



# *Using Tags*

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## About the New Furniture Tags Feature

Recently, the Office Furniture industry standardized its system of tagging items. In compliance with these industry standards, DDMS software imports, stores, modifies, displays, communicates and reports on these new tag fields. You can now import the same tag field as in previous versions, now Tag 1, but instead of seven characters, the system lets you import all characters from specification software packages. Existing Tag Descriptions populate the Tag 2 field. However, new file imports include the generic code tag populated by your specification software as tag 2 in DDMS. We've also added new fields to make up a total of five tag fields: Tag 3 correlates to your specifier software's alias 1 field, while Tag 4 is alias 2, and Tag 5 is alias 3. If you use a specifier program, such as 20-20 Worksheet or Project-Spec, you can export these five tag types into a SIF file that can then be imported into Furniture Order Entry. You can also view, change, and add tag information using the Order Notes (F11) dialog box. You can use tags when assigning Print Groups. The Modify Tags function has been added to Furniture O/E that lets you mass change tags. You can access tags during Order, Change, Initial Verify, Final verify, and Delete modes in Furniture Order Entry, and view tags in O/E History and P/O History. Also, when releasing quotes to an order, the system automatically brings the tags over to the new order. This new tag information can be viewed and changed in Purchase Order Entry when a P/O is built for the furniture order. New formats have also been created so you can print the new tag information. Tag detail can also be printed in Report Writer

Currently, there are five standard tag fields:

<b>Industry Field Names</b>	<b>DDMS Field Names</b>
TG = Tag	Tag 1
GC = Generic Code	Tag 2
L1 = Alias 1	Tag 3
L2 = Alias 2	Tag 4
L3 = Alias 3	Tag 5

If you use a specifier program, such as 20-20 Worksheet or Project-Spec, you can export these five tag types and tag descriptions into a SIF file. After you do, you can import this information into Furniture Order Entry. The tags appear in the Item Detail tab's Description column as yellow text. They are shown beneath the item's options and display beneath the heading PLEASE TAG AS FOLLOWS.

## Using Tags

Using the following tag example:

Industry Field Names	DDMS Field Names
TG = Tag	RM-237
GC = Generic Code	Seating
L1 = Alias 1	Second Floor
L2 = Alias 2	Billing Department
L3 = Alias 3	Bill Johnston's Office

The text would appear in the Item Detail tab as:

PLEASE TAG AS FOLLOWS:  
RM-237  
Chair One  
Second Floor  
Billing Department  
Bill Johnston's Office

### Before You Begin

Before you begin using the new Tags feature, you must:

1. Install version 8.14.0 or higher DDMS software.

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**Note:** During the installation, the system automatically converts the current Tag Type field to Tag 1 and the current Tag Description field to Tag 2. The conversion views the P-MASTER, JOUR-S and all files listed in your (LGA) journals as well as the PO-MASTER and JOUR-PO files. Depending on the amount of tag information to be converted, installation time for furniture dealers may be increased.

---

```
This program will convert P-LINE Tag fields to the new style  
P-SPECIAL tag specials for any journal you select.
```

```
Main Journal Name [JOUR-S ] Volume [SR ]
```

**Figure 1:**  
**Running the**  
**Manual**  
**Conversion**  
**Function**


After this installation, open the EnsieEBS Utility Program and import the SalesOrderJournal files and any current sales order files. To import current sales order, select Import Data to SQL from the Diagnostic Tasks menu. To import sales history files, select Sales Journal Import from the Diagnostic Tasks menu. For more instructions, see the handout **Using the EnsieEBS Utility Program** on our website at [www.ddms.com](http://www.ddms.com).

2. Manually convert and compress older sales journal files not stored in the (LGA) screen.

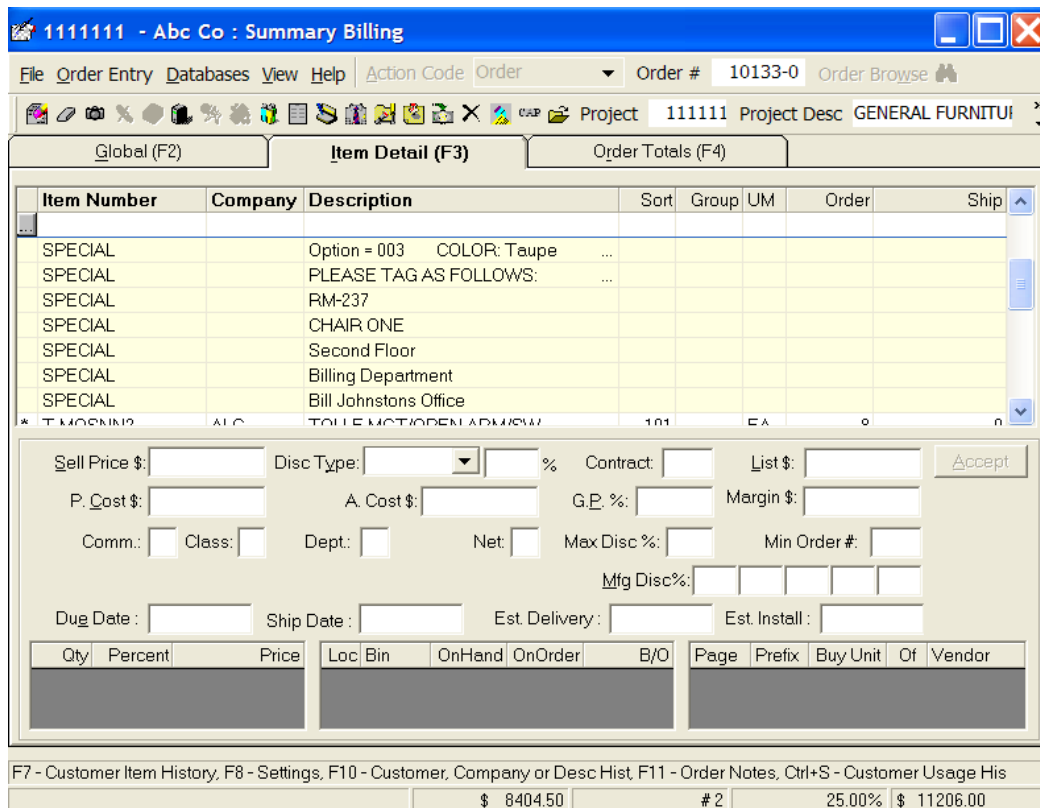
**Note:** This is a dedicated function. Determine the file names to be converted and use the [B4] Execute Program function in the (Z) Master Utilities screen. In the Enter File Name field, type ;SPCCVOTAG and press Enter. When the conversion program opens, enter the journal name and volume, as shown in Figure 1. After the journal has been converted, you must compress the file using the [B4] function in the (Z) screen. Enter ;SPCCMPJR and press Enter. When the Compress Journal Files screen opens, type F in the Journal Type field. Specify the journal name and volume to compress.

## Using the Tags Feature

In Furniture Order Entry, begin by importing the file you created using specification or specifier software.

- 1 Double-click . If the Order Style list box does not default to Furniture, click the down arrow and click Furniture.

**Figure 2:**  
Viewing the Tags in the Item Detail Tab





The screenshot shows a software window titled "1111111 - Abc Co : Summary Billing". The "Item Detail (F3)" tab is active, displaying a table with columns: Item Number, Company, Description, Sort, Group, UM, Order, and Ship. The table contains several rows of data, including "SPECIAL" items with descriptions like "Option = 003 COLOR: Taupe" and "PLEASE TAG AS FOLLOWS:". Below the table are various input fields for pricing and order details, such as "Sell Price \$:", "Disc Type:", "Contract:", "List \$:", "P. Cost \$:", "A. Cost \$:", "G.P. %:", "Margin \$:", "Comm.:", "Class:", "Dept.:", "Net:", "Max Disc %:", "Min Order #:", "Mfg Disc%:", "Dug Date:", "Ship Date:", "Est. Delivery:", and "Est. Install:". At the bottom, there is a summary row with values: "\$ 8404.50", "# 2", "25.00%", and "\$ 11206.00".

Item Number	Company	Description	Sort	Group	UM	Order	Ship
SPECIAL		Option = 003 COLOR: Taupe					
SPECIAL		PLEASE TAG AS FOLLOWS:					
SPECIAL		RM-237					
SPECIAL		CHAIR ONE					
SPECIAL		Second Floor					
SPECIAL		Billing Department					
SPECIAL		Bill Johnstons Office					
* TMOENIN2	ALC	TOLE MCTIOPEN ADMW	101	EA		0	

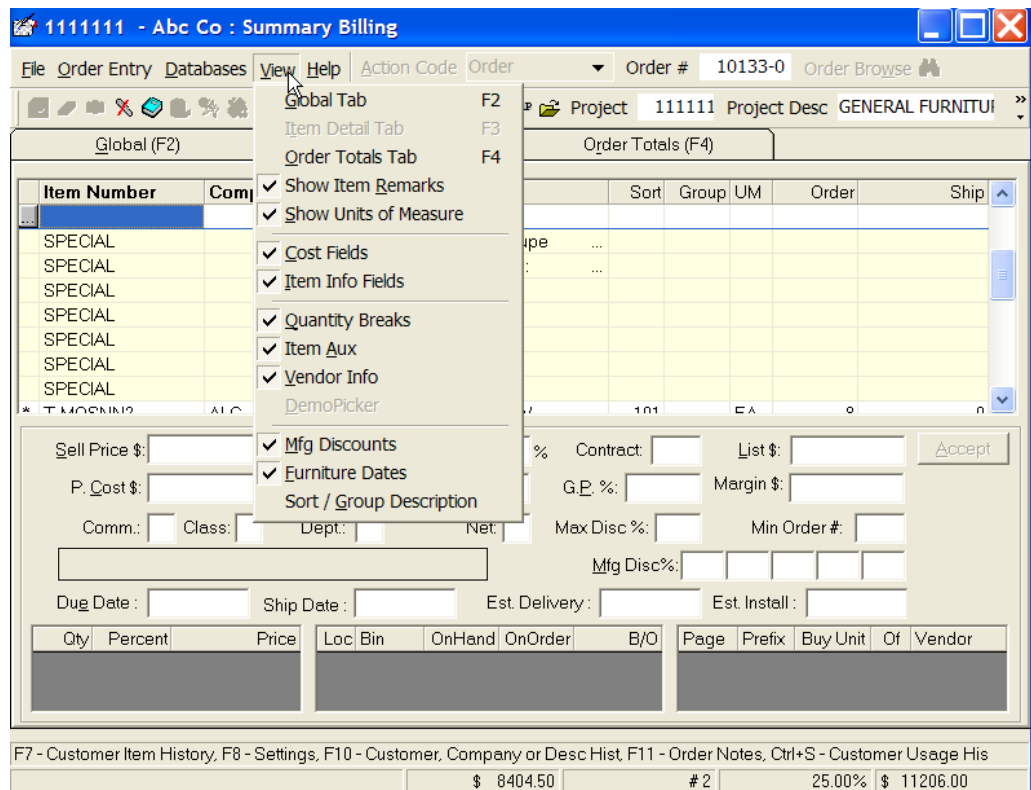
## Using Tags

The Tag # and Tag Description boxes are also no longer available in the Item Settings dialog box.


The Tag option in the Order Notes dialog box is available in all Furniture Order Entry modes, including Order, Change, Initial and Final Verify, and Delete.

- 2 Select the type of project to create. You can choose from General Project, New Project, or Existing Project.
- 3 Select the customer for this order.
- 4 Click the Item Detail tab.
- 5 Click  or press F12.
- 6 Scroll to the location on your network hard drive where the Sif file containing the tags is stored, C:\SIF Files, for example, and import the file.
- 7 At the Process SIF File prompt, click Yes.
- 8 The Process message appears while the system imports the file. When the file is imported, the new tag information appears under the item options, as shown in Figure 2.
- 9 Notice the Item Detail tab no longer displays the Tag # and Tag Desc boxes in the bottom section of the tab. The option to view tag information has also been removed from the View menu. See Figure 3.
- 10 To change tags, a new feature has been added to the Order Notes dialog box. Double-click a line item to move it to the Item Number box.
- 11 Click  or press F11.

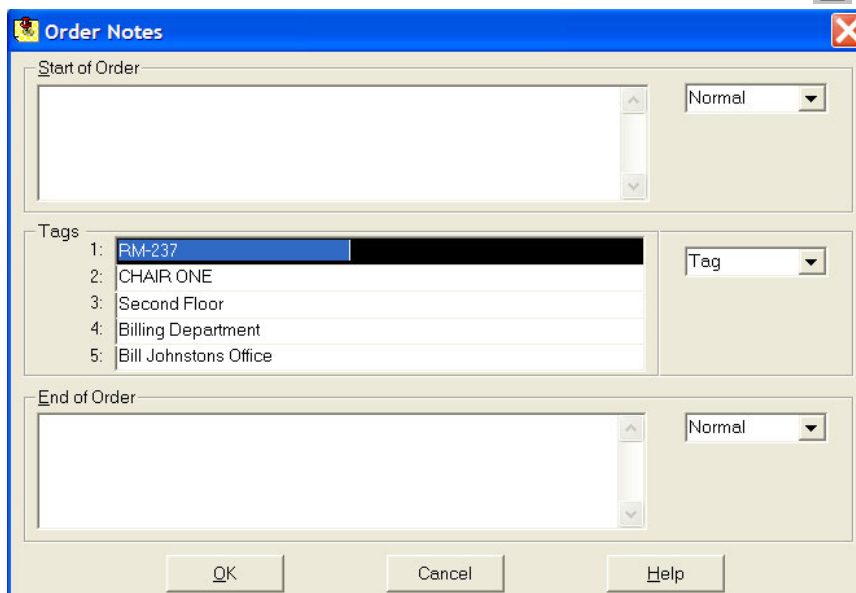
**Figure 3: The Removed Tag # and Tag Desc Boxes**



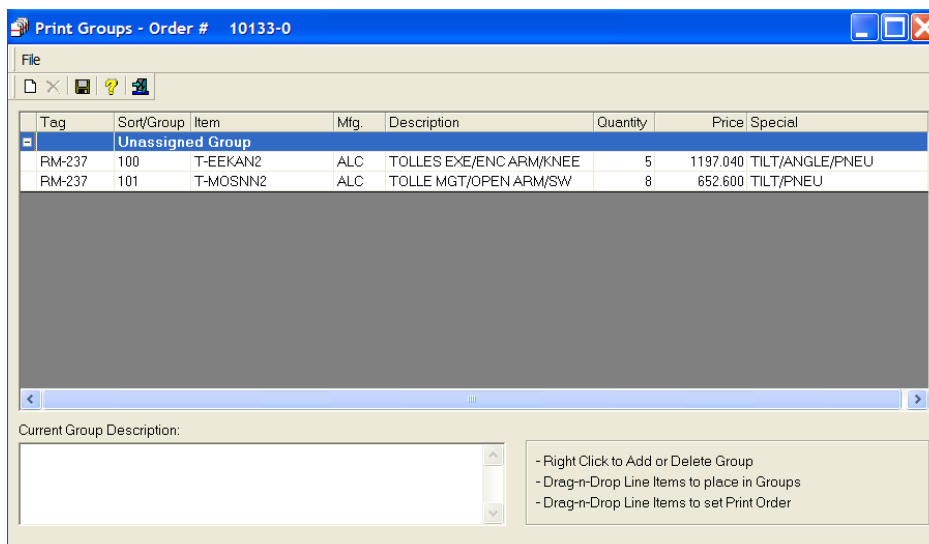
*When releasing a quote to an order, the system automatically includes the new tag information.*

- 12 In the Order Notes dialog box, click the down arrow to the right of the Line Item box. Click Tag. The tags for the line item you specified appear in the Tag 1 through Tag 5 boxes. To change a tag, click the text to change and enter the new text. You can specify up to 50 alphanumeric characters. The text you enter is stored in the P-SPECIAL file. When finished, click OK. See Figure 4.
- 13 The Tag 1 box has also been added to the Print Group dialog box. To use print groups, click the Order Entry menu and select Print Groups.
- 14 As shown in Figure 5, Tag 1 appears as the first column in the dialog box, in this example, RM-237. Tag 1 through Tag 5 are not shown. You can create print groups as needed. When finished, click .

**Figure 4:  
Changing Tags  
in the Order  
Notes Dialog  
Box**



**Figure 5: The  
Print Groups  
Dialog Box**



15 Build the purchase order as you normally would and complete the order.

**Note:** When you build the purchase order, the new tag information also appears in the Items to Be Purchased dialog box.

## Excluding Furniture Tags

We have also added new check boxes to the Furniture Profile Settings dialog box, as shown in Figure 6. These check boxes let you exclude tags when importing the file. To do this, you specify the tag settings to act as the defaults, and then click Save. These settings remain the same until you change them.

- 1 From within the Furniture Order Entry window, click the Global tab.
- 2 In the Furniture box portion of the window, click Furniture Profile Settings.
- 3 When the dialog box opens, click each Exclude Tag Import box (#1 - #5) to exclude when importing tags.
- 4 When finished, click Save. The tags you specified to exclude remain excluded for all orders until you change the setting.

**Figure 6:**  
Excluding Tags  
in the Furniture  
Profile Settings  
Dialog Box

The screenshot shows the 'Furniture Profile Settings' dialog box with the 'General' tab selected. The 'Project Type' section has 'General Project' selected. The 'Dates' section has three empty text boxes. The 'Posting Dates' section has two empty text boxes. The 'View Options' section has three unchecked checkboxes. The 'Default Options' section has several unchecked checkboxes, including 'Exclude "Option =" on SIF Import Option Items'. The 'Exclude Tag Import for #' section has five unchecked checkboxes labeled 1 through 5. The bottom of the dialog features 'Reset', 'OK', 'Save', and 'Cancel' buttons.

## Modifying Furniture Tags

In addition to individually changing tags in the Order Notes dialog box, you can also mass change furniture tags. You do this using the new Modify Tags dialog box.

To view specials for the line items on the order, click the Show Specials button.

The tags you specify can include up to a maximum of 50 alphanumeric characters.

To delete a tag, click the Delete box corresponding to the tag to remove.

- 1 In Furniture Order Entry, click the down arrow in the Action Code box and select Change.
- 2 Select the order to modify.
- 3 When the Enter Furniture Limits dialog box opens, you can limit the items to change by purchase order or acknowledgment number. When finished, click OK.
- 4 When the Change tab opens, click the Order Entry menu and click Modify Tags or type **Ctrl + F4**.
- 5 The Modify Tags dialog box opens, as shown in Figure 7. The item information shown in the bottom section of this tab appears in columns.
- 6 Select the tag(s) to change. You can mass change tags, or select specific tags.
  - To mass change tags by vendor, click the Sel box corresponding to the vendor to change. The tags for the vendor and all vendor aliases are automatically highlighted in the bottom section of the dialog box.
  - To mass change tags by vendor alias, click the plus sign (+) to the left of the vendor. Click the Sel box corresponding to each vendor alias to change. The system highlights the appropriate tags in the bottom section of the dialog box.

**Figure 7: The Modify Tags Dialog Box**

ORDER: 10131-0  
1111111 - ABC CD

Tags

Sel	Vendor	Mfg Disc 1	Mfg Disc 2	Mfg Disc 3	Mfg Disc 4	Mfg Disc 5
<input checked="" type="checkbox"/>	ALLSTEEL					
<input type="checkbox"/>	ALC	50.00	22.00			

Item Number	Co.	Description	Sort	Grp	Tag 1	Tag 2	Tag 3	Tag 4	Tag
T-EEKAN2	ALC	TOLLES EXE/ENC ARM/KNEE	100		RM-237	CHAIR ONE	Second Floor	Billing Department	Bill J
T-MOSNN2	ALC	TOLLE MGT/OPEN ARM/SW	101		RM-237	CHAIR ONE	Second Floor	Billing Department	Bill J

ORDER TOTALS

Show Specials Print Preview 0 item row(s) selected Reset Cancel Update

## Using Tags

To delete a tag, click the Delete box corresponding to the tag to remove.

Click the column heading to resort the data. This helps you find the information you need. For example, if you click the Item Number column, you can sort the displayed items by number, from highest to lowest.

- To select a specific tag, click the appropriate line at the bottom of the dialog box. To select more than one, hold down the Ctrl key and click each line. The system highlights each line you select.
  - To select all the tags shown, click Select All.
- After the tags to change are highlighted in the bottom section of the dialog box, you can change the text using each of the following methods.
    - In the top section of the dialog box, click the Tag 1 through Tag 5 box. Enter the new tag text. Click Apply. See Figure 8.
    - In the bottom section of the dialog box, click the Tag 1 through Tag 5 box, enter the new text over the existing text, if any. Press Enter.
  - To print tag information or export to a file, click Print Preview.
  - When you finish changing information in the Modify Tags dialog box, click Update.
  - The system displays the Modifying Orders message. When the process is complete, the cursor returns to the Change tab so you can make additional changes to the order.

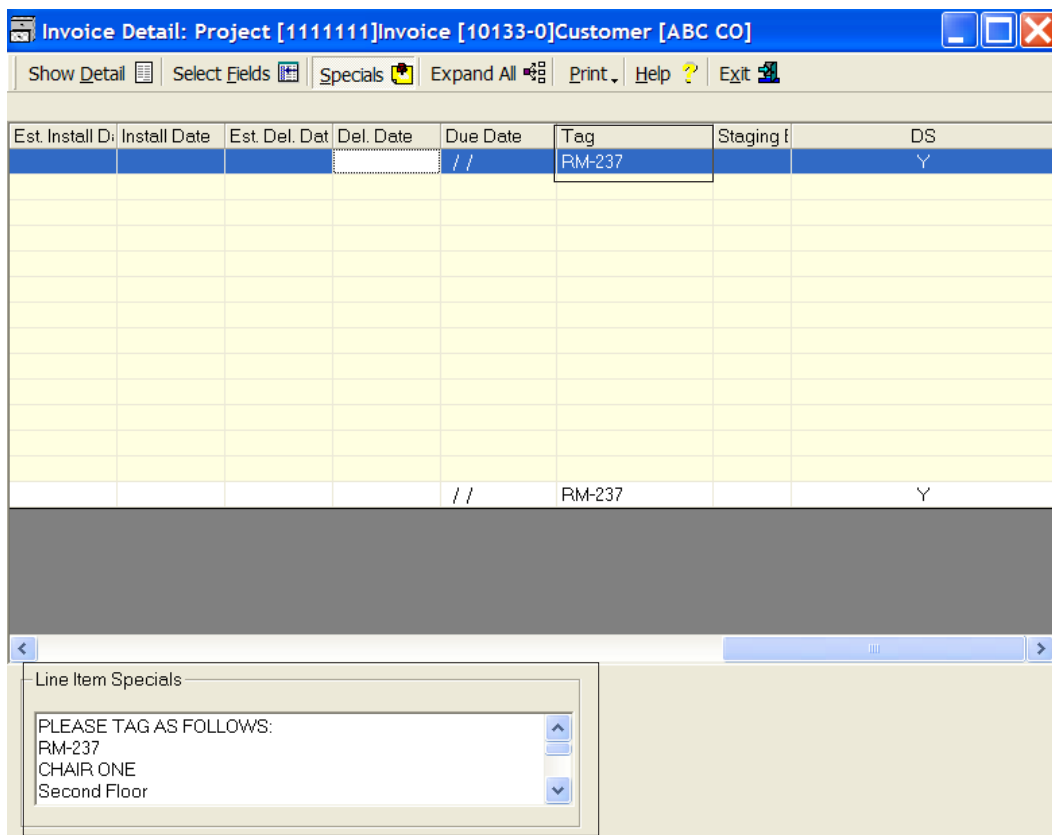
**Figure 8:**  
Modifying Tags  
Using the Tags 1  
Through Tags 5  
Boxes

Item Number	Co.	Description	Sort	Grp	Tag 1	Tag 2	Tag 3	Tag 4	Tag
T-EEKAN2	ALC	TOLLES EXE/ENC ARM/KNEE	100		RM-237	CHAIR ONE	Second Floor	Billing Department	Bill J
T-MOSNN2	ALC	TOLLE MGT/OPEN ARM/SW	101		RM-237	CHAIR ONE	Second Floor	Billing Department	Bill J

## Viewing Tags in Project Management

When you use the Project Management feature, the system displays the tag information in the Invoice Detail dialog box. The Tag column displays the text for Tag 1, and the Line Item Specials box displays detail for Tag 1 through Tag 5 for the line item you selected. See Figure 9.

**Note:** The Tag # and Tag Desc boxes have been removed from the Project Management Item Detail dialog box. These boxes can no longer be edited using this dialog box.




**Figure 9:**  
Viewing Tag  
Information in  
the Project  
Management  
Window

## Using Tags

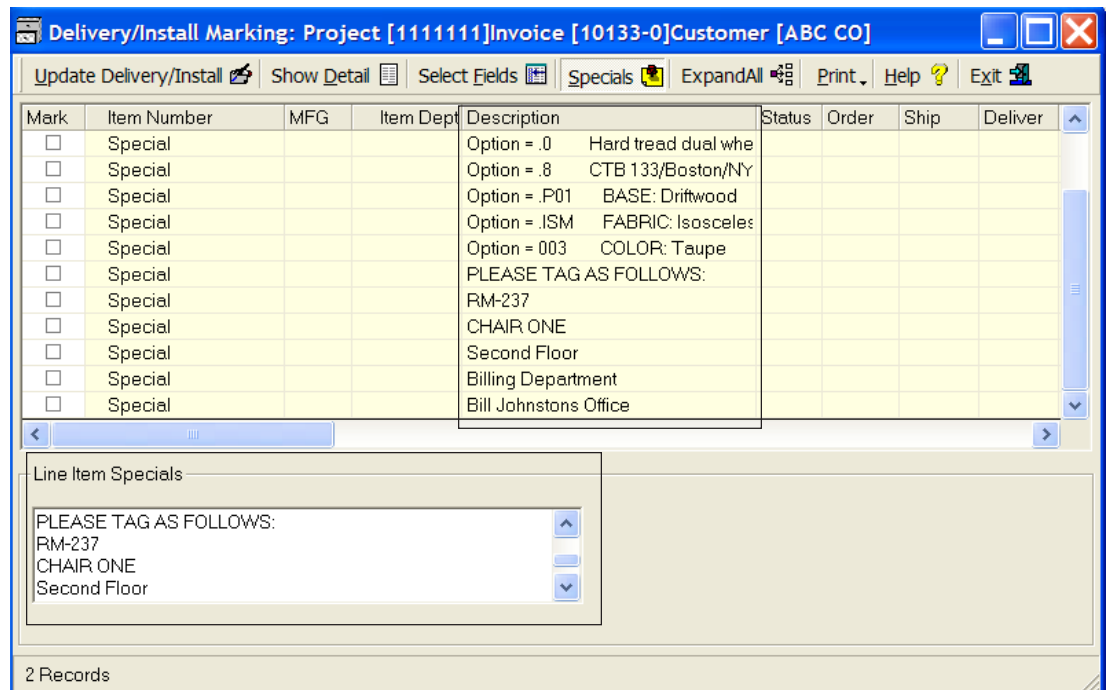
*The new Tag feature is also available when billing shipped lines.*

## Viewing Tags in Delivery/Install Marking

The Delivery/Install Marking dialog box has also been updated to include the new tag information. To view tag information, click **Specials** .

As shown in Figure 10, the Description column displays the tag information under the item's options. The Line Item Specials box displays tag information for the line item you selected. You can also click the Description column to resort the data. This allows you to more easily find the tag information you need.

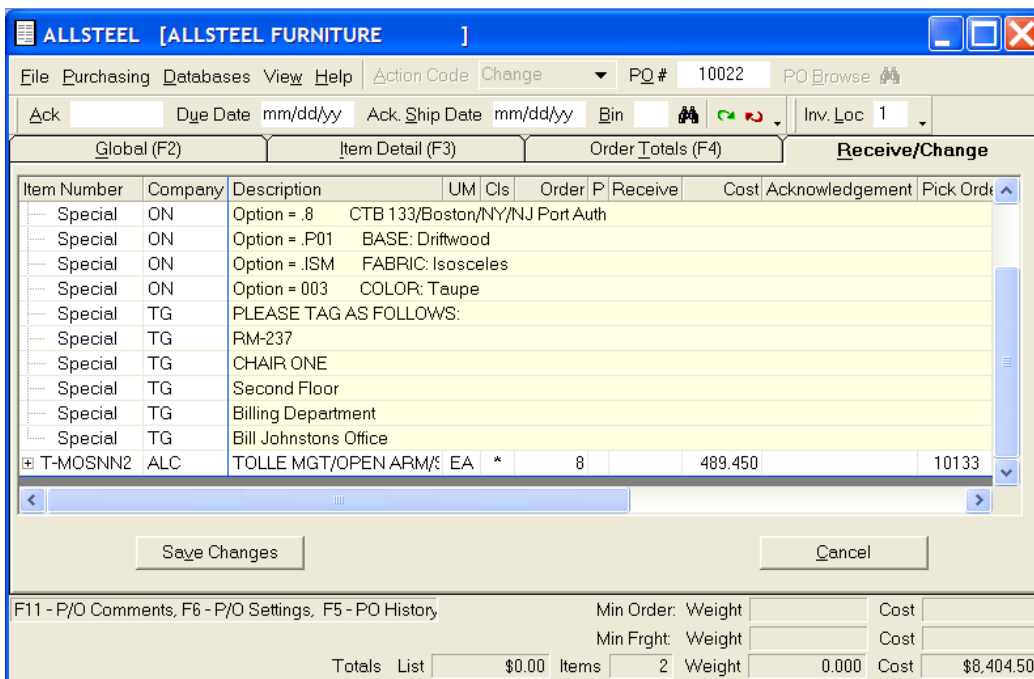
**Figure 10:**  
Viewing Tag Information in the Delivery/Install Marking Dialog Box



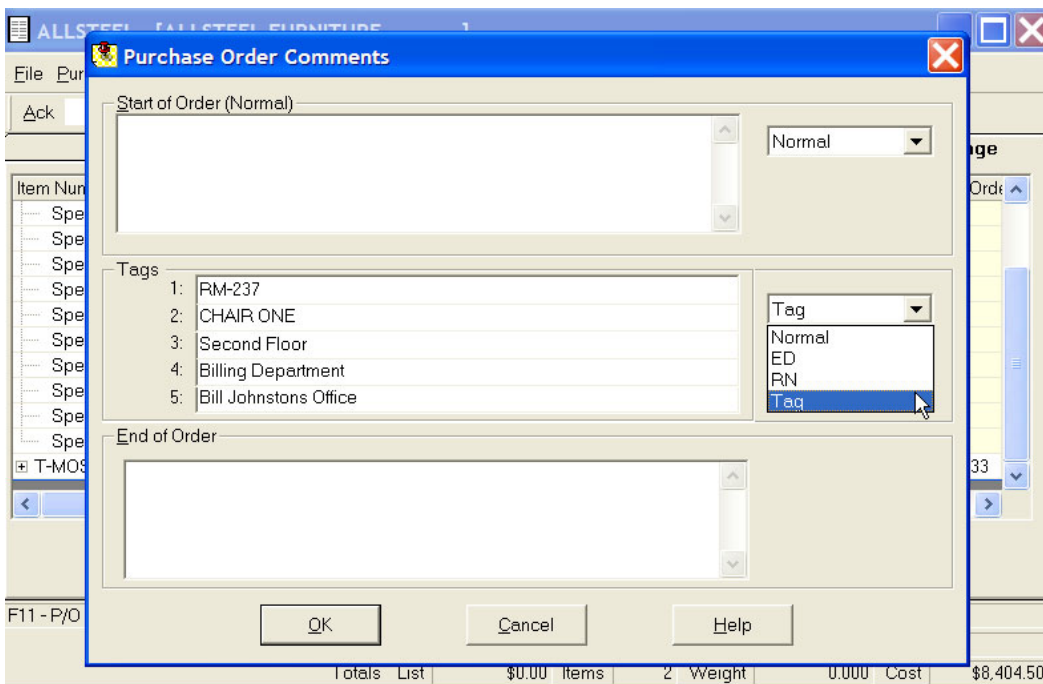
## Purchase Order Entry

The Purchase Order Entry window also includes the new tags feature. You can view tags, as well as change tag information. See Figures 11 and 12.

**Figure 11: The Purchase Order Entry Receive/Change Tab**



**Figure 12: Changing Tags in the Purchase Order Comments Dialog Box**



## O/E History and P/O History

After the order and purchase order have been invoiced, the system displays the tag information in the Description column in the O/E History and P/O History windows.

## Text-Based Systems

The new tag feature is also available for text-based users. To use this feature, simply go to the text-based Furniture Order Entry screen and begin placing the order as you normally would. With the cursor in the Item field, type SPECIAL TG. The system automatically adds the text PLEASE TAG AS FOLLOWS after the special text is entered. See Figure 13.

**Figure 13: Using the New Tag Feature in Text-Based Order Entry**

```

11:18:34                (GF) Furniture Order Entry (12/05/07)                01/17/08
-----
Order Writer :ROBI          G/L Loc # 1  Inv Loc # 1      Transaction # 10135-0
Furn.Order          Charge          Project #      TEST22
Name :ABC CO          Account # 1111111
122                  Slsm : 101 Status :N   P/O #
                                Lines # 1 61.0%
ROANOKE              TX 76262          800          Sub-Total $ 190.00
-----
# Sort/Grp Item              Mfg.      Description          Order Ship
105     SPECIAL TG          140     .....
-----
1 100    5193N              HON      HON HON 24X20 STRAIGHT TABLE MAH      1
SPECIAL TG          100 PLEASE TAG AS FOLLOWS:
SPECIAL TG          110 RM-237
SPECIAL TG          120 CHAIR ONE
SPECIAL TG          130 SECOND FLOOR
-----
Enter Item or <??> For Options
    
```

If you previously used delivery and installation formats DT and IT, the new DS and IS formats contain line 27 and display only tags 1 and 2. The remaining formats display the tags in the special lines.

## Reporting

Since older report formats did not include this tag information, new formats have been created for use with the tag feature. These report formats are shown below.

Format Code	Format Type
TN	Pick Ticket
PN	Proforma
AN	Acknowledgment
DN	Delivery Ticket
IN	Install Ticket
QN	Proposal/Quote
FE	Invoice
DS	Delivery
IS	Installation.

In addition, you can use the tag feature with Report Writer, as shown in Figure 14.

**Figure 14: Using the New Tag Feature with Report Writer**

```

===== P-SPECIAL SELECTION ===== |REPORT NAME - [AM    ON SR??] [!RPT]
PICK #          -  SORT :    GROUP :   |          SEND TOF? [C] LINES [60]
ITEM #          CO:                   |TITLE -          RPT [ ] WIDTH [ ]
SPECIAL TYPE :    SEQUENCE #          |[FURNITURE ACKNOWLEDGEMENT W/SALE-EX]
TEXT :USETAGS TAG-NUMBER-TAG-NU      |MASTER FILE >> 1 P-MASTER <<
      :SPECIAL TEXT SECOND HALF.      |
P/O #.....|PAGE BREAKS IN FILE Y/N ?
ATTN :.....|PRINTER SETUP FILE-[ ]
WHO CALL :.....|
SCAN :.....|
TAG NBR :.....|HEADINGS (1-20)   BREAKS (21-25)
      :.....|DETAIL (26-35)  SUBTOTALS (36-40)
TAG DESC :.....|TOTALS (41-55)  TRAILERS (56-65)
      :.....|LINE [91] BOILERPLATE [ ]
PREPAY ORIGINAL ORDER TOTAL $......|FONTS [19] [ ] [ ] [ ] [ ] [ ]
PREPAY PREVIOUS PAID TOTAL $......|SKIPS BEFORE [ ] AFTER [ 1] LAST [54]
PREPAY CURRENT PAID TOTAL $......|FILE TO SELECT FROM [45] TYPE F/T [F]
==== Tax Included Line Item Totals ====|** ENTER 99 FOR TEXT ONLY **
  Sell Price $...... ext. $......|
v-----|
                                SPECIAL TEXT FIRST HALF..SPECIAL TEXT SECOND HALF.
<CTRL F>,BACKSPACE MOVES CURSOR,<ENTER> PLACES FIELD | ---- LINE = 1 COL = 1

```