2013-107 - Initiate and Run a Query

Initiate the Query

For this example, the query will be executed from the Material details window. Open the 'Material Details' window and **press <F11>** to activate query mode. For this example, we will be using the BY query function. Once the query details are entered, p**ress <F12>** to run the query. Once the query has been run, the number of items in the query is displayed at the top of the window (as below).

3			Materia	al - <qbf< th=""><th>Browse:</th><th>l of 79></th><th></th><th></th><th></th><th></th><th></th><th></th></qbf<>	Browse:	l of 79>						
Material Code:		Mate	rial Descript	ion:						Rev:	Date Ente	red:
46081904	-	TU.I	1.46081904								28/09/	2018
Details Allocati	on History M	ore Info Pu	irchase Qu	otes Used I	n Invoice	s Financial	Hist Not	es				
Active	✓ Inventor	vitem 🗆 A	ctual Purch	ase in Multin	le 🗆 Du	mmy [Pre Orde	r Emi	. 12	- Opto	o Man	
Fill to Maximu	im 🗸 Auto Ori	der 🗍 J	ob Group Qt	y in Multiple		b Site				✓ Pur	UoM 2	
Aaterial Group:		Bom T:	🗌 Multipl	e Length	Width	Weight:	Surface:	Volume:	UoM 1:	UoM 2:	Thick	Lead
ECOFL - ECO	FLON1	М	985.000	0 1000	15	.000	.000		MM 👻	EA 👻		5
Supplier Coc AUTO256	46081904	TU.F1/	5uj 46081904	oplier Descrip	otion	1	ate Price 28/09/18	.04	2 UOM 2	0.0000 Ye	er. Sup Qu Is	ote
Sub Material G	oup	Inve	ntory			Purchasing	,			IOM Conv	ersion Fact	or —
•		0	n Hand:			Min Ord	er:	.0000	U	oM2 > Uol	M1: 985	.00000
Spacing:	Border:	Bin Lo	cation: 01	A001	•	Max Lev	el:	.0000	- N	Aargin		
Last Bure	hare Drice	Used	In:		-	Safety Lev	el:	.0000		.00	╵─└	
\$.04	06 0%				-	Reorder Lev	el:	.0000		Sell Price		.040
28/09/2018 AI		ocated:	ated: .0000 Stock		Stock Typ	Type:		Account Details				
20,03,201		Dise	000		0000	0.0.0.4		0000		Purch Acc	°	
\$.04	Avg Price:	Plan:	.000		.0000	<u>on Ora</u>	<u>e.</u>	.0000		Sales Acc		
\$.04	06 Std Price:		0 Available	8	.0000	To Ord	er:	.0000		Asset Acc		

Export Query Data

With the query window still open, navigate to the *Home* tab in the Opto ribbon and click on the *Export* icon to open the *Export Data* table. **Select** a 'Definition Name', then click on the *Export* button (circled below) to export the query data into an excel spreadsheet.



Once the query has been exported, the Excel spreadsheet will need to be saved to a location on your PC.

1	lutoSave 🖲		5•∂-:	g - 1	Book	- Excel			Sam Sam		- 0	×
	le Hom	e Insert										
Pas Clip	te 🛷	Calibri B I U - ⊡ + + Font	11 • A A A	= = = = = = = = = = = = = = = = = = =	Gener - \$ - 38 4 5 Num	al = 96 * 8 ber 5	Cond Form Cell S	itional Fo et as Tabl tyles = Styles	ermatting * le *	Enser Delet Form Cells	t - P Editing	~
02	0 7		~ J.									~
.4	А	В	с	D	Е	F	1.0	3	н	1.1	J	
2	46081904	TU.F1.460	01A001	01 ROW A	COLUMN	1						
3	AA-30-A1	AA-30-A1										
4	ACR-03.0-	Acrylic She	et 3.0 mn	n 2400 × 120	0							
5	AD-30-A1	AD-30-A1										
6	ANG-EQ-5	ANGLE EQ	01A018	01 ROW A	COLUMN	18						
7	ANG-EQ-7	ANGLE EQ	01A004	01 ROW A	COLUMN	4						
8	ANG-EQ-7	ANGLE EQ	01A026	01 ROW A	COLUMN	26						
9	AR063X20	63 x 20mm	01A038	01 ROW A	COLUMN	38						
10	CH-230-75	CHANNEL	230x75-PF	FC 9.0 M Ler	ngth							
11	DC-20000	Stock Sales	Item PN	20000								
12	DC-20001	Stock Sales	Item PN	20001								
13	DC-20002	Stock Sales	Item PN	20002								
14	DC-20003	Stock Sales	Item PN	20003								
15	DC-20004	Stock Sales	Item PN	20004								
16	DC-20005	Stock Sales	Item PN	20005								
17	DC-30000	Stock Sales	Item PN	30000								
18	DC-30001	Stock Sale:	NONE	NO LOCAT	ION							
19	DC-30002	Stock Sales	Item PN	30002								
20	DC-30002-	Stock Sales	Item PN	3000555								
21	DC 20002	County College	Iteen Dhi	20002								
		Sheet1	(+)									ъ
Deer								6222 0	CTT) (200			4400/

Examples of a query are as follows:

List Inventory Parts that are required to be manufactured - Open the *Manufacturing* module and then **click** on the 'Parts Details' icon – (*Initiate and execute query as above*), enter **>0** in the 'To Order' field. This will display the first of the parts list required for manufacture with all details displayed. The total number of parts that are within the selected criteria is displayed (e.g. 1 of 50 at the top of the window after the query has been run).

List All Clients or Suppliers - Open the **Core Data** module and **click** on either the 'Clients' or 'Suppliers' icon (*Initiate and execute query as above*), enter **BY** in the 'Client Code' or 'Supplier Code' field. This will display the first of the Clients or Suppliers with all details displayed. The total number of Clients or Suppliers is displayed (e.g. 1 of 250 at the top of the window after the query has been run).

List All Clients without an ABN number - Open the **Core Data** module and **click** on either the 'Clients' (*Initiate and execute query as above*), enter =" or ="" in the 'ABN' field. This query will only display all Clients <u>without</u> ABN numbers.

List All Clients with Export Name - Open the **Core Data** module and **click** on the 'Clients' icon, **click** on the "Client Info" (*Initiate and execute query as above*), enter <>" **or** <>"" in the 'Export Name' field. This query will only display all Clients with an Export Name.

Query Search Option

Symbol	Search Field that	Example	Result				
[] followed by data criteria	Containing data	[]ABC	Finds all items in the selected field				
			containing ABC				
] followed by data criteria	Starting with]ABC	Finds all items in the selected field				
			starting with ABC				
[followed by data criteria	Ending with	[ABC	Finds all items in the selected field				
			ending with ABC				
; separates data criteria	Matching either data	ABC;200MM	Finds all items which contains either ABC				
			or 200MM				
> followed by data criteria	Data greater than This could be in relation to measurement, dates, or a						
< followed by data criteria	Data less than	ss than number sequence.					
<>"or <>""	Data field not empty		Find all selected fields that have data.				
="or =""	Data field empty		Finds all selected fields that are empty in				
			the selected records.				
>= ???&<=???	All data equal to or greater than the first data and less than or equal to the second						
	data.						
Ву	All data in alpha or numeric order						
By-dsnd	All data in descending order						
By1	All data sorted by this field first						
By2	All data sorted by this field second						

Function Keys

Keys	Action				
<f11></f11>	Initialise a Query Report				
<f12></f12>	Execute a Query by Report				
<ctrl-f></ctrl-f>	Go to first record of the Query				
<ctrl-p></ctrl-p>	Go to previous record of Query				
<ctrl-s></ctrl-s>	Close current				
<ctrl-n></ctrl-n>	Go to Next record in the Query				
<ctrl-l></ctrl-l>	Go to Last record in the Query				
Sort Query by	selected fields – Ascending or Descending				
Run Ad-Hoc Report icon or <ctrl+r></ctrl+r> can then generate a required report on query criteria.					
Excel icon or Ctrl+R> enables the user to export the data to a Microsoft Excel Spreadsheet.					
Word icon or <ctrl+e></ctrl+e> enables the user to export the data to a Microsoft Word Document.					