

How-To: Navigating Tags Settings

Purpose: This guide explains how to find and navigate 'Tags' on the Settings Dashboard.

Step 1: Navigate to the Settings Dashboard

1. Click the three horizontal lines in the top left corner.



2. Select 'Settings' from the menu.





Step 2: Navigating 'Tags' in Settings Dashboard

1. Select 'Tags' on the Control Panel or select 'Tags' on the drop-down menu 'Settings & Configuration'.

	≡	EServ				
X	🚝 Control Panel			Control Panel		
	¢	Settings & Configuration	~	Settings & Configuration		
		Finance & Billing	~	Company Settings		
		Scheduling & Operations	~	Tags		
	Employees & Access Control		~	Finance & Billing Quickbooks		
	Ê	Sales & Quotes	~	Subscription		

- 2. Tags are custom identifiers that can be assigned to Customer/Property or Inventory. This allows you to filter, sort and organize your database.
 - On this page, you can view all tags, Customer/Property or Inventory by clicking the toggles.

Tags							
Customer / Property							
Inventory							
801 black iron (Inventory)							
124 do not service (Customer / Propert	(y)						
684 email (Customer / Property)							
96 Family and Friends (Customer / Pr	operty)						

• For instructions to add tags to customers visit <u>https://sales.eserv.com/how-to</u> for a How-To Guide.



- 3. Select 'Archive' to archive tags you are no longer using.
 - You can edit and restore tags as needed.

Tags	New
Customer / Property	
Inventory C	Archive
801 black iron (Inventory)	* (* *
Archived ^	
800 Division 1 (Inventory)	্র ১ 🖉

4. Select 'New' in the upper right corner to create new tags.



• This will open a pop-up, you will be prompted to create a new tag. Creating a label, selecting type and color.

New Tag	×
Label Military Discount	Preview Military Discount
Type Select a type	
Customer / Property Inventory	GH Colors Sketch Colors Twitter Colors
	Submit

New