

# Enquiries

Providing access to the data stored in any Sage Enterprise system is crucial in providing users and managers with the information required to run their business. Whilst Sage Enterprise provides a wide range of on-screen enquiries these are often fragmented around the system and the modular nature of the product means that there are few enquiries that draw data from different modules. The **VI ENQUIRIES** module allows enquiries to be built using data from any of the tables within the system, thus combining the scope, flexibility and power of Report Writer with the ease-of-use and familiar look and feel of existing Sage Enterprise enquiry programs.

Furthermore enquiries can be run not only from within the Sage Enterprise menus but also from the TCR drill-downs, thus extending the scope of drill-downs to be able to access any data within the Sage Enterprise database.

## Features

### Designing Enquiries

New enquiries are created by defining the fields that will be displayed in the enquiry, the sort and selection criteria that are to be available to the user and the lower level enquiries that will be available.

Up to four levels of enquiry and drill-down are possible within the one enquiry. Hence a stock enquiry, for example, makes it possible to produce a list of stock items, to then view lists of sales orders, purchase orders, works orders, batches, allocations etc for a selected item and then to drill-down to the source transaction or to static information such as stock details, assembly, price lists and supplier info

### Browse Enquiries & Form Enquiries

The results of the enquiry can be displayed in a Browse window, where there are multiple records to be displayed, or in a Form where data for a single record is to be displayed.

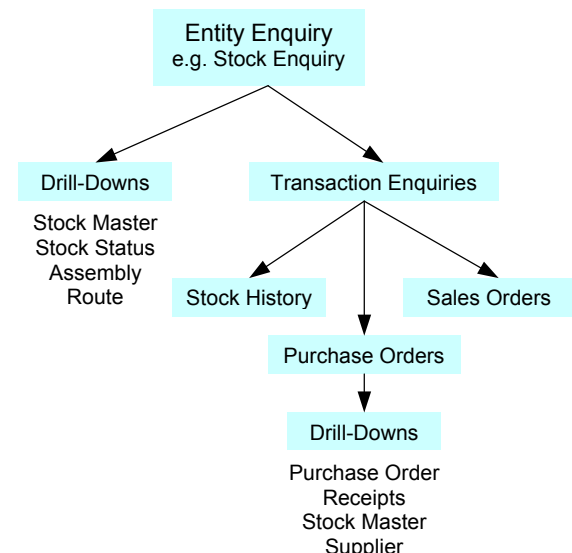
### Versions

Multiple versions of an Enquiry can be created, perhaps with slightly differing displayed fields or with pre-set selection criteria.

To control access to potentially sensitive data, once an Enquiry Version has been created it is possible to specify which users have access to the version.

### Data Lists

These allow lists of data to be pre-configured for use in selection criteria. This is to allow data to be grouped into entities that may not be otherwise possible within Sage Enterprise (e.g. to group together all Northern Regions in a sales analysis or all receipt stock transactions).



### Calculated Fields

Calculated fields can be used within Enquiries and can be based on fields within the Sage Enterprise tables, numerical values and mathematical operators. Calculation results can be numerical, dates or number of days.

### Sub-Totalling

Enquiries can be totalled by any of the fields in the enquiry. This feature provides the potential for analysis-type enquiries such as sales by territory/region, transaction value by date or type etc. etc. with the ability to drill-down to the transactions that make up the total.

### Menu Options

Menu options can be set up for entity enquiries (e.g. Stock Enquiry), individual transaction enquiries (e.g. Sales Order Enquiry) or enquiry versions (e.g. Fred's European Sales Analysis by Territory).

# Enquiries

## Using Enquiries

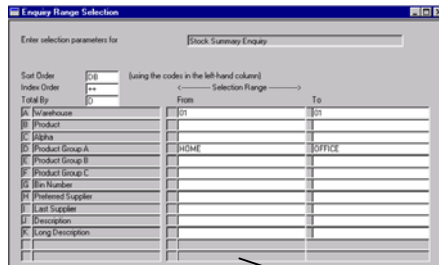
The following describes how an enquiry based on the Stock Code might operate, run either from a menu or a drill-down.

### Running from the menu

#### Selection

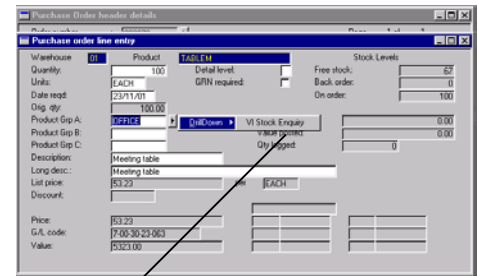
A sort and selection form is displayed containing fields set up on the enquiry definition. Up to 5 levels of sort criteria and sub-totalling can be specified.

Against each sort field it is possible to specify whether records are to be sorted in ascending or descending order (thus allowing date columns to be sorted with the most recent at the top).



### Running from a Drill-Down

The Enquiry will select records based upon the value entered into the field to which the drill-down is attached.



### Browse Enquiry

A list of stock items that match the selection criteria is displayed in the order specified by the sort criteria. This list can contain fields from the database and calculated fields.

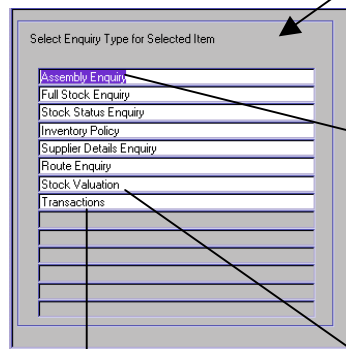
If the enquiry has been sub-totalled then totals will be displayed for any numeric columns.

Yr	Product	Description	Physical	Allocated	Free Stock	On Order	Standard Cost	Value (Std)	Current Cost
01	MTCTN001	Carton Meeting Table	800.00	0.00	800.00	0.00	1.300	1170.000	1.250
01	MTSPCD001	Spacer Meeting Table	600.00	0.00	600.00	0.00	0.650	390.000	0.500
01	POLISH	High Gloss Lacquer	392.50	0.00	392.50	0.00	0.000	0.000	0.000
01	SEALER	Sealant	295.00	0.00	295.00	0.00	0.000	0.000	0.000
01	SIDEDKD	D/Kneehole Desk Side	0.00	0.00	0.00	0.00	0.000	0.000	0.000
01	SM025X100	Softwood 25x100	57.11	0.00	57.11	0.00	350.000	19989.550	325.000
01	SM050X050	Softwood 50x50	68.61	0.00	68.61	0.00	325.000	22289.875	300.000
01	SM075X075	Softwood 75x75	68.31	0.00	68.31	0.00	360.000	24593.400	330.000
01	TABLEM	Meeting Table	69.00	2.00	67.00	0.00	53.230	3672.870	53.230
01	TOPKDK	D/Kneehole Desk Top	0.00	0.00	0.00	0.00	0.000	0.000	0.000
01	TOPMT	Meeting Table Top	0.00	50.00	-50.00	50.00	26.691	0.000	26.691
01	WARDROBEH	Bedroom Wardrobe	31.00	2.00	29.00	15.00	95.000	2945.000	85.000

### Drill-Down

At this point the user can drill-down to a standard Sage Enterprise enquiry (e.g. Full Stock Details), to a single record "Form" enquiry or to a "Browse" enquiry containing transactions for the selected stock items.

Drill-downs can be set up to be conditional upon the value of one of the fields in the browse. Thus from the stock history enquiry it is possible to drill-down to different enquiries depending upon the transaction type (i.e. Sales Order Enquiry if type = SALE, Purchase Order Enquiry if type = RECP, Works Order Enquiry if type = W/O etc).



### Sage Enterprise Enquiry

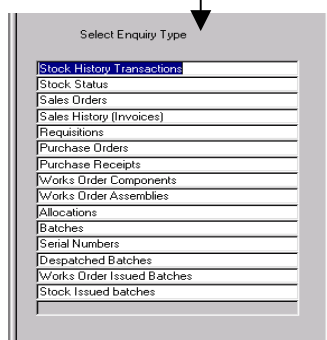
Any of the standard Sage Enterprise enquiries can be incorporated into an enquiry. All existing functionality within the CS3 enquiry is retained (e.g. paging and extra details).

Seq Ref	Component code	Quantity	Units	Description
001	TOPMT	1	EACH	Meeting Table Top
002	LEIGHT	4	EACH	Meeting Table Leg
003	POLISH	0.005	LITS	High Gloss Lacquer
004	SEALER	0.000	LITS	Sealant
005	BRT10MT	4	EACH	100mm Corner Bracket
006	MTCTN001	1	EACH	Carton Meeting Table
007	MTSPCD001	4	EACH	Meeting Table Spacer

### Transaction Enquiry

Any transaction enquiries that have been linked to the main entity enquiry can be run for the selected stock item.

After the required enquiry has been selected a further sort and selection screen will be displayed and the above process repeated for the transaction enquiry.



### Forms Enquiry

A Forms enquiry contains data for a single record. Where there are several such records which match the selection criteria it is possible to step through the records one at a time by using the cursor keys. As with Browse-type enquiries it is possible to launch other enquiries from these enquiries.

	Quantity	Valuation @ std
Physical	69.00	3673.00
Allocated	2.00	106.00
On Order	0.00	0.00
Back Order	0.00	0.00
Free Stock	67.00	3566.00