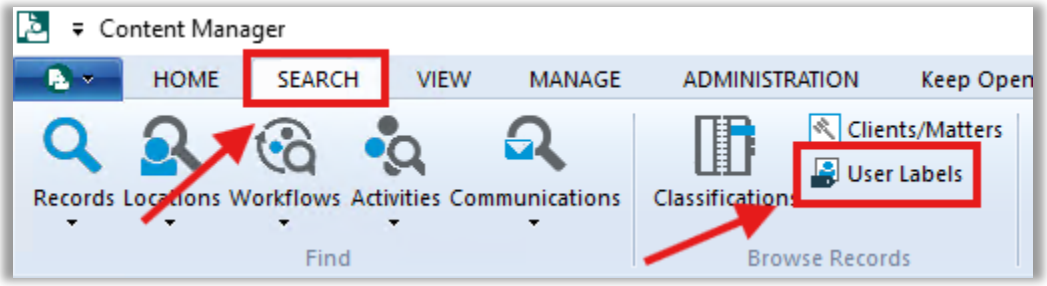
User Labels

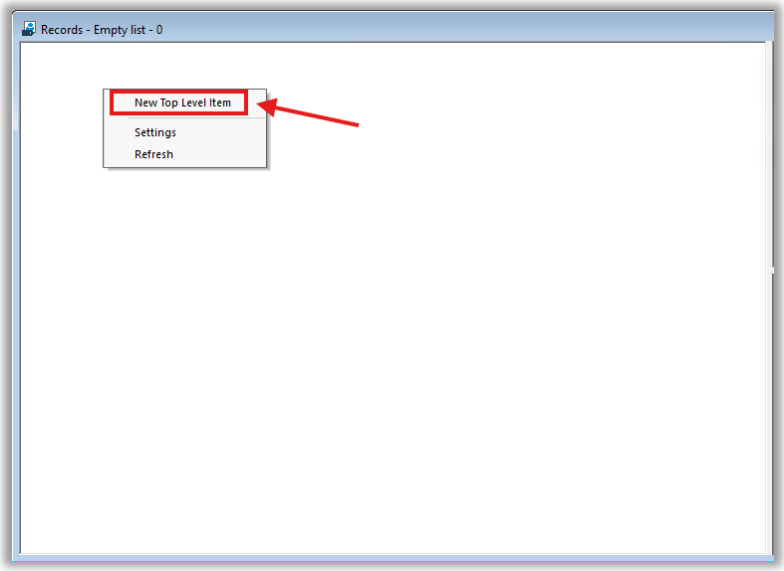
User Labels are useful to group records together for easy access (for example, responding to a public records request).

User Labels can be accessed from the Search Tab on the top of the screen.

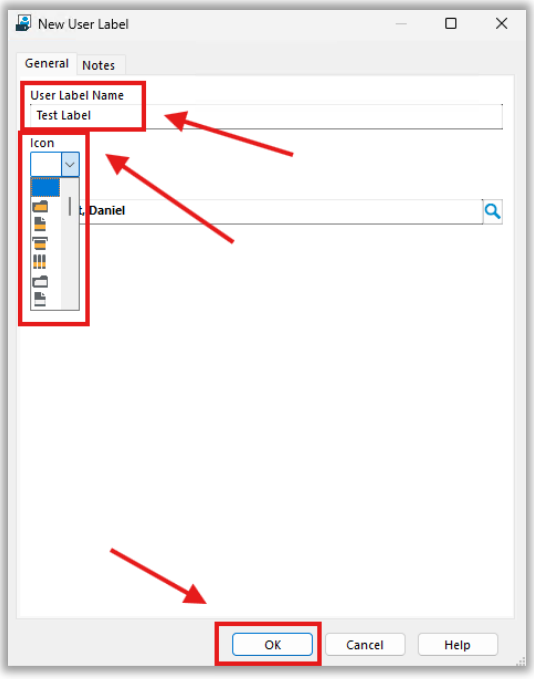


Creating a New User Label:

Step 1. RIGHT-CLICK in the blank space then click on **NEW TOP LEVEL ITEM**.



Step 2. In the New User Label window, type in a name under **USER LABEL NAME**, then select an **ICON** from the dropdown menu to distinguish it from other User Labels. Then click on the **OK** button.



Additional questions?
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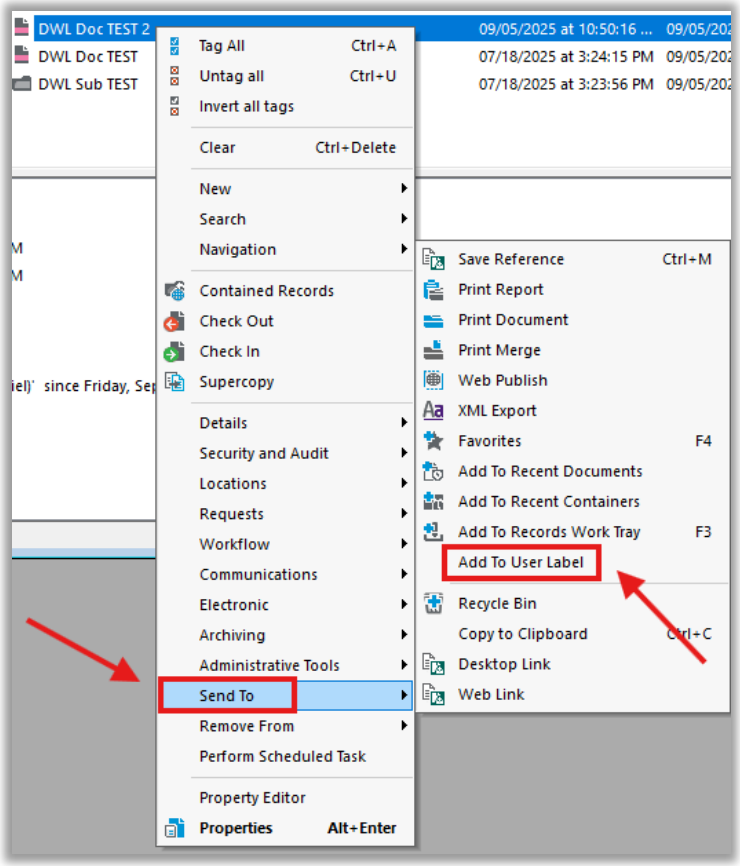
1-888-354-2006
ormshelp@chavessupport.com

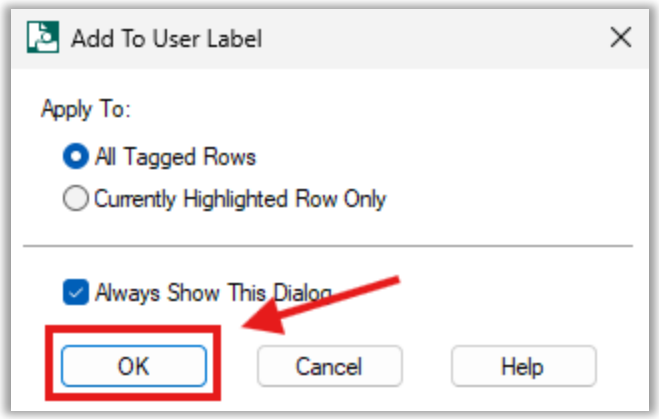
User Labels

Applying User Labels to Records:

Step 1. Locate your Record(s) that you want to add your User Label to, **RIGHT-CLICK** on the Record(s), hover your cursor over **SEND TO** then click **ADD TO USER LABEL**.



Step 2. On the pop-up window, click on the **OK** button.



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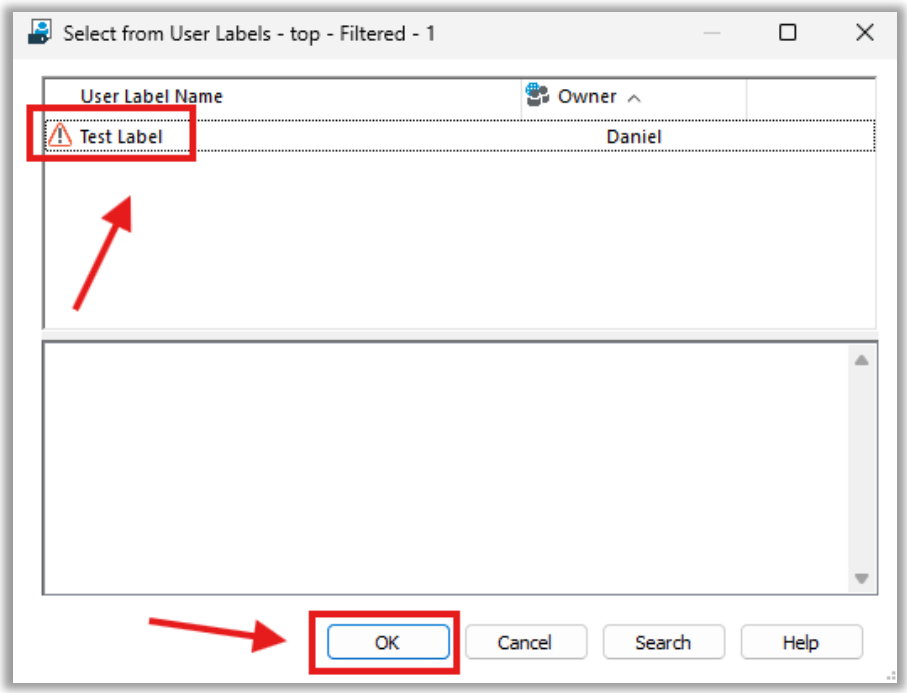
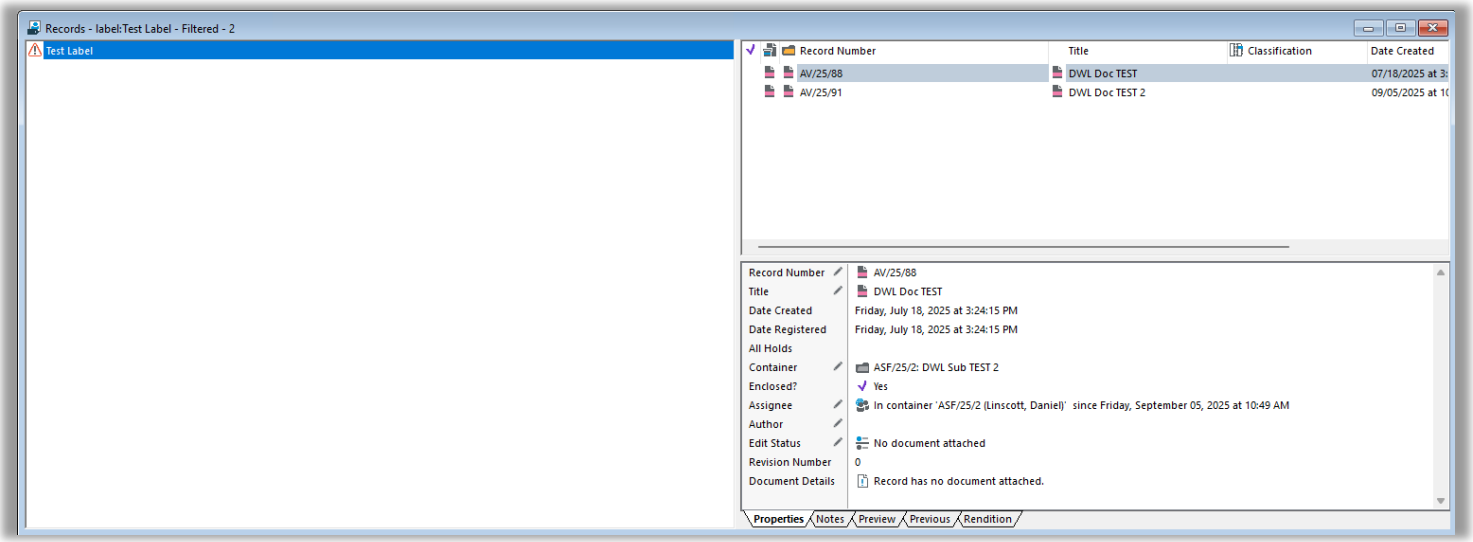
User Labels

Step 3. Select your **USER LABEL** then click on the **OK** button.



Your Records are now listed under your created User Label.



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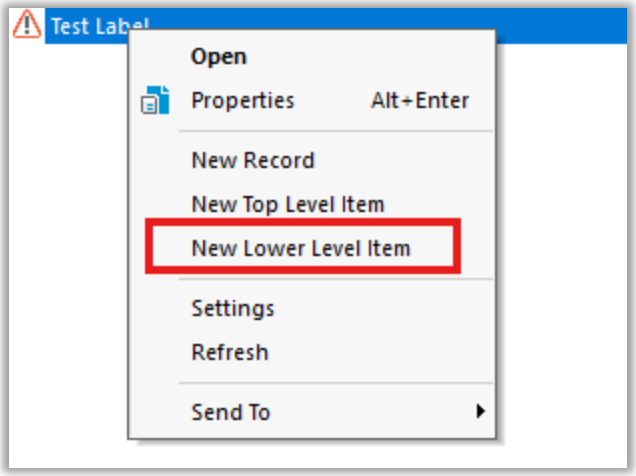
User Labels

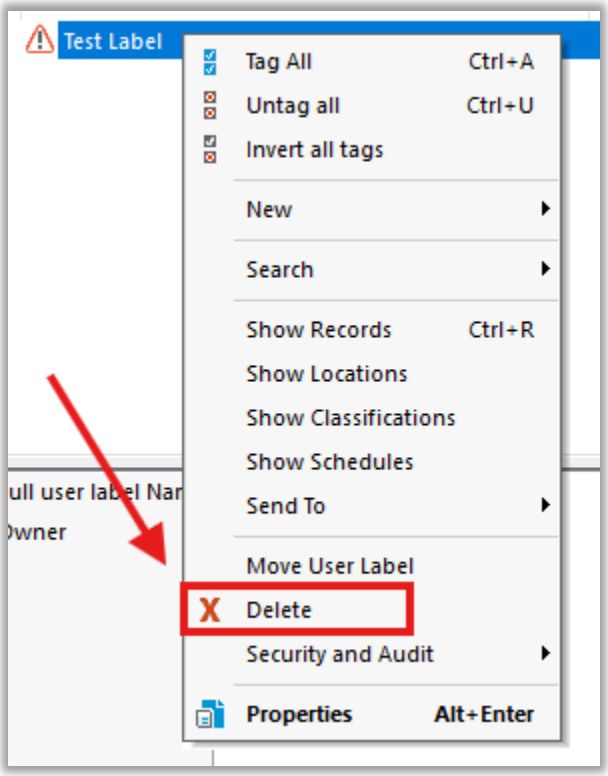
Adding records to a User Label does not move the records or modify them in any way. They are simply a tool to group and access collections of records. Specific project files, even if they are in different folders, can be grouped for easy access under a User Label.

Note: You can drag and drop one label to merge it with another.

You can also create **Nested Labels** by **RIGHT-CLICKING** on your User Label and selecting **NEW LOWER LEVEL ITEM.**



When you have no further need for a User Label, you can delete it by **RIGHT-CLICKING** on your User Label and selecting **DELETE**.



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