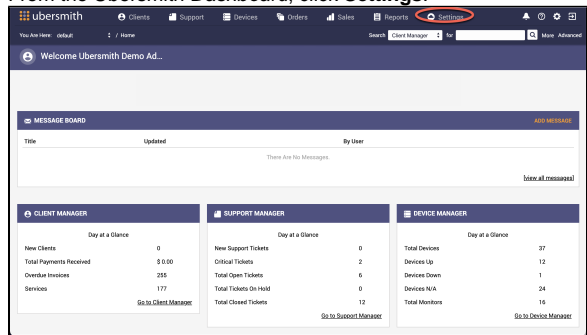


Adding Client Tags

Client tags help you visually identify important data specific to your company at a glance, such as their service level agreement or account manager.

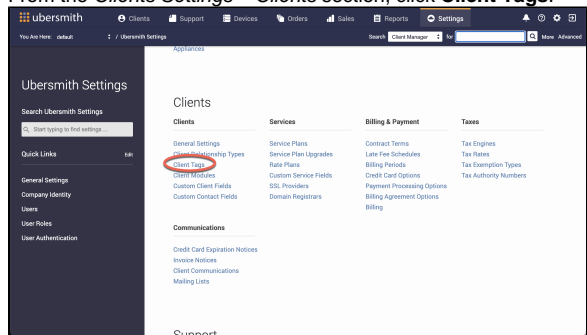
Access the Client Tags Page

1. From the Ubersmith *Dashboard*, click **Settings**.



The *Ubersmith Settings* page appears.

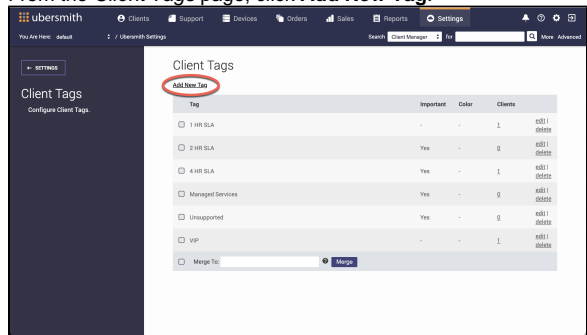
2. From the *Clients Settings – Clients* section, click **Client Tags**.



The Client Tags page appears.

Complete the Create Client Tag Page

1. From the *Client Tags* page, click **Add New Tag**.



The *Create Client Tag* page appears.

2. In the **Tag** field, enter the name of the tag.
3. In the **Color** field, enter a six-digit hexadecimal number.
4. In the **Important** field, select **Yes** if you want to display the tag in the client bar. Select **No** if you only want to display the tag in the [Tags](#) section in the [Client Profile](#) page.

On this page:

On this page:

- [Access the Client Tags Page](#)
- [Complete the Create Client Tag Page](#)
- [Related Topics](#)

5. Click **Save** or **Save & New**.

ubersmith

Create Client Tag

Tag: Demo Admin ?

Color: #rrggbb ?

Important: ☒ Yes ☐ No ?

Save Save & New Cancel

Related Topics

[Managing Client Tags](#)

[Managing Users](#)