

Knowledge Base



Tags

Last updated on April 8th, 2024

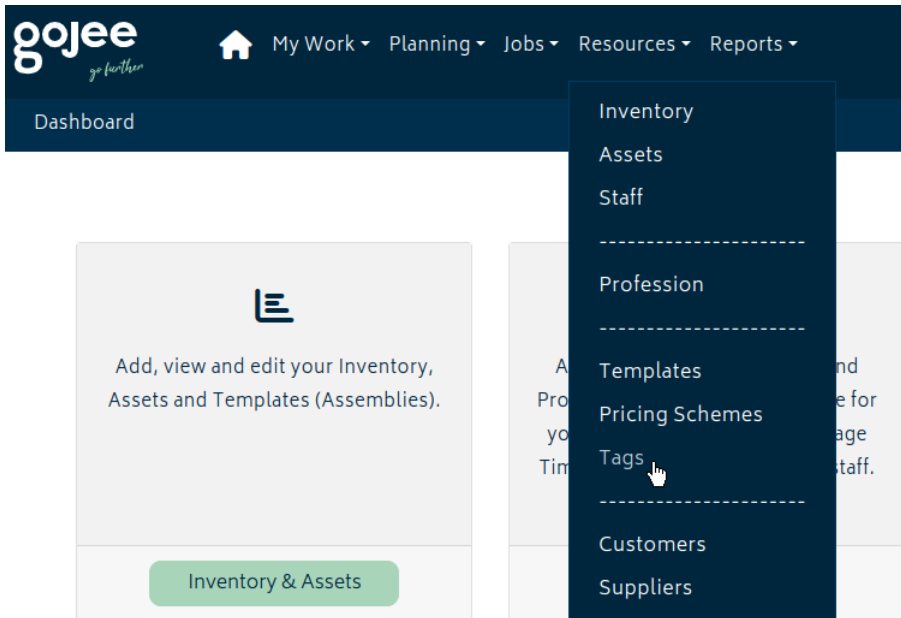
Tags

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:

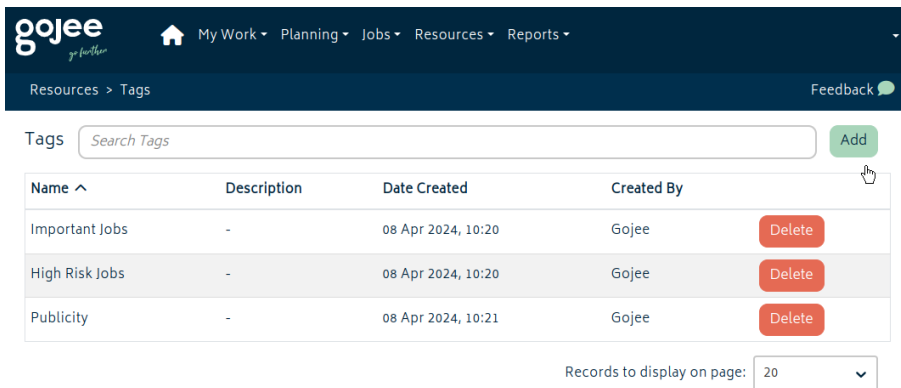
- The type of work being done
- Which teams have jurisdiction over the job
- By priority, deadlines, or turnaround time
- Labeling jobs that require special considerations, such as handling dangerous materials
- Any other way you like

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.

Edit Tag

Name

Low Risk Jobs

Description

Standard jobs.

Color

00D084

Preview

Low Risk Jobs x

Save

Cancel

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

Resources > Tags Feedback

Tags Add

Name ^	Description	Date Created	Created By	
Publicity	High-profile and should be managed well.	08 Apr 2024, 10:21	Gojee	Delete
Important Jobs	Special considerations required.	08 Apr 2024, 10:20	Gojee	Delete
High Risk Jobs	Dangerous jobs or flaky clients.	08 Apr 2024, 10:20	Gojee	Delete
Team A	Sales HQ	08 Apr 2024, 16:00	Gojee	Delete
Team B	Sales East Office	08 Apr 2024, 16:00	Gojee	Delete
Low Risk Jobs	Standard jobs.	08 Apr 2024, 15:55	Gojee	Delete

Records to display on page: 20

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.

Job SettingsCustomerJob DetailsBill of MaterialsCommentsAttachments

General Information

Reference Number

J00008

Cus

Job Title

Job 5

Cha

Sales Person

Jimmy Oliver

☐ Approve for Purchasing

Tracking

Region

West Coast

x

Tags

Publicity xTeam B xLow Risk x

x

High Risk

Important

Team A

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

Jobs

Feedback

Customer Jobs

Draft

Quoted

Approved

All Open

Completed

Rejected

All

Search

Add

Refresh

Table Options

Low Risk xTeam B x

x

Important x

x

Warning: Filter settings have been applied

Job reference	Customer	Job Title	Customer Reference	Job Contact Name	Job Contact Number	Preferred Start Date	Quoted Amount	Invoiced Amount	Deposit Amount	Last Update	
J00004	Richard Smith	Repair Work	43243	Richard Smith	4822874832	21 Mar 2024	Not Quoted	Not Invoiced	No deposits	08 Apr 2024, 16:26	Job Actions
J00008	Zimbabwe Zimmers	Job 5	-	Zim	3492398324	26 Mar 2024	\$80,801.20	Not Invoiced	No deposits	08 Apr 2024, 16:23	Job Actions

Records to display on page:

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