Invoice Tags

Description

* A way to tag invoices with specific words/phrases (up to 5 per invoice) that allows a user to search for reporting on specific topics

Resolution

**Part I: Setup**

1. *At Enterprise level*, click **Maintenance**, **Companies**
2. Click **Edit**
3. Click **Advanced**
4. Click on **Tags** tab
5. Click **Add** to add new tag
6. Type in the new tag (up to 25 characters)
7. Click **OK**
8. Repeat steps 5-7 for any additional tags needed
9. Click **OK**
10. **Save**

**Part II: Tagging Invoices**

Tags can be added to any status of invoice (Pending, Posted, Partially-Paid, Paid or Voided)

1. Click **Modules, Accounts Payable**
2. Click **Invoice** tab
3. Click **Tags**
4. Set the criteria needed
   1. Set for specific vendor, Invoices entered by you, or Tag for All Vendors
   2. Set data range or select all dates
   3. Payment Method: ACH, Epay, Regular, Manual or All
   4. Invoice Type: Fully Paid, Part Paid, Payment Made, Pending, Posted, Unpaid, Voided, or All
   5. Approval Status: Approved, Unapproved, or All
   6. Tags- search for all invoices that currently have a specific tag assigned
5. Click **OK**
6. The *Update Invoice Tags* box pops up with the results of the criteria set
7. In column Tag, click the Ellipsis box to view and select Tags to set for the invoice.
8. Place a check mark next to the tags needed – choose up to 5.
9. Click **OK**
10. Continue steps 7 & 8 until all invoices have been tagged.
11. Click **Tag** when complete
12. The tags will be visible in the top section of each invoice

**Part III: Reporting**

*Invoice Details*

1. Click **Modules, Accounts Payable**
2. Locate invoice
3. Click **Print, Invoice Details**
4. The Tag category section will show tags currently selected for the invoice

*Batch Invoices Report*

1. Click **Modules, Accounts Payable**
2. Click **Reports**
3. Click **Batch Invoices**
4. On the section Tags- use drop down to choose which tag to report along with other criteria set
5. Click **Show Report**
6. Report will show tags for each invoice listed

**Part IV: Maintenance**

1. *At Enterprise level*, click **Maintenance, Companies**
2. Click **Edit**
3. Click **Advanced**
4. Click on **Tags** tab
5. Choose the tag to:
   1. **Rename** – box pops up to allow renaming of tag. It will cascade the change to wherever that tag is used
   2. **Delete**- allows you to delete a tag if it’s not in use
   3. **Deactivate**- allows you to deactivate a tag that is in use. Removes it from the active selection when tagging, but still active in reporting
   4. **Reactivate**- allows you to reactivate a tag that was once deactivated