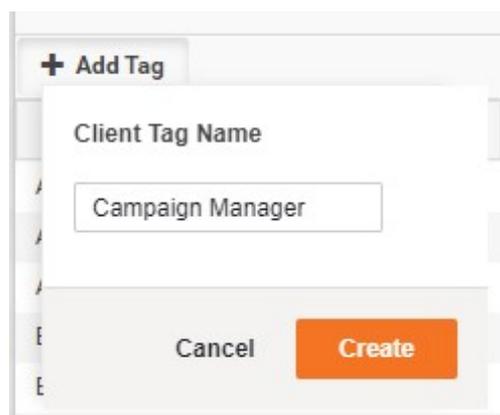
Client Tags

6. To create a new tag, click **+ Add Tag**.



+ Add Tag

7. Give your new tag a name. This might be something to help you report on certain segments of your business or brand; you could even use a tag that helps differentiate the campaign manager on a specific account. The choice is entirely up to you.



The screenshot shows a dialog box titled '+ Add Tag'. It contains a text input field labeled 'Client Tag Name' with the text 'Campaign Manager' entered. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Create'.

8. Once your new tag has a name, click **Create**.
9. Client tags, similar to Marin dimensions, have a top-level tag and a tag value. For example, you might have a top-level tag called "Type" and values such as Search, Social, or eCommerce. Once your new client tag has been created, you'll still want to make sure a tag value has been applied.

To do this, simply find the row corresponding with your new client tag in the Side Panel and double click into the *Tag Value* column. Click *Enter* on your keyboard to accept the changes or *Esc* to cancel your changes. (But hold on! There's one more step to go before your new tag value will be applied.)



To apply multiple tag values to this same client, simply double click into the *Tag Value* column and apply as many as you'd like. Want to add the same tag to multiple clients at the same time? We'll walk you through this in the **Applying Tags Via Multi-Edit** section of this article.

10. Once you're finished adding tag values and have clicked *Enter* to accept your changes, click **Save** to finalize your change. If you don't wish to keep your changes, click **Cancel**.



Applying Tags Via Multi-Edit

Once your Client Tags have been created, they can be applied to additional client accounts via a multi-edit from the **Clients** tab. You can do so by following the instructions below.

1. The first step is to navigate to the **Clients** tab.
2. Next, select the check-boxes next to the clients that you would like to tag with the same value. If you have multiple clients you would like to tag with different values, these should be done with separate multi-edits.
3. From there, click the **Edit button ('pencil' icon)**.
4. From the drop-down, select the specific Client Tag you would like to apply to the clients that you selected in step 2. Then, type in a value into the available text box. This is an important step, as selecting a client tag but not typing in a value will cause your tag to not be applied properly.

58 Clients

Selected **1** Edit will be applied to selected clients

Client Tag

Advertiser

Set new value

Clear value

Cancel

5. Once your tag value has been entered, click **Apply**.

Removing Tags Via Multi-Edit (Untagging)

1. The first step is to navigate to the **Clients** tab.
2. Next, select the check-boxes next to the clients for which you would like to remove a Client Tag.
3. Select the applicable Client Tag from the drop-down.
4. Then, rather than setting a value, toggle the radio button for **Clear value**.

58 Clients

Selected **2** Edit will be applied to selected clients

Client Tag

Brand

Set new value

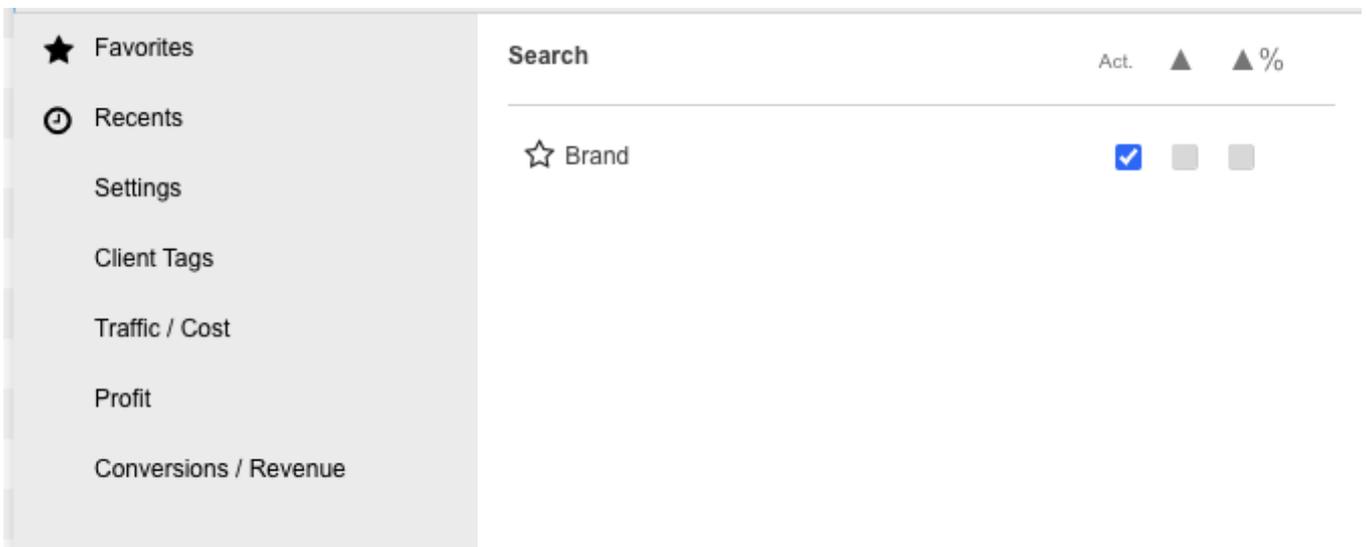
Clear value

Cancel

5. Lastly, click **Apply**.

Adding Tags to the Grid

From the **Clients** tab, click the **Column Selector (View Builder)** to the top-right above the grid. From here, click into the **Client Tags** category and you can add columns to the grid for any of your created Client Tags. Simply toggle the check-box for each column to add it to the grid.



Example Tags

Here are just a few possible tags that you can use:

Advertiser

Should be used as the first level tag. Future iterations will include more capabilities that allow you to share settings (e.g. dimensions, conversion types, custom columns) across clients with the same Advertiser tag.

Line Of Business

Can be used to differentiate the different components of your business.

Region

Can be used to differentiate the different geographic locations of your business.

Other tags can be added as you desire, however, for the sake of consistency in your application experience, we suggest using the above three tags before using others.

Frequently Asked Questions

Can I Update Client Tags For Multiple Client Accounts Via A Bulk Upload?

It is **not** possible to update client tags via bulk upload now. Our engineers are working to add this functionality in an upcoming product release.

Can I Delete Client Tags?

It is not possible to manually delete tags at the moment. If you do need to remove tags, please reach out to our Customer Support team via the **Contact Us** button on this page.

Want To Know More?

[Multi-Client Reporting](#)