Creating User Labels

**Primary Audience:** All Users

**Purpose:** Create User Labels when you need to group or categorize records for your business needs. There is no limit to the number of User Labels you can create. You can apply multiple User Labels to the same record. No one else sees your User Labels, so name them anyway you prefer.

1. To display your own User Labels:
   a. Click **Trays** from the **Shortcuts** bar.
   b. Click **User Labels**. The User Labels screen displays the User Labels for which you are the owner.

2. To create a new **User Label**:
   a. From the **Manage** tab, select **User Label**.
   b. On the **User Labels** popup:
      - To create a new highest level label, right click in the screen area and from the **New** menu, choose **New Top Level Item**.
To create a sub-level of an existing label, right click on the label and from the **New** menu, choose **New Lower Level Item**.

c. On the **New Top Level/New Lower Level Item** popup:
   - Enter a name for your new user label in the **User Label Name** field. Remember that these labels are not visible to or accessible by anyone else. They are simply your shortcuts.
   - If desired, select an icon for the new user label from the dropdown.

d. Click **OK**.
3. To apply a User Label to records:
   a. Tag the record(s), right click, select Send To and then Add to User Label.
   b. Select the appropriate User Label and click OK.
c. **Please note:** Once a specific User Label has already been applied to a record, it will be hidden from the list of available User Labels. This can be confusing. If a record has been previously labelled, the User Label will not appear in the list. If you tag a group of records to add to a User Label, and one of the records had been added to the User Label previously, the User Label will not appear as an option for you to select, even though there are other records in the group that have not been added.

4. To view the records associated with your User Labels:
   
   a. Double click on the User Label, or
   
   b. Right click on the User Label and select **Show Records.**

   All the records associated with the User Label will be displayed.

5. To remove records from a User Label:

   a. Tag the record (or records), right click and select **Clear,** OR
b. Select the record (or records), right click and select **Remove from User Label**.

c. On the **Select From User Labels** popup, select the User Label you want to remove.

d. Click **OK**. The record will no longer be associated with the User Label. However, the record itself will be unchanged.
6. To modify a User Label:
   a. Right click on the User Label.
   b. Select Properties.
   c. Modify the label title or icon.

7. To delete a User Label:
   a. Right click on the User Label.
   b. Select Delete. A message asking you to confirm that you want to remove the User Label will be displayed.
   c. Click OK.
   d. Other ways to see your own User Labels:
      • Select User Labels from the Manage tab.
      • Select User Labels from the Search tab.