

# Microsoft® Business Solutions Foundation–Great Plains®



## Smart Tag Manager

Microsoft Office XP Smart Tag Manager helps your employees work more productively by providing “links” between Microsoft Office documents and the underlying data in their Microsoft Business Solutions application.

This feature allows users to instantly drill back from spreadsheets, e-mails and Microsoft Word documents to customer, vendor and product information stored in their accounting and business management records.

Carlson Specialties - Message - Microsoft Word

To: Suzanne Tremontaine  
Subject: Carlson Specialties

Suzanne,

Carlson Specialties is one of my vendors. We have 2 outstanding invoices for them.

Invoices 1240 and 1246 for the total amount of \$1,112.89 are outstanding to be paid to Carlson. I want them set up with net 30 terms – can you pay these asap.

Let me know if there are any problems.

Thanks Suzanne,  
Alan

Alan Webber  
Sales Manager  
The World Online, Inc.  
awebber@two.com

**Payables Transaction Inquiry - Vendor**

Vendor ID: CARLSONS0001  
Name: Carlson Specialties

Documents: by Document Number All From: To:

Include:  Work  Open  History

Origin	IC	Document Number	Type	Doc. Date	Original Amount	Unapplied Amount
Voucher/Payment Number		Due Date	Disc. Date	Transaction Description	Currency ID	
OPEN	<input type="checkbox"/>	1240	INV	1/26/2002	\$638.01	\$638.01
OPEN	<input type="checkbox"/>	1246	INV	12/2/2002	\$474.88	\$474.88

Smart Tag Manager works with Microsoft Business Solutions–Great Plains for SQL Server, and Microsoft Office XP. With smart tags, Microsoft Office can become a “front end” for your application, allowing you to use the spreadsheets, e-mails and Word documents you already use, and instantly link back to your accounting and business management information to answer questions or further analyze the data before making a decision.

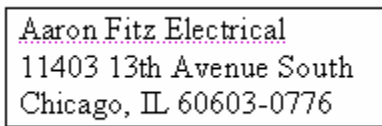
## How Smart Tag Manager Works:

Smart tags are new user-interface icons that recognize meaningful text in Word, Excel and Outlook documents. They present you with a menu containing relevant actions based on the recognized text.

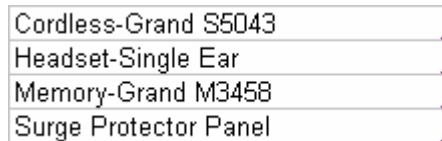
With Smart Tag Manager, smart tag recognizers automatically are established for key master records within your application. Anytime these items appear in a Microsoft Office XP document, they will be recognized with an Office XP smart tag. Items that will be recognized include:

- Customer names
- Vendor names
- Inventory Item numbers and descriptions
- General Ledger Account numbers and descriptions
- Checkbook descriptions
- Employee names
- Salesperson names

When a master record name or number is recognized in an Office XP document, it will be “smart tagged” with either a dotted underline (Word) or a small triangle (Excel), indicating there is additional information that can be linked to.



Aaron Fitz Electrical  
11403 13th Avenue South  
Chicago, IL 60603-0776

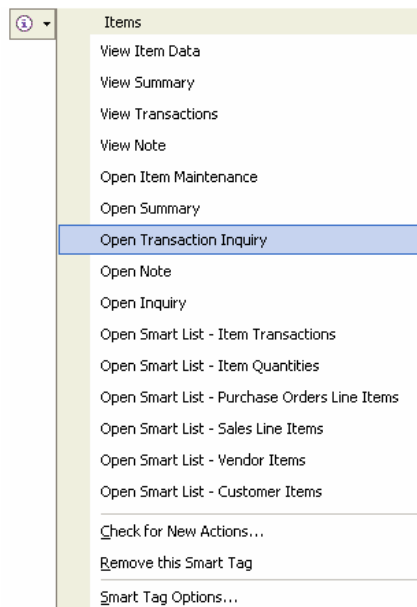


Cordless-Grand S5043  
Headset-Single Ear  
Memory-Grand M3458  
Surge Protector Panel

When you click on a smart tag, a menu pops up, allowing you to choose the type of information you would like to see.

Types of information that can be displayed using Smart Tag Manager include master record detail, allowing you to review, for example, customer payment terms or quantities on hand, as well as account activity and lists of transactions related to the tagged item.

Choosing an option from the menu instantly links you to the underlying data stored in your application.



**Smart Tag Manager Highlights:**

**Works for users running Microsoft Business Solutions applications:** Individuals within your company will be able to access master record, account summary, transaction inquiry and SmartList windows to quickly look up information they need.

**Works for users who are NOT running Microsoft Business Solutions applications:** Line managers, executives, salespeople – anyone who can benefit from the information displayed by Smart Tag Manager can be given access to “Views” of the information stored in their tables, without having to have a copy of their business application running on their local computer.

The screenshot shows a window titled "Office XP Smart Tag Viewer" with a menu bar containing "File" and "Help". The main content area is divided into three sections:

- Customer Identification Information:**
  - Customer ID: AARONFIT0001
  - Name: Aaron Fitz Electrical
- Period Summaries:**

	Period 1	Period 2	Period 3	Period 4
Period Description:	Current	31-60 Days	61-90 Days	90-120 Days
Period Balance:	6,635.85	0.00	2,453.48	0.00
- Year-to-Date, Last year and Life-to Date Totals:**

	Year-to-Date	Last Year	Life-to-Date
Number of Sales Docs:	32	0	32
No. of Paid Invoices:	25	0	25
Sales:	42,635.22	0.00	42,635.22
Cost:	9,453.85	0.00	9,453.85
Cash Received:	26,948.45	0.00	26,948.45
Writeoffs:	0.00	0.00	0.00

**Strong security:** Smart Tag Manager takes advantage of your existing NT Authentication routines, reducing administration and ensuring only authorized personnel have access to your business management information.

**Access permission can be granted per user, per window:** It’s easy to set up access rights within Smart Tag Manager. Rights are granted to individuals or groups of employees, and can include entire series of information (for example, all customer information, but no employee information), or can be set to allow access to certain types of information (for example, personnel information for an employee, but no pay/transaction information).

**Requires no programming:** Once you set up the access rights, Smart Tag Manager automatically recognizes customer names, product numbers, salesperson names and other data in your Office documents and marks them with a smart tag.

**No separate purchase required:** If you own Microsoft Business Solutions–Great Plains, plus Microsoft Office XP, you can begin taking advantage of smart tags at any time. Smart Tag Manager is included with System Manager and does not require a separate purchase.

**Easy to install:** Smart Tag Manager is installable via the network, so once your administrator has determined who in your organization will benefit from having smart tags, each individual can load his or her own copy of Smart Tag Manager, reducing IS administration.

**Here are some real-life ways Smart Tag Manager can make your business more productive immediately:**

- Drilling back on a budget report – If you use Excel to do your budgeting, you can easily link back from the account numbers or descriptions in your spreadsheet to the period summary or detailed transaction information for each account.
- Check up on a checkbook balance – If you receive an e-mail alerting you that one of your checkbooks has fallen below the minimum balance, you can click on that checkbook name and see a list of recent checks and deposits.
- Review a vendor’s invoices before cutting a check – If an employee sends you an e-mail asking you to pay one of his vendors, you can instantly view the vendor’s outstanding invoices to determine if payment is appropriate at this time.
- Look up a customer’s address and account activity information even if you aren’t running Microsoft Business Solutions–Great Plains.
- Follow up on an e-mail request for personnel information such as start dates or last review dates. And, because you can control who has access to each type of information, you can make sure your sensitive payroll information is available only to authorized personnel.

To see Smart Tag Manager in action, visit [www.greatplains.com/officeintegration](http://www.greatplains.com/officeintegration).