

# How to Set Up Auto-Tagging Rules

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## What Is This?

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Auto-tagging rules automatically add tags to your customers based on their behaviour. Instead of manually tagging hundreds of customers, the system does it for you every day. This saves you time and keeps your customer segments up to date for targeted campaigns.

## Real-Life Example

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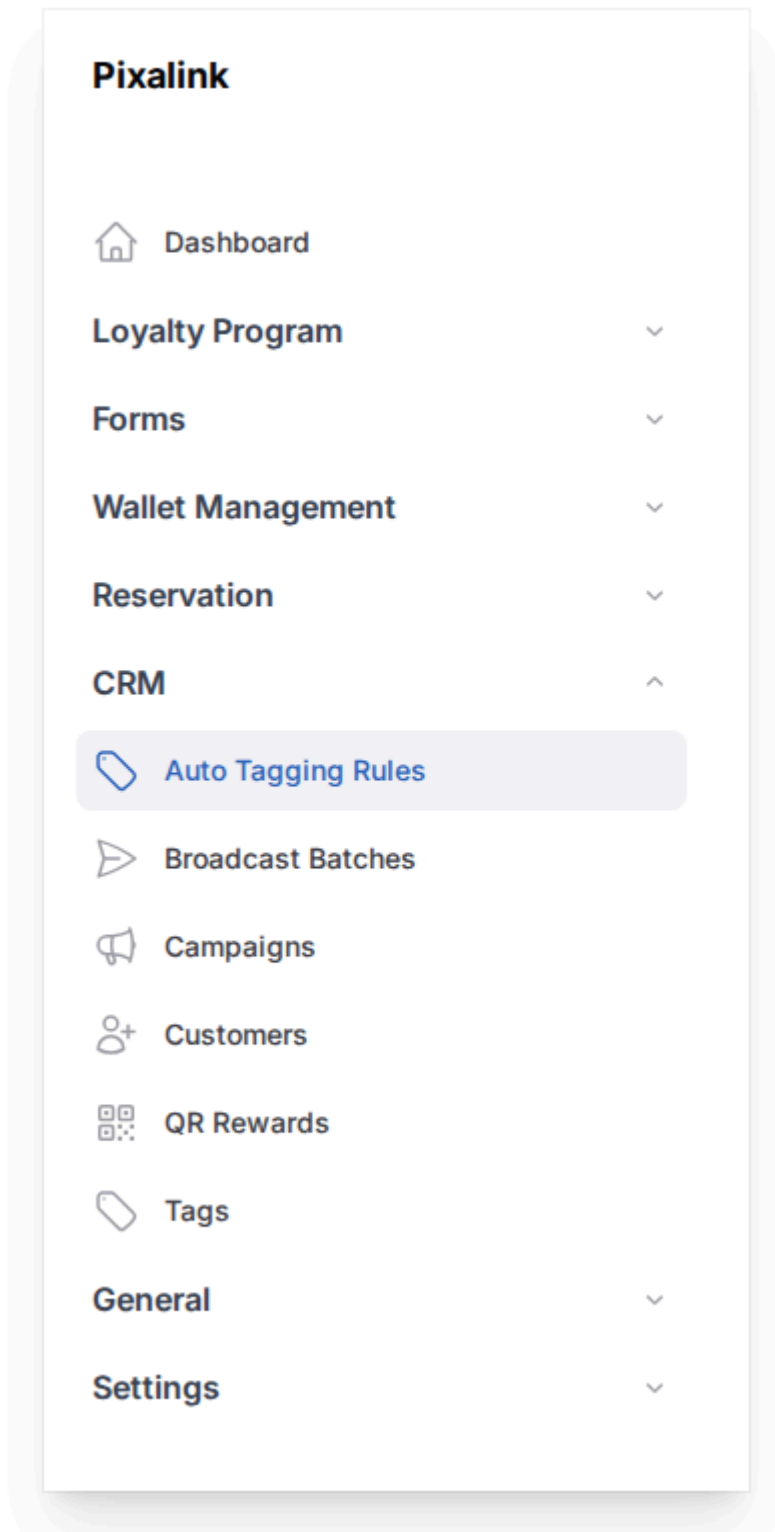
Siti runs a bubble tea chain with three outlets. She noticed that many customers sign up, visit once or twice, then stop coming back. She had no easy way to identify who these inactive customers were — until she set up an auto-tagging rule.

Siti created a rule that tags any customer who hasn't made a purchase in 60 days as "Inactive." Within a day, 340 customers were automatically tagged. She then sent a broadcast campaign offering RM5 off their next drink to just those customers. Over the next week, 47 of them came back. Now Siti runs this win-back campaign every month without lifting a finger to sort through customer lists.

## How to Set It Up

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1. Go to **Admin Panel** → **CRM** → **Auto Tagging Rules**



2. Click **Enable Auto-Tagging** at the top of the page. A confirmation dialog will appear — click **Enable** to confirm. This is the master switch that controls whether any auto-tagging rules run. Once enabled, the button changes to **Disable Auto-Tagging**, which you can click at any time to pause all rules.
3. Click **New Auto Tagging Rule** to create your first rule. Fill in the **Rule Name** (e.g., "Inactive Customer Tagging") and choose the **Tagging Type**.
  - Currently available: **Inactive Customers** — tags customers who haven't made a purchase within a set number of days

**Rule Configuration**  
Configure the auto-tagging rule settings.

Rule Name: Inactive Customer Tagging

Tagging Type\*

Enable Inactive Customer Tagging

When enabled, customers without purchase transactions within the specified period will be automatically tagged.

4. Turn on the **Enable Inactive Customer Tagging** toggle to activate this rule. Then select the **Tagging Type** (e.g., "Inactive Customers") and more fields appear: You'll see:

- **Inactivity Period** — how many days without a purchase before a customer is considered inactive (default: 90 days, range: 1–730 days)
- **Tag Name** — the tag that will be added to inactive customers (default: "Inactive"). You can change this to anything you like, such as "Lapsed" or "Needs Attention"

**Rule Configuration**  
Configure the auto-tagging rule settings.

Rule Name: Inactive Customer Tagging

Tagging Type\*

Enable Inactive Customer Tagging

When enabled, customers without purchase transactions within the specified period will be automatically tagged.

**Inactive Customer Settings**  
Define when customers should be considered inactive and how they should be tagged.

**Inactivity Period**  
90 days  
Number of days without a purchase transaction before a customer is considered inactive.

**Tag Name**  
Inactive  
The tag that will be applied to inactive customers. This tag can be used to filter customers in broadcasts.

5. Once the **Enable Inactive Customer Tagging** toggle is on, a **Preview** section appears. Check it to see how many customers would be tagged based on your current settings.

6. Click **Create** to save your rule.

Your rule will now run automatically every day. You can see all your rules on the main Auto Tagging Rules page.

Rule Name	Type	Tag	Enabled	Inactive Days	Last Updated
Inactive Customer Tagging	Inactive Customers	Inactive	✓		2026-03-15 10:30:00
Lapsed High Spenders	Inactive Customers	Lapsed VIP	✓		2026-03-20 14:15:00

## Good to Know

- **Runs daily** — the system checks all your customers once a day and applies or removes tags automatically.
- **Tags are removed too** — if a customer tagged as "Inactive" comes back and makes a purchase, the tag is automatically removed. You don't need to clean up tags manually.

- **One rule per type** — you can only have one "Inactive Customers" rule. If you need different inactivity periods, update the existing rule.
- **Use tags in campaigns** — once customers are tagged, you can filter by that tag when sending broadcast campaigns. This is perfect for win-back offers.
- **Two-level control** — there are two switches: the **Enable Auto-Tagging** button on the list page (master switch for all rules) and the **Enable Inactive Customer Tagging** toggle inside each individual rule. Both must be on for a rule to run. If you turn off the master switch, no rules will run regardless of their individual settings.
- **Only purchase transactions count** — the system looks at purchase transactions only. Points earned from referrals or manual adjustments don't reset the inactivity counter.

## Need Help?

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Reach out to our support team — we're happy to help you get started.

## What's Next?

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- [How to Create and Use Tags](https://kb.pixalink.io/articles/how-to-create-and-use-tags) (https://kb.pixalink.io/articles/how-to-create-and-use-tags) — learn more about managing tags manually
- [How to Send a Broadcast Campaign](https://kb.pixalink.io/articles/how-to-send-a-broadcast-campaign) (https://kb.pixalink.io/articles/how-to-send-a-broadcast-campaign) — send targeted messages to tagged customers
- [Auto-Assign Rewards by Customer Tag](https://kb.pixalink.io/articles/auto-assign-rewards-by-customer-tag) (https://kb.pixalink.io/articles/auto-assign-rewards-by-customer-tag) — automatically give rewards to customers with specific tags