

How to Automatically and Manually Add Tags to Your Contacts



Introduction

Tags segment your audience for newsletters, automations, and reporting on systeme.io. You can assign them **manually** to one or thousands of contacts, or **automatically** when someone opts in, buys, or hits a workflow step. This guide covers both paths—based on [How to automatically and manually add tags to your contacts](#).

What You Need

- A systeme.io account
- At least one tag—or create one first ([How to create a tag](#))

You can also create a new tag name directly inside an automation rule; systeme.io will create the tag when you save the rule ([How to create a tag](#)).

Adding Tags Manually

Use manual tagging for one-off fixes, imports review, or bulk updates after migration.

1. Click **Contacts** under the **CRM** menu
2. Select the contact(s) you want to tag (checkboxes)—or filter first, then select all on the view
3. Click **More actions**
4. Choose **Add tag**
5. In the popup, select the tag to assign
6. Click **Add tag to contacts**

To tag a single new person, you can also assign tags when you [add a contact manually](#).

Tip: filter by source or import batch, then bulk-tag so you do not miss stragglers after [importing a contact list](#).

Adding Tags Automatically

Automatic tagging uses **automation rules** (trigger → action). Learn the model in [How do automation rules operate?](#)

Global rules (Automations menu)

1. Go to **Automations** → **Rules**
2. Click **Create**
3. Choose a **trigger**, for example:
 - **Funnel step form subscribed** — opt-in on a specific page
 - **New sale** — customer completed a purchase
 - **Tag added** — chain tags (rule must exist before tag is applied)
4. Add action **Add tag** and select the tag
5. Save the rule

Rules inside the funnel editor

Open your funnel step (opt-in, order form, etc.) → **Automation rules** → **Add rule** → same trigger/action pattern. Ideal for “this landing page adds tag lead-webinar.”

Two-step order forms

On step one of a [two-step order form](#), contacts are added when they complete the first step—add a rule with trigger **Funnel step form subscribed** and action **Add tag** to label partial checkouts or leads.

Workflows

In visual **Workflows**, use steps that add or remove tags as contacts move through sequences—often combined with wait steps and conditions ([How do automation rules operate?](#)).

Tags on CSV Import

When importing, you can:

- Assign one tag to the **entire batch** during upload
- Map a CSV column to **contact tags** so each row keeps its tags from your old ESP ([How to import or export a contact list](#))

This is the fastest way to restore segmentation after migration ([Migration of your contact list to Systeme.io: advanced tips](#)).

Bulk-Tag Migrated Contacts (Add to Funnel Step)

If you imported thousands of contacts *without* tags and cannot tag manually, use a dedicated mini-funnel:

1. Create a funnel with one opt-in step (minimal form)
2. On that step: **Automation rules** → trigger **Funnel step form subscribed** → action **Add tag** (e.g. CSC)
3. In **Contacts**, select everyone who should get that tag
4. Use **Add to funnel step** to push them through the step so the rule fires
5. Repeat per tag (respect your plan's tag limit— [pricing](#))

Prefer CSV tag column mapping when your export still has tag data.

API, Webhooks, and External Tools

- **Public API:** create/update contacts and assign tags ([How to use Systeme.io's public API](#))
- **Webhooks:** on new opt-in or sale, external tools (Zapier, Make) can call API to add tags ([How to create and trigger a webhook after an opt-in or a sale](#))

Removing Tags

Use **More actions** → remove tag options on selected contacts, or automation actions **Remove tag** in rules/workflows. Remember: tag **Total** stats still count historical assignments ([How to create a tag](#)).

Frequently Asked Questions

Will a newsletter send when I only add a tag?

No—tags segment who *can* receive a newsletter; you still create and send the newsletter ([How to send or schedule a newsletter](#)).

Tag added trigger not firing?

The tag must be applied **after** the rule exists; retroactive tags do not replay old triggers.

Multiple tags on one opt-in?

Add several **Add tag** actions in the same rule, or one rule per tag.

Related Resources

- [How to automatically and manually add tags to your contacts](#)
- [How to create a tag](#)
- [How do automation rules operate?](#)
- [How to import or export a contact list](#)

[systeme.io](#) — tag once manually or forever automatically.

Last updated: July 11, 2026 · Based on *How to automatically and manually add tags to your contacts*