

Data Retrieval and Analysis

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Timing and Agenda

Aug 3, 2021 -10 AM -12 PM

Day 1

Lesson 1.1: Discovering DACs

Lesson 1.2: Copying a Predefined Inquiry

Lesson 1.3: Modifying Inquiry Results

Lesson 1.4: Applying Sorting And Grouping

Lesson 1.5: Using Conditions and Parameters

Lesson 1.6: Using Formulas

Aug 4, 2021 -10 AM -12 PM

Day 2

Lesson 1.7: Enabling Navigation

Lesson 1.8: Making a Generic Inquiry a Substitute Form

Lesson 1.9: Transferring an Inquiry

Lesson 1.10: Creating a Generic Inquiry

Lesson 1.11: Getting Data from Multiple DACs

Lesson 1.12: Exposing an Inquiry by Using OData

Timing and Agenda

Aug 5, 2021 -10 AM -12 PM

Day 3

**Lesson 1.13: Accessing the Exposed Inquiry
Through Odata**

**Lesson 1.14: Managing Access Rights to Generic
Inquires**

Lesson 2.1: Managing Advanced Filters

Lesson 2.2: Managing Pivot Tables

Lesson 2.3: Managing Dashboards

Day 1



Part 1: Managing Generic Inquiries

Lesson 1.1: Discovering DACs

Learning Objectives

In this lesson, you will learn how to inspect UI elements to find the underlying data fields.

Figure: Data access workflow

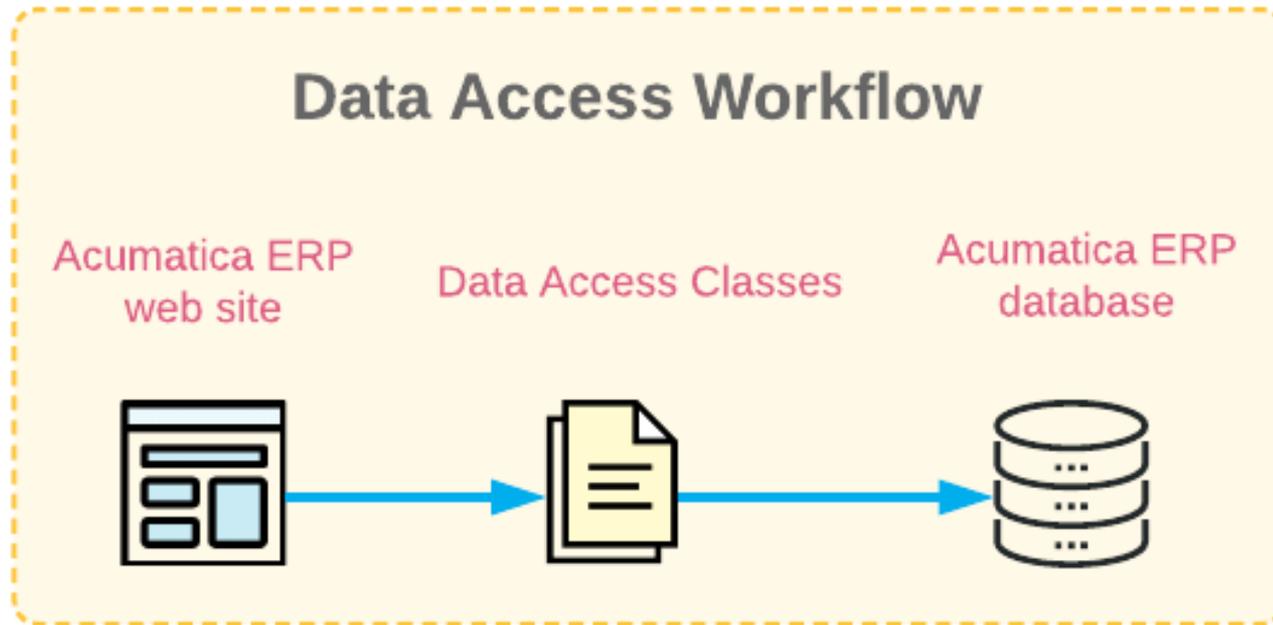


Figure: Form element inspection

The screenshot displays a software interface for 'Sales Orders'. A modal window titled 'Element Properties' is open, showing details for a selected form element. The 'Order Nbr.' field in the background form is highlighted with a red box. In the 'Element Properties' window, the following fields are highlighted with red boxes:

- Control Type: Selector
- Data Class: SOOrder
- Data Field: OrderNbr

The 'Element Properties' window also shows:

- View Name: Document
- Business Logic: SOOrderEntry

Buttons at the bottom of the 'Element Properties' window include 'CUSTOMIZE', 'ACTIONS', and 'CANCEL'. The 'ACTIONS' dropdown menu is open, showing options:

- Customize Business Logic...
- Customize Data Fields...
- View Aspx Source...
- View Business Logic Source...
- View Data Class Source...

The background form includes fields for 'Order Type' (SO), 'Order Nbr.' (000029), 'Status' (Open), 'Date' (1/29/2019), and 'Requested On' (1/29/2019). The bottom of the interface shows a table with columns for 'Branch', 'Inventory ID', 'Free', and 'Warehouse'.

Figure: Inspection of a form element with a drop-down control

The screenshot displays the 'Invoices and Memos' application window. The 'Element Properties' dialog is open, showing the following configuration:

- Control Type: Drop Down
- Data Class: ARInvoice
- Data Field: DocType
- View Name: Document
- Business Logic: ARInvoiceEntry

The 'Drop Down Values' dialog is also open, showing a list of values and their descriptions:

Value	Description
INV	Invoice
DRM	Debit Memo
CRM	Credit Memo
FCH	Overdue Charge
SMC	Credit WO

Figure: The list of data access classes and their aliases

Generic Inquiry ☆

NOTES FILES CUSTOMIZATION TOOLS ▾

VIEW INQUIRY EXPORT AS REPORT

* Inquiry Title: AR-Payments and Applicator
 Make Visible on the UI

Site Map Title: Payments and Applications

Workspace:

Category:

Screen ID: AR3020PL

Arrange Parameters in: 3 columns

Select Top: 0 records

Records per Page: 0

Export Top: 0 Records

Expose via OData
 Expose to Mobile

TABLES RELATIONS PARAMETERS CONDITIONS GROUPING SORT ORDER RESULTS GRID ENTRY POINT

* Table Name	* Alias
PX.Objects.AR.ARPayment	ARPayment
PX.Objects.CR.BAccountR	BAccountR

Discovering DACs: To Inspect UI Elements

Story

Suppose that you are a technical specialist in your company who is working on simple customizations. A sales representative has requested that you create a generic inquiry that lists sales orders. The inquiry should include the following data for each listed sales order: the sales order number, the order type, the status, the date, and the customer name.

Lesson 1.2: Copying a Predefined Inquiry

Learning Objectives

In this lesson, you will learn how to make a copy of an existing generic inquiry.

Copying a Predefined Inquiry: To Copy an Existing Generic Inquiry

Story

Suppose that you are a technical specialist in your company who is working on simple customizations. An accountant of your company has requested an inquiry that collects data about invoices and memos. You have offered the predefined Invoices and Memos (AR3010PL) generic inquiry form, which has the AR-Invoices and Memos inquiry title and the Invoices and Memos site map title specified on the Generic Inquiry (SM208000) form, but the accountant has requested some additions to the inquiry. In this activity, acting as the technical specialist, you will copy the predefined generic inquiry to leave it intact, and then you will modify its copy as requested.

Lesson 1.3: Modifying Inquiry Results

Learning Objectives

In this lesson, you will learn how to do the following:

- Hiding or revealing columns
- Adding a data field to the results
- Changing the caption of a column
- Specifying the default navigation setting of a column in the inquiry results
- Adding a quick filter to the inquiry results
- Including deleted records in the inquiry results
- Selecting the table to which files and notes will be attached

Figure: Rows added to show deleted records in the Journal Transactions inquiry

Generic Inquiry NOTES FILES CUSTOMIZATION TOOLS

VIEW INQUIRY ACTIONS

* Inquiry Title: Make Visible on the UI Show Deleted Records Expose via OData Expose to the Mobile Application

Site Map Title: Arrange Parameters in: columns

Workspace: Select Top: records

Category: Records per Page: Records

Screen ID: Attach Notes To:

TABLES RELATIONS PARAMETERS CONDITIONS GROUPING SORT ORDER **RESULTS GRID** ENTRY POINT NAVIGATION

Row Style:

Active	Object	Data Field	Caption	Schema Field	Width (px)	Style	Visible	Default Navigation	Navigate To
<input checked="" type="checkbox"/>	Branch	BranchCD					<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Batch	Module					<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Batch	DeletedDatabaseRecord	Deleted Batch				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Ledger	DeletedDatabaseRecord	Deleted Ledger				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Batch	BatchNbr					<input checked="" type="checkbox"/>	<input type="checkbox"/>	GL301000 - Journal Tra
<input checked="" type="checkbox"/>	Batch	Status					<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Figure: Records of the Journal Transactions inquiry filtered by the deleted batches

The screenshot shows the Acumatica Journal Transactions inquiry interface. The top navigation bar includes the Acumatica logo, a search bar, and system information: Revision Two Products, Products Wholesale, 11/29/2019 6:26 AM, and user admin admin. The main header displays 'Journal Transactions' with a star icon, 'CUSTOMIZATION', and 'TOOLS'. Below the header are navigation icons and filter controls. The filters include Module: All, Status: All, Ledger: All, Post Period: All, and Deleted Batch: = 'True'. The table below shows two records with columns for Module, Deleted Batch, Deleted Ledger, Batch Number, Status, Ledger, Transaction Date, Post Period, and Description.

Module	Deleted Batch	Deleted Ledger	Batch Number	Status	Ledger	Transaction Date	Post Period	Description
GL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	GL001118	Balanced	ACTUAL	12/31/2018	12-2018	Eliminate Payroll Liabi
GL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	GL001099	Balanced	ACTUAL	7/31/2018	07-2018	

Modifying Inquiry Results: To Include an Additional Output Field

Story

Suppose that you are a technical specialist in your company who is working on simple customizations, including those involving the creation, modification, and use of generic inquiries. An accountant of your company has requested an inquiry that displays data about invoices and memos. You have offered the predefined Invoices and Memos (AR3010PL) generic inquiry form, which has the *AR-Invoices and Memos* inquiry title and the *Invoices and Memos* site map title specified on the *Generic Inquiry* (SM208000) form, but the accountant has requested the following changes to this generic inquiry:

- Add the identifier of the related project (that is, the project related to the listed invoice) to the inquiry results and name the column **Project ID**
- Add the ability to view the details of any project by clicking its identifier in the **Project ID** column
- Add the ability to filter the inquiry results by an identifier of a project
- Place the **Project ID** column after the column that holds the reference numbers of invoices and memos

Figure: The Invoices and Memos with Projects generic inquiry

Invoices and Memos with Projects []

			Type	Reference Nbr.	Project ID	Status	Date	Post Period	Customer
>			Invoice	000055	X	Closed	1/22/2021	01-2021	RETSALE
			Invoice	000056	X	Closed	1/25/2021	01-2021	RETSALE
			Invoice	000058	X	Closed	1/7/2021	01-2021	TOMYUM
			Invoice	000089	TOMYUM12	Open	1/30/2021	01-2021	TOMYUM
			Invoice	000090	TOMYUM12	Open	2/28/2021	02-2021	TOMYUM
			Invoice	000075	TOMYUM11	Open	1/28/2021	01-2021	TOMYUM
			Credit Memo	000081	X	Open	1/24/2021	01-2021	MORNINGCAF
			Invoice	000084	X	Open	1/31/2021	01-2021	MORNINGCAF
			Invoice	000085	X	Open	1/2/2021	01-2021	MORNINGCAF
			Invoice	000086	X	Open	1/14/2021	01-2021	MORNINGCAF
			Invoice	000079	X	Open	1/9/2021	01-2021	MORNINGCAF

Lesson 1.4: Applying Sorting And Grouping

Learning Objectives

In this lesson, you will learn how to do the following:

- By grouping the inquiry output
- By aggregating the inquiry output
- By adding a default sort order for the inquiry output

Figure: Warning about the default sort order

The screenshot displays a software interface with a top navigation bar containing the following tabs: TABLES, RELATIONS, PARAMETERS, CONDITIONS, GROUPING, SORT ORDER, and RESULTS GRID. The 'SORT ORDER' tab is currently selected and highlighted in blue. Below the navigation bar is a toolbar with icons for refresh, add, delete, up, down, and other functions. A yellow warning box with a red border is positioned over the 'SORT ORDER' tab, containing the text: "No sort order was defined. Default sort order will be used. We recommend that you define a custom sort order because the default order may slow down the inquiry." Below the toolbar is a table with columns for 'Active' and 'Data Field'. At the bottom of the interface, a status bar displays the text: "Default Sort Order: ARInvoice.DocType ASC, ARInvoice.RefNbr ASC, BAccountR.AcctCD ASC".

TABLES RELATIONS PARAMETERS CONDITIONS GROUPING **SORT ORDER** RESULTS GRID

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☰ 📎 📄 Active Data Field

No sort order was defined. Default sort order will be used. We recommend that you define a custom sort order because the default order may slow down the inquiry.

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! Default Sort Order: ARInvoice.DocType ASC, ARInvoice.RefNbr ASC, BAccountR.AcctCD ASC

Applying Sorting and Grouping: To Group and Sort Inquiry Data

Story

Suppose that you are a technical specialist in your company who is working on simple customizations, including those involving the creation, modification, and use of generic inquiries. An accountant of your company has requested a generic inquiry that collects data about invoices and memos. You have offered the predefined Invoices and Memos (AR3010PL) generic inquiry form, which has the ARInvoices and Memos inquiry title and the Invoices and Memos site map title specified on the Generic Inquiry (SM208000) form, but the accountant would like the results to list not individual invoices but instead the average invoice amount of each customer, with these rows sorted in descending order by the average invoice amount.

Figure: Generic inquiry with the average invoice amount grouped by customer name

Average Invoice Amount by Customer



Customer Name	Average Amount
> The Equity Group Investors	7,948,661.81
Thai Food Restaurant	1,800.00
Morning Cafe	707.61
FourStar Coffee&Sweets Shop	382.68
HM's Bakery & Cafe	354.23
Candy Cafe	167.87
GoodFood One Restaurant	34.82
Individual Retail Customer	0.00

Lesson 1.5: Using Conditions and Parameters

Learning Objectives

In this lesson, you will learn how to do the following:

- Add a Selection area with parameters so that users of the generic inquiry form can view the most relevant data for their current information needs
- Specify conditions to limit the listed data by default

Figure: Condition to display only open sales orders

Data Field	Condition	From Schema	Value 1
SOOrder.Status	Equals	<input checked="" type="checkbox"/>	Open

Figure: Condition that uses predefined values in the database

Data Field	Condition	From Schema	Value 1	Value 2
SOOrder.Status	Equals	<input checked="" type="checkbox"/>	Open	 

- Open
- On Hold
- Pending Approval
- Rejected
- Credit Hold
- Completed
- Canceled
- Back Order
- Shipping
- Invoiced

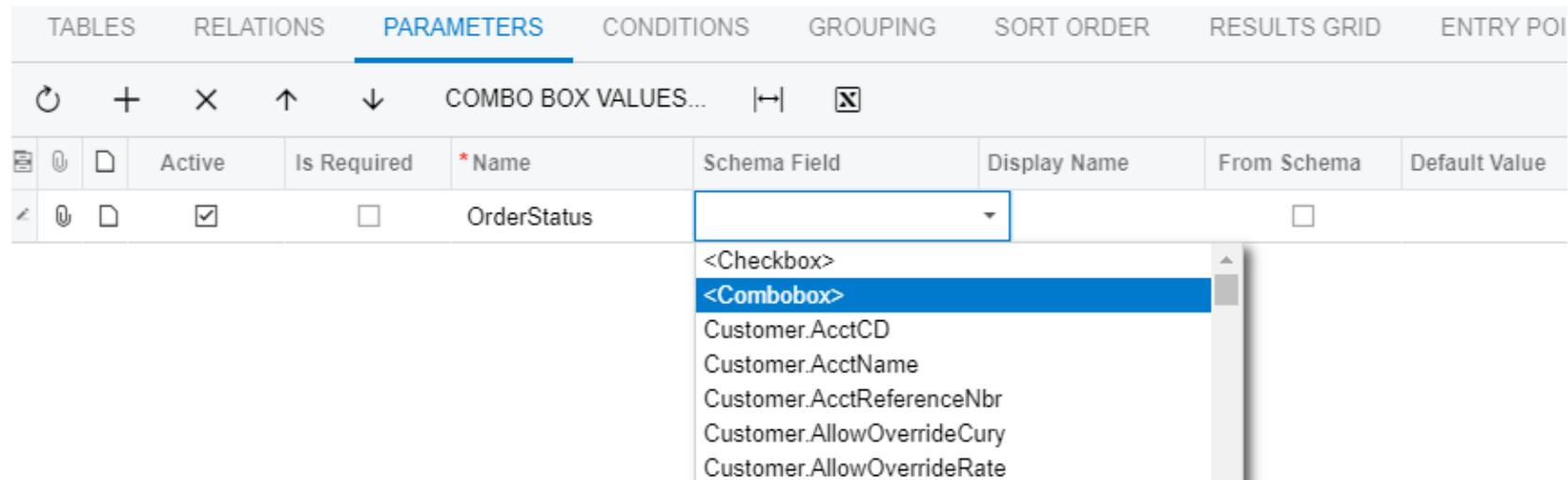
Figure: Condition that uses a value specified by a user

Data Field	Condition	From Schema	Value 1
SOOrder.CuryOrderT...	Is Greater Than or Equal To	<input type="checkbox"/>	2000

Figure: Two conditions joined with the And operator

	Active	Brackets	Data Field	Condition	From Schem	Value 1	Value 2	Brackets	Operator
>	<input checked="" type="checkbox"/>		SOOrder.Status	Equals	<input checked="" type="checkbox"/>	Open			And
	<input checked="" type="checkbox"/>		SOOrder.CuryOrderTotal	Is Greater Than or Equal To	<input type="checkbox"/>	2000			And

Figure: Selection of the control type of the parameter



The screenshot shows a software interface with a 'PARAMETERS' tab selected. A table lists parameters, and a dropdown menu is open for the 'OrderStatus' parameter, showing options for control types and schema fields.

Active	Is Required	* Name	Schema Field	Display Name	From Schema	Default Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OrderStatus	<Combobox>		<input type="checkbox"/>	

Dropdown menu options for 'OrderStatus':

- <Checkbox>
- <Combobox>
- Customer.AcctCD
- Customer.AcctName
- Customer.AcctReferenceNbr
- Customer.AllowOverrideCury
- Customer.AllowOverrideRate

Figure: The OrderStatus parameter defined as a check box

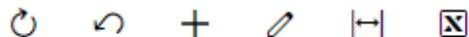
			Active	Is Required	*Name	Schema Field	Display Name	From Schema	Default Value	Column Span	Control Size
>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	OrderStatus	<Checkbox>	Open Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	

Figure: A complex condition corresponding to the OrderStatus parameter

			Active	Brackets	Data Field	Condition	From Schema	Value 1	Value 2	Brackets	Operator
>			<input checked="" type="checkbox"/>	(([OrderStatus]	Equals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		And
			<input checked="" type="checkbox"/>		SOOrder.Status	Equals	<input checked="" type="checkbox"/>	Open)	Or
			<input checked="" type="checkbox"/>		[OrderStatus]	Equals	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>)	And

Figure: Elements arranged in one column in the Selection area of the generic inquiry form

Invoices and Memos ☆



Period From:	01-2019	
Period To:	01-2020	

Drag column header here to configure filter

			Type	Status	Date	Post Period	Customer	Customer Name
>			Credit Memo	Open	1/23/2020	01-2020	COFFEESHOP	FourStar Coffee&Sweets Shop
			Credit Memo	Open	1/24/2020	01-2020	HMBAKERY	HM's Bakery & Cafe
			Credit Memo	Open	1/24/2020	01-2020	MORNINGCAF	Morning Cafe

Figure: Elements arranged in two columns in the Selection area of the generic inquiry form

Invoices and Memos ☆



Period From:

01-2019



Period To:

01-2020



Drag column header here to configure filter

			Type	Status	Date	Post Period	Customer	Customer Name
>			Credit Memo	Open	1/23/2020	01-2020	COFFEESHOP	FourStar Coffee&Sweets Shop
			Credit Memo	Open	1/24/2020	01-2020	HMBAKERY	HM's Bakery & Cafe
			Credit Memo	Open	1/24/2020	01-2020	MORNINGCAF	Morning Cafe

Using Conditions and Parameters: To Add a Date Condition

Story

Suppose that you are a technical specialist in your company who is working on simple customizations, including those involving the creation, modification, and use of generic inquiries. An accountant of your company has requested an inquiry form that displays data about invoices. You have offered the predefined Invoices and Memos (AR3010PL) generic inquiry form, which has the *AR-Invoices and Memos* inquiry title and the *Invoices and Memos* site map title specified on the *Generic Inquiry* (SM208000) form, but the accountant wants the inquiry form to show results limited to a range of financial periods that the accountant wants to analyze. Specifically, the inquiry form should display only invoices (that is, no other document types) posted from the *12-2020* financial period through the *01-2021* financial period (including the starting and ending periods).

Figure: Generic inquiry with date condition

S130 Invoices and Memos

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Type	Reference Nbr.	Status	Date	Post Period	Customer
Invoice	000002	Open	12/5/2020	12-2020	GOODFOOD
Invoice	000065	Closed	1/21/2021	01-2021	COFFEESHOP
Invoice	000066	Open	1/8/2021	01-2021	COFFEESHOP
Invoice	000067	Open	1/15/2021	01-2021	COFFEESHOP
Invoice	000069	Closed	1/5/2021	01-2021	GOODFOOD
Invoice	000070	Closed	1/10/2021	01-2021	HMBAKERY
Invoice	000072	Closed	1/15/2021	01-2021	GOODFOOD
Invoice	000073	Closed	1/23/2021	01-2021	COFFEESHOP
Invoice	000074	Open	1/17/2021	01-2021	HMBAKERY
Invoice	000075	Open	1/28/2021	01-2021	TOMYUM
Invoice	000076	Open	1/16/2021	01-2021	GOODFOOD
Invoice	000077	Open	1/10/2021	01-2021	COFFEESHOP

Using Conditions and Parameters: To Add Period-Range Parameters to the Selection Area

Story

Suppose that you are a technical specialist in your company who is working on simple customizations, including those involving the creation, modification, and use of generic inquiries. An accountant of your company has requested an inquiry form that displays data about invoices and memos. You have offered the predefined Invoices and Memos (AR3010PL) inquiry form, which has the *AR-Invoices and Memos* inquiry title and the *Invoices and Memos* site map title specified on the *Generic Inquiry* (SM208000) form, but the accountant has asked you to design the inquiry form to give users the ability to limit the results to a user-defined range of financial periods—that is, it should be possible for a user to specify the needed range of periods.

Figure: Generic inquiry with parameters that define a range

S130 Invoices and Memos



		Period From:	01-2020	Period To:	02-2021			
			Type	Reference Nbr.	Status	Date	Post Period	Customer
>			Credit Memo	000068	Open	1/23/2021	01-2021	COFFEESHOP
			Credit Memo	000071	Open	1/24/2021	01-2021	HMBAKERY
			Credit Memo	000081	Open	1/24/2021	01-2021	MORNINGCAF
			Invoice	000001	Open	11/28/2020	11-2020	COFFEESHOP
			Invoice	000002	Open	12/5/2020	12-2020	GOODFOOD
			Invoice	000003	Closed	1/28/2021	01-2021	COFFEESHOP
			Invoice	000004	Open	1/29/2021	01-2021	COFFEESHOP
			Invoice	000005	Open	1/25/2021	01-2021	GOODFOOD
			Invoice	000006	Closed	1/29/2021	01-2021	HMBAKERY

Using Conditions and Parameters: To Add a Field Parameter to the Selection Area

Story

Suppose that you are a technical specialist in your company who is working on simple customizations, including those involving the creation, modification, and use of generic inquiries. An accountant of your company has requested an inquiry that displays data about invoices and memos. You have offered the predefined Invoices and Memos (AR3010PL) generic inquiry form, which has the *AR-Invoices and Memos* inquiry title and the *Invoices and Memos* site map title specified on the *Generic Inquiry* (SM208000) form, but the accountant wants to give users the ability to filter the inquiry results by a particular customer—that is, users should be able to select a particular customer in the Selection area of the resulting generic inquiry form and review only that customer’s invoices and memos.

Figure: Generic inquiry with a box that filters data by customer

S130 Invoices and Memos ☐

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Customer: 🔍

		Type	Reference Nbr.	Status	Date	Post Period	Customer
>	🔗	Credit Memo	000068	Open	1/23/2021	01-2021	COFFEESHOP
	🔗	Invoice	000001	Open	11/28/2020	11-2020	COFFEESHOP
	🔗	Invoice	000003	Closed	1/28/2021	01-2021	COFFEESHOP
	🔗	Invoice	000004	Open	1/29/2021	01-2021	COFFEESHOP
	🔗	Invoice	000064	Closed	1/18/2021	01-2021	COFFEESHOP
	🔗	Invoice	000065	Closed	1/21/2021	01-2021	COFFEESHOP

Lesson 1.6: Using Formulas

Learning Objectives

In this lesson, you will learn how to modify an existing generic inquiry by using formulas.

Figure: The Formula Editor components

The screenshot displays the Formula Editor interface. On the left, a metadata panel shows 'Sales Orders' as the Site Map Title and 'SO3010PL' as the Screen ID. Below this is a table with columns for 'Accl', 'Object', 'Qui Filt', and 'Data Field'. The 'orderNbr' field is highlighted with a red box and an edit icon.

The main editor area is divided into three panes:

- Component Type pane:** A tree view showing categories like Operators (Arithmetic, Logical, Comparison, Other) and Functions (Conversion, Text, Math, Date/Time, Other).
- Component Selection pane:** A list of functions including 'IIf', 'IsNull', 'Switch', and 'NullIf'.
- Formula Text pane:** A text area containing the formula 'orderNbr'.

At the bottom right of the editor, there are buttons for 'VALIDATE', 'OK', and 'CANCEL'.

Figure: The Styles component type

The screenshot displays the Acumatica interface with the 'RESULTS GRID' tab selected. A red box highlights the 'Row Style:' dropdown menu. A dialog box is open, showing a tree view of component types. The 'Styles' component type is highlighted with a red box. The dialog also shows a list of style names and a text input field containing a conditional formula.

Row Style: [dropdown]

Operators

- Arithmetic
- Logical
- Comparison
- Other

Functions

- Conversion
- Text
- Math
- Date/Time
- Other

Fields

Styles

'default'
'bad'
'good'
'neutral'
'red'
'red60'
'red40'
'red20'
'red0'
'orange'
'orange60'
'orange40'
'orange20'
'orange0'
'green'
'green60'

=IIf([CRCase.Priority]='H', 'red', 'default')

VALIDATE OK CANCEL

Using Formulas: To Highlight Row with Color

Story

Suppose that you are a technical specialist in your company who is working on simple customizations, including those involving the creation, modification, and use of generic inquiries. An accountant of your company has requested an inquiry form that displays data about invoices and memos. You offered the predefined Invoices and Memos (AR3010PL) generic inquiry form, which has the *AR-Invoices and Memos* inquiry title and the *Invoices and Memos* site map title specified on the *Generic Inquiry* (SM208000) form, but the accountant has asked you to develop a similar generic inquiry form in which you highlight with yellow the rows of documents whose balance exceeds \$1000.

Figure: The inquiry with the highlighted rows

Invoices and Memos ☆

CUSTOMIZATION ▾ TOOLS ▾



Type: All ▾	Status: All ▾	Date: All ▾							
Type	Reference Nbr.	Balance	Status	Date	Post Period	Customer Name			
> Invoice	000055	0.00	Closed	1/22/2020	01-2020	Individual Retail Customer			
Invoice	000056	0.00	Closed	1/25/2020	01-2020	Individual Retail Customer			
Invoice	000058	0.00	Closed	1/7/2020	01-2020	Thai Food Restaurant			
Invoice	000075	400.00	Open	1/28/2020	01-2020	Thai Food Restaurant			
Invoice	000089	1,700.00	Open	1/30/2020	01-2020	Thai Food Restaurant			
Invoice	000090	5,100.00	Open	2/28/2020	02-2020	Thai Food Restaurant			
Invoice	000079	760.00	Open	1/9/2020	01-2020	Morning Cafe			
Invoice	000080	1,050.00	Open	1/16/2020	01-2020	Morning Cafe			
Invoice	000082	653.25	Open	1/30/2020	01-2020	Morning Cafe			
Credit Memo	000081	110.00	Open	1/24/2020	01-2020	Morning Cafe			
Invoice	000084	2,300.00	Open	1/31/2020	01-2020	Morning Cafe			
Invoice	000085	46.00	Open	1/2/2020	01-2020	Morning Cafe			

Using Formulas: To Concatenate Strings

Story

Suppose that you are a technical specialist in your company who is working on simple customizations, including those involving the creation, modification, and use of generic inquiries. The sales team of your company has requested that on the Sales Orders (SO3010PL) generic inquiry form, which has the *SO-SalesOrder* inquiry title and the *Sales Orders* site map title specified on the *Generic Inquiry* (SM208000) form, you add each sales order's description after its number in the **Order Nbr.** column, whose name (caption) should be changed to **Order Number and Description**. The column should contain this information in the following format: <order number>—<order description>.

Figure: Inquiry results with the concatenated strings

Sales Orders ☆

CUSTOMIZATION ▾ TOOLS ▾



Order Type: All ▾		Status: All ▾	Date: All ▾	Customer: All ▾					Filter	Print	More	Search
Order Type	Order number and description	Status	Date	Sched. Shipment	Customer	Customer Name	Ordered Qty.					
> IN	000057--Installation of equipment at the custo...	Invoiced	1/7/2020	1/7/2020	TOMYUM	Thai Food Restaurant	1.00					
IN	000059--Installation of equipment at the custo...	Invoiced	1/9/2020	1/9/2020	HMBAKERY	HM's Bakery & Cafe	1.00					
IN	000061--Installation of equipment at the custo...	Invoiced	1/15/2020	1/15/2020	GOODFOOD	GoodFood One Restaurant	2.00					
IN	000063--Installation of equipment at the custo...	Invoiced	1/18/2020	1/18/2020	COFFEESHOP	FourStar Coffee&Sweets Shop	1.00					
SO	000001--Fresh fruits	Completed	1/29/2020	1/29/2020	COFFEESHOP	FourStar Coffee&Sweets Shop	40.00					
SO	000002--Orange and apple jam, local delivery	Completed	1/25/2020	1/25/2020	GOODFOOD	GoodFood One Restaurant	50.00					
SO	000003--25 large jars of jam	Completed	1/27/2020	1/27/2020	HMBAKERY	HM's Bakery & Cafe	25.00					
SO	000004--Sale of 44 pounds of apples and 80...	Completed	11/2/2019	11/2/2019	HMBAKERY	HM's Bakery & Cafe	124.00					
SO	000005--Sale of 52 pounds of apples and 40...	Completed	11/5/2019	11/5/2019	GOODFOOD	GoodFood One Restaurant	92.00					
SO	000006--Sale of 63 pounds of apples	Completed	11/8/2019	11/8/2019	HMBAKERY	HM's Bakery & Cafe	63.00					
SO	000007--Sale of 75 pounds of oranges	Completed	11/13/2019	11/13/2019	GOODFOOD	GoodFood One Restaurant	75.00					
SO	000008--Sale of 42 pounds of apples and 78...	Completed	11/15/2019	11/15/2019	HMBAKERY	HM's Bakery & Cafe	120.00					
SO	000009--Sale of 63 pounds of apples and 65...	Completed	11/19/2019	11/19/2019	GOODFOOD	GoodFood One Restaurant	128.00					

Day 2

Lesson 1.7: Enabling Navigation

Learning Objectives

In this lesson, you will learn how to specify different navigation options from generic inquiries to make the user's work easier.

Figure: Navigation parameters provided for selection by the system

The screenshot displays a software interface with a 'NAVIGATION' tab selected. On the left, there is a 'Navigation Targets' table. In the center, a 'NAVIGATION PARAMETERS' table is shown with a dropdown menu open, listing various parameters. The 'Correction.DocType' parameter is highlighted in blue in the dropdown menu. The 'NAVIGATION' tab on the right has a sub-tab 'NAVIGATION' and a 'From Schema' checkbox.

TABLES	RELATIONS	PARAMETERS	CONDITIONS
Navigation Targets			
🔄 + ✕			
Acti	* Link	Window Mode	
<input checked="" type="checkbox"/>	AR301000 - Invoice...	Inline	
<input type="checkbox"/>	SO303000 - Invoices	Side P...	

NAVIGATION PARAMETERS	
🔄 + ✕	
* Field	
DocType	Correction.DocType
RefNbr	Correction.RefNbr

- Correction.DiscountedTaxableTotal
- Correction.DiscTaken
- Correction.DiscTot
- Correction.DisplayCuryInitDocBal
- Correction.DocBal
- Correction.DocClass
- Correction.DocDate
- Correction.DocDesc
- Correction.DocDisc
- Correction.DocType**
- Correction.RefNbr

NAVIGATION

From Schema

Figure: Generic inquiry with a side panel

The screenshot displays a software interface for managing invoices. On the left, a table lists various invoices, with the invoice having reference number 000002 highlighted. On the right, a side panel provides detailed information for this specific invoice.

Invoices and Memos ☆

Refresh, Undo, Add, Edit, Filter, Print

Type: All | Status: All | Date: All

Type	Reference Nbr.
Credit Memo	000068
Credit Memo	000071
Credit Memo	000081
Invoice	000001
Invoice	000002
Invoice	000003
Invoice	000004
Invoice	000005
Invoice	000006
Invoice	000007
Invoice	000008
Invoice	000009
Invoice	000010
Invoice	000011

Invoices and Memos
INV, 000002

SAVE & CLOSE | Refresh | Undo | Add | RELEASE | ACTIONS ▾

INQUIRIES ▾ | REPORTS ▾

Type: Invoice
Reference Nbr.: 000002

Status: Open
 Hold

Date: 12/5/2019
Post Period: 12-2019
Customer Ord...
Customer: GOODFOOD - GoodFood One Restaurar ✎
Location: MAIN - Primary Location
Terms: 30D - 30 Days
* Due Date: 1/4/2020 ▾
* Cash Discount... 1/4/2020 ▾
Project/Contract: X - Non-Project Code. ✎
Description: Consulting

Detail Total: 200.00

Enabling Navigation: To Specify Visibility Conditions for a Side Panel

Story

Suppose that you are a technical specialist in your company who is working on simple customizations, including those involving the creation, modification, and use of generic inquiries. A sales representative of your company has requested an inquiry form that displays data about business accounts. You have offered the predefined Business Accounts (CR3030PL) generic inquiry form, which has the *CRBusinessAccounts2018R1* inquiry title and the *Business Accounts* site map title specified on the *Generic Inquiry* (SM208000) form, but the sales representative has asked you to give users the capability to view the following detailed information on the side panel:

- For business accounts of vendor type: Vendor details on the *Vendors* (AP303000) form
- For business accounts of customer type: Customer details on the *Customers* (AR303000) form
- For business accounts of business account type: Business account details on the *Business Accounts* (CR303000) form

Figure: The list of business accounts on the left and the Vendors form in the side panel

The screenshot displays the Acumatica interface. On the left, the 'Business Accounts' list is shown with filters for Type, Class, and Customer Status. The 'All Fruits Mall' account is selected, and its 'Vendor' status is highlighted. On the right, the 'Vendors' form for 'All Fruits Mall' is open, showing details such as Vendor ID (ALLFRUITS), Vendor Status (Active), and various balances. The 'Vendors' tab and the 'Vendor' cell in the table are highlighted with red boxes.

Business Accounts List:

Business Account	Business Account Name	Type
ABAKERY	Allen's Bakery	Customer
ACMEDO	Acme Doors & Glass	Vendor
> ALLFRUITS	All Fruits Mall	Vendor
BLUELINE	Blueline Advertisement	Vendor
CAKEADO	Cakeado Cafe	Customer
CANDYY	Candy Cafe	Customer
COFFEESHOP	FourStar Coffee&Sweets Shop	Customer
COMPULINK	Compulink and Co	Vendor
CONCRESUP	Concrete Supply Co.	Vendor

Vendor Form Details:

- Vendor ID: ALLFRUITS
- Vendor Status: Active
- * Vendor Class: DEFAULT - Default Vendor Class
- Balance: 1,139.10
- Prepayment Balance: 0.00
- Retained Balance: 0.00

Account Information:

- * Account Name: All Fruits Mall
- ACCOUNT ADDRESS: VIEW ON MAP
- Address Line 1: 3340 Deans Lane, Arlington
- Address Line 2:
- City: New York
- State: NY - NEW YORK

Enabling Navigation: To Configure Navigation to an External URI

Story

Suppose that you are a technical specialist in your company who is working on simple customizations, including those involving the creation, modification, and use of generic inquiries. A sales manager of your company has requested an inquiry form that displays a list of shipped packages. This generic inquiry should allow the manager to monitor delivery of the packages by FedEx delivery services company. The sales manager has asked you to make it possible to open a page on the FedEx site with details of the package, based on the tracking number.

Figure: The resulting generic inquiry form with the page associated with the external URI

Packages ☆ CUSTOMIZATION ▾ TOOLS ▾

🔄 ↶ ⏪ 🗒

Drag column header here to configure filter 🔍

📄	📄	Shipment Nbr.	↑	Customer	Shipment Date	Tracking Number	Description
📄	📄	002667		CONSTPLAZA	9/23/2019	1Z84E0R60392401	
📄	📄	002667		CONSTPLAZA	9/23/2019	1Z84E0R60390626	
📄	📄	002698		NAAAPASSOC	9/26/2019	794647358001	
📄	📄	002990		CONSTPLAZA	3/2/2020	794688177023	
📄	📄	002998		ELITEANSW	3/2/2020	Sample Label-(2ab	
📄	📄	003025		BESTYPEIMG	3/10/2020	1Z84E0R60391727	
>	📄	003026		DIGITECHPR	3/10/2020	398305336614	
📄	📄	003028		ETELLIGENT	3/10/2020	390989937340	
📄	📄	003029		ABARTENDE	4/1/2020	391559726144	
📄	📄	003115		AACUSTOMER	4/17/2020	391980351997	
📄	📄	003116		ABCSTUDIOS	5/1/2020	392439202123	
📄	📄	003137		AACUSTOMER	5/1/2020	392441546050	
📄	📄	003172		AACUSTOMER	5/1/2020	1Z84E0R60330669	
📄	📄	003233		AACUSTOMER	7/1/2020	394396146630	
📄	📄	003234		ANTUNSWEST	7/1/2020	394396185557	

Track your package or shipment with FedEx Tracking - Google Chrome

fedex.com/apps/fedextrack/?action=track&trackingnumber=398305336614

FedEx Express Ship Track Manage My Account Customs Tools Support Search Login

TRACK ANOTHER SHIPMENT

398305336614

Estimated delivery date:
Pending

The delivery date may be updated when FedEx receives the package.

LABEL CREATED
Shipment information sent to FedEx

GET STATUS UPDATES

FROM SEATTLE, WA US TO LITTLE FALLS, NJ US

Travel History Shipment Facts Local Scan Time

Wednesday, 08/10/2020 08:23 Shipment information sent to FedEx

Lesson 1.8: Making a Generic Inquiry a Substitute Form

Learning Objectives

In this lesson, you will learn how to substitute an inquiry form for a data entry form.

Figure: The Window Mode setting of Inline

TABLES	RELATIONS	PARAMETERS	CONDITIONS	GROUPING	SORT ORDER	! RESULTS GRID	ENTRY POINT	NAVIGATION
Navigation Targets								
🔄 + ✕								
Active	*Link	Window Mode						
<input checked="" type="checkbox"/>	AR301000 - Invoices and Memos	Inline						
NAVIGATION PARAMETERS								
🔄 + ✕								
	*Field	*Parameter	From Schema					
>	DocType	ARInvoice.DocType	<input type="checkbox"/>					
	RefNbr	ARInvoice.RefNbr	<input type="checkbox"/>					

Making a Generic Inquiry a Substitute Form: To Configure an Inquiry as an Entry Point

Story

Suppose that you are a technical specialist in your company who is working on simple customizations, including those involving the creation, modification, and use of generic inquiries. An accountant of your company has asked you to replace the *Invoices and Memos* (AR301000) form with a generic inquiry. You have offered the predefined *Invoices and Memos* (AR3010PL) generic inquiry form, which has the *ARInvoices and Memos* inquiry title and the *Invoices and Memos* site map title specified on the *Generic Inquiry* (SM208000) form; this form is the substitute form for the *Invoices and Memos* form by default. The accountant said that this inquiry form generally provides the needed functionality, but that the new form should also give users the abilities to view the total tax amount and to create a new document directly on the inquiry form.

In the system preparation for this activity, you will copy the predefined inquiry to leave the original inquiry intact; you will modify its copy as requested.

Making a Generic Inquiry a Substitute Form: To Suspend the Replacement of a Primary Form

Story

Suppose that you are a technical specialist in your company who is working on customizations. Earlier, you configured Acumatica ERP in your company so that the *Invoices and Memos* (AR301000) form is replaced with the predefined *Invoices and Memos* (AR3010PL) generic inquiry form, which has the *ARInvoices and Memos* inquiry title and the *Invoices and Memos* site map title specified on the *Generic Inquiry* (SM208000) form. Now an accountant of your company has asked you to make changes to the generic inquiry that is defined as a substitute form. Before you begin making these changes, you need to suspend the replacement of the primary form, so that the generic inquiry form is not opened while you are in the process of making changes to it.

Lesson 1.9: Transferring an Inquiry

Learning Objectives

In this lesson, you will learn how to export and import a generic inquiry form as an XML file, how to export a generic inquiry form as an RPX file, and how to export inquiry results to an XLS file.

Transferring an Inquiry: To Export and Import an Existing Inquiry as XML File

Story

Suppose that you are a technical specialist in your company who is working on simple customizations. Further suppose that your company uses multitenant configuration, and that the predefined Invoices and Memos (AR3010PL) generic inquiry form was deleted from one tenant by mistake. The accounting department that uses the tenant has asked you to recover the inquiry form. You have decided to transfer the predefined generic inquiry form from one tenant of your company to another.

Lesson 1.10: Creating a Generic Inquiry

Learning Objectives

In this lesson, you will learn how to do the following:

- Prepare to create an inquiry
- Create a simple inquiry with one table
- Publish an inquiry

Creating a Generic Inquiry: To Create an Inquiry Based on One DAC

Story

Suppose that you are a technical specialist in your company who is working on simple customizations, including the creation and modification of generic inquiry forms. An accountant of your company has requested an inquiry form that collects data about invoices and memos. You have offered the predefined Invoices and Memos (AR3010PL) generic inquiry form, which has the *AR-Invoices and Memos* inquiry title and the *Invoices and Memos* site map title specified on the *Generic Inquiry* (SM208000) form, but the accountant instead wants a simpler inquiry that displays columns with the document type, reference number, and the balance of the invoice with that number. The accountant has asked you to leave the default access rights to the inquiry.

Lesson 1.11: Getting Data from Multiple DACs

Learning Objectives

In this lesson, you will learn how to retrieve data from multiple related data access classes.

Figure: Join types

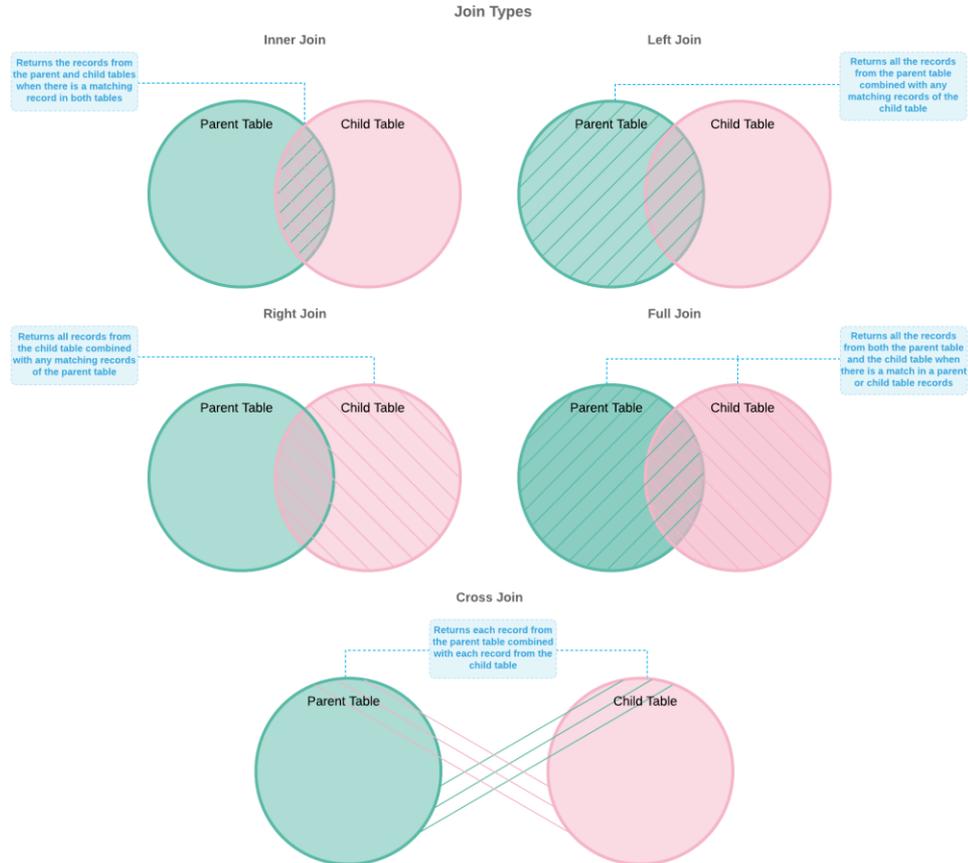


Figure: Exploration of a data access class on the Source Code form

Revision Two HQ Source Code

CUSTOMIZATION HELP ▾

Screen Aspx Business Logic **Data Access** Find in Files Website Sources

Table Name:

1

```
public partial class SOOrder : PX.Data.IBqlTable, PX.Data.EP.IAssign, IFreightBase, ICCAuthorizePayment, ICCapturePayment, IInvoice
{
    #region Selected

    #region OrderType

    #region Behavior

    #region ARDocType

    #region OrderNbr
    public abstract class orderNbr : PX.Data.IBqlField
    {
    }
    protected String OrderNbr;
    [PXDBString(15, IsKey = true, IsUnicode = true, InputMask = ">CCCCCCCCCCCCCCC")]
    [PXDefault()]
    [PXUIField(DisplayName = "Order Nbr.", Visibility = PXUIVisibility.SelectorVisible)]
    }
```

2

3

Figure: Exploration of the Customer class on the Source Code form

Revision Two HQ Source Code

CUSTOMIZATION HELP ▾

Screen Aspx Business Logic **Data Access** Find in Files Website Sources

Table Name:

```
public partial class Customer : BAccount, FX.SM.IIncludable
{
    #region BAccountID
    public new abstract class bAccountID : FX.Data.IBqlField
    {
    }
    #endregion
    #region AcctCD

    #region Type

    #region IsCustomerOrCombined

    #region ParentBAccountID

    #region ConsolidateToParent
```

Figure: Further exploration of the Customer class on the Source Code form

Revision Two HQ Source Code

CUSTOMIZATION HELP ▾

Screen Aspx Business Logic **Data Access** Find in Files Website Sources

Table Name:

```
//***** 1 *****  
public partial class BAccount IBqTable, IAssign, IAttributeSupport, IPXSelectable  
{  
    #region Selected  
    #region BAccountID  
    public abstract class bAccountID : PX.Data.IBqField  
    {  
        2  
        protected Int32? BAccountID;  
        [PXDBIdentity()],  
        [PXUIField(Visible = false, Visibility = PXUIVisibility.Invisible)]  
        public virtual Int32? BAccountID  
        {  
            3  
            get  
            {  
                return this.BAccountID;  
            }  
        }  
    }  
}
```

Figure: Data combined from two tables

SOOrder DAC						
OrderType	OrderNbr	OrderDate	CustomerID	OrderQty	OrderTotal	Status

Customer DAC					
BAccountID	AcctCD	AcctName	Status	CustomerClassID	CreditLimit
19	COFFEESHOP	FourStar	Active	DEFAULT	0
17	GOODFOOD	GoodFood One	Active	DEFAULT	0
16	HMBAKERY	HM's Bakery &	Active	DEFAULT	0
18	LAKECAFE	Lake Cafe	Active	INTLCA	0
48	MORNINGCAF	Morning Cafe	Active	DEFAULT	0
20	RETSALE	Individual Client	Active	DEFAULT	0
21	TOMYUM	Thai Food	Active	DEFAULT	0

Combined Data From Both Tables												
OrderType	OrderNbr	OrderDate	CustomerID	OrderQty	OrderTotal	Status	BAccountID	AcctCD	AcctName	Status	CustomerClassID	CreditLimit
SO	000029	1/29/2019	20	20.00	56.45	Open	20	RETSALE	Individual Client	Active	DEFAULT	0
IN	000063	1/18/2019	19	1.00	4,100.00	Open	19	COFFEESHOP	FourStar	Active	DEFAULT	0
IN	000061	1/15/2019	17	2.00	6,700.00	Invoiced	17	GOODFOOD	GoodFood One	Active	DEFAULT	0
IN	000059	1/9/2019	16	1.00	2,600.00	Open	16	HMBAKERY	HM's Bakery &	Active	DEFAULT	0
IN	000057	1/7/2019	21	1.00	4,100.00	Open	21	TOMYUM	Thai Food	Active	DEFAULT	0
SO	000028	1/24/2019	16	135.00	327.01	Invoiced	16	HMBAKERY	HM's Bakery &	Active	DEFAULT	0
SO	000027	1/21/2019	17	92.00	210.66	Completed	17	GOODFOOD	GoodFood One	Active	DEFAULT	0
SO	000026	1/17/2019	16	57.00	151.76	Completed	16	HMBAKERY	HM's Bakery &	Active	DEFAULT	0
SO	000025	1/14/2019	17	157.00	382.23	Open	17	GOODFOOD	GoodFood One	Active	DEFAULT	0
SO	000024	1/10/2019	16	129.00	316.25	Invoiced	16	HMBAKERY	HM's Bakery &	Active	DEFAULT	0

Getting Data from Multiple DACs: To Create an Inquiry with Two Tables

Story

Suppose that you are a technical specialist in your company who is working on simple customizations, including the creation and modification of generic inquiry forms. A salesperson of your company has requested an inquiry form that displays sales orders for the customer selected by the user. The salesperson would like the inquiry form to list the orders of customers defined in the system. The inquiry form should have a Selection area with the following elements:

- **Date From**
- **Date To**
- **Customer**
- **Order Status**

Getting Data from Multiple DACs: To Create an Inquiry with Two Tables

Story

By default, these boxes should be empty, so that the inquiry results initially include sales orders with any status for all customers and for all the dates that are in the database. If users select values in the boxes, the results are narrowed.

The results grid of the inquiry form will consist of columns that display the following information about each sales order: sales order number, type, status, date, and customer name.

Figure: Selection area with the parameters requested by the salesperson

DB-SOOpenByCustomer



Date From: Order Status:

Date To: Customer:

Drag column header here to configure filter 🔍 📄 ⋮

			Order Nbr.	Order Type	Status	Date	Customer Name
>			000057	IN	Invoiced	1/7/2019	Thai Food Restaurant
			000059	IN	Invoiced	1/9/2019	HM's Bakery & Cafe
			000061	IN	Invoiced	1/15/2019	GoodFood One Restaurant
			000063	IN	Invoiced	1/18/2019	FourStar Coffee&Sweets Shop

Lesson 1.12: Exposing an Inquiry by Using OData

Learning Objectives

In this lesson, you will learn how to expose a generic inquiry form by using OData.

Figure: Example of an advanced chart built with PowerBI

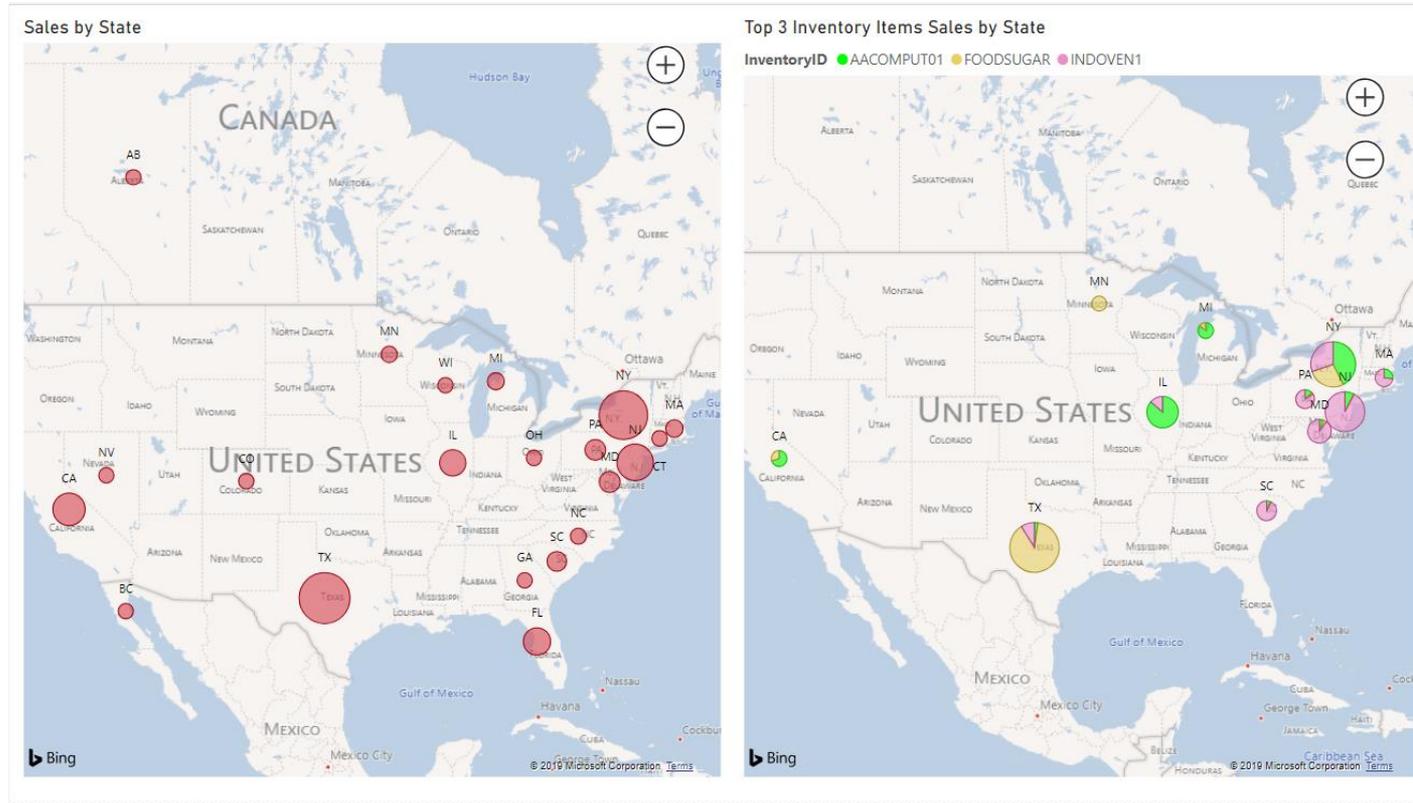


Figure: Inquiries that are exposed via OData

Generic Inquiry ☆

VIEW INQUIRY EXPORT AS REPORT

DB-APBillsAdjusts Arrange Parameters in: 3 columns

Select - Inquiry Title

SELECT

Inquiry Title	Expose via OData	Site Map Title
BI-Customers	<input checked="" type="checkbox"/>	Customers
BI-Dates	<input checked="" type="checkbox"/>	Dates
BI-Employees	<input checked="" type="checkbox"/>	Employees
BI-Opportunities	<input checked="" type="checkbox"/>	Opportunities
CR-CampaignInvoices	<input checked="" type="checkbox"/>	Campaign Invoices
CR-CampaignSalesOrders	<input checked="" type="checkbox"/>	Campaign Sales Orders
DB-CashByPeriod	<input checked="" type="checkbox"/>	DB Cash By Period

TABLES RELATIONS

* Table Name
PX.Objects.AP.AP
PX.Objects.AP.AP
PX.Objects.AP.Ve
PX.Objects.CR.BA

Exposing an Inquiry by Using OData: To Expose Inquiry Results Through OData

Story

Suppose that you are a technical specialist in your company who is working on simple customizations, including the creation and modification of generic inquiry forms. An accountant of your company has asked you to provide access to the predefined Invoices and Memos (AR3010PL) inquiry form, which has the *AR-Invoices and Memos* inquiry title and the *Invoices and Memos* site map title specified on the *Generic Inquiry* (SM208000) form, through Microsoft Excel. The accountant uses Excel for building reports based on the data of this inquiry and would like for the data to always be up to date. Suppose that the access role of the accountant is *Accountant*.

Figure: The level of access rights of the Accountant role for the exposed inquiry

Access Rights by Screen ☆

CUSTOMIZATION TOOLS ▾



- Import/Export Scenarios
- Incoming Payments History
- Inter-Branch Account Mapping
- Invoices
- Invoices and Memos**
- Issues
- Journal Transactions
- Journal Vouchers
- KB Response
- KB Send Email
- Kit Assembly
- Labor Cost Rates
- Landed Cost Codes
- Landed Costs

Role	Guest Role	Description	* Access Rights	Applied to Nested
Accountant	<input type="checkbox"/>	Role for accountants and managers who...	Delete	<input checked="" type="checkbox"/>
AcumaticaSupport	<input type="checkbox"/>	Role for Acumatica Support. Access simi...	Not Set	<input checked="" type="checkbox"/>
Administrator	<input type="checkbox"/>	System Administrator	Revoked	<input checked="" type="checkbox"/>
Anonymous	<input checked="" type="checkbox"/>	Anonymous	View Only	<input checked="" type="checkbox"/>
AP Admin	<input type="checkbox"/>	Access to AP functions and settings	Edit	<input checked="" type="checkbox"/>
AP Clerk	<input type="checkbox"/>	Access to AP functions	Insert	<input checked="" type="checkbox"/>
AP Viewer	<input type="checkbox"/>	Read-only access to AP functions	Delete	<input checked="" type="checkbox"/>
AR Admin	<input type="checkbox"/>	Access to AR functions and settings	Not Set	<input checked="" type="checkbox"/>

Day 3

Lesson 1.13: Accessing the Exposed Inquiry Through OData

Learning Objectives

In this lesson, you will learn how to access an exposed generic inquiry through Microsoft Excel and how to configure cross-origin resource sharing (CORS) to access an exposed inquiry through client-side web applications.

Figure: The list of exposed inquiries accessed through the browser

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```
▼<service xmlns="http://www.w3.org/2007/app" xmlns:atom="http://www.w3.org/2005/Atom"
  xml:base="...">
  ▼<workspace>
    <atom:title type="text">Default</atom:title>
    ▼<collection href="BI-Employees">
      <atom:title type="text">BI-Employees</atom:title>
    </collection>
    ▼<collection href="CR-CampaignSalesOrders">
      <atom:title type="text">CR-CampaignSalesOrders</atom:title>
    </collection>
    ▼<collection href="BI-Dates">
      <atom:title type="text">BI-Dates</atom:title>
    </collection>
    ▼<collection href="BI-Opportunities">
      <atom:title type="text">BI-Opportunities</atom:title>
    </collection>
    ▼<collection href="CR-CampaignInvoices">
      <atom:title type="text">CR-CampaignInvoices</atom:title>
    </collection>
    ▼<collection href="BI-Customers">
      <atom:title type="text">BI-Customers</atom:title>
    </collection>
    ▼<collection href="DB-CashByPeriod">
      <atom:title type="text">DB-CashByPeriod</atom:title>
    </collection>
    ▼<collection href="AR-Invoices%20and%20Memos">
      <atom:title type="text">AR-Invoices and Memos</atom:title>
    </collection>
  </workspace>
</service>
```

Figure: The login names of tenants

Tenant List ☆

↻ INSERT TENANT ↑ MOVE UP ↓ MOVE DOWN ↔					
📄	Currer	Tenant ID	Tenant Name	* Login Name	Status
	<input checked="" type="checkbox"/>	2	sweetlife	SweetLife Fruits & Jams	Active
>	<input type="checkbox"/>	3	calipso	Calipso LLC	Active
	<input type="checkbox"/>	4	athena	Athena LLC	Active

Figure: User menu with the tenant login name

Search... 

Revision Two Products Products Retail 

12/17/2019 6:53 AM 

Tenant List

 INSERT TENANT  MOVE UP  MOVE DOWN 

	Currer	Tenant ID	Tenant Name	*Login Name	Status
>	<input checked="" type="checkbox"/>	2	sweetlife	SweetLife Fruits & Jams	Active
	<input type="checkbox"/>	3	calipso	Calipso LLC	Active
	<input type="checkbox"/>	4	athena	Athena LLC	Active

- SweetLife Fruits & Jams
- Calipso LLC
- Athena LLC

 admin admin
administrator@acumatica.com

[MY PROFILE](#)

 [SIGN OUT](#)

Accessing the Exposed Inquiry Through OData: To Access an Exposed Inquiry in Microsoft Excel

Story

Suppose that you are a technical specialist in your company who is working on simple customizations, including those involving the creation, modification, and use of generic inquiries. An accountant of your company has asked to have access in Excel to the predefined Invoices and Memos (AR3010PL) generic inquiry form, which has the *AR-Invoices and Memos* inquiry title and the *Invoices and Memos* site map title specified on the *Generic Inquiry* (SM208000) form. The accountant uses Excel for building reports based on the data of this generic inquiry and would like for the data to always be up to date.

You have exposed the requested generic inquiry, and now you need to verify that it can be accessed through Excel.

Lesson 1.14: Managing Access Rights to Generic Inquires

Learning Objectives

In this lesson, you will learn how to set up access rights to generic inquiries.

Managing Access Rights to Generic Inquiries: To Define Access Rights to a Generic Inquiry

Story

Suppose that you are a system administrator who manages user access to Acumatica ERP in your company. A financial supervisor of your company has requested that you allow users who are working with the *SweetLife Store* branch to view information on the Expected Receipts (GI000081) inquiry form, which is the predefined generic inquiry form with the *DB-ARexpectedReceipts* inquiry title and the *Expected Receipts* site map title specified on the *Generic Inquiry* (SM208000) form.

For the *DB-ARexpectedReceipts* generic inquiry, you have reviewed the inquiry settings on the **Entry Point** tab of the *Generic Inquiry* form and made sure that the inquiry is not configured as a substitute form for an entry form. This means that you need to specify the level of access rights directly for the form because the inquiry form does not inherit access rights from an entry form.

You have reviewed the roles that are assigned to the employees of the branch and determined that to give these employees the ability to view information on the form, you need to assign the *View Only* level of access rights to the *Branch Retail* role.



Part 2: Managing Advanced Filters, Pivot Tables, and Dashboards

Lesson 2.1: Managing Advanced Filters

Learning Objectives

In this lesson, you will learn how to do the following:

- Create advanced filters
- Share advanced filters
- Modify advanced filters
- Delete advanced filters
- Create personal filters based on shared filters

Figure: Button to access the Filter Settings dialog box

Invoices and Memos ☆ CUSTOMIZATION ▾ TOOLS ▾

🔄 ↶ + ✎ ⏪ ☒

Type: All ▾ Status: All ▾ Date: All ▾

			Type	Reference Nbr.	Status			Date	Post Period	Customer
>	📎	📄	Credit Memo	000081	Open			1/24/2019	01-2019	MORNINGCAF

Filter Settings

Figure: The clauses of the Open Invoices filter

Invoices and Memos ☆

ALL RECORDS MY DOCUMENTS **OPEN INVOICES** CURRENT QUARTER OPEN MEMOS FOR CURR

Filter Settings

Open Invoices Default Shared

<input type="checkbox"/>	Bracket	*Property	*Condition	Value	Value2	Bracket	Operatc
> <input checked="" type="checkbox"/>		Type	Equals	Invoice			And
<input checked="" type="checkbox"/>		Status	Equals	Open			And

NEW SAVE COPY REMOVE APPLY CANCEL

Invoice 000080 Open 1/16/2020 01-2020 MORNINGCAF

Managing Advanced Filters: To Create Advanced Shared Filters

Story

Suppose that you are a technical specialist in your company who is working on simple customizations. An accountant of your company has asked you to add multiple filters (that is, filter tabs) for the Invoices and Memos (AR3010PL) generic inquiry form, which is the predefined generic inquiry with the *AR-Invoices and Memos* inquiry title and the *Invoices and Memos* site map title specified on the *Generic Inquiry* (SM208000) form. These filters should be available to all users that have access to the inquiry.

The following filter tabs need to be added with the noted content:

- **Open Invoices:** Only invoices that have the *Open* status.
- **Current Quarter:** Documents for the current quarter.
- **Previous Quarter:** Documents for the previous quarter.

Figure: The settings of the Open Invoices filter

Filter Settings ✕

Open Invoices ▼ Default Shared

<input type="checkbox"/>	Bracket	*Property	*Condition	Value	Value2	Bracket	Operatc
<input checked="" type="checkbox"/>		Type	Equals	Invoice			And
> <input checked="" type="checkbox"/>		Status	Equals	Open			And

Figure: The settings of the Current Quarter filter

Filter Settings ✕

Current Quarter ▾ Default Shared

↻ | ⇄ | ✎ | + | ✕

	<input type="checkbox"/>	Bracket	*Property	*Condition	Value	Value2	Bracket	Operatc
>	<input checked="" type="checkbox"/>		Date	Is Between	@Quarter...	@Quarter...		And ▾

NEW SAVE COPY REMOVE APPLY CANCEL

Figure: The added filter tabs

Invoices and Memos CUSTOMIZATION ▾ TOOLS ▾

ALL RECORDS **OPEN INVOICES** CURRENT QUARTER PREVIOUS QUARTER

Drag column header here to configure filter   

			Type	Reference Nbr.	Status	Date	Post Period	Customer
>			Invoice	000001	Open	11/28/2020	11-2020	COFFEESHOP
			Invoice	000002	Open	12/5/2020	12-2020	GOODFOOD

Managing Advanced Filters: To Remove an Advanced Filter

Story

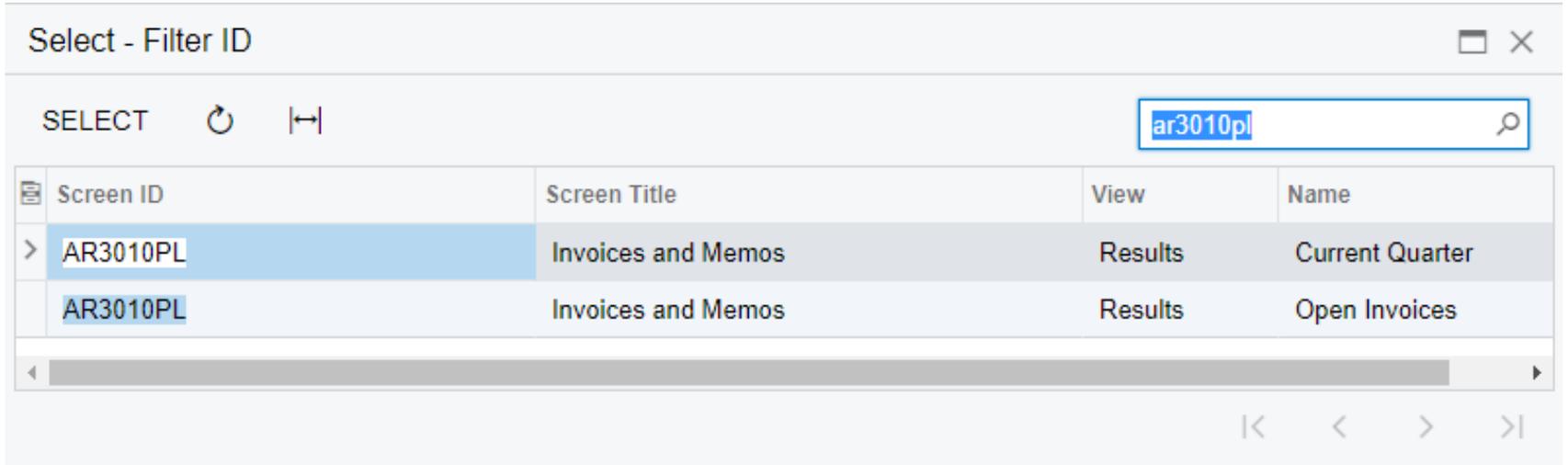
Suppose that you are a technical specialist in your company who is working on simple customizations. One year ago, you configured a set of shared filters for the Invoices and Memos (AR3010PL) generic inquiry form, which is the predefined generic inquiry with the *AR-Invoices and Memos* inquiry title and the *Invoices and Memos* site map title specified on the *Generic Inquiry* (SM208000) form. Further suppose that the accounting department has worked with the set of shared filters for some time and realized that the **Previous Quarter** tab is not needed, so you have been asked to remove the filter tab.

Managing Advanced Filters: To Modify an Advanced Shared Filter

Story

Suppose that you are a technical specialist in your company who is working on simple customizations. A year ago, you configured a set of shared filters for the Invoices and Memos (AR3010PL) generic inquiry form, which is the predefined generic inquiry with the *AR-Invoices and Memos* inquiry title and the *Invoices and Memos* site map title specified on the *Generic Inquiry* (SM208000) form. The accounting department has worked with the set of filters for some time and decided that the **Open Invoices** tab needs to list all open documents, regardless of their type; accordingly, its name should be **Open Documents**.

Figure: Searching for an existing shared filter



The screenshot shows a window titled "Select - Filter ID" with a search bar containing "ar3010pl". Below the search bar is a table with the following data:

Screen ID	Screen Title	View	Name
AR3010PL	Invoices and Memos	Results	Current Quarter
AR3010PL	Invoices and Memos	Results	Open Invoices

Managing Advanced Filters: To Create an Advanced Personal Filter Based on an Advanced Shared Filter

Story

Suppose that you are an accountant in your company. Some time ago, a set of shared filters was configured for the Invoices and Memos (AR3010PL) generic inquiry form, which is the predefined generic inquiry with the *AR-Invoices and Memos* inquiry title and the *Invoices and Memos* site map title specified on the *Generic Inquiry* (SM208000) form.

Further suppose that you are responsible for tracking the open credit memos for the current year. The generic inquiry has no filter you can use to quickly view these documents, so you have decided to create a personal filter and define it as your default tab, to streamline your work.

Lesson 2.2: Managing Pivot Tables

Learning Objectives

In this lesson, you will learn how to do the following:

- Configure a pivot table as a separate form and make it available to other users
- Modify the generic inquiry that is used as the basis for a pivot table while you are configuring the table
- Configure a pivot table as a filter tab on an inquiry form and share it with other users

Figure: Configuration of the layout of a pivot table

Fields	Filters	Columns	Properties																												
	  	  	<table border="1"><tr><th>Field Name</th><td>SOOrder.OrderDate</td></tr><tr><td>Caption</td><td>Date</td></tr><tr><td>Aggregate</td><td>Max</td></tr><tr><td>Sort Order</td><td>Ascending</td></tr><tr><td>Sort By</td><td>Value</td></tr><tr><td>Show Percent</td><td><input type="checkbox"/></td></tr><tr><td>Show Total</td><td><input checked="" type="checkbox"/></td></tr><tr><td>Collapsed</td><td><input type="checkbox"/></td></tr><tr><td>Total Label</td><td></td></tr><tr><td>Show Empty Value as</td><td></td></tr><tr><td>Width</td><td>100</td></tr><tr><td>Format</td><td>yyyy Q</td></tr><tr><td>Date Part</td><td>None</td></tr><tr><td>Round to</td><td>Quarters</td></tr></table>	Field Name	SOOrder.OrderDate	Caption	Date	Aggregate	Max	Sort Order	Ascending	Sort By	Value	Show Percent	<input type="checkbox"/>	Show Total	<input checked="" type="checkbox"/>	Collapsed	<input type="checkbox"/>	Total Label		Show Empty Value as		Width	100	Format	yyyy Q	Date Part	None	Round to	Quarters
Field Name	SOOrder.OrderDate																														
Caption	Date																														
Aggregate	Max																														
Sort Order	Ascending																														
Sort By	Value																														
Show Percent	<input type="checkbox"/>																														
Show Total	<input checked="" type="checkbox"/>																														
Collapsed	<input type="checkbox"/>																														
Total Label																															
Show Empty Value as																															
Width	100																														
Format	yyyy Q																														
Date Part	None																														
Round to	Quarters																														
Behavior	Order Type	Date																													
Branch																															
Branch Name																															
Created By																															
Created On																															
Currency																															
Customer																															
Customer Name																															
Customer Order Nbr.																															
Date																															
Default Salesperson																															
Description																															
Last Modified By																															
	Rows	Values																													
	  	  																													
	Customer	Order Nbr.																													

Figure: The Save as Pivot action on an inquiry form

Sales Orders ☆ CUSTOMIZATION ▾ TOOLS ▾

🔄 ↶ + ✎ ⏪ ☒

ALL RECORDS MY SALES ORDERS OPEN ORDERS

Order Type	Order Nbr.	Status	Date	Sch Shipm	Customer Name
SO	SO005205	Completed	11/21/2019	11/21/20	Plaza Constr
SO	SO005204	Completed	11/6/2019	11/6/20	Plaza Constr

Order Type: All ▾ Status: All ▾ Date: All ▾ Customer: All ▾

🔍 📄 ⋮

- Save As
- Save As Pivot**
- Remove

Figure: The levels of access rights for pivot tables as filter tabs

Access Rights by Screen ☆

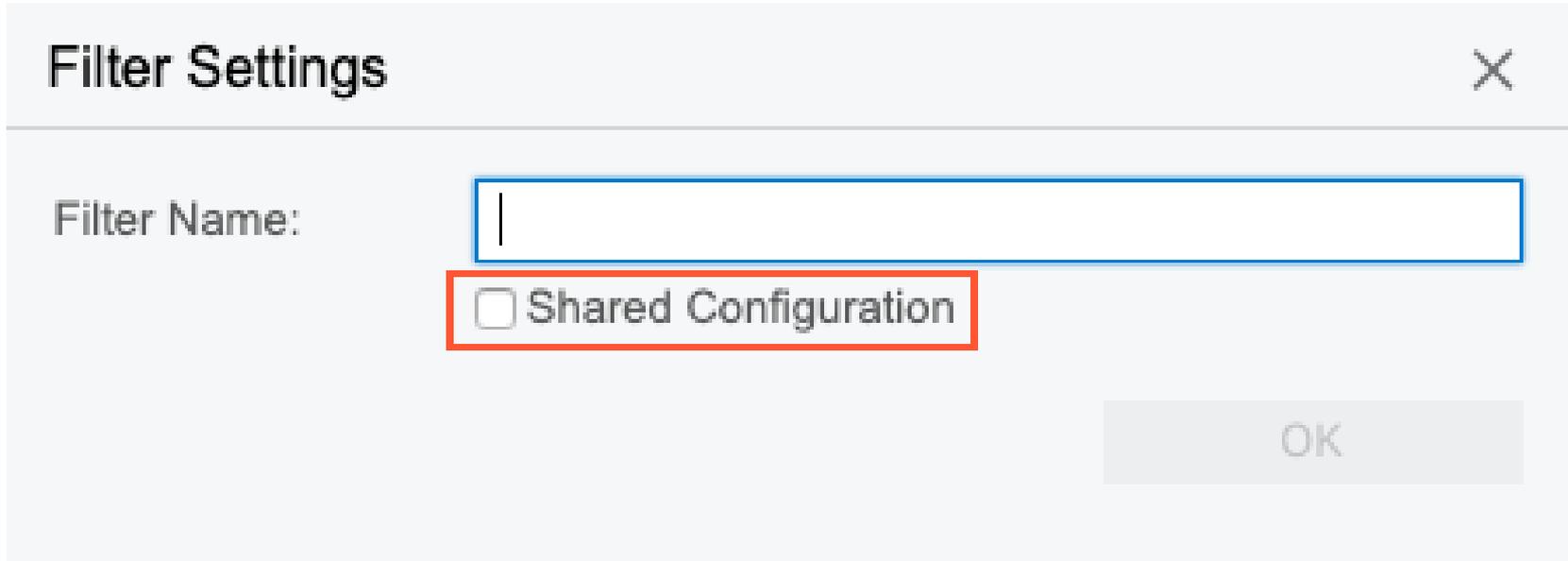
CUSTOMIZATION TOOLS ▾



Role	Guest Role	Description	* Access Rights	Applied to Nested
Accountant	<input type="checkbox"/>	Role for accountants and managers who acce...	Not Set	<input checked="" type="checkbox"/>
AcumaticaSupport	<input type="checkbox"/>	Role for Acumatica Support. Access similar to ...	Not Set	<input checked="" type="checkbox"/>
> Administrator	<input type="checkbox"/>	System Administrator	Not Set	<input checked="" type="checkbox"/>
Anonymous	<input checked="" type="checkbox"/>	Anonymous	Not Set	<input checked="" type="checkbox"/>
AP Admin	<input type="checkbox"/>	Access to AP functions and settings	Not Set	<input checked="" type="checkbox"/>
AP Clerk	<input type="checkbox"/>	Access to AP functions	Not Set	<input checked="" type="checkbox"/>
AP Viewer	<input type="checkbox"/>	Read-only access to AP functions	Not Set	<input checked="" type="checkbox"/>
AR Admin	<input type="checkbox"/>	Access to AR functions and settings	Not Set	<input checked="" type="checkbox"/>
AR Clerk	<input type="checkbox"/>	Access to AR functions	Not Set	<input checked="" type="checkbox"/>
AR Viewer	<input type="checkbox"/>	Read-only access to AR functions	Not Set	<input checked="" type="checkbox"/>
BI	<input type="checkbox"/>	Access to Business Intelligence Views	Not Set	<input checked="" type="checkbox"/>
Branch HeadOffice	<input type="checkbox"/>	Access to the HeadOffice branch	Not Set	<input checked="" type="checkbox"/>
Branch MHead	<input type="checkbox"/>	Access to the Muffins Wholesale branch	Not Set	<input checked="" type="checkbox"/>

Pivot Tables
SM.20.80.20

Figure: The Shared Configuration check box in the Filter Settings dialog box



The image shows a dialog box titled "Filter Settings" with a close button (X) in the top right corner. Below the title bar, there is a label "Filter Name:" followed by a text input field. Below the input field, there is a checkbox labeled "Shared Configuration" which is highlighted with a red rectangular border. At the bottom right of the dialog, there is an "OK" button.

Figure: Edit mode of a pivot table as a filter tab

Sales Orders ☆ CUSTOMIZATION ▾ TOOLS ▾

ALL RECORDS MY SALES ORDERS OPEN ORDERS TOTAL ORDERS BY CUSTOMER >>

Order Type: All ▾ Status: All ▾ [1] [2] [3]

Fields	Rows	Values	Properties
Behavior	Customer	Order Nbr.	Field Name SOOrder.Order
Branch			Caption Order Nbr.
Branch Name			Aggregate Count
Created By			Sort Order None
Created On			Sort By Display Value
Currency			Show Percent <input type="checkbox"/>
Customer			Show Total <input checked="" type="checkbox"/>
Customer Name			Collapsed <input type="checkbox"/>
Customer Order Nbr.			Total Label
Date			Width 100
Default Salesperson			Format
Description			
Last Modified By			

4

Table: User-Defined Format for Numbers

Format Definition	Output Example
0	8972
0.0	8972.2
0.00	8972.23
#,##0.00	8,972.23
\$#,##0.00	\$8,972.23

Managing Pivot Tables: To Create a Pivot Table as a Form

Story

Suppose that you are a technical specialist in your company who is working on simple customizations, including the creation and modification of generic inquiry forms and pivot tables. An accountant of your company has asked you to create a pivot table that aggregates invoice totals by quarter for each customer and displays this customer's percentage of the grand total of all sales to customers in the quarter.

Figure: The Invoice Totals by Customer pivot table

INVOICE TOTALS BY CUSTOMER

🔄 ☒ Inactive Fields

Date	2020 Q4		2021 Q1		2021 Q2		Total	
	Line Total	Line Total	Line Total	Line Total	Line Total	Line Total	Line Total	Line Total
CANDYY			\$155.00	0.00%			\$155.00	0.00%
COFFEESHOP	\$30.00	0.00%	\$10,653.07	0.03%			\$10,683.07	0.03%
EQUGRP					\$39,743,309.06	99.86%	\$39,743,309.06	99.86%
GOODFOOD	\$1,866.10	0.00%	\$8,449.95	0.02%			\$10,316.05	0.03%
HMBAKERY	\$1,887.30	0.00%	\$12,653.75	0.03%			\$14,541.05	0.04%
MORNINGCAF			\$4,900.00	0.01%			\$4,900.00	0.01%
RETSALE	\$1,350.80	0.00%	\$1,300.40	0.00%			\$2,651.20	0.01%
TOMYUM			\$11,300.00	0.03%			\$11,300.00	0.03%
Total	\$5,134.20	0.01%	\$49,412.17	0.12%	\$39,743,309.06	99.86%	\$39,797,855.43	100.00%

Managing Pivot Tables: To Create a Pivot Table on a Filter Tab

Story

Suppose that you are a technical specialist in your company who is working on simple customizations, including the creation and modification of generic inquiry forms and pivot tables. A warehouse manager of your company has asked you to create a pivot table that groups stock items by item class and shows the total number of all items and the number of items in each class. Also, the pivot table should be viewed as a tab of the predefined Stock Items (IN2025PL) inquiry form, which has the *INStockItem* inquiry title and the *Stock Items* site map title specified on the *Generic Inquiry* (SM208000) form.

Figure: A pivot table with the groups collapsed

Stock Items



ALL RECORDS ITEMS BY ITEM CLASS

Type: All	Item Class: All	Item Status: All
Item Class	Total	
ALLOTHER	3	
BLADE	2	
COMPUTERS	3	
CONTAINER	2	
COVER	1	
FOOD	9	
JAM	18	
JCRCFGPRT	17	

JUICER	2
JUICERCFG	2
JUICERLOW	2
JUICERMED	2
MJUICE	9
OTHERPART	3
PACKAGE	6
PRESSET	4
SPICES	2
TEASET	3
Total Positions	90

Expand All



Managing Pivot Tables: To Delete a Pivot Table as a Form

Story

Suppose that you are a technical specialist in your company who is working on simple customizations, including the creation and modification of generic inquiry forms and pivot tables. An accountant of your company has asked you to delete the *Invoice Totals by Customer* pivot table, which you created as a result of performing the *Managing Pivot Tables: To Create a Pivot Table as a Form* activity.

Lesson 2.3: Managing Dashboards

Learning Objectives

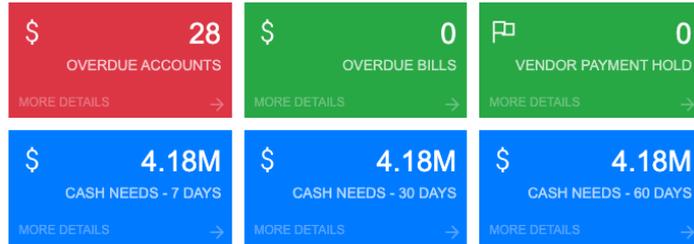
In this lesson, you will learn how to do the following:

- Design a dashboard
- Manage access rights for the viewing, configuration, and personalization of dashboards

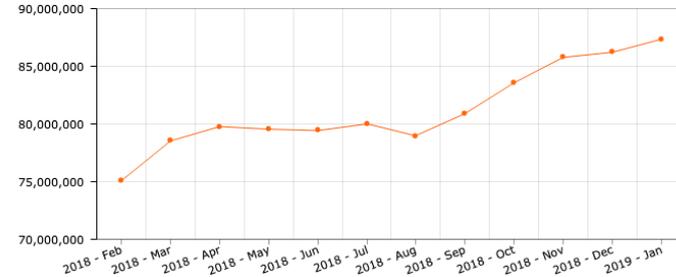
Figure: The AP Clerk predefined dashboard

AP Clerk ☆

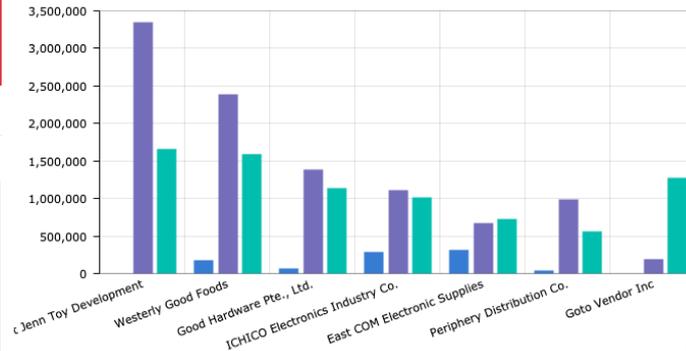
DESIGN TOOLS ▾



CASH POSITION BY MONTH



VENDOR PURCHASING TRENDS



VENDOR TOTAL DUE

Vendor Name	Total
Westerly Good Foods	891,521.00
ICHICO Electronics Industry Co.	589,700.00
East COM Electronic Supplies	510,906.00
McCormick Computers	357,786.00
Good Hardware Pte., Ltd.	304,113.60
Periphery Distribution Co.	267,494.40
Empire BlueCross BlueShield	253,000.00
Global Industrial Tools	230,034.34

Managing Dashboards: To Add a Dashboard

Story

Suppose that you are a technical specialist in your company who is working on simple customizations. A sales manager of your company has requested a dashboard named *Sales Mgr Dashboard*. Every sales manager would like to have the capability to create a personal copy of the dashboard and populate it with widgets on their own. The dashboard should be visible to sales managers only and made available through a link in the **Opportunities** workspace under the **Dashboards** category.

Figure: Sales Mgr Dashboard viewed by a sales manager

The screenshot displays the SweetLife application interface. At the top, a blue navigation bar contains the SweetLife logo, a search bar with the placeholder text "Search...", a refresh icon, the company name "SweetLife Fruits & Jams" with a dropdown arrow, the date and time "10/12/2020 11:56 AM" with a dropdown arrow, a help icon, and the user profile "David Chubb" with a dropdown arrow. Below the navigation bar, a sidebar on the left lists navigation options: "Favorites", "Data Views", "Receivables", and "Opportunities". The main content area shows the "Sales Mgr Dashboard" with a star icon. In the top right of the main area, there are three buttons: "CREATE USER COPY" (highlighted with a red box), "REFRESH ALL", and "TOOLS" with a dropdown arrow.

Figure: Sales Mgr Dashboard viewed by the owner of the dashboard

The screenshot displays the SweetLife dashboard interface. At the top, a blue navigation bar contains the SweetLife logo, a search bar with the placeholder text "Search...", a refresh icon, a dropdown menu for "SweetLife Fruits & Jams SweetLife Head Office and Wh...", a date and time display for "10/12/2020 12:49 PM", a help icon, and a user profile for "Kimberly Gibbs". Below the navigation bar, the main content area shows "Sales Mgr Dashboard" with a star icon. To the right of the dashboard title are the options "REFRESH ALL", "DESIGN", and "TOOLS". On the left side, a sidebar menu is visible with three items: "Favorites", "Data Views", and "Opportunities".

Your feedback is appreciated

<https://www.surveymonkey.com/r/OnlineTraining2021>



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Thank you

Cesar Betances

Benjamin Crisman