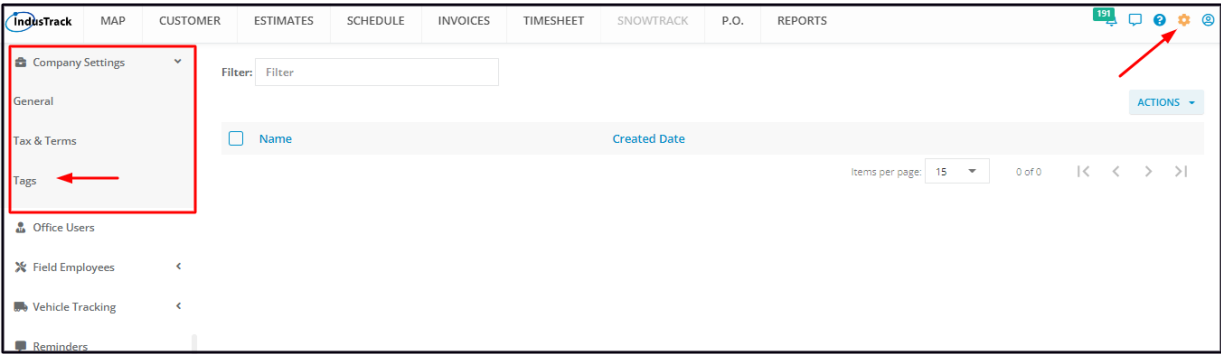


# Set Up Tags

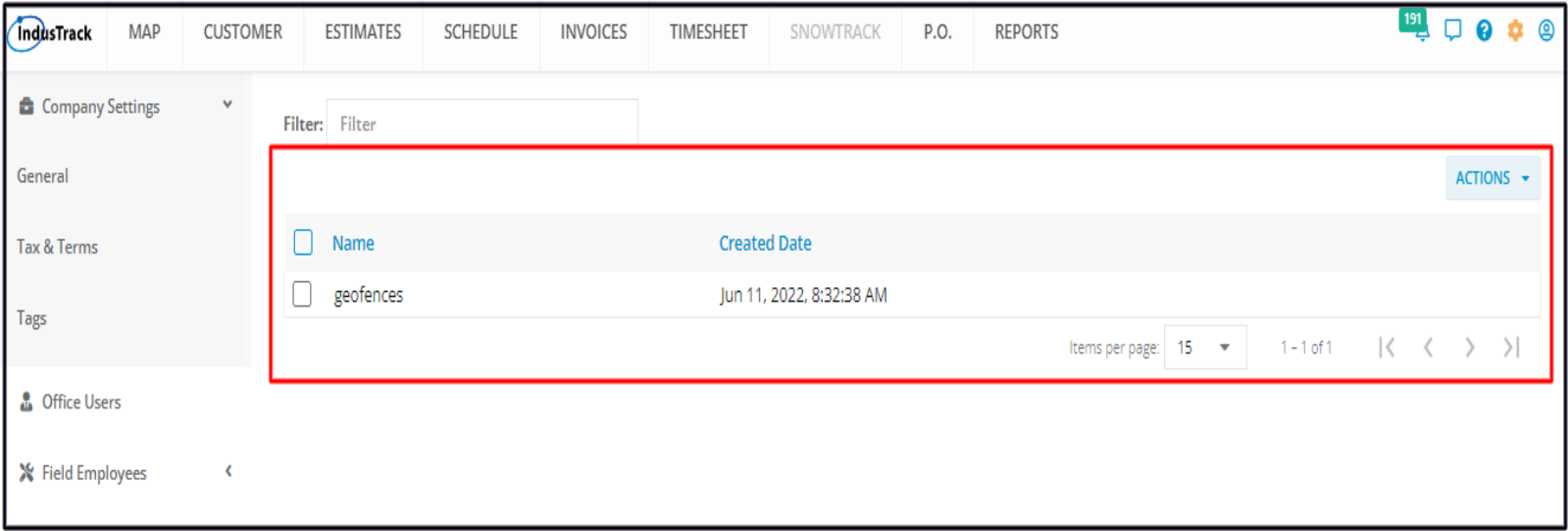
Create and utilize tags to keep track of customers and navigate IndusTrack more effectively.

To access the Tags page, go to **Settings > Company Settings > Tags**



## Using the Tags Table

From the **Tags tab**, you will see a list of all previously created tags. From this page, you will also be able to view, create, edit and delete different tags.

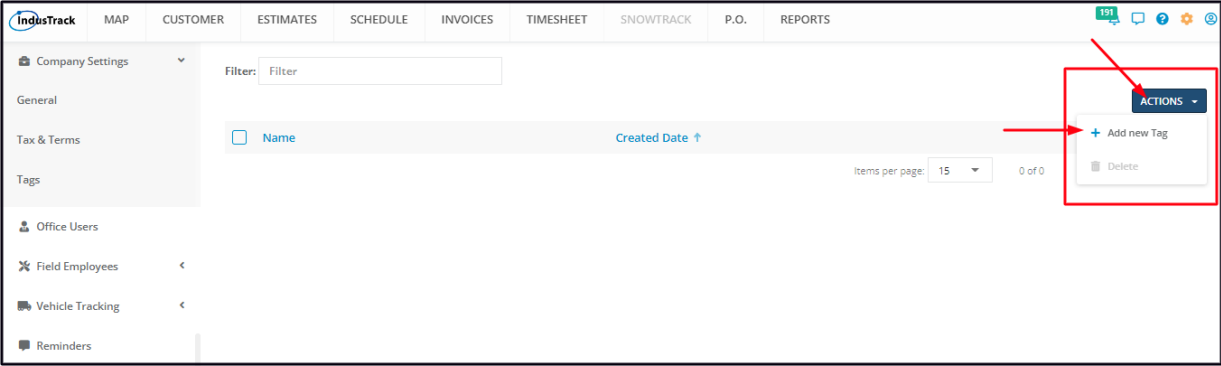


## Using the Terms Table

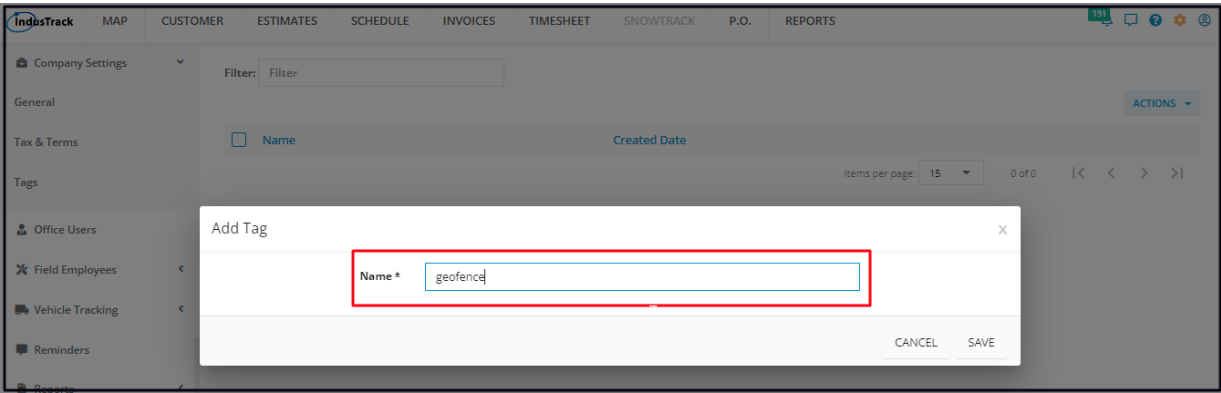
- The Tags table has 2 columns:
  - Name – The name you gave the tag.
  - Created Date
- Items Per Page
  - Select the number of tags to be displayed per page. Options to choose from are 15, 25, and 50.
  - Use the side arrows to move from one page to another (if there is more than one page). If there is only 1 page, this feature is disabled

## Create a New Tag

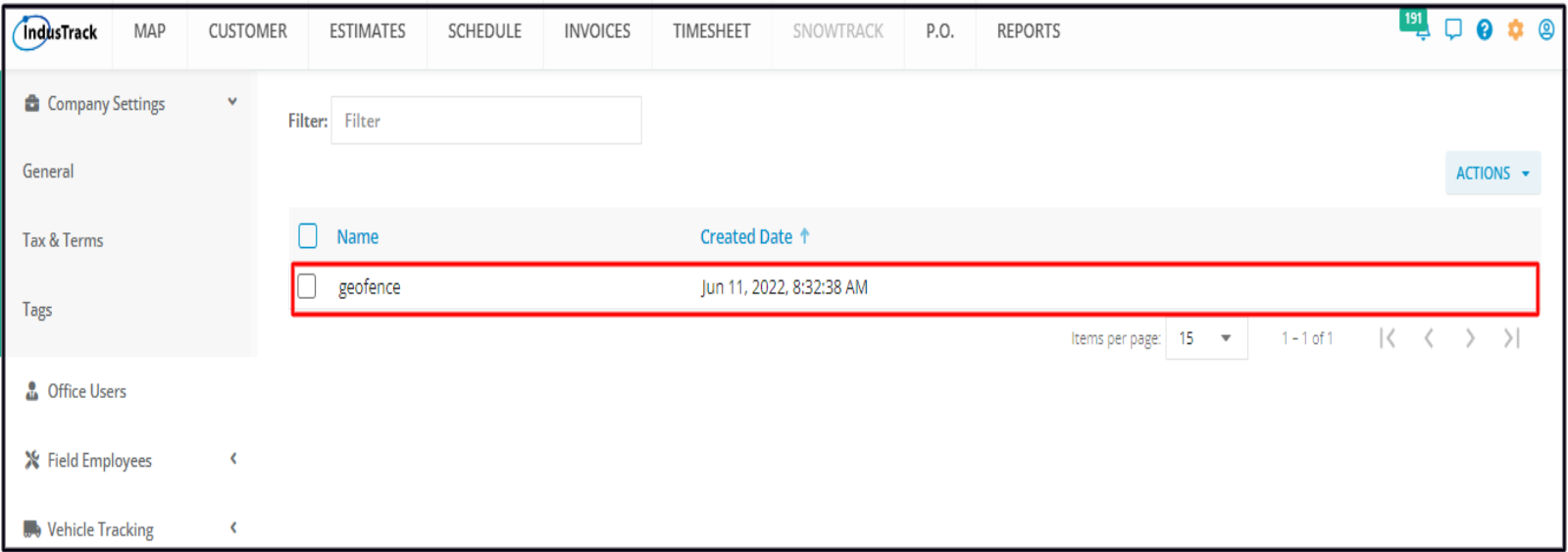
Go to the **Actions** button and select **+ Add New Tag**.



On the **Add Tag** window, give the tag a name and hit Save.

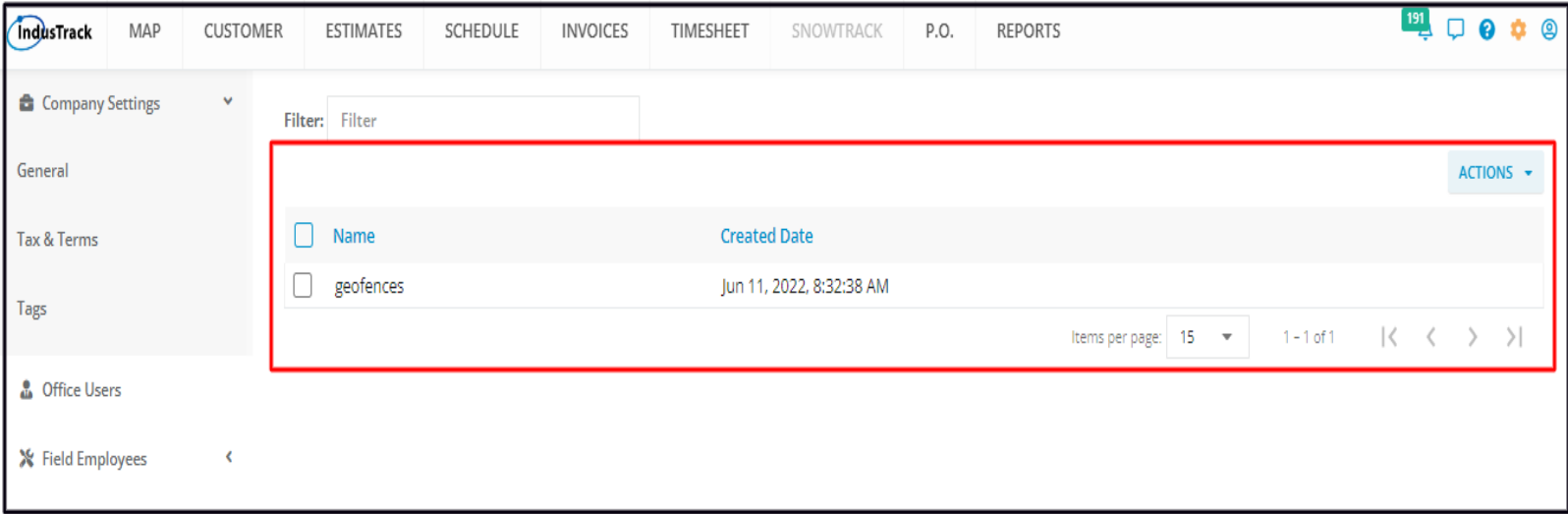


After saving the Tag, this will be added to the **Tags List**.

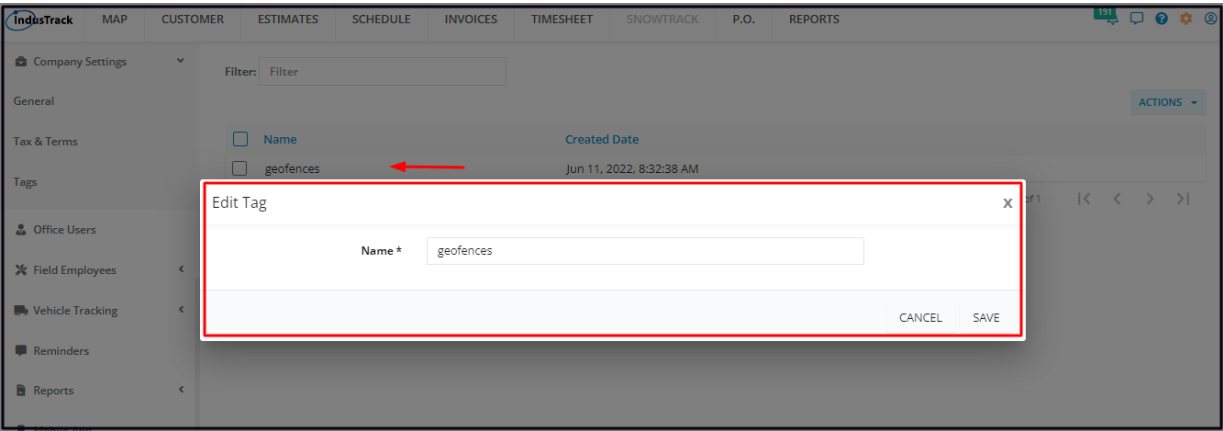


**Edit a Tag**

Find the term item to be updated from the list and click any on the row to open the tag in edit mode.



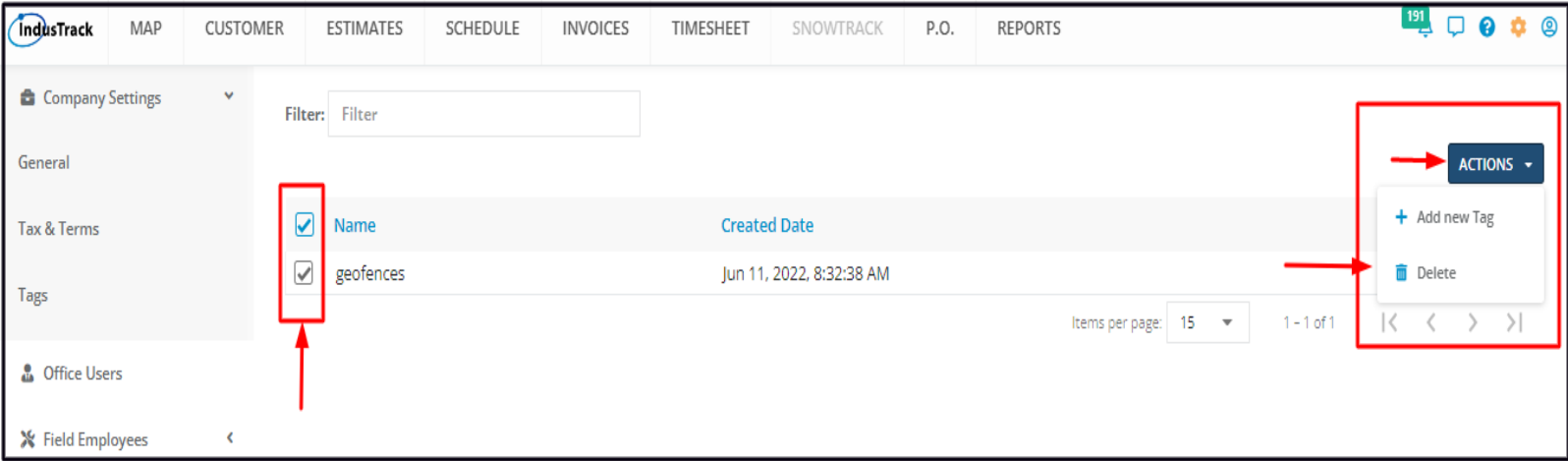
Edit as may be needed. Once done, **Save** the changes.



### Delete a Tag

Find the term item to be removed from the list, and tick the checkbox to the left of the tag to be removed. To delete multiple tags, tick the checkboxes to the left of all the tags to be removed. If all terms will be deleted, just tick the checkbox of the Name header.

Go to **Actions** and select **Delete**.



Confirm the delete action. The tag will be removed from the list.

### Assign Tags to Customers

Tags can be assigned to your customers making it easy to group them and find the ones similarly tagged.

Go to the Customer's Module and find the customer to be assigned the tag. Click anywhere on the row to open the Customer's Address Book.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS
AAAAAA		NOT DEFINED		NOT DEFINED					
AAAAAAA DDDDDDDD		AAAAAAA		DDDDDDDD					
Abato, Ronald P		Ronald P Abato							
ABBC Properties LLC		Chuck Welk							
Abbott, Shirley		Abbott, Shirley							
ABC Software		ABC Software							

From the customer's address book, go to the Tags field which is located at the middle of the page, next to the customer's name. Click on the field and select the tag or tags to be assigned to the customer.

IndusTrack

MAP

CUSTOMER

ESTIMATES

SCHEDULE

INVOICES

TIMESHEET

SNOWTRACK

P.O.

REPORTS

← BACK

Abato, Ronald P

Tags: Assign

geofences

EDIT CONTACT

Contact Info:

Billing Address:

Service Location:

Customer Number:

Phone:

Email:

Awaiting Payments

Invoice overdue

Pending Quotes

Location

Estimates

Jobs

Invoices

Equipment

Reminders

Notes

Attachments

Geofences

Messaging

Contracts

Filter:

CLEAR FILTER

+ ADD NEW

Location name

Contact Name

Location

Phone Number

Email

To assign the tag, click on it and it will automatically be added to the profile. The tag will be highlighted in green.

IndusTrack

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SNOWTRACK

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← BACK

Abato, Ronald P

Tags: Assign

geofences

EDIT CONTACT

Contact Info:

Billing Address:

Service Location:

Customer Number:

Phone:

Email:

Awaiting Payments

Invoice overdue

Pending Quotes

Location

Estimates

Jobs

Invoices

Equipment

Reminders

Notes

Attachments

Geofences

Messaging

Contracts

Filter:

CLEAR FILTER

+ ADD NEW

Location name

Contact Name

Location

Phone Number

Email

From the Customers' List, the assigned tag or tags will be indicated under the column Tags.

IndusTrack	MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS
ab									
Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
Asus ROG	Anna	Delvey	215 Belmont Ave West Babylon NY 11704	(770) 431-6984			annad@gmail.com		
Wiseco OLD	Mirabel	Madrigal	326 S Jackson St Perryville MO 63775	(573) 547-2334			mirabelmads@wiseco.com		
Wiseco NEW	Isabel	Madrigal	677 Twisted Oaks Dr Camdenton MO 65020	(573) 346-2356			isabelmads@wiseco.com		
Federal bmx	zahara	gabriel	14819 Downey Ave #305 Paramount CA 90723	(562) 634-7791			zzz@federrailbmx.com		
Abato, Ronald P	Ronald P Abato		Ronald Abato Deer River MN 56636	(218) 327-2200					geofences
ABBC Properties LLC	Chuck Welk		ABBC Properties LLC Grand Rapids MN 55744	(218) 256-5288					

To remove the tag, click on the delete button (X) beside the tag name.

IndusTrack

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TIMESHEET

SNOWTRACK

P.O.

REPORTS

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Abato, Ronald P

Tags: Assign

geofences

EDIT CONTACT

Contact Info:

Customer Number:

Contact name: Ronald P Abato

Phone: (218) 327-2200

Email:

Billing Address:

Ronald Abato

Deer River, MN 56636

Service Location:

Ronald Abato

Deer River, MN 56636

Awaiting Payments

\$ 0.00

Invoice overdue

\$ 0.00

Pending Quotes

\$ 0.00

Location

Estimates

Jobs

Invoices

Equipment

Reminders

Notes

Attachments

Geofences

Messaging

Contracts

Filter:

CLEAR FILTER

+ ADD NEW

Location name

Contact Name

Location

Phone Number

Email

Ronald P Abato

Ronald Abato Deer River MN 56636

(218) 327-2200

Items per page:

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