

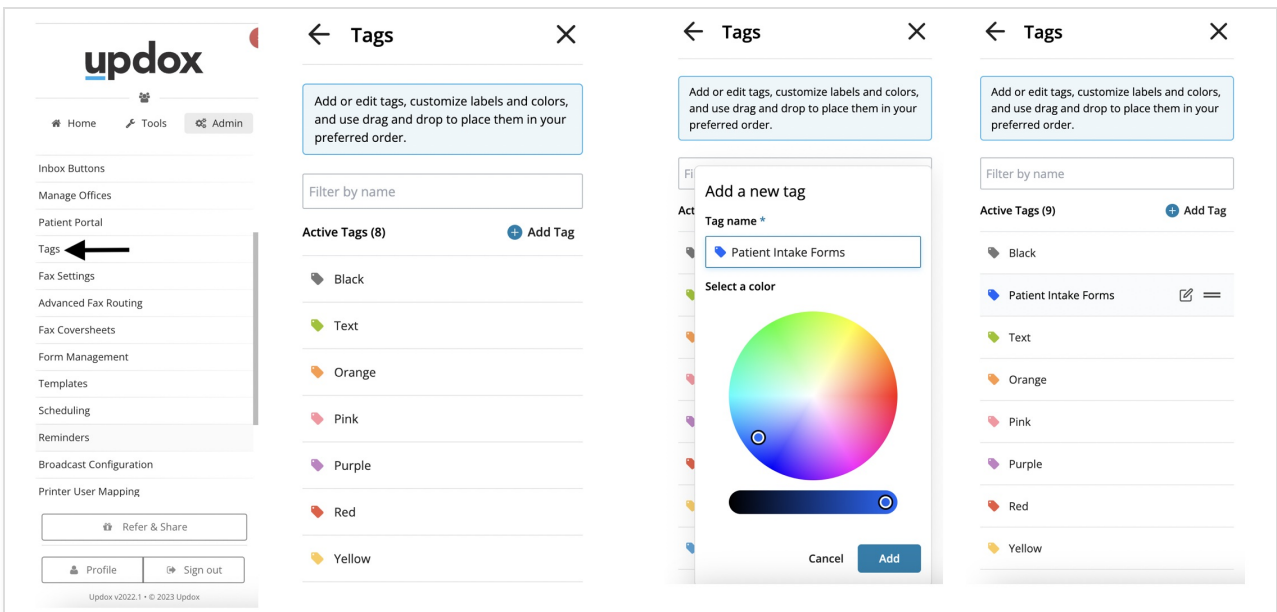
# Tips and Tricks: Using Tags with Forms

Last Modified on 01/27/2025 10:48 am EST

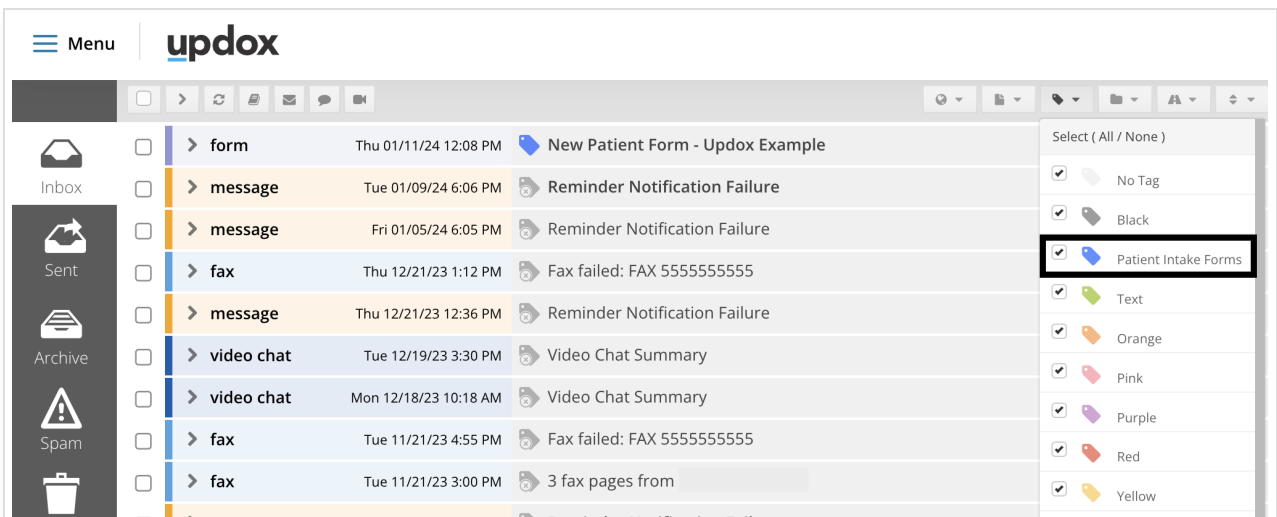
Tags allow you to filter and organize the items in your Inbox. You can [customize tags](#) to fit the needs and workflows of your practice. Once created, tags can be applied to the items in your Inbox. Did you know that you can add a tag to a form? If you add a tag to a form, after the recipient completes and submits it, it will automatically have the tag applied so it is organized and ready to filter when it hits your Inbox.

First, let's take a look at setting up a tag.

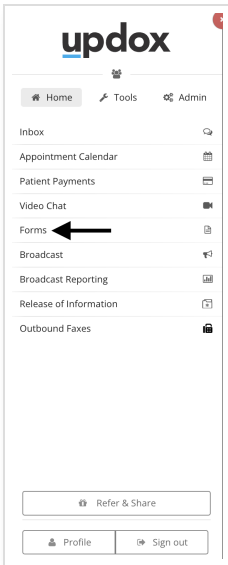
1. Go to **Menu > Admin > Tags**.
2. Click **Add Tag** (or you can edit an existing tag).
3. Name the tag, select the color, and save.
4. You can then reorder the tag by dragging it to the position you would like.



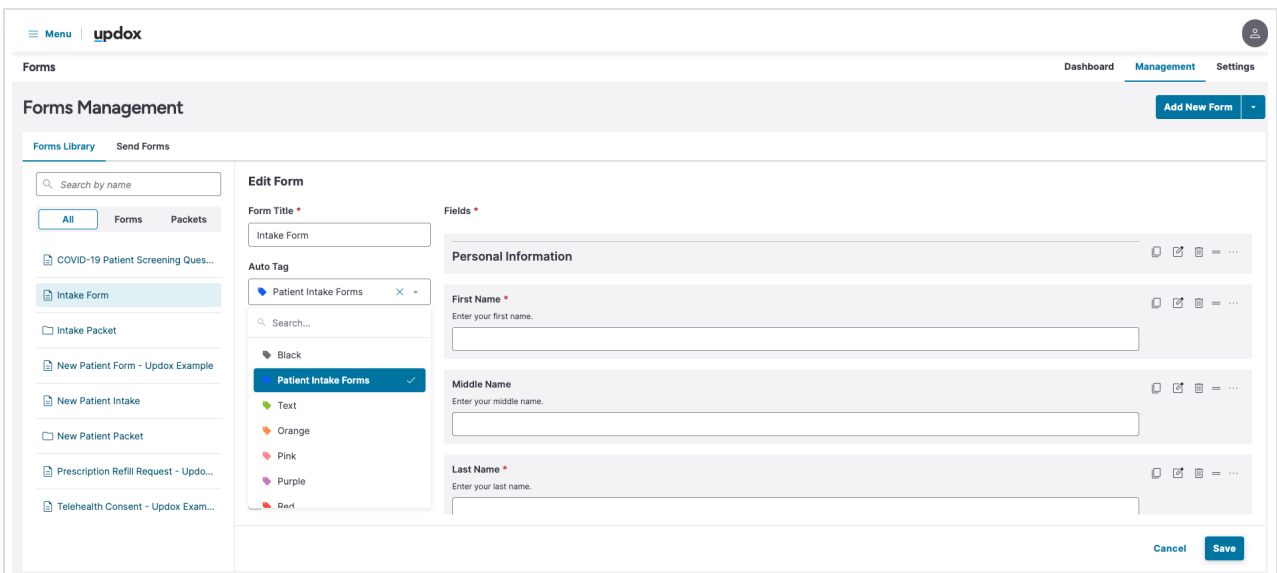
The tag will appear in the Tags dropdown in your Inbox.



Now that we have created the tag, let's add it to one of our forms. Go to **Menu > Forms**.



Select the form you would like to add the tag to. Click **Edit Form**. Choose the tag from the **Auto Tag** dropdown menu and **Save**.



Now that we have applied the tag to the form when it is filled out and submitted by the patient, it will automatically be tagged and organized for you.



> form Thu 01/11/24 12:08 PM New Patient Form - Updox Example

- Inbox
- Sent
- Archive
- Spam
- Trash

- Select (All / None)
- No Tag
  - Black
  - Patient Intake Forms
  - Text
  - Orange
  - Pink
  - Purple
  - Red
  - Yellow
  - New Patient Forms