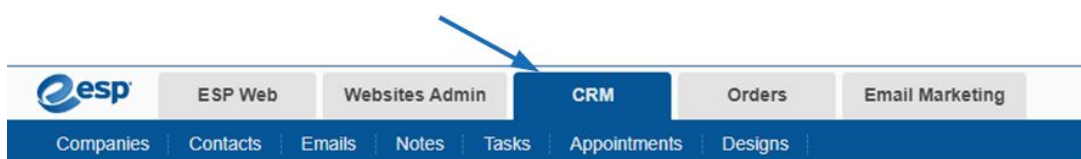




ESP Quick Tip #75: Add Tags to a Company in CRM

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Tags can be a helpful option for organizing companies and contacts in CRM. To create tags for a company, log into ESP Web and click on the CRM tab.



Companies include customers, suppliers, decorators, and prospects. To add tags to a company, click on the Company name from the available listing or add a new company.

Note: If you click on an existing company, you will need to click on the pencil icon to edit the company's information.

Tags are automatically generated from the information entered in the company record. In the Tags field, select from the existing tags or type a new term and hit enter, comma, or tab on the keyboard. When you are finished adding tags, click on the Save button.

[See these steps in action!](#)