

GETTING STARTED WITH RUNDOD · SETUP

Group It, Find It

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.