What type of research is desired?

- “If you do not know where you are going, then any road will get you there.”
  » Lewis Carroll – Alice in Wonderland

- Once you have established what you are looking for, then you can determine which tool will help you find the information you are seeking.
  - Is it item specific, or customer specific, or both??
  - Is it vendor specific, or item specific, or both??
  - Does the search revolve around a specific transaction?
  - Six degrees within Acclamare??
Researching within Acclamare

Our focus for this session is primarily Sales and Purchase History

- Available methods for research...
  - **Various Lookups (using Advanced and the Grid)**
    - Sales Order, Sales Invoice, Customer Payment, Purchase Order, Item, Customer, Vendor, etc.
    - Remember CTRL F to find...
  - **Dynamic Inquiry**
    - Great information at your finger tips
    - Not a digging into the past type of tool
  - **Acclamare Inquiries**
    - Very powerful...specifically designed for intensive research
    - Customer only..
    - Vendor only...
    - Combination Inquiries...
  - **Reporting**
    - The sky is limit, but really not within Acclamare
• Acclamare Lookups
  – Can be flexible
    • Default search methods can be enhanced to search on several variables. For example
      – Sales Order can lookup by customer name, account number, customer po number, etc.
        » even an item number (not recommended)
  – Limited in scope (not good for the BOTH scenario)
    • Results are only going to show information that is directly relevant to the area you are in...
      – I.E. Sales Invoice...cannot see the payment that took care of the invoice...
    • Cannot see item details, etc.
Researching within Acclamare

• Acclamare Inquires (Dynamic and Static)
  – Dynamic Inquiry
    • 20 inquiries to assist with “on-the-fly” type of questions and inquiries
    • Information is readily available and related to the area you are presently in (context sensitive)
    • Limited results set
      – Results limited to not bog down any processing
  • Sales
    – Item? Or Customer?
  • Purchasing
    – Item? Or Vendor?
Researching within Acclamare

• Acclamare Inquires (Dynamic and Static)
  – Static Inquiries
    • Customer Side Only
      – Customer statistics
        » Rollup sales, profitability, this year versus last year
      – Customer Collection Inquiry
        » Used to review call history to customers about specific invoices
      – Customer History Inquiry
        » Shows transactional accounting activity within the date range selected
        » Can drill into invoices and payments
        » New design more clearly shows related records
Researching within Acclamare

• Acclamare Inquires (Dynamic and Static)
  – Static Inquiries
    • General Ledger Inquiry
      – Not covered in this session
    • Inventory History Inquiry
      – What has been happening with this item?
        » Review of inventory layer activity
Researching within Acclamare

• Acclamare Inquires (Dynamic and Static)
  – Static Inquiries
    • Vendor statistics
      – Shows Purchases and Returns by default
        » Could show Invoice and Credit aggregates, if desired
    • Vendor History Inquiry
      – Shows transactional accounting activities within a date range
      – Can drill into invoices and payments
      – New design more clearly shows related records
• Acclamare Inquires (Dynamic and Static)
  – Static Inquiries
  • Combination Inquiries (the most powerful of the inquiries)
    – Customer Documents
      » 11 Filters to choose from
      » Document Type choices
      » Just Customer and date, or item and date, or both
      » Activity based…not accounting transaction based…
      » Do not forget about the grid….
    – Vendor Document Inquiry
      » 7 Filters to choose from
      » Document Type choices
      » Also NOT accounting transaction based…
      » Do not forget about the grid….
Researching within Acclamare

• Reporting/Data Mining
  – Everything is really reporting 😊
    • “I don’t want a report.”
  – Can be customized exactly to your specs..
    • Search by the filters you want
    • Show the results that you want
• Conclusion
  – First
    • Identify what you are looking for
      – Recent (Dynamic Inquiry)
      – Less Recent
        » Lookup areas or heavy lifting within static inquiry
  – Second
    • Choose your best method