Labels

Introduction

The Labels section of settings is where label are created and managed and can be assigned for various purposes. A label can be attached to a Customer, Location, Employee and Service Visits to provide additional information. Examples are labels used to identify a type of customer, the type of property the loaction is, what job an employee is performing or service visits to identify ugency and type of service being performed. To reach the Labels section, click on the dropdown next to admin, click opn settings, then click on Labels. Clicking on the 3 bars on the top left corner of the page will expand the side menu for easier access. Upon landing on the Labels page, there will be 4 tabs that can be selected for creating labels

Labels

When arriving on the Labels page, There will be 4 tabs to identify what the label is being created for

- Customer
- Location
- Employee
- Service Visits

Each tab will show each label as a line item with the following columns

- Name - Shows the label of the name
- Type - Shows the type of the Label (Types can be created for Customer, Location and Employee, but not for Service Visits
- Status - The status of the label, Active or Inactive
- Actions - Actions that can be taken on the label
  - Edit - Click here to edit a label
  - Status - Clicking here will toggle the label between Active or Inactive
  - Trash - Clicking here will delete the Label

Creating Labels

Creating Labels is simple and is done the same way for all categories with the exception of types under Service Visits. To creat a label

1. Select a tab to add a label to that category
2. Click on the Add Label button to bring up the Add Label popup
3. Add the name of the Label
4. Add the type of label
    - The type of label can be added simply by typing out what the type should be named and creating the label. Now that type will generate as part of the dropdown for types going forward. This can only be done for Customer, Location and Employee
    - Service visits only has 4 types to select from, each with it's own color attached for urgency
        - Other - Blue
        - Equipment - Purple
        - Action - Green
        - Problem - Red
5. Click Create to generate a label for the category

Once labels are created, they can be attached to the category the were created for

- Customer - Can be attached on the Customer Overview page, a detailed look on how can be seen on the Customer Account page
- Location - Can be attached on the Manage locations page, A detailed look on how can be seen on the Manage Location Settings page
- Employee - Can be attached on the Employee Management page, a detailed look on how can be seen on the Employee Management page
- Service Visits - Can be attached on the Customer Service Page

In order to attach a label to any of the mentioned categories, the label must be created on the settings page first.

Editing Labels

Editing Labels is simple and is done by clicking on the Edit button under the actions section of a created label. After clicking on edit, the Edit Label menu will popup and any edits can be made to the label. Once completed, clicking on the Update Label button will update the label with the new information and clicking on cancel will close out the popup and erase any changed made on the label.

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