



MARKETING

# Contacts, Audiences, Segments & Tags

Manage who you send to. Contacts, manual audiences, dynamic segments, and ad-hoc tags — what each is for and when to use them.

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Marketing organizes the people you send to using four related concepts: **Contacts** (the people themselves), **Audiences** (manually-curated lists), **Segments** (saved filters that re-evaluate dynamically), and **Tags** (simple labels). This guide covers all four.

## Contacts

A Contact is one person you can email. They have a name, email address, optional metadata (company, custom fields), and a subscription status. Unsubscribed contacts are skipped from all future sends automatically — you cannot accidentally email someone who opted out.

### Adding Contacts

- **Manually** — go to **Contacts** → **Add Contact** and fill in the details.
- **Import from CSV** — go to **Contacts** → **Import** and upload a CSV. The first row should be column headers. Marketing maps common column names (`email`, `first_name`, `last_name`) automatically and lets you map the rest.
- **Synced from other UrTravelPro apps** — subscribed contacts from Books, Trips, and Compass appear automatically in your Marketing contact list.
- **Forms, popups, and landing pages** — every submission creates or updates a contact.

### Custom Fields

In addition to the built-in fields (name, email, company), you can define custom fields for any data you collect — favorite destination, anniversary date, loyalty number, etc. Use them in segments, merge tags, and as filters in reports.

## Subscription Status

Every contact has a subscription status: **subscribed**, **unsubscribed**, **bounced**, or **complained** (marked as spam). You cannot send marketing emails to contacts in any state other than subscribed. Bounced and complained contacts are automatically suppressed permanently to protect your sending reputation.

## Audiences

Audiences are **manually-curated lists** of contacts. You add contacts to an audience explicitly (one at a time, in bulk, or via an import). A contact can be in many audiences. Use audiences when you want a stable list — "Newsletter Subscribers", "VIP Clients", "2025 Cruise Group" — that you build up over time.

### ADVISOR TIP

Audiences are about deliberate grouping. If you find yourself wishing the list updated automatically when a contact matches some criteria, you want a Segment, not an Audience.

## Segments

Segments are **saved filters** that re-evaluate every time you use them. Define the rules once ("contacts who clicked any campaign in the last 30 days AND have the tag vip"), and the segment recalculates the matching set on every send.

### Common segment patterns

- **Engaged contacts** — opened or clicked anything in the last N days
- **Cold contacts** — never opened in the last 90 days (re-engagement candidates)
- **Custom field match** — favorite destination = "Caribbean", or loyalty tier = "platinum"
- **Combined audience + behavior** — in audience "Past Cruisers" AND clicked the cruise campaign last month

## Tags

Tags are **simple labels** you attach to contacts. There's no schema — just type a tag like `disney` or `honeymoon` and it sticks. Tags are great for ad-hoc grouping you don't want to formalize into an audience or segment.

You can filter and segment by tag, send to all contacts with a specific tag, and tags appear on the contact's profile. A contact can have any number of tags.

## When to Use Which

- **Audience** — stable, deliberate list (you decide who's in it)
- **Segment** — dynamic, rule-based list (system decides on every use)
- **Tag** — fast informal label, often combined with segments for filtering
- **Custom field** — structured data you want to store, display, or merge into emails