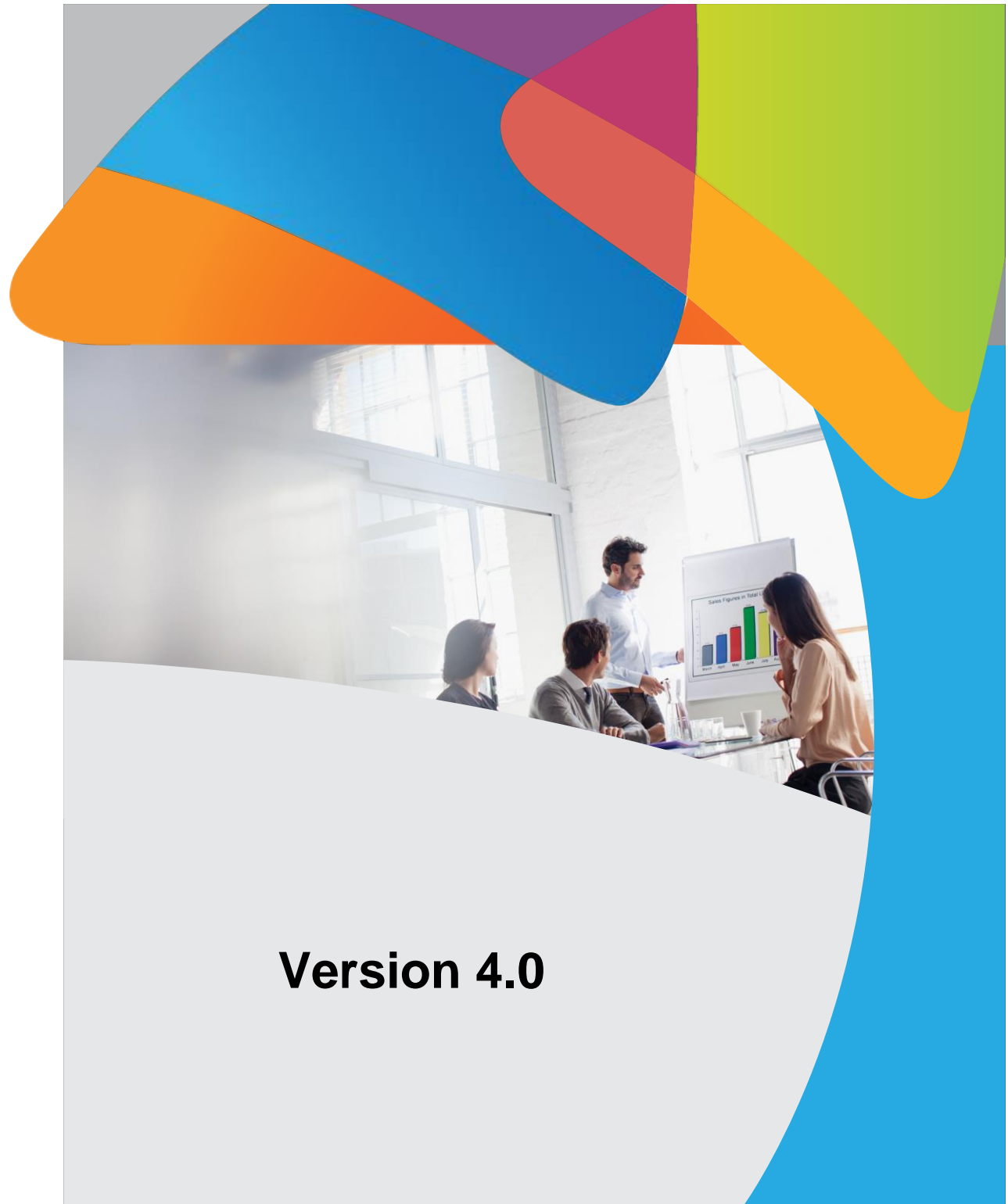




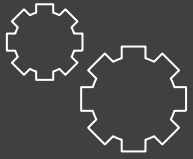
tagMe



**URDHVA TECH**



**Version 4.0**



## KEY FEATURES

- ✓ Add predefined tags
- ✓ Allow option to prevent non-admin user to create new tag
- ✓ Set limit for select existing tags
- ✓ Mass add or replace tags
- ✓ Tag Cloud
- ✓ Search data by tags globally from Dashlet
- ✓ Search data by tags module wise from Detail View
- ✓ Import Tags

## Introduction

Tag management is the ability to manage user-generated tags within the system. Tagging is fundamentally a means to classify data to make it structured and ultimately useful.

Through Tag Management user can handle large amounts of records with similar attributes or types. User can also easily find any contents, important customer, important notes etc. through appropriate tagging.

Fed up of remembering important clients? Tag them!

This plugin allows you to organize your data by giving those tags!!

Tags are keywords or terms that help describe a contact. Using additional information or notes that you have about your contact, tags help you list the little things about your contact that would normally be forgotten.

For example, if you know your contact is a fan of NFCNorth Teams, you can add in the "Tags" section of the "Edit Contact" page, 'The NFC-north'. If your organization ever gives away tickets to contacts, you can search for any contact with the tag 'NFC-north' in SuiteCRM. tagMe will pull up all contacts that have this tag and you can then get in touch with your contacts and give them those tickets!

Tags are independent of categories defined in SuiteCRM. You can use n-number of tags to best organize the contacts sharing similar interests.

Color coded tags make it even simpler to catch them.

P.S. Color codes are randomly generated.

## How to get the plugin?

- For SuiteCRM, Buy it from the link below.

[tagMe - SuiteCRM Store](#)

## How to install?

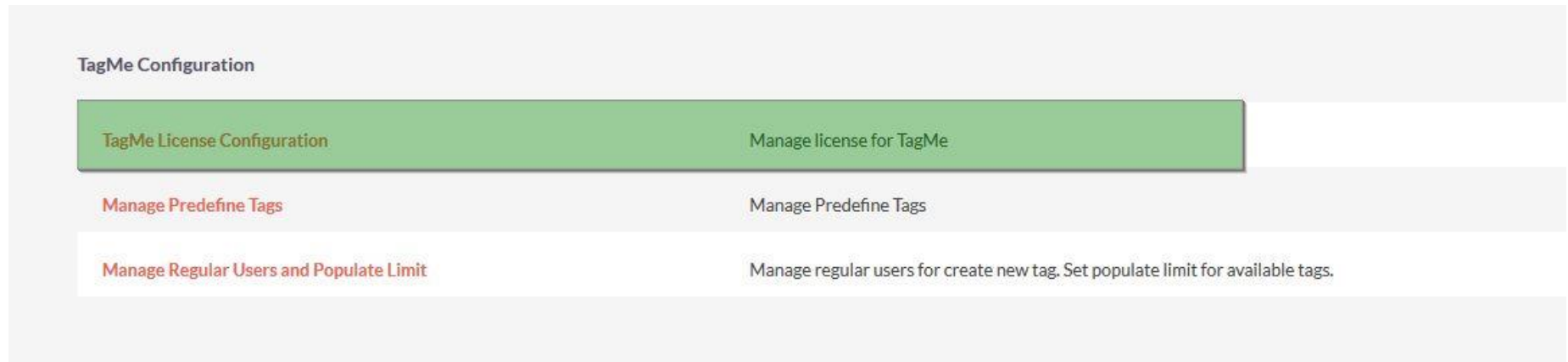
- Navigate to **Admin > Module Loader** and select the zip file, that you would have received upon the purchase. Follow the installation process.
- After successful installation, the custom field type “TagMe” appears in studio and module builder too.
- P.S. This plug-in does NOT support IE 10. It works with Compatibility mode IE 9.
- P.S. Make sure you create just 1 field of this type in a module.

## What's new in Version 4?

- Newly modern compact tags.

# Validate the license

- Once add-on is installed successfully, you have to provide valid license. Go to Admin and access “TagMe Configuration” link shown as below.



- Provide the license key that you have received upon purchase and validate it.

The screenshot shows a web interface for TAGME License Configuration. At the top, there is a dark navigation bar with a home icon and menu items: TAG ME, SALES, MARKETING, SUPPORT, ACTIVITIES, COLLABORATION, and ALL. Below this is a light gray header with a play icon and the title "TAGME LICENSE CONFIGURATION: MANAGE LICENSE FOR TAGME".

The main content area is titled "To Locate Your Key" and contains a numbered list of instructions:

1. Login to SugarOutfitters
2. Go to Account->Downloads
3. Locate the key for the purchase of this add-on
4. Paste into the License Key box below
5. Hit "Validate"

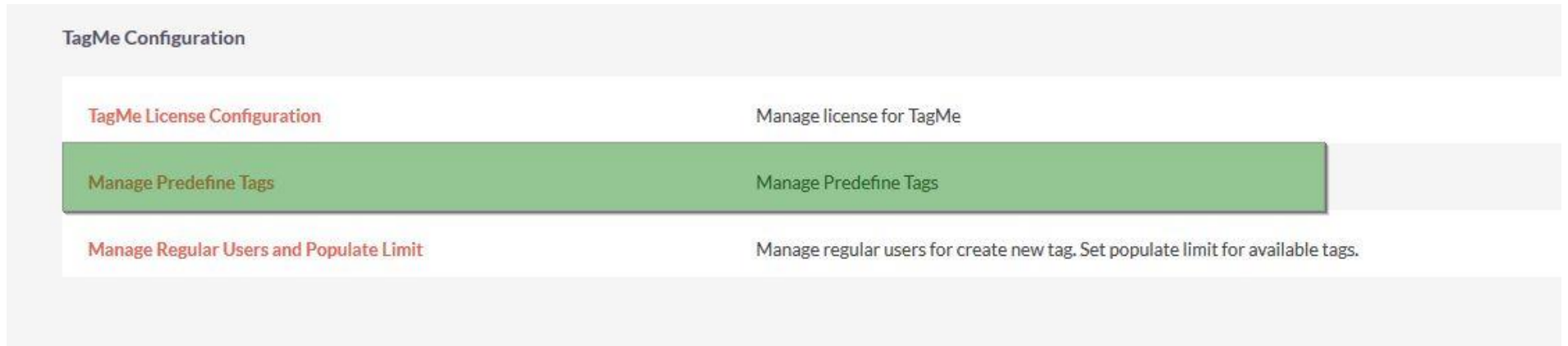
Below the instructions, there is a form with a label "License Key" and a large green input field. To the right of the input field is a brown button labeled "VALIDATE".

At the bottom, there is a section titled "Contact Information" with the text "We need your feedback." followed by a red button labeled "VERIFY TAGME IS WORKING". Below this are four bullet points:

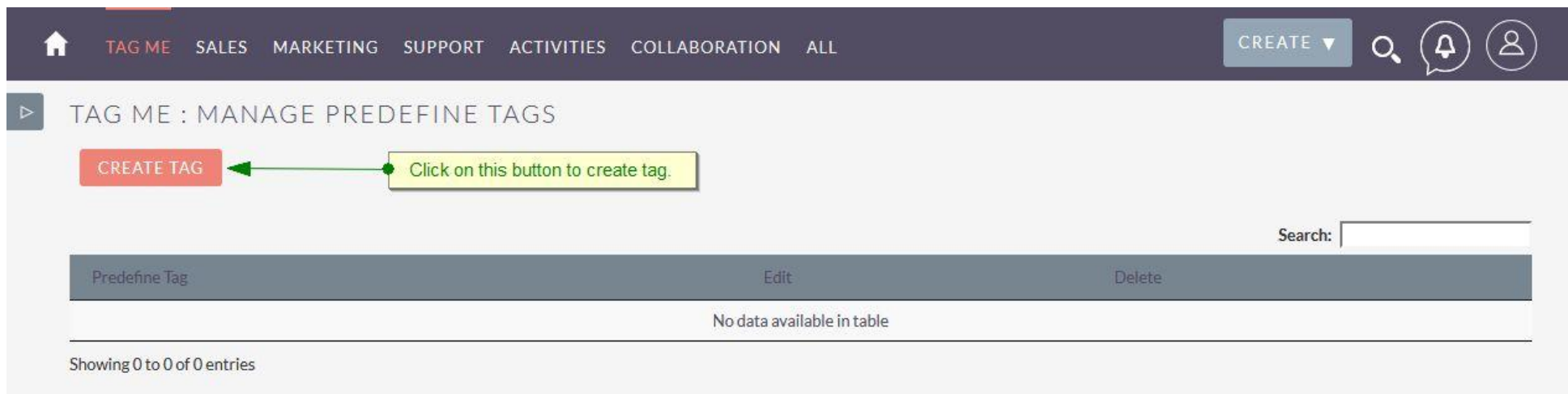
- Email : [contact@urdhva-tech.com](mailto:contact@urdhva-tech.com)
- Skype : urdhvatech
- Follow our blog posts: <http://urdhva-tech.com/blogs>
- Follow us on Twitter: [@Urdhvatech](https://twitter.com/Urdhvatech)

# Create Predefine Tags

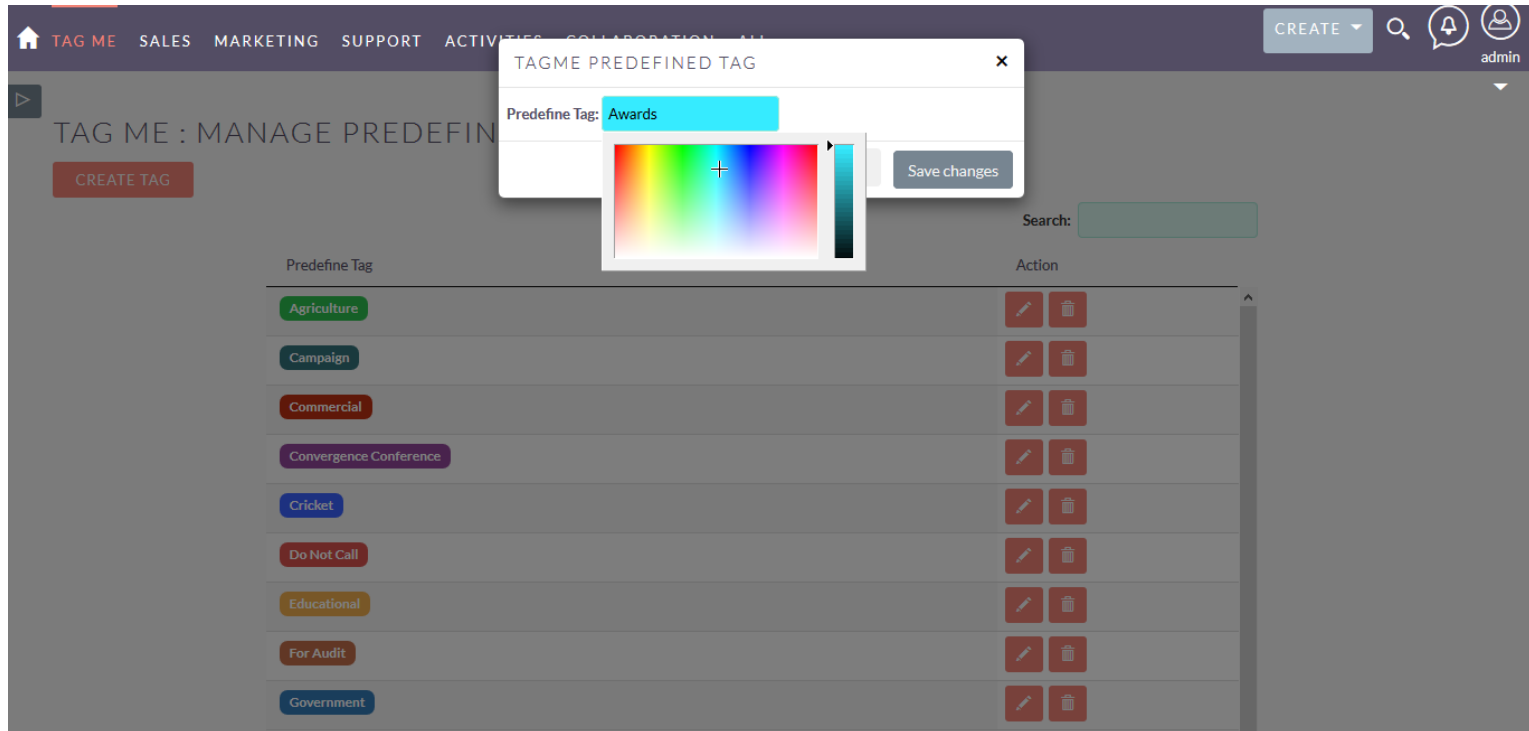
- Only admin users can able to add predefine tags.
- Once add-on is installed successfully, Go to Admin and access "TagMe Configuration" section. You can have "Manage Predefine Tags" link shown as below.



- After accessing "Manage Predefine Tags" link following screen will display.



- Once click on "Create Tag" button, dialogue will open to create tag with color selection box.



➤ Tag will display as follows.

The screenshot shows a web application interface for managing predefined tags. The top navigation bar includes a home icon, 'TAG ME', 'SALES', 'MARKETING', 'SUPPORT', 'ACTIVITIES', 'COLLABORATION', and 'ALL'. A 'CREATE' button with a dropdown arrow is on the right, along with search, notification, and user profile icons (labeled 'admin').

The main content area is titled 'TAG ME : MANAGE PREDEFINE TAGS' and features a 'CREATE TAG' button. A search bar is located above the table. The table has two columns: 'Predefine Tag' and 'Action'.

Predefine Tag	Action
Agriculture	
Awards	
Campaign	
Commercial	
Convergence Conference	
Cricket	
Do Not Call	
Educational	
For Audit	
Government	



➤ Edit Tag.

The screenshot displays a web application interface for managing predefined tags. A modal window titled "TAGME PREDEFINED TAG" is open, showing the "Commercial" tag being edited. The modal includes a color picker and a "Save changes" button. The background shows a list of predefined tags with their respective colors and action buttons (edit and delete).

Navigation: TAG ME SALES MARKETING SUPPORT ACTIVITIES COLLABORATION ALL

CREATE [dropdown] [search] [notifications] [admin profile]

### TAG ME : MANAGE PREDEFIN

CREATE TAG

Search: [input]

Predefine Tag	Action
Agriculture	[edit] [delete]
Awards	[edit] [delete]
Campaign	[edit] [delete]
Commercial	[edit] [delete]
Convergence Conference	[edit] [delete]
Cricket	[edit] [delete]
Do Not Call	[edit] [delete]
Educational	[edit] [delete]
For Audit	[edit] [delete]

➤ Search Tag.

The screenshot shows a web application interface for managing predefined tags. At the top, there is a dark navigation bar with a home icon, a menu with items 'TAG ME', 'SALES', 'MARKETING', 'SUPPORT', 'ACTIVITIES', 'COLLABORATION', and 'ALL', a 'CREATE' button with a dropdown arrow, a search icon, a notification bell icon, and a user profile icon labeled 'admin'. Below the navigation bar, the main content area has a header 'TAG ME : MANAGE PREDEFINE TAGS' with a play button icon on the left. A red 'CREATE TAG' button is positioned below the header. A search bar on the right contains the text 'Do Not Call'. Below the search bar, there is a table with two columns: 'Predefine Tag' and 'Action'. The table contains one row with the tag 'Do Not Call' and two action buttons: an edit icon and a delete icon. At the bottom of the table, it says 'Showing 1 to 1 of 1 entries (filtered from 17 total entries)'.

HOME TAG ME SALES MARKETING SUPPORT ACTIVITIES COLLABORATION ALL CREATE 🔽 🔍 🔔 👤 admin

### ▶ TAG ME : MANAGE PREDEFINE TAGS

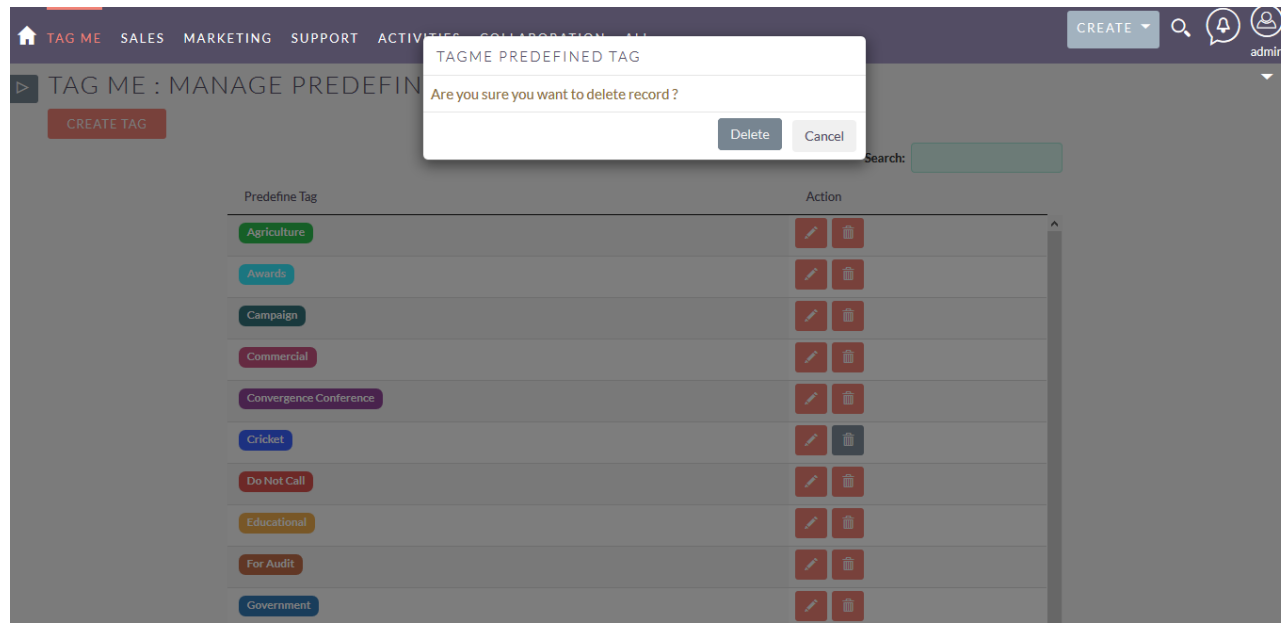
CREATE TAG

Search: Do Not Call

Predefine Tag	Action
Do Not Call	 

Showing 1 to 1 of 1 entries (filtered from 17 total entries)

➤ Delete Tag.



## Manage Regular Users and Populate Limit

➤ From admin "TagMe Configuration" section, access "Manage Regular Users and Populate Limit" link shown as below.

TagMe Configuration	
<a href="#">TagMe License Configuration</a>	Manage license for TagMe
<a href="#">Manage Predefine Tags</a>	Manage Predefine Tags
<a href="#">Manage Regular Users and Populate Limit</a>	Manage regular users for create new tag. Set populate limit for available tags.

➤ After accessing “Manage Regular Users and Populate Limit” link, screen will display as follows.

The screenshot shows a web application interface for managing users and tag limits. At the top, there is a navigation bar with a home icon, a 'TAG ME' button, and menu items for SALES, MARKETING, SUPPORT, ACTIVITIES, COLLABORATION, and ALL. On the right side of the navigation bar, there are buttons for 'CREATE', a search icon, a notification bell, and a user profile icon.

The main content area is titled 'MANAGE REGULAR USERS AND SET LIMIT FOR POPULATE AVAILABLE TAGS'. Below the title are two red buttons: 'SAVE' and 'CANCEL'. The interface is divided into two sections:

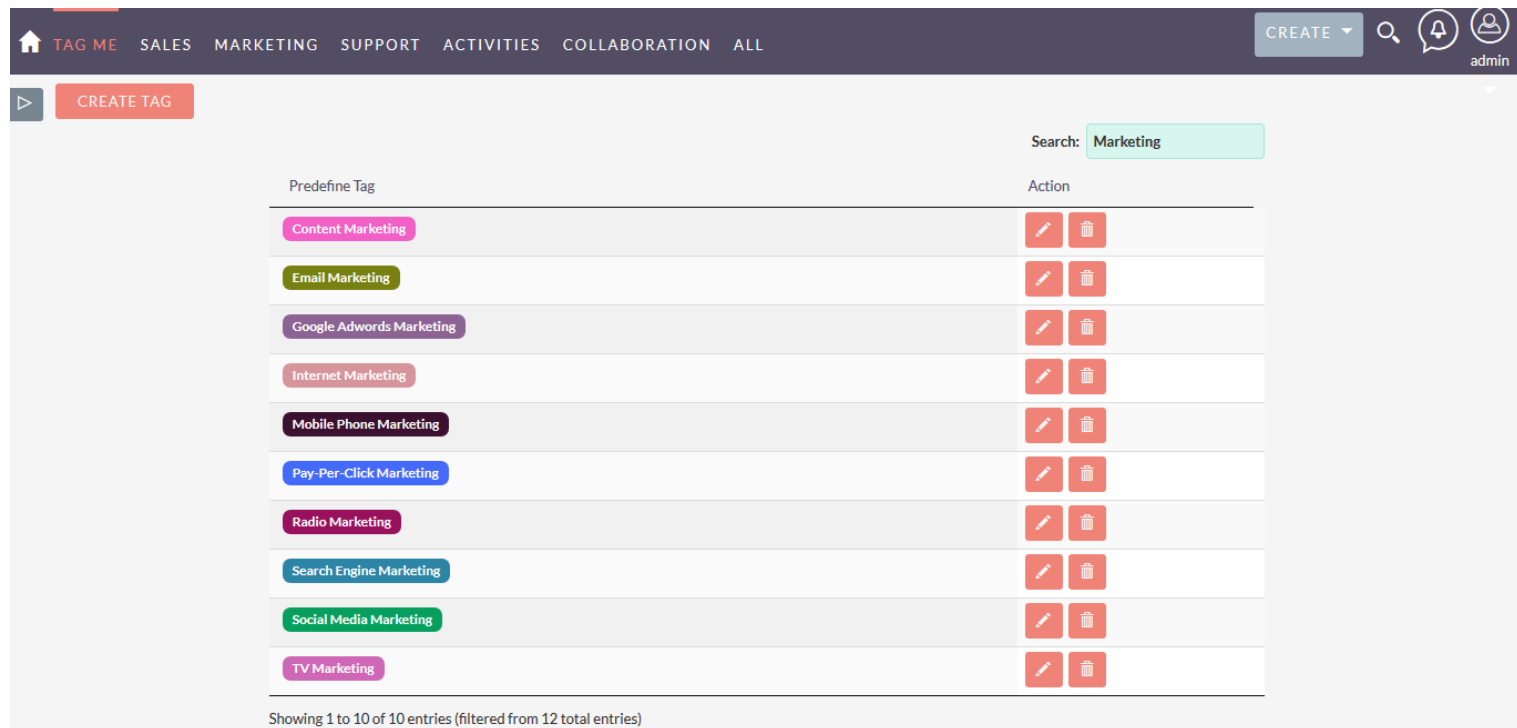
- Set limit for populate available tags.** This section contains a text input field labeled 'Populate Limit:' with the value '10'. A yellow callout box with a green arrow pointing to the input field contains the text: "You can set the limit for populate existing tag while applying tags in custom field."
- Select user to prevent for create new tag** This section features a search bar on the right labeled 'Search:'. Below it is a table with two columns: 'User' and 'Prevent'. The table lists six users with checkboxes in the 'Prevent' column. A yellow callout box with a green arrow pointing to the 'Prevent' column contains the text: "List of all Non-admin users." and another yellow callout box with a green arrow pointing to the checked checkboxes contains the text: "These users are not able to create new tag. They must have to select existing tags while create/edit module record with custom field."

At the bottom of the interface, there are two red buttons: 'SAVE' and 'CANCEL'. The text 'Showing 1 to 6 of 6 entries' is displayed below the table.

User	Prevent
Chris Olliver	<input checked="" type="checkbox"/>
Jim Brennan	<input type="checkbox"/>
Max Jensen	<input type="checkbox"/>
Sally Bronsen	<input type="checkbox"/>
Sarah Smith	<input checked="" type="checkbox"/>
Will Westin	<input type="checkbox"/>

# How Populate Limit works?

- For example, admin user has created different tags which contain word "Marketing" as shown in below image.



- There are 12 tags find into system with the word "Marketing".

- Now if we want to apply tag into module record with the word "Marketing" then only 10 records will populate for selection because we have set 10 into "Populate Limit" field. See in below snapshot.

CONTACTS SALES MARKETING SUPPORT ACTIVITIES COLLABORATION ALL CREATE

LAVERN MCCREARY » EDIT

SAVE CANCEL SAVE AND CONTINUE VIEW CHANGE LOG < PREVIOUS (24 of 200) NEXT >

OVERVIEW

First Name: Lavern

Last Name: Mccreary

Contact Tag: Marketing

- Affiliate Marketing
- Content Marketing
- Email Marketing
- Google Adwords Marketing
- Internet Marketing
- Mobile Phone Marketing
- Pay-Per-Click Marketing
- Radio Marketing
- Search Engine Marketing
- Social Media Marketing

Office Phone: Mobile: (655) 974-3660

Title: Department:

Account Name: Pay-Per-Click Marketing Fax:

Email Address: Primary Opted Out Invalid

## How Manage Regular Users works?

- Admin users can also restrict regular users from creating new tags into systems. Once regular users are prevented for creating new tags then they must have to select existing tags while create/edit module record with TagMe custom field.
- Let's logged into system with user "Sarah Smith". We have prevented her for create new tags. There is no tag existing into system with the word "Entertainment" and Sarah want to apply it into TagMe custom field. But because of restriction she can't do it.

The screenshot shows the 'RHETT CRADER > EDIT' form in a CRM system. The user is logged in as Sarah Smith. The form is in 'Overview' mode. The 'Contact Tag' field is highlighted with a green box and a message: "Try to create tag but once selected tag has been vanished because of the restriction." The 'Contact Tag' dropdown menu is open, showing 'Entertainment' as the only available option. The form includes fields for First Name (Rhett), Last Name (Crader), Office Phone, Mobile, Title, Department, Account Name, and Fax. The Email Address field contains two entries: beans77@example.biz and the.the.the@example.de.

The screenshot shows the 'RHETT CRADER > EDIT' form in a CRM system. The user is logged in as Sarah Smith. The form is in 'Overview' mode. The 'Contact Tag' field is empty, and a message "Tag is not created." is displayed in a green box with an arrow pointing to the field. The form includes fields for First Name (Rhett), Last Name (Crader), Office Phone, Mobile, Title, Department, Account Name, and Fax. The Email Address field contains two entries: beans77@example.biz and the.the.the@example.de.

➤ Now let's try with the admin user. He/she allow creating it. Please look at below image.

The screenshot shows a CRM interface for editing a contact. The top navigation bar includes a home icon, menu items (CONTACTS, SALES, MARKETING, SUPPORT, ACTIVITIES, COLLABORATION, ALL), a CREATE button, search, notifications, and a user profile for 'admin'. The main header displays 'RHETT CRADER » EDIT'. Below this are action buttons: SAVE, CANCEL, SAVE AND CONTINUE, and VIEW CHANGE LOG. A pagination bar shows '< PREVIOUS (1 of 200) NEXT >'. The 'OVERVIEW' section contains the following fields:

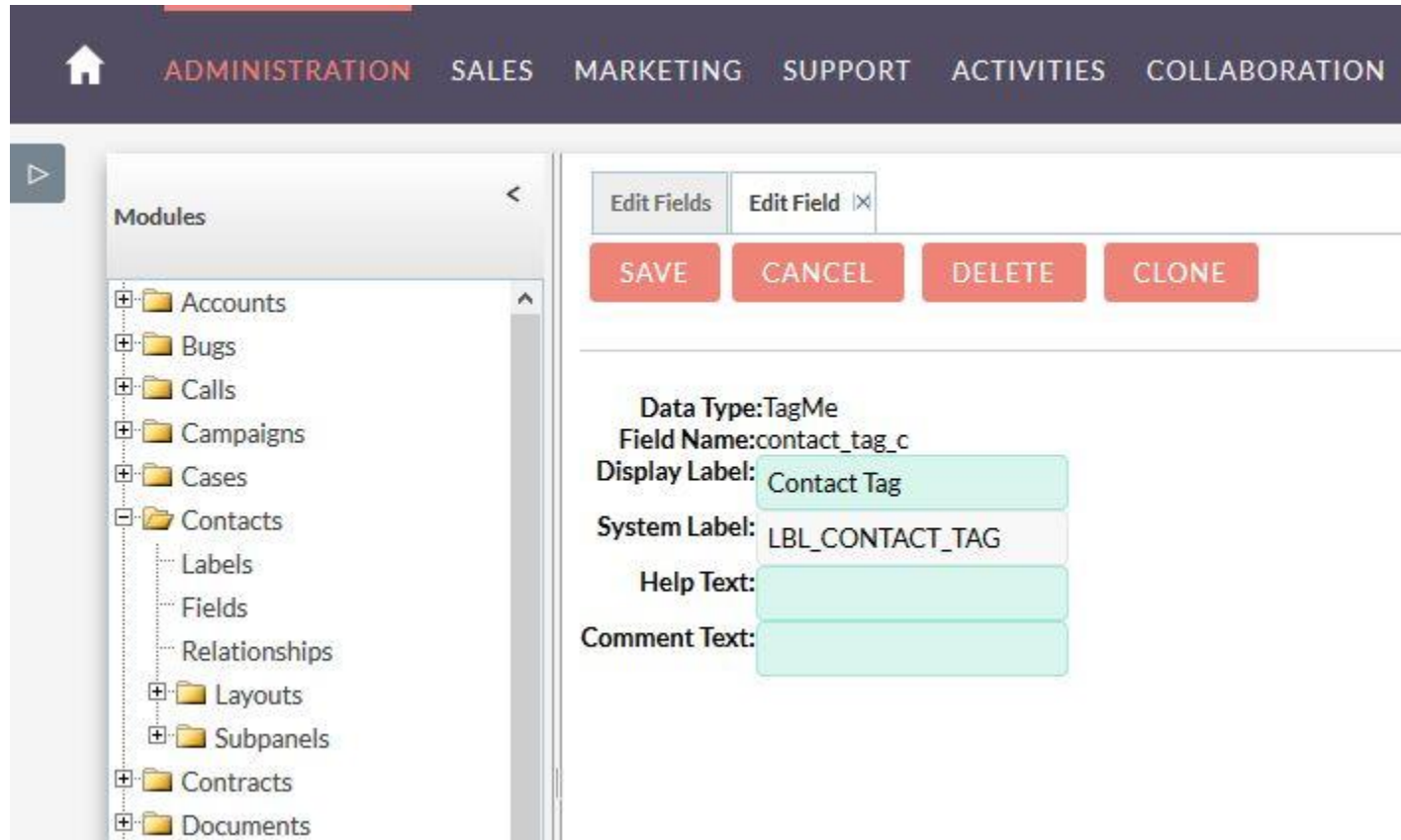
- First Name:** Rhett
- Last Name:** Crader
- Contact Tag:** Entertainment x
- Office Phone:** (552)891-4115
- Mobile:** (283) 411-0983
- Title:** Senior Product Manager
- Department:** (empty)
- Account Name:** (empty)
- Fax:** (empty)
- Email Address:** beans77@example.bix (Primary status selected)

Additional controls for the email address include a plus sign for adding more addresses, minus signs for removing them, and checkboxes for 'Opted Out' and 'Invalid'.



# Create field of type “TagMe”

- TagMe adds a new field type to Studio that you can add to any module.



- Add newly created field into edit, detail and list views. And why not, in subpanel too!

➤ EditView

CONTACTS SALES MARKETING SUPPORT ACTIVITIES COLLABORATION ALL CREATE 🔍 🔔 👤 admin

➤ DREW ALDACO » EDIT

SAVE CANCEL SAVE AND CONTINUE VIEW CHANGE LOG < PREVIOUS (3 of 200) NEXT >

OVERVIEW

First Name:

Last Name:

Contact Tag: Accountant x Campaign x The NFC-north x Football x Sales x

Office Phone:  Mobile:

Title:  Department:

Account Name:    Fax:

Email Address:     Primary  Opted Out  Invalid

➤ DetailView

🏠 CONTACTS SALES MARKETING SUPPORT ACTIVITIES COLLABORATION ALL CREATE 🔍 🔔 👤 admin

## ▶ RHETT CRADER ☆

OVERVIEW MORE INFORMATION OTHER ACTIONS ▾ < PREVIOUS (4 of 200) NEXT >

First Name:	Rhett	Last Name:	Crader
Contact Tag:	<span>Campaign</span> <span>Entertainment</span> <span>Tradeshow</span> <span>Educational</span> <span>Do Not Call</span>		
Office Phone:	(552)891-4115	Mobile:	(283) 411-0983
Title:	Senior Product Manager	Department:	
Account Name:		Fax:	
Email Address:	<a href="mailto:beans77@example.bix">beans77@example.bix</a> (Primary) <a href="mailto:the.the.the@example.de">the.the.the@example.de</a>		
Primary Address:	111 Silicon Valley Road Persistence NY 27840 USA	Other Address:	

- Click on tag in Detail View of any module, e.g. Contacts, and you will have the list of Contacts having that tag (assuming that the Tag field is available in Advance search), or use Advance Search.

The screenshot displays a CRM interface with a navigation bar at the top containing 'CONTACTS', 'SALES', 'MARKETING', 'SUPPORT', 'ACTIVITIES', 'COLLABORATION', and 'ALL'. On the right side of the navigation bar, there is a 'CREATE' button, a search icon, a notification bell icon, and a user profile icon labeled 'admin'. Below the navigation bar, the main content area is titled 'CONTACTS'. A table of contacts is shown, with columns for 'Contact Tag', 'Name', 'Title', 'Account Name', 'Email', 'Office Phone', 'User', and 'Date Created'. The table includes a 'BULK ACTION' dropdown and pagination controls showing '(1 - 20 of 200)'. Five contact entries are visible, each with a list of tags and a 'Do Not Call' status.

Contact Tag	Name	Title	Account Name	Email	Office Phone	User	Date Created
The NFC-north, Top	Faith Acuff	Director Operations	South Sea Plumbing Products	dev.kid.info@example.com	(727) 826-0687	chris	06/05/2019 12:18
The NFC-north, Campaign, Do Not Call	Grant Carraway	Director Sales	Calm Sailing Inc	support.sugar.sugar@example.net	(684) 964-3937	sarah	06/05/2019 12:18
Platinum Client, Tradeshow, Influencer, Project Acquired	Eugenio Agan	Mgr Operations	Ink Conglomerate Inc	dev.the.section@example.info	(176) 036-5228	max	06/05/2019 12:18
Campaign, Entertainment, Tradeshow, Educational, Do Not Call	Rhett Crader	Senior Product Manager		beans77@example.bix	(552)891-4115	will	06/05/2019 12:18
Accountant, Campaign, Football, The NFC-north, Sales	Drew Aldaco	Director Operations	Calm Sailing Inc	support.the@example.name	(666) 588-5152	sarah	06/05/2019 12:18

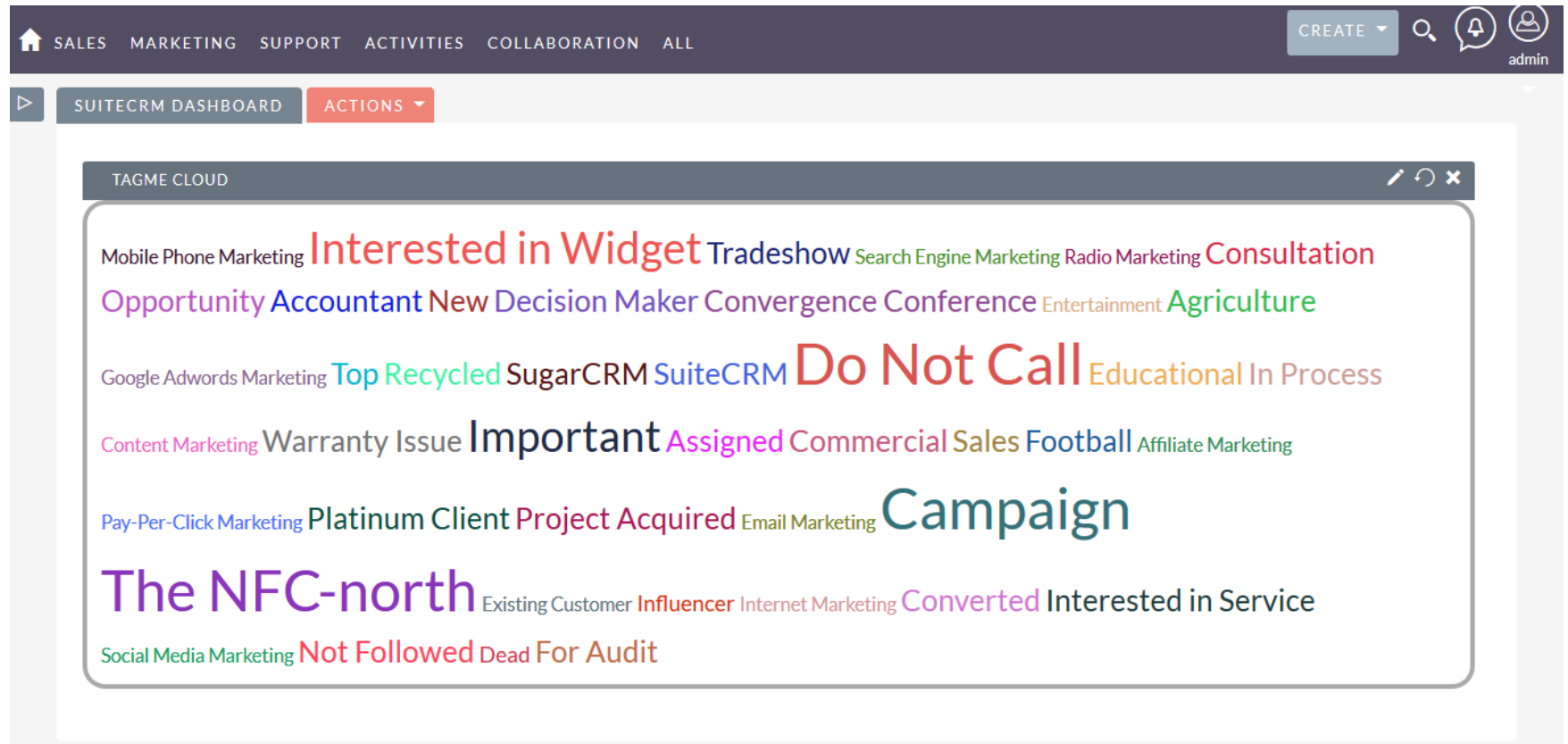
➤ SubpanelView

The screenshot displays a CRM subpanel for a contact. The top navigation bar includes a home icon, menu items (ACCOUNTS, SALES, MARKETING, SUPPORT, ACTIVITIES, COLLABORATION, ALL), a CREATE button, search, notifications, and user profile (admin). The subpanel has tabs for OVERVIEW, MORE INFORMATION, OTHER, and ACTIONS. The main content area shows contact details: Name (Calm Sailing Inc), Office Phone ((732) 515-5848), Website (www.kidphone.de), Fax, Email Address (section.vegan.the@example.tw (Primary), im.dev@example.it), Billing Address (345 Sugar Blvd, Denver CA 39806 USA), Shipping Address (345 Sugar Blvd, Denver CA 39806 USA), Description, and Assigned to (sarah). Below this is a CONTACTS table with columns for Contact Tag, Name, City, State, Email, and Office Phone. The table shows one contact: Drew Aldaco, Salt Lake City, CA, support.the@example.name, (666) 588-5152. The contact has tags: Accountant, Campaign, Football, The NFC-north, and Sales. An Edit button is present for this contact.

Contact Tag	Name	City	State	Email	Office Phone
	Drew Aldaco	Salt Lake City	CA	support.the@example.name	(666) 588-5152

# “TagMe Cloud” Dashlet

- You have a new dashlet named “tagMe Cloud”, which gives insight of tags used system wide. Often the tag is used, bigger the tag size will be in dashlet.



- You may drill down the data by tags from dashlet. Click on a tag, and it will show up a page showing all records across the system having that tag.

The screenshot shows a CRM dashboard with a navigation bar at the top containing 'TAG ME', 'SALES', 'MARKETING', 'SUPPORT', 'ACTIVITIES', 'COLLABORATION', and 'ALL'. A 'CREATE' button and user profile 'admin' are also visible. The main section is titled 'Tags Global Search' and features a search input field with 'Accountant' and a 'SEARCH' button.

Below the search is a section titled 'Contacts (3)' containing a table with the following columns: Contact Tag, Name, Title, Account Name, Email, Office Phone, User, and Date Created. The table lists three contacts, each with a set of tags on the left side of the row.

Contact Tag	Name	Title	Account Name	Email	Office Phone	User	Date Created
<b>Do Not Call</b> <b>Accountant</b> Warranty Issue <b>Top</b>	Benjamin Brashear	VP Sales	S Cane Sweeteners Ltd	phone.sugar.qa@example.tw	(237) 068-6105	sally	06/05/2019 12:18
<b>Accountant</b> <b>Do Not Call</b> Warranty Issue <b>Top</b> Convergence Conference	Abbie Brandenburg	VP Operations	Green Tractor Group Limited	section.support@example.tw	(007) 820-6272	sarah	06/05/2019 12:18
<b>Campaign</b> <b>Accountant</b> <b>Sales</b> <b>Football</b> <b>The NFC-north</b> <b>Educational</b> <b>Interested in Widget</b> <b>Consultation</b>	Drew Aldaco	Director Operations	Calm Sailing Inc	support.the@example.name	(666) 588-5152	sarah	06/05/2019 12:18

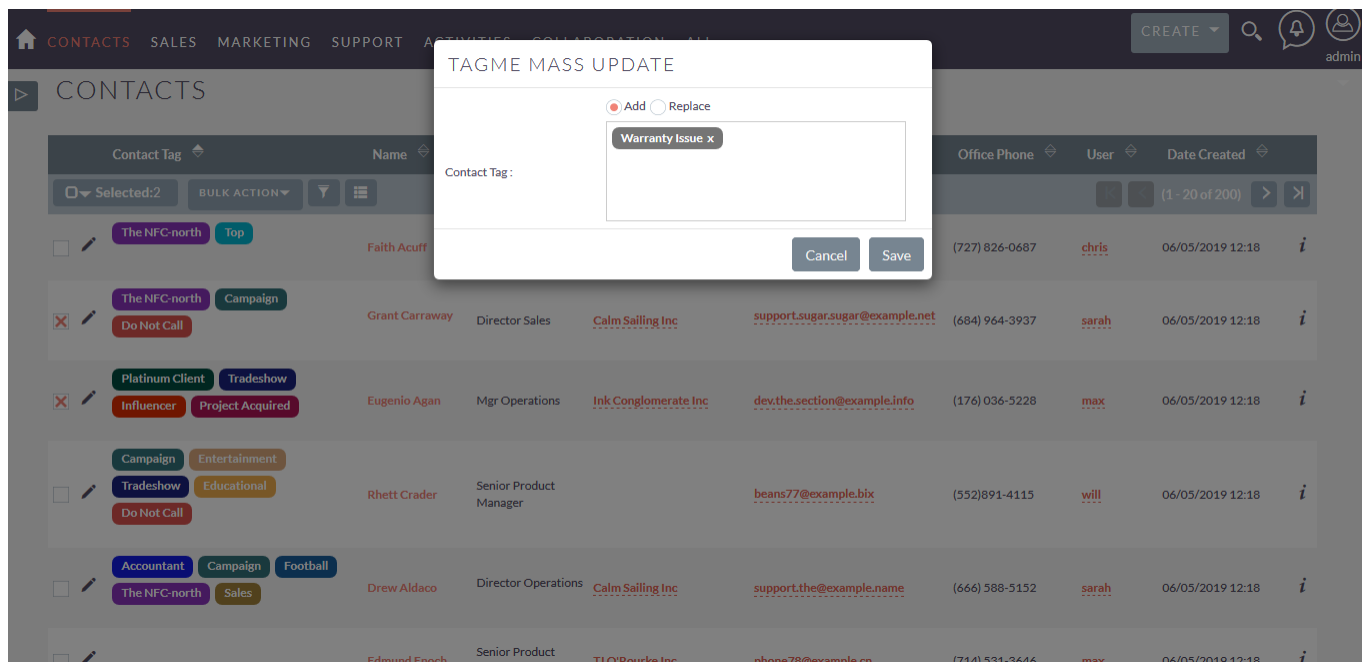
# Mass update tags!

- You can now add or replace tags using a new action in list view.

The screenshot shows a CRM interface with a dark navigation bar at the top containing 'CONTACTS', 'SALES', 'MARKETING', 'SUPPORT', 'ACTIVITIES', 'COLLABORATION', and 'ALL'. A 'CREATE' button and user profile 'admin' are on the right. Below the navigation bar is a 'CONTACTS' header with a play button icon. The main area is a table of contacts with columns: Contact Tag, Name, Title, Account Name, Email, Office Phone, User, and Date Created. A 'Selected:2' dropdown and a 'BULK ACTION' menu are visible above the table. The menu includes options like Email, Mass Update, Merge, Add To Target List, Print as PDF, Export, Map, Delete, and tagMe Mass Update. The table contains five contact rows with various tags and data.

Contact Tag	Name	Title	Account Name	Email	Office Phone	User	Date Created
<input type="checkbox"/> <b>The NFC-nor</b>	Faith Acuff	Director Operations	South Sea Plumbing Products	dev.kid.info@example.com	(727) 826-0687	chris	06/05/2019 12:18
<input checked="" type="checkbox"/> <b>The NFC-nor</b> <b>Do Not Call</b>	Grant Carraway	Director Sales	Calm Sailing Inc	support.sugar.sugar@example.net	(684) 964-3937	sarah	06/05/2019 12:18
<input checked="" type="checkbox"/> <b>Platinum Client</b> <b>Influencer</b>	Eugenio Agan	Mgr Operations	Ink Conglomerate Inc	dev.the.section@example.info	(176) 036-5228	max	06/05/2019 12:18
<input type="checkbox"/> <b>Campaign</b> <b>Tradeshow</b> <b>Do Not Call</b>	Rhett Crader	Senior Product Manager		beans77@example.bix	(552)891-4115	will	06/05/2019 12:18
<input type="checkbox"/> <b>Accountant</b> <b>Campaign</b> <b>Football</b> <b>The NFC-north</b> <b>Sales</b>	Drew Aldaco	Director Operations	Calm Sailing Inc	support.the@example.name	(666) 588-5152	sarah	06/05/2019 12:18





- If you choose "Add", new tags get added to selected records. If you choose "Replace", it will delete old tags and assign new tags.



## CONTACT US



[CONTACT@URDHVA-TECH.COM](mailto:CONTACT@URDHVA-TECH.COM)



[URDHVATECH](https://www.snapchat.com/add/URDHVATECH)



[@URDHVATECH](https://twitter.com/URDHVATECH)