

How to Create a Tag



Introduction

Tags are the backbone of contact organization on systeme.io. They let you classify people by origin or status—lead, customer, student, buyer of a specific course—and power **newsletters**, **automations**, and **funnel rules**. Without tags, you cannot segment broadcasts or send targeted emails to your list.

This guide explains how to create a tag manually in CRM, interpret tag statistics, and connect tags to the rest of your marketing stack—based on [How to create a tag](#).

Why Tags Matter

- **Segmentation:** filter contacts for campaigns, exports, or bulk actions
- **Newsletters:** include or exclude audiences by tag ([How to send or schedule a newsletter](#))
- **Automations:** trigger workflows when a tag is added or removed
- **Funnels:** add tags on opt-in or purchase via automation rules
- **Reporting:** see sales attributed to contacts carrying a tag

Example: create Client-course-1, assign it automatically when someone buys course 1, then email only that tag with bonus content.

Creating a Tag (Manual)

1. Navigate to the **CRM** tab
2. Click **Tags**
3. Click **Create**
4. Enter a name in the **Tag name** field (clear, unique—e.g. lead-webinar-march)
5. Click **Save**

The tag appears in your list immediately. You can assign it when [importing a contact list](#), adding a contact manually, or building automations.

Tip: create tags *before* building funnels or import batches so they appear in dropdowns ([How to automatically and manually add tags to your contacts](#)).

Understanding Tag Statistics

On the Tags screen, each tag shows metrics such as:

- **Total:** number of contacts who *ever* received this tag (including those who later had it removed)
- **Removed:** contacts who had the tag removed from their profile
- **Sales & Sales per contact:** revenue from contacts associated with that tag

Important: *Total* is **not** the same as “contacts who currently have the tag.” If Total = 2 and Removed = 1, only **one** contact actively has the tag now. Click the tag to filter the contact list and see current holders.

Assign Tags After Creation

Manually

CRM → **Contacts** → select one or more contacts → **More actions** → **Add tag** → choose your tag → confirm ([How to automatically and manually add tags to your contacts](#)).

On import

During CSV import, pick a tag to apply to the entire batch ([How to import or export a contact list](#)).

Automatically (funnels & automations)

- **Funnel opt-in:** open the step → **Automation rules** → trigger e.g. form subscribed → action **Add tag**
- **Workflows:** trigger on purchase, tag added, etc. → action Add or Remove tag ([How do automation rules operate?](#))
- **API:** create/assign tags programmatically ([How to use systeme.io's public API](#))

Naming and Plan Limits

Use consistent prefixes: src-facebook, buyer-product-x, student-course-2. Avoid duplicate concepts (“Customer” vs “customer”).

Lower-tier plans cap how many **tags** you can create (e.g. heavy use—one tag per class—may require a plan upgrade). Consolidate tags where possible or upgrade via [pricing](#).

Tags and Newsletters

When you send a newsletter, you choose tags to **include** and optionally **exclude**. A contact must have an included tag to receive the email; **one excluded tag blocks delivery** even if they match include rules ([How to send or schedule a newsletter](#)).

Create tags first, assign them to contacts, then build your newsletter audience—tags are not optional for targeted sends.

Frequently Asked Questions

Can I create a tag from the contact import screen?

You typically select an **existing** tag on import—create it under CRM → Tags first.

Can I rename or delete a tag?

Manage tags from the Tags list; removing a tag from contacts is separate from deleting the tag definition—check current UI options before deleting tags used in live automations.

Do tags replace lists from Mailchimp?

On [systeme.io](#), **tags + filters** replace most “list” workflows; map each old list to one or more tags during migration ([Migration of your contact list to \[systeme.io\]\(#\): advanced tips](#)).

Related Resources

- [How to create a tag](#)
- [How to automatically and manually add tags to your contacts](#)
- [How to import or export a contact list](#)
- [How to send or schedule a newsletter](#)

Organize your audience on [systeme.io](#) —create tags once, use them everywhere.

Last updated: July 11, 2026 · Based on *How to create a tag*