

# Course Agenda

## Inquiry Designer

**Sage 300 CRE | Instructor: Keith Andrews**

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### Course Overview

This 2-hour online class is designed to provide you with a solid foundation in the inquiry designing skills, concepts, and terminology regarding Sage 300 CRE Inquiry Designer. We will discuss data structure, how to get the information you want on your inquiries, drill down on summary information to view supporting detail, and finally generate the information in excel in a clean format.

### Building Excel Based Inquiry Designs in Sage 300 CRE

#### Agenda

- Create customized inquiries for anyone who relies on Sage 300 CRE data
- Drill down on summary information to view supporting detail (i.e. drill down on an invoice to see associated distributions and payments)
- Create your own formulas or choose from a list of standard ones
- Place conditions on inquiries to display only the information you want to see
- Add additional columns of information while viewing inquiries for easy access to all the information you need to see
- View inquiry information through form and table formats
- Add fields while in form view in order to include even more data
- Access the other tables in your Sage 300 CRE database (security permitting)
- Generate Inquiry design in Excel