



How to: Use Tags

What are tags?

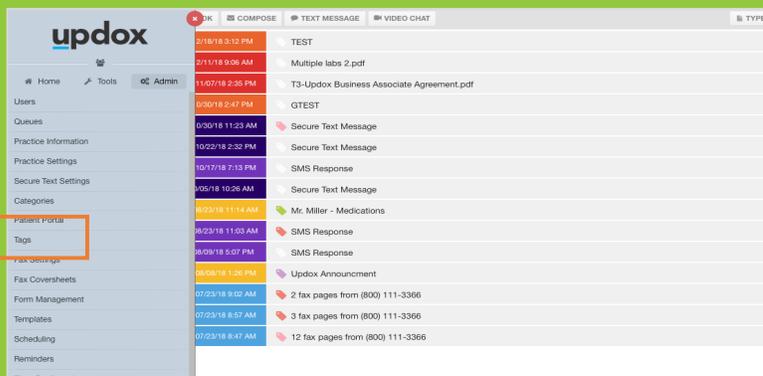
Tags are a colorful way to organize items in the Updox Inbox. They add a visual splash of color that will draw your attention without needing to read the subject or open the document. You will assign a tag to all items in your Inbox. You can even limit which items are shown in your workspace by filtering based on tag color.

Your current document triage process can often provide a blueprint for how you will design tags in Updox. For example, if you have a folder for all incoming Rx requests, that will likely be a tag.

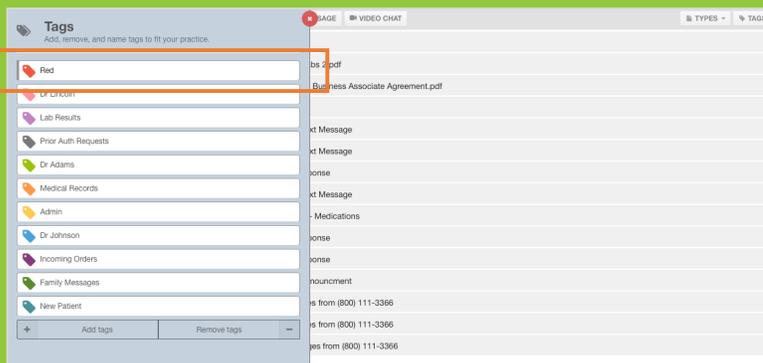
How do I set up tags?

Follow these step-by-step instructions:

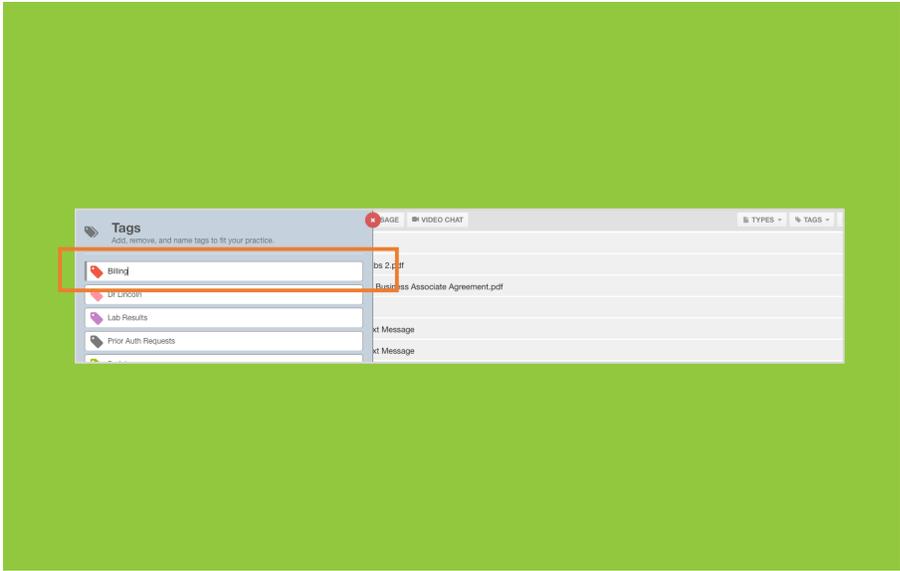
Configuring tags



1. Select Menu > Admin > Tags

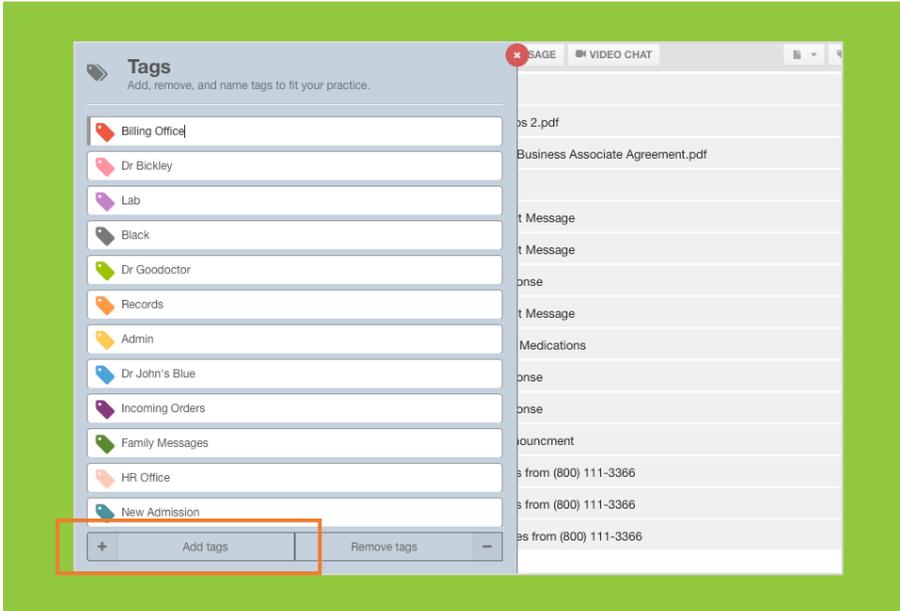


2. When the screen first displays, 12 tags are visible. You will notice the description is just the color of the tag.

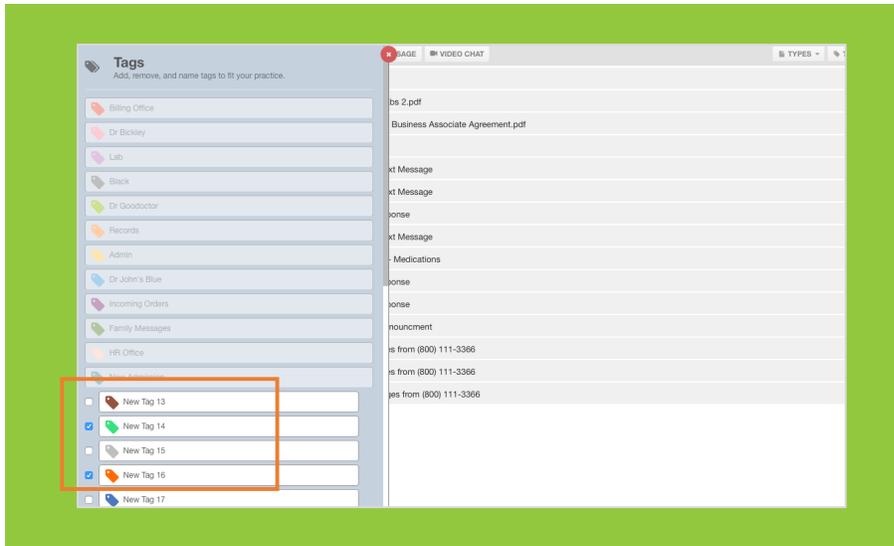


3. Click on the tag you would like to rename and enter a new description. Save your changes when complete.

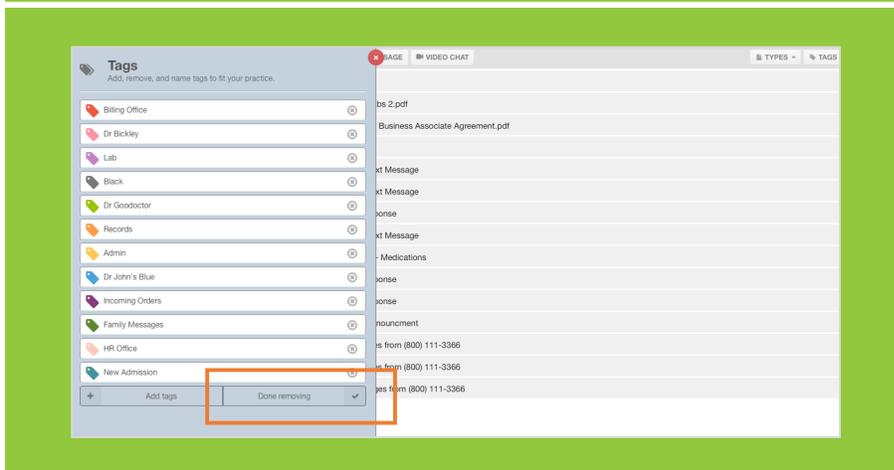
TIP: Review the process you currently use to sort documents. This can be a good template to use when creating tags. Think of tags as the electronic version of your document sorting process.



4. If you need more than 12 tags, select **Add tags**. A total of 49 tags will be available to you.



5. Select the additional tag colors you would like to use by checking the box beside each one. Click on the color description and rename. Save your changes when complete.



6. If you would like to remove a tag, select **Remove tags** and click the X on any tag you want to remove. Select **Done removing** to finish.

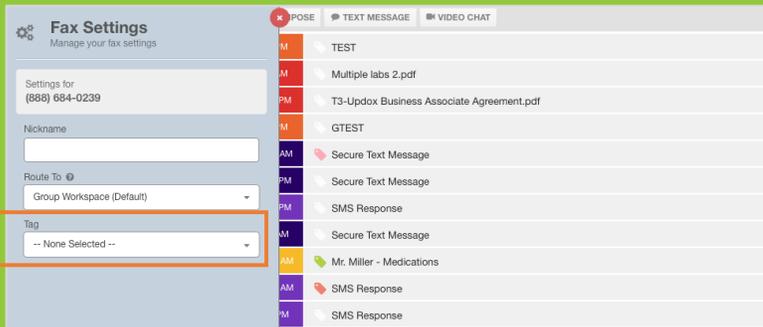
NOTE: You cannot remove a tag if you have already assigned it to an item in your Inbox.

Using tags

Auto assign tags to incoming faxes
or
Manually assign tags

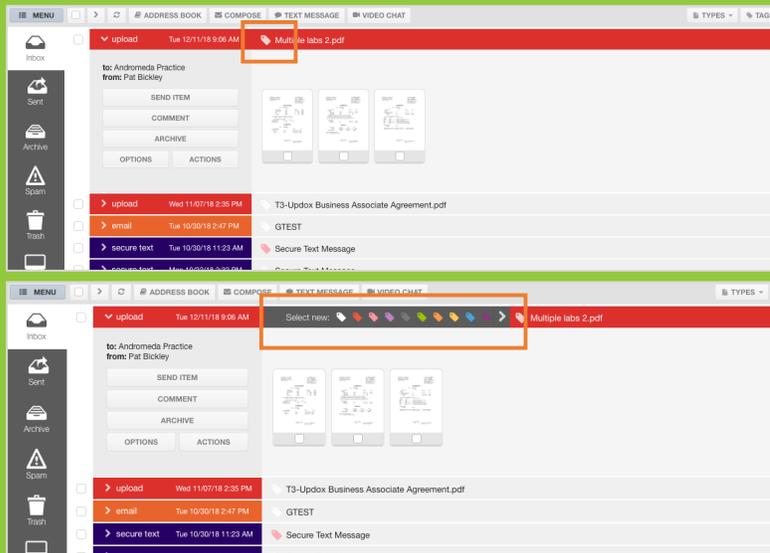
7. There are 2 ways you can attach tags to items in your Inbox.

- a. Auto assign a tag to all inbound faxes.
- b. Manually assign tags to Inbox items.



8. To auto assign a tag to all incoming faxes, go to the Admin menu and select Fax Settings.
9. Select the tag you would like assigned for all incoming faxes for the fax number listed.

NOTE: If you have multiple fax lines, they will be listed. Assign a separate tag to each one.

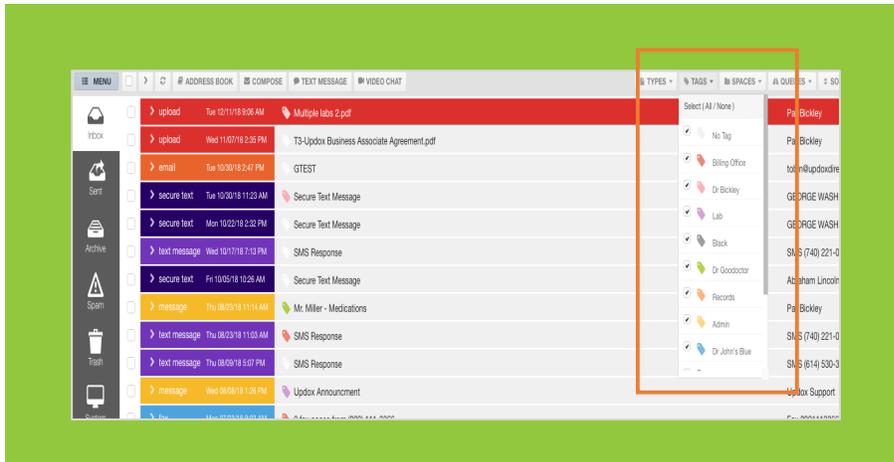


10. To manually assign a tag to an item in your Inbox, select the tag icon displayed beside the title of your item.
11. Select the tag you want to assign. To see more tags, select the arrow on the tag line.

NOTE: Roll your cursor over the tag to see the description of the tag.

NOTE: To close the tag selection bar without selecting a tag, click the tag icon preceding the title/subject.

Filtering the Inbox by tag



12. If you would like to filter your Inbox view based on tags, select Tags from the navigation bar located at the top of the Inbox. All tags will be selected by default. Unselect the tags you want to hide from your view.

NOTE: You can make changes to this filter as needed.

Frequently Asked Questions

Q: Can I assign more than one tag to an item?

A: No. You can only assign one tag to an Inbox item.

Q: Who has permission to add a tag or remove a tag from an item?

A: Any user can add or remove tags from an item.

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