Rundoo

GETTING STARTED WITH RUNDOO · SETUP

Creating & Using Tags

> Tag any product or customer, then pull up the whole group in one click.

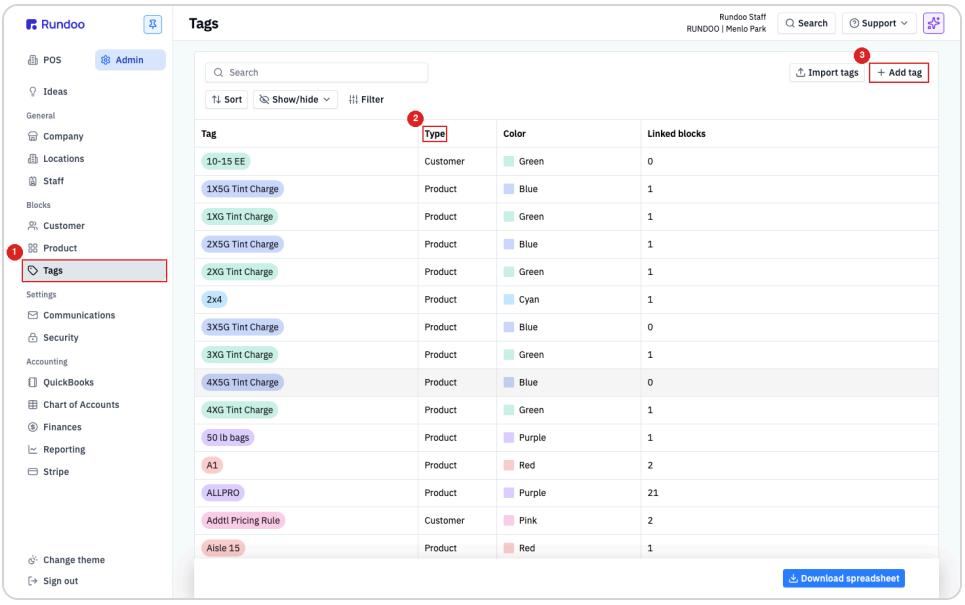
Step-by-step walkthrough ~4 min read Companion to the 4:16 video

You already know your store better than any software does. You know which products are part of your spring seasonal push, and you know which regulars are your key contractors. A tag is just a digital label you stick on those groups, so instead of scrolling and squinting, you pull the whole group up with a single click. Same idea for products and for customers, and none of it touches your receipts or your books.

WHAT A TAG REALLY IS

One flat label you can pile on

Tags are flat labels, no parent and child to fuss over, and you can put as many on a record as you like. A single product can carry a dozen of them. Use tags for the groupings your categories can't express cleanly: aisle numbers, vendor programs, seasonal pushes, contractor affiliations. They live in **Admin**, under **Tags** in the left sidebar, where every tag in the company is listed with its Type, color, and a Linked blocks count.



Admin → Tags lists every tag with its Type, color, and how many records use it. Add tag sits in the top-right.

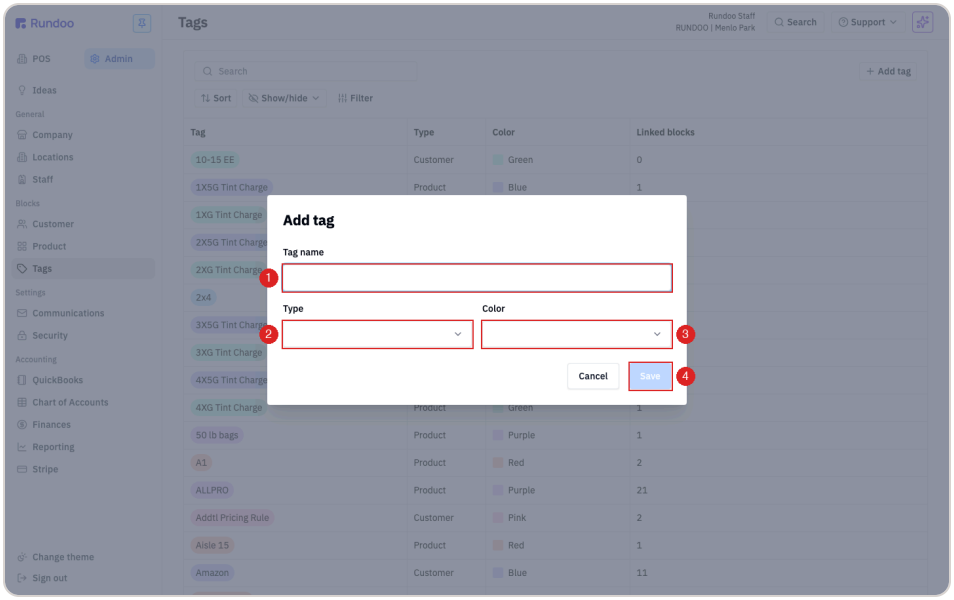
DO THIS

Group it, find it, step by step

1 Create the tag

Say you want a group for your contractors. In **Admin**, open **Tags** and click **Add tag** in the top-right. Give it a name like "Contractor". Then pick a **Type**, either Product or Customer, and a color to make the pill easy to spot. Click **Save**.

Get the Type right the first time. A tag's Type is locked once you save. A Customer tag can never move to a product, and a Product tag can never move to a customer. If you pick wrong, you have to delete it and start over, so choose before you save.

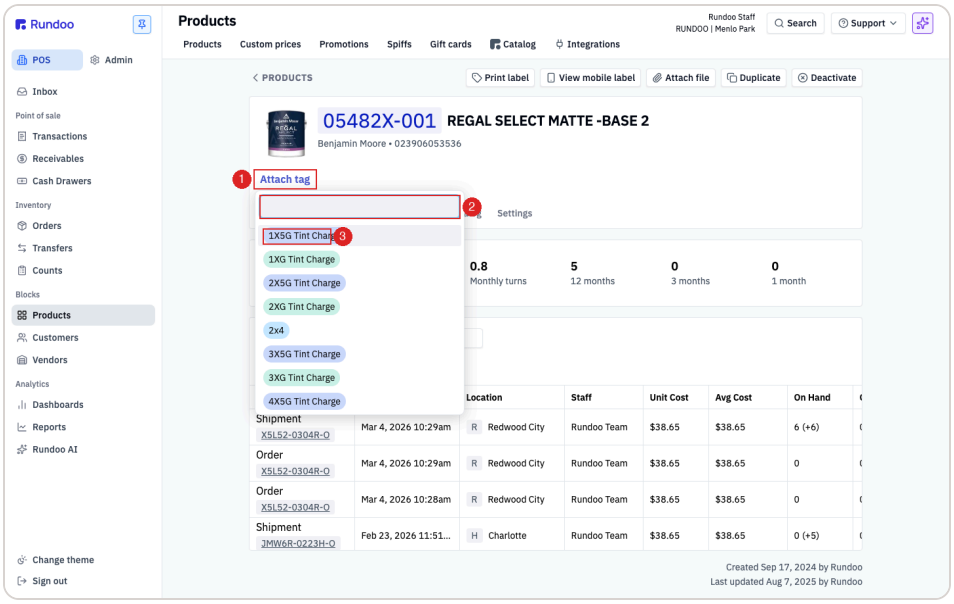


Name, Type, color, Save. Type and color are picked from dropdowns. Type is fixed at creation.

2 Attach it from the record

You attach tags from the thing you want to label, not from the Tags screen. Open a customer's detail page in **POS → Customers**, find the **Attach tag** link near the top, click it, and pick "Contractor" from the list. The picker only shows tags of the matching type, so you can't accidentally hang a product tag on a customer.

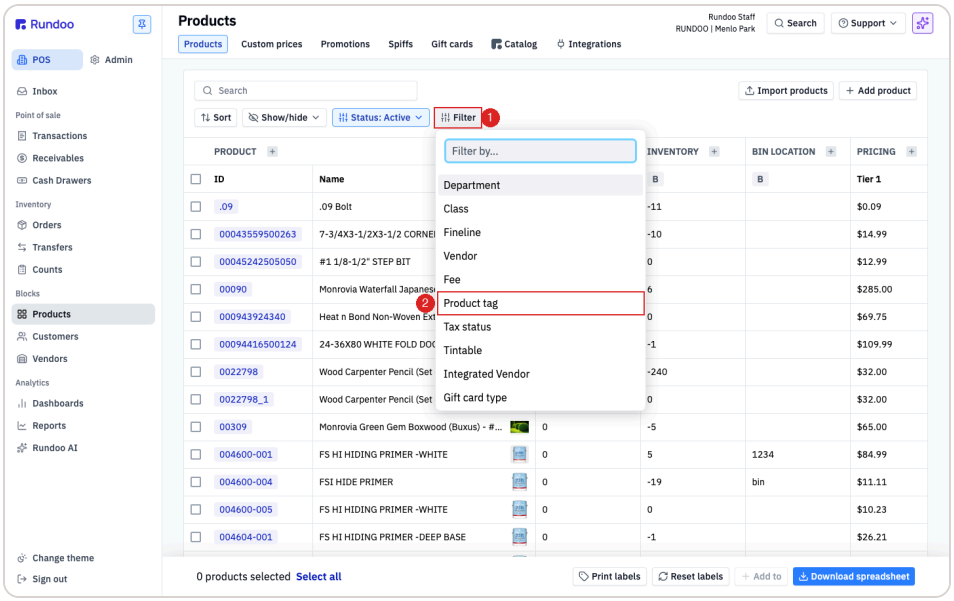
Products work the exact same way. On a product, the **Attach tag** link sits right under the product image. Click a pill to attach it, and click its little × to take it back off.



Attach tag lives under the product image (and near the top of a customer page). Type to narrow the list, then click a pill to attach.

3 Pull up the whole group

Here is where the work pays off. Back on your list, click **Filter** in the strip above the table and choose **Customer tag** (or **Product tag** on the products list). Click the filter pill, pick "Contractor", and the list instantly narrows to just that group. That is the whole promise: label once, find them all in one click.



Filter → Product tag (or Customer tag) narrows the list to the group you tagged.

4 Do the same for your inventory

The product side is the identical routine. Create a "Spring" tag with the **Type** set to Product, attach it to your seasonal items, then filter your product list by **Product tag** to see them all together. Same three steps, different purpose. And because tags flow into reporting, you can slice sales, margin, or inventory by any tag you've built over in **Admin → Reporting**.

5 Manage and prune from Admin

Back on the **Admin → Tags** list, the **Linked blocks** column shows how many records carry each tag, which makes dead tags easy to spot. Click any tag row to open its edit modal and rename it or delete it. One caution worth repeating: deleting a tag is permanent, so be thoughtful before you clear one out.

KEEP IT HANDY

Tags at a glance

WHERE THEY LIVE

Admin → Tags

Create, edit, and delete. See the Linked blocks count.

TWO TYPES

Product or Customer

Picked at creation and locked. Choose before you save.

ATTACH

Attach tag on the record

Under the product image, or near the top of a customer page.

FIND THE GROUP

Filter → Product / Customer tag

Also filters reports for sales, margin, and inventory.

Good to know

- A tag filter is any-of, not all-of. Filtering by "Loyalty" and "Aisle 5" returns records with either tag, not only the ones with both. Build a narrower tag if you need the overlap.
- Tags are internal. They help you group, filter, and report, and they never show up on a customer's receipt or a purchase order.
- Tags and Product categories are complements, not rivals. Categories are your strict one-bucket hierarchy (Department, Class, Fineline). Tags are the free-form labels for everything that fits in more than one place at once.
- Practice first. Build a tag that actually means something for your store in your practice store. It's a dress rehearsal, so none of it touches your real books.