Tags

Tags are the various methods through which managers and agents can quickly identify an individual call or set of calls. Tags are used to distinguish calls from one another and serve as a reminder for future actions. The image below is an outline of the tag section

Adding a tag

1. To create a root tag, click the add root tag button.

2. Input the desired name of the root tag in the blank section shown below

3. Select the "agent" or "chat" checkbox(es) as desired.

Creating a Child Tag

Child Tags are subtags to the Root Tag created.

1. Click the "Add Child Tag" button, , the following will be displayed

   below the Root Tag:

2. Type the desired name for the tag.

3. Select the "agent" or "chat" checkbox(es) as desired.
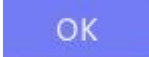
Editing a Tag or a Child Tag

1. For any tag or child tag, click the text input box of the tag's name to modify the tag's

   name.

2. Select and Deselect the "agent" and "chat" checkboxes as desired.

Deleting a Tag or a Child Tag

1.   Tags can be deleted by pressing the delete ✖ button on the column of the desired tag.

   The following pop-up window will appear:
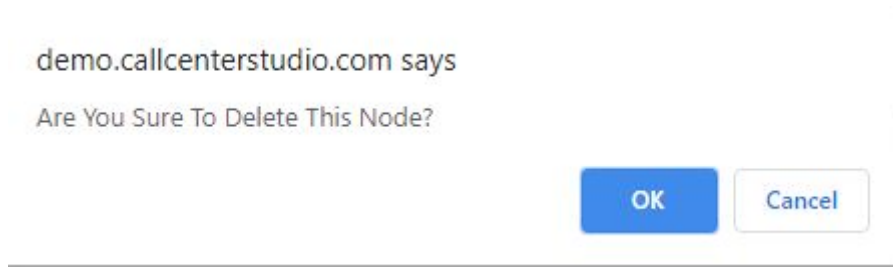
- *Selecting the cancel button,* *, will cancel the deletion.*

- *Selecting the OK button,* *, will confirm the deletion.*

The screen will reload and the deleted tag will not be shown.

Note: the child tags must be deleted before deleting the root tag. Using the same instructions as above, child tags can be deleted.