

Sage 300 CRE
Online Conference

Inquiry Designer

Presented by:
Linda Whitener

OnPoint Construction
Software User Group (OCG)

Learning Objectives

- Features and Overview
- Sage Data Structures
- Record Relationships
- Inquiry features and options
- Views
- Copy and Modify Inquiry
- Creating a new Inquiry
- Security

Inquiry - Features

- Modify inquiries supplied by Sage
- Print Inquiry Data
- Export data in Inquiry to Excel spreadsheet
- Create inquiries with detail or summary information
- Build Drill down inquiries
- Assign security

Inquiry – Data Structure

- Sage 300 stores data in a company folder.
- Within the folder are data files – master and transaction.
- With the file are tables (records).
- The tables contain fields – a single piece of information

Inquiry – Data Structure

- Data Dictionary is a guide listing all of the fields stored in each record type. Information stored in Data Dictionary includes:
 - Field name
 - Field Type
 - Field Length
 - ODBC Replaceable
 - Special Values
 - Standard Orders

Inquiry – Data Structure

- Ways to Access Data Dictionary
 - Sage Knowledge Base
 - Event 1 Quick AIM
 - Print Your Own (RD: Tools > Available Fields)

Inquiry – Data Structure

- **Concepts:**
 - **Key** – field or combination of fields the software uses to quickly locate each record
 - Provides the address of the record
 - Sort Order
 - Access
 - **Standard Orders** : The keys are listed at the bottom of the data dictionary under “Standard Orders”.
 - **Primary Key**: Every record has a primary key – default address and sort order – first one listed.

Record Relationships

- **One to Many:** One record is linked to many records of another record type. Example – vendor and it's invoices.
 - NOTE: Most Inquiries are built with this record relationship.
- **One to One:** One record is linked to one record of another record type. Example – Invoice to the vendor.
- **None:** One record is not linked to another record type. Example – Check to Invoice.

Features within Sage Inquiries

- **Classic vs Toolbar**
- **Table versus Form Views**
- **Conditions**
- **Printing**
- **Sorts**
- **Select (add or modify column contents)**
- **Export to Excel**

Views

- **Table**
 - Columnar layout
 - Default View
- **Form**
 - Report layout
 - Optional view- Access by clicking button

Inquiry Design Basics

- Start Level
- Conditions
- Sort Orders
- Views
- Additional Records
- Jumps
- Inquiry Options

Inquiry Design Security

- Record Security
- Inquiry Options
- View Options
- Security Administration

Inquiry - Tips

- Plan ahead: Map out the inquiry before you start
 - Column headings help determine where to get data
 - Use the Data Dictionary to help find the tables
 - Define drill downs you want
- Consider your Audience
 - Who should have access
 - Do you want users to change Inquiry
- Remember that views can be shared

Recap

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Resources

- We appreciate your feedback!
- A link to the session recording will be sent to you.
- Visit our website for additional resources:
 - [Free Sage 300 CRE Procedure Guides](#)
 - [Free recorded Sage 300 CRE webinars and videos](#)

Contact us:

clientcare@onpoint-software.com

www.onpoint-software.com

Thank you for being here!