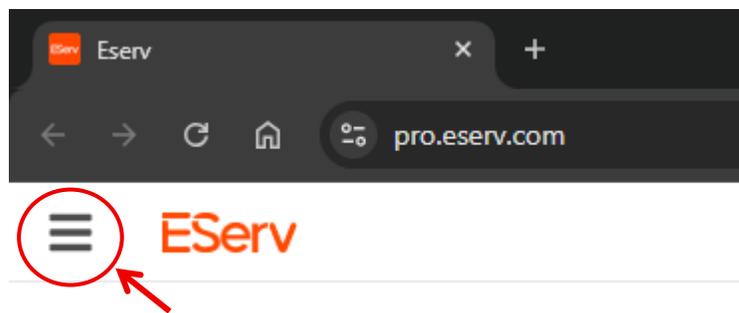


How-To: Navigating Tags Settings

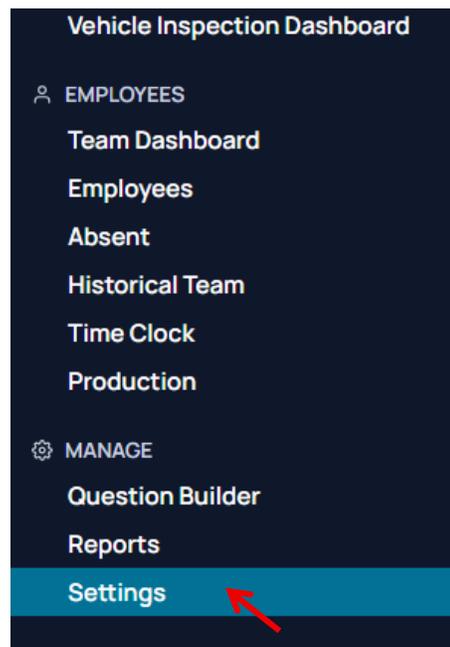
Purpose: This guide explains how to find and navigate 'Tags' on the Settings Dashboard.

Step 1: Navigate to the Settings Dashboard

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

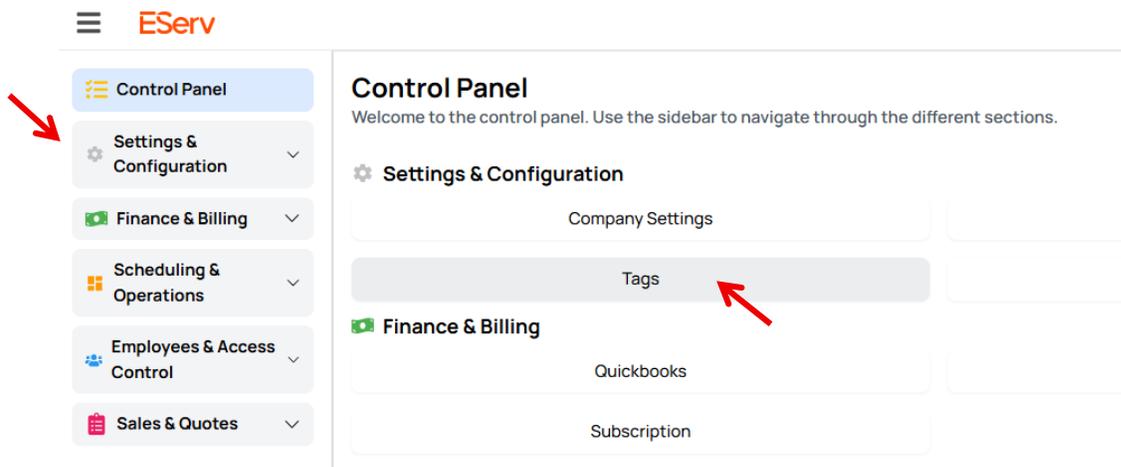


2. Select 'Settings' from the menu.

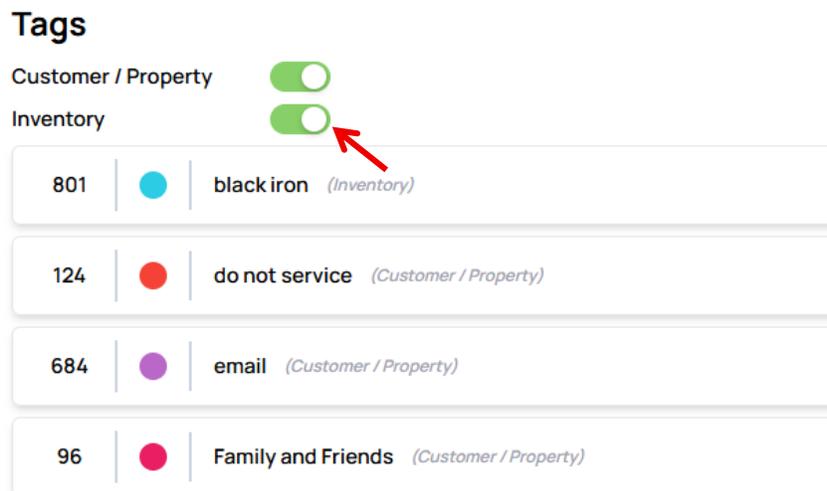


Step 2: Navigating 'Tags' in Settings Dashboard

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

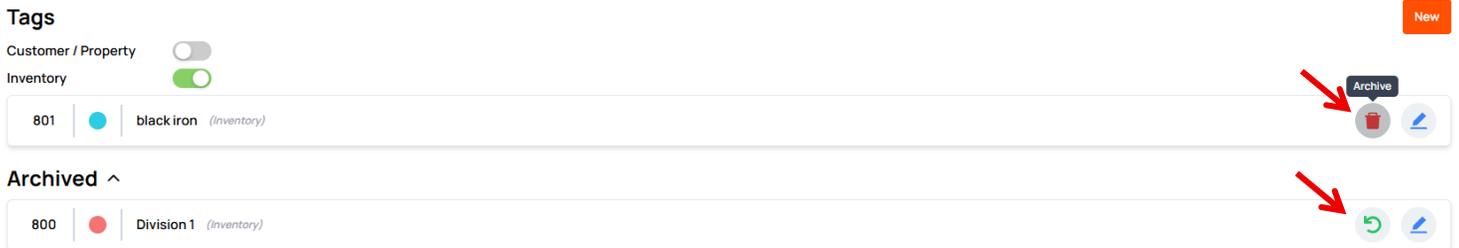


2. Tags are custom identifiers that can be assigned to Customer/Property or Inventory. This allows you to filter, sort and organize your database.
 - o On this page, you can view all tags, Customer/Property or Inventory by clicking the toggles.



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

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



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



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

