Tags: adding tags to an agreement and filtering by tags

Adding tags to an agreement

> ⚠ NOTE: at this time (Honeysuckle) you CANNOT DELETE a tag once you've created it, so be careful!

Steps

1	Go to the Agreements app, and view an existing Agreement by searching for it in the "Search & filter" pane, or create a new Agreement.
2	Click on the Agreement in the results list to open the detail view in the 3rd pane.
3	Check for the tags icon at the top right of the Agreement's detail view. Expected Result At the top right of the Agreement detail record, there should be a little tag icon. If tags are assigned to the Agreement, there will be a number next to it. If no tags assigned, it will have a zero.
4	Add one or more tags to the Agreement record. Note that capital letters and spaces are not allowed in tags, e.g. **needs work** will become **needswork**, unless you use punctuation such as **needs-work** or **needs.work** Expected Result If the tag already exists, you can see it and select it from the existing list when you start typing. **If the tag does not already exist, type your tag name into the tags box and select "Add tag for:".** It will be created and added to the existing list once you have assigned it.
5	Check to be sure that the number icon next to the tags icon has increased by the number of tags that you added to the Agreement, and that you can see the assigned tags.
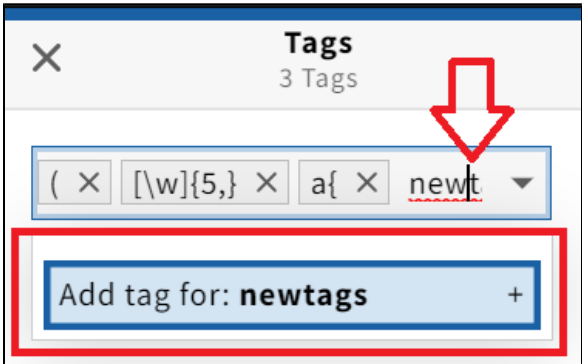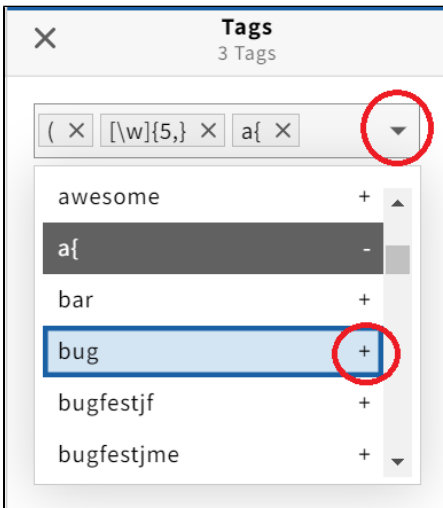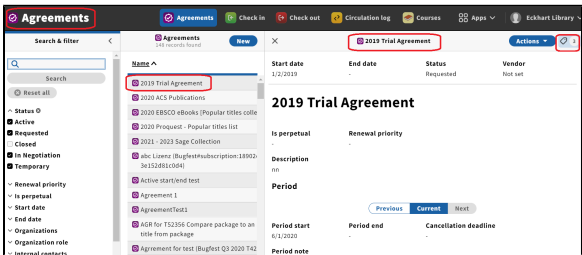
Filter Agreements by tags

Steps

1	Go to the Agreements app
2	Find the **Tags** filter in the list of filters in the left pane - expand the Tags accordion, if needed
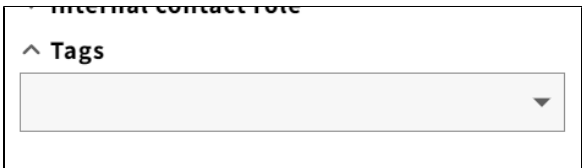
3	Select one or more tags from the list in the Tags filter (the dropdown menu)
	Expected Result
	Results list of Agreements will only show ones that have the selected tags applied to them