

Researching within Acclamare

Fort Worth, Texas

October 21-22, 2013



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



Researching 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



Researching within Acclamare

- 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



Researching within Acclamare

- 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

