

How to Create and Use Tags

By Zu Wei | Published Mar 19, 2026 | Customers | 2 min read

What Is This?

Tags are labels you attach to customers to organise and segment them. Think of them like coloured stickers — you tag customers based on their behaviour, preferences, or any criteria that matters to your business. Tags are powerful because they integrate with campaigns, rewards visibility, and broadcast filtering.

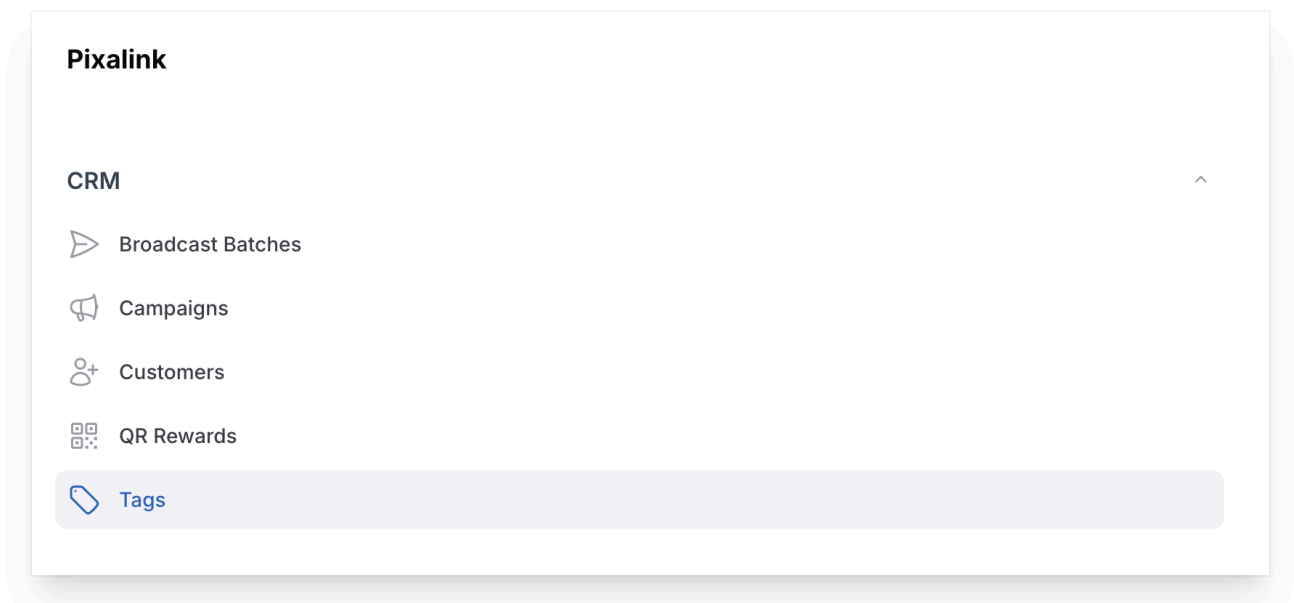
Real-Life Example

Puan Mira runs **Petshop Mira** in Kota Kinabalu. She creates tags like "Cat Owner", "Dog Owner", "Premium Customer", and "Walk-in". When she launches a cat food promotion, she sends the broadcast only to customers tagged "Cat Owner" — no wasted messages, higher engagement.

How to Create Tags

Step 1: Open the Tags Page

From the Admin Panel sidebar, go to **Settings** → **Tags**.



Step 2: Create a New Tag

Click **Create** at the top of the page. Enter the tag **Name** (e.g., "VIP", "Student", "Cat Owner") and click **Create**.

That's it — the tag is ready to use.











Name

Cat Owner

Step 3: Manage Existing Tags

From the Tags list, you can:

- **Edit** — Click the pencil icon to rename a tag
- **Delete** — Click the delete icon to remove a tag
- **Bulk Delete** — Select multiple tags and delete them at once

Tags	
Name	
VIP	 Edit  Delete
Cat Owner	 Edit  Delete
Dog Owner	 Edit  Delete
Premium Customer	 Edit  Delete
Walk-in	 Edit  Delete

How to Use Tags

Tagging Customers

You can tag customers in several ways:

1. **Manually** — Open a customer's profile and add tags
2. **During import** — Include a "Tags" column in your CSV import

3. **Automatically** — Tags can be assigned through automations and reward rules

Using Tags for Targeting

Once customers are tagged, use tags to:

- **Filter broadcasts** — Send campaigns only to customers with specific tags
- **Control reward visibility** — Show certain rewards only to tagged customers
- **Segment reports** — Analyse performance by customer segment
- **Filter customer lists** — Quickly find groups of customers

Good to Know

- **Tags are organisation-wide** — Tags you create are available across all spaces in your organisation.
- **No limit on tags** — Create as many tags as you need.
- **Case sensitive** — "VIP" and "vip" are treated as different tags. Be consistent with naming.
- **Import-friendly** — When importing customers via CSV, include tags as a comma-separated list in the Tags column.
- **Automations** — Some features (like referrals and reward assignments) can automatically tag customers when triggered.