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Document Query



Overview The Document Query uses the historical records kept in the system from all inbound and outbound transactions. It provides a centralized and interactive way to search and query your historical EDI processing with your ACCPAC system.



This feature is only available if the **Document Tracking** feature in the Company Profile has been turned on.

The Document Query program can be accessed through a number of menus in the system. Each of the Inbound and the Outbound processing menus have a menu choice for the Document Query program. You can also access it from the drop down Query menu at the top of the EDI-PAC/2000 main form.

The Document Query program responds immediately to any changes in selection criteria. In this way it is “interactive” with your choices and you get positive feedback each time a choice is made. At times the displayed results may appear “odd” to you. Typically, when the dates are checked or the infrequently used transaction type re-selected the information may be more informative.

Document Query

There are two main ways that historical documents can be searched:



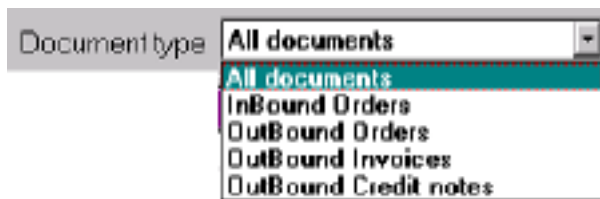
Document

The document query allows you to search through transactions regardless of who the trading partner was. This is useful when you are looking at all the documents or a specific type for a particular time period.

Trading Partner

The trading partner query provides a filtered look at the transaction history by specific trading partner (customer). This can be beneficial when you are for a specific transaction for a particular customer. It makes it easy to check various time periods for the customers activity.

Once you have chosen how you want to look at the data, you can then choose to search for a specific transaction or document type.



Click on the drop down box in the **Document Type** field to display the document types you can filter on. "All Documents" does not do any filtering of information. All types are shown.

Document Query Screen

The screenshot shows a window titled "Document Tracking Query". It has a "Query by:" section with two radio buttons: "Documents" (unselected) and "Trading partners" (selected). To the right, there are two dropdown menus: "T/Partner" with the value "1105 Bargain Mart - Oakland" and "Ship-to" which is empty. Below these is a "Document type" dropdown menu set to "All documents".

WQ	Doc	Doc Number	DocDate	T/P No.	Ship To	Exp Date	S
IR	ORD	D0001472	6/14/10	1105		6/14/10	
DB	INV	IN00001379	8/17/99	1105	EAST	8/17/99	
DB	ORD	100	5/25/99	1105	EAST	5/25/99	
DB	ORD	R1005	6/07/99	1105	EAST	6/07/99	

At the bottom of the window, there are month tabs: Jul, Aug, Sep, Oct, Nov, Dec, Jan, Feb, Mar, Apr, May, Jun. A "Show entire year" checkbox is unchecked. The "Year" field is set to "1999". There are "Print" and "Exit" buttons at the bottom right.

When you have sent some of your basic criteria, you can then click on the “month” tabs at the bottom of the screen to look at the activity in specific months.

Changing Criteria

At any time search and filter criteria can be changed on the form. Immediately the program responds to any changes “interactively” as options are made. Queries according to the criteria set are applied against the database.

Searching by Trading Partner

If you set the **Query By** button to “**Trading Partner**” the trading partner dialogue box is activated.

This is a close-up of the trading partner search fields. It shows a "T/Partner" dropdown menu and a "Ship-to" dropdown menu, both with empty text boxes and dropdown arrows.

When you are searching by trading partner, you can click on the trading partner drop down box to display all of your EDI customers. Immediately the display responds to display only transactions for the particular trading partner.

You can also make a further selection by customer ship-to code. In this search, only transactions with that ship-to address are displayed.

Search by Date

At any time during your query you can click on the “month” tabs to change the period of transactions that are displayed. You can further look through “years” for the same time period.

Printing your Query

Once you have the query criteria set, you can print the information out. Click on the **Print** button on the form to print the contents of the current query Window.