GETTING STARTED WITH RUNDOO · SETUP

Creating & Using Tags

Tag any product or customer, then filter to pull up the whole group in one click. Tags live in Admin → Tags.

THE WHOLE FLOW IN THREE MOVES

1

Create

Name it, set the Type, pick a color.

Admin → Tags → Add tag

2

Attach

From the product or customer, not the Tags screen.

Attach tag on the record

3

Find

The list instantly narrows to that group.

Filter → Product / Customer tag

Create a tag in 4 clicks

1. In **Admin**, open **Tags**, click **Add tag**.
2. Type a **name** (like "Contractor" or "Spring").
3. Pick **Type**: Product or Customer, plus a color.
4. Click **Save**, then attach and filter.

Type is locked

Product or Customer

A tag's Type is **fixed at creation**. Pick wrong and you delete and recreate, so choose before you save.

Any-of, not all-of: a tag filter returns records with **either** tag, not only the ones with both. Build a narrower tag when you need the overlap.

Tags vs categories: categories are the strict one-bucket hierarchy (Department, Class, Fineline). Tags are the flat, pile-them-on labels for anything that fits in more than one place. Deleting a tag is permanent.