

Getting Started with Tagging

Introduction

This is a three-step quick start guide for getting started with Tagging on the RAPid Platform.

There are three steps to the tagging process:

- Step 1: Create business logic.
- Step 2: Tag to a dimension.
- Step 3: Submit tagging request.

Spend By and Advanced Spend By are the best features to use. **It is not advisable to use Advanced Transactions.** This is because each invoice line is unique and when one invoice line is tagged a repeatable rule will **not** be created.

Tagging Process

1. Create business logic

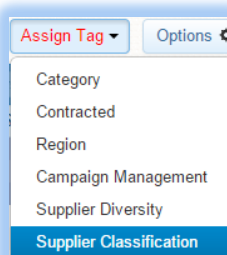
This is an example of tagging three suppliers as 'preferred suppliers'. Click on the line(s) to be tagged.

Code	Description	Value (GBP)	Invoices	Suppliers	POs
SUP-0000400121	CABLE WIRE COMPANY	1,080,671.38	03	01	
SUP-0000400854	FEDEX	297,571.60	01	01	
SUP-0000400171	EMMANUEL PLASTICS SERVICES CO	199,437.48	05	01	
SUP-0000400335	EMMANUEL PROTECTOR DIVISION INC	179,495.66	01	01	
SUP-0000100755	O'HARA TECH LTD	100,794.10	01	01	
SUP-0000400090	GEA PROCESS ENGINEERING INC	99,770.27	01	01	
SUP-0000400021	SAWYER CORP	49,469.84	01	01	
SUP-0000100651	SCALE SERVICES INC	15,680.38	01	01	
SUP-0000400689	NATIONAL LABEL COMPANY INC	3,786.41	01	01	
SUP-0000100203	CCL LABEL	2,085.76	02	01	
SUP-0000100367	PAPER BOX INC	935.55	01	01	
SUP-0000101402	DIAGNOSTICS INC	500.00	01	01	
SUP-0000100897	DELL LTD	314.68	01	01	
SUP-0000400514	STACEY SERVICES LTD	69.89	01	01	
SUP-0000101716	STACEY SERVICES LTD	22.13	01	01	
Grand Total		2,029,795.14			

Click on Assign Tag.

Assign Tag ▾

Click on the taggable dimension



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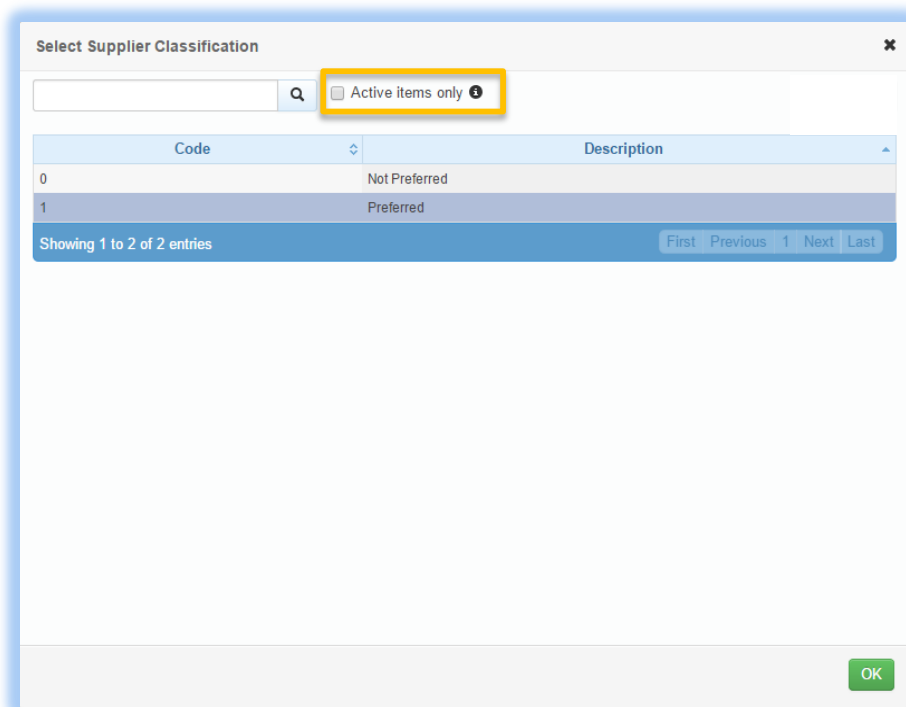
2. Tag to a dimension

This will open the dimension search box.

Uncheck the 'Active Items Only' to see full list of options.

Click to select the new value the supplier(s)/line(s) will be assigned.

Click 'OK'.

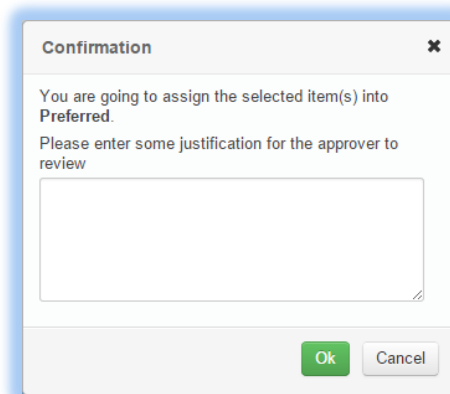


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3. Submit tagging request

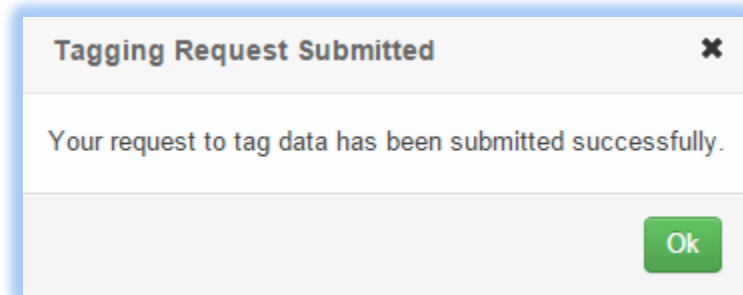
This will open a confirmation box.

A reason must be provided about why this tag is being submitted. This is the reason the Client Administrator or Approver will see, so use this opportunity to make the reasoning clear.



Click 'OK' to submit otherwise click 'Cancel'.

The tag has been submitted, waiting for approval. Click 'OK'



Approval

Step 3 is submitting a tagging **request**. Tagging is always a request. All tags must be **approved by a Client Administrator** or a user with special access rights.

No spend will move to a new category or tag without approval.

If a tag is submitted in error, contact the Client Administrator about rejecting the request.

For further information on Tagging e.g. with or without filters, refer to the full Tagging Guide.