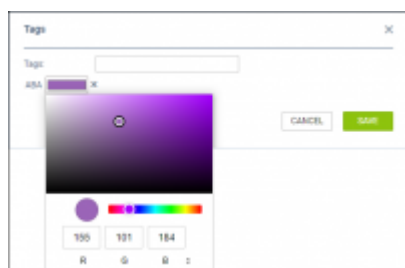# TAGGING REQUESTS

RQ list with assigned tags

It is possible to tag requests in a similar to tagging flights/trips in the OPS section.

There are 2 possible ways of **creating the tags**:

- in the **Tags** column
- in the **Edit tags** pop-up window

'Tags' column

Creating new tag

In order to **create a new tag** in the 'Tags' column you need to:

- Make sure that the 'Tags' column is activated in the [...] filter
- Click on the 'Tags' column
- In the 'Tags' pop-up window:
    - Insert the name of the new tag and press 'Enter' key on your keyboard
    - Click on the new tag colour square and select the prefered colour
    - Save the changes
- The tag is added to the list as well as added to the selected request

It is possible to **assign multiple tags** to one request following the abovementioned process. When tagging a request it is possible to both add new tags as well as assign already existing tags. Clicking on the 'Tags:' field will display a dropdown list with already added tags.

'Edit tags' pop-up window

'Edit tags' pop-up window

Edit tags section is located in the top bar of the 'Requests/Quotes' section, right to the 'FILTER' option

The **Edit tags** section lists all the created tags and allows:

- creating new tags
- filtering the tags
- deleting the tags

Creating new tag

Creating new tag

In order to **create** a new tag, the process is as follows:

- Open the 'Edit tags' pop-up window
- Enter the new tag name in the 'Filter or Create' box
- Select the tag color
- Click on **+** to add and save the new tag

Filtering the tags

Filtering tags

In order to **filter**, simply insert the required tag name in the 'Filter or Create' box.

In the case of newly created tags, the name stays in the 'Filter or Create' box. Since this box works as the filter at the same time, in order to preview all the available tags, you need to remove the newly created tag name from the box.
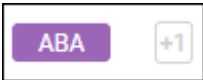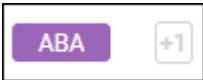
Deleting the tags

Deleting tags

In order to **delete** existing tags, the process is as follows:

- Open the 'Edit tags' pop-up window
- Click on the **x** next to the tag
- Select ✔ to confirm or **x** to dismiss

Once the tag is deleted, it is also removed from all the requests it is assigned to.

Main RQ view

If there are multiple tags added to a request, the list will display it as . Hovering the mouse over the number will display the names of remaining tags in a tooltip.

Filtering by tags

There is a possibility of **filtering by tags**. Simply click on the icon and insert the names of the tags you'd like to filter by.

The filter works based on 'or' rule which means that if there are tags 'A' and 'B' and there are 3 trips - one with 'A' and 'B' assigned, second with only 'A' assigned and third with only 'B' assigned - filtering by 'A' and 'B' will display all of these flights.

Additionally, **tags are available in the Report Wizard, scope 'Quote'**. We have added column 'Tags' as well as a filtering by 'Tags' with 'Include'/'Exclude' options.

> **Once the trip is booked the tags do not appear in the OPS section. Sales and OPS tags are not shared.**

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