Knowledge Base

Tags

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Tags

Tags are a powerful tool to help you keep your jobs organized in the way that you see fit, and then see that at a glance from the job list page. You can use them any number of ways:

- The type of work being done
- Which teams have jurisdiction over the job
- By priority, deadlines, or turnaround time
- Labeling jobs that require special considerations, such as handling dangerous materials
- Any other way you like

Editing/Adding New Tags

You can find the Tags menu under Resources > Tags.
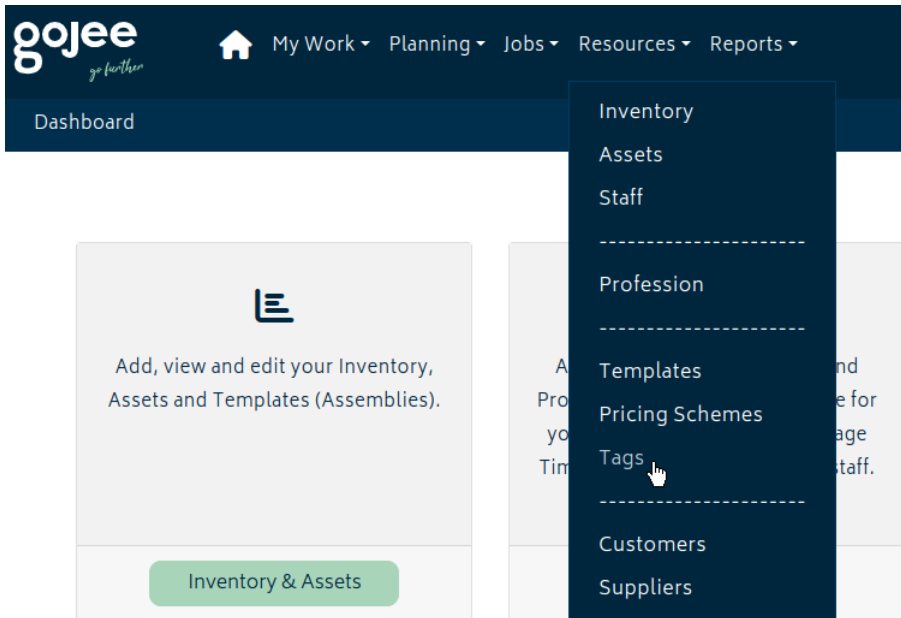
From here, you can add new tags or edit existing ones. Click anywhere on the field of an existing tag to edit it, or click the Delete button if you want to permanently remove it.
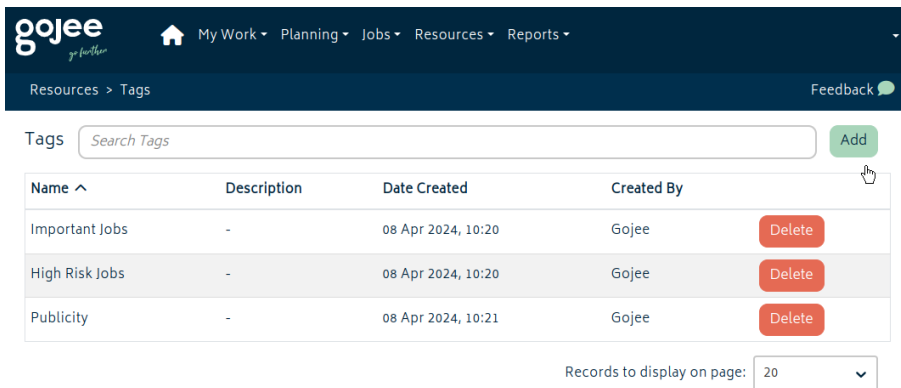
Click the "Add" button to create a new tag. You can set the name, description, and the colour visible when in use.

With your tags set up, you're ready to start applying them.

Applying Tags to Jobs

Tags for jobs are easy to set up. They can be selected when making a new job or editing an existing one. Go to the Customer Jobs list and select a job.

At the bottom of the Job Settings page, you will find the tag list. You can select multiple tags for each job.

You can then use these to filter from the job list, much the same way as you are able to use other filters.

Next: Back to Knowledge Base.