

Set Up Tags

By using tags, you can add important report possibilities. We highly recommend using tags as a way of associating income and expenses with different farm enterprises (or perhaps crop years or partnership shares or projects such as remodeling). This allows you to print reports summarizing income and expenses for specific components of the farm operation, for example, the cow/calf, wheat, or alfalfa enterprise. When you imported the farm income and expense categories, several tags – CowCalf, Family Living, Hay, Milo, Oats, Overhead, Stocker, and Wheat – were also imported. Let's add an Alfalfa tag. From the main menu, click

Tools

Tag List (or press **Ctrl+L**)

New (located in the lower left of the Tag List window)

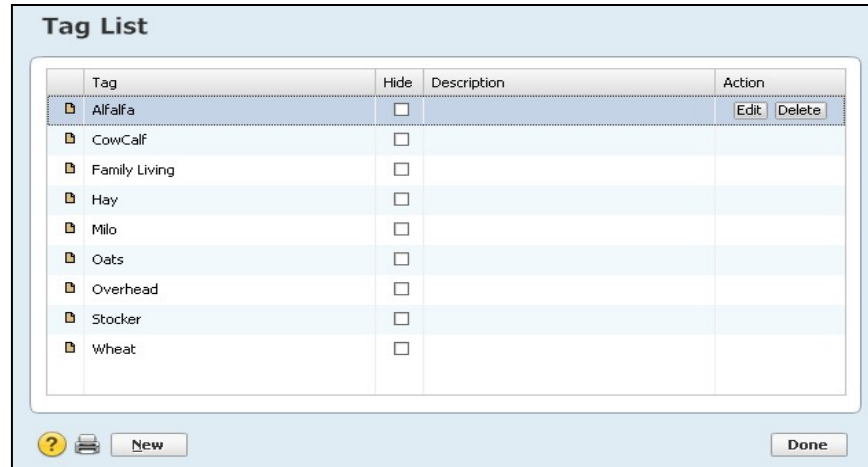


The screenshot shows a 'New Tag' dialog box. The title bar reads 'New Tag'. In the top right corner, there is a legend: '*Required fields'. The dialog contains three input fields: 'Name *' with the text 'Alfalfa', 'Description' which is empty, and 'Copy number' with a checkbox and the text 'Tell me more'. At the bottom left is a yellow question mark icon, and at the bottom right are 'OK' and 'Cancel' buttons.

Note: A Description may be added. Copy number: is used only if you are filing multiple copies of a particular tax form because you have more than one business entity and need to identify with which business this tag is associated. An example of this would be a Qualified Joint Venture by a husband and wife for Farm Service Agency reporting.

Click **OK**

Add any other tags needed. Recording a tag along with a category for a transaction documents more specifically how the income was earned or how the expense item was used.



To edit a tag, highlight the appropriate tag name by clicking on it, and then click on the **Edit** button at the right.

Note: If the selected tag name has been used in transactions and you change it, all previously recorded transactions will automatically change.

To delete a tag, **highlight the tag** line and click on the **Delete** button to the right.

Note: We recommend that you run a report sorted by Tag before deleting one to make sure there are no transactions which use it. For tags that have been used in the past but will not be used in the future, we suggest clicking on the Hide field next to the tag. This will not remove it from previously recorded transactions, but will remove it from the tag list in normal view. Deleting a tag that has been used will cause those transactions to have a blank tag field.

We have decided we don't need the Oats tag since we do not raise oats.

Click on the **Oats** tag.

Delete