priority™

Data Retrieval and Queries Script

Clip Link:
http://www.priority-software.com/eshbel.com/Movie_Search/Data_Retrieval_&_Queries_Clip.htm
Note: Yellow highlights indicate action instructions.

*HEADINGS ARE NOT MEANT TO BE READ ALOUD.

BEFORE YOU BEGIN:

SEVERAL CUSTOMERS SHOULD BE RECORDED FOR TODAY'S DATE AND ASSIGNED TO ME. A FEW CUSTOMERS SHOULD HAVE NAMES ENDING IN *LTD. AND/OR BE LINKED TO THE 0? BRANCH.

ONE OR TWO OPEN ORDERS THAT WERE PLACED THIS MONTH SHOULD BE RECORDED FOR CUSTOMERS WHOSE NAME CONTAINS THE STRING LLC, A FINAL PRICE = 1,000-10,000 AND NO OVERALL DISCOUNT%.

ORDERS SHOULD HAVE AT LEAST ONE OR TWO (OPEN) ITEMS.

Data Retrieval Techniques (00:00-02:04)
In this video we will demonstrate how to retrieve data in ***Priority*** so that you can view and revise selected records.
Priority provides a variety of techniques for retrieving selected data in the system's forms.
Let's begin by opening the **Customers** form located in the **CRM**, **Customers** menu item.
We're going to use this form to demonstrate some basic data retrieval operations, which can be used in any form throughout the system, including all root forms[HIGHLIGHT THE Customers FORM] and any of their sub-level forms[SCROLL DOWN AND HIGHLIGHT FIRST THE Customer Contacts FORM AND THEN ITS SUB-LEVEL FORM, Address].
If you have this information handy, the quickest way to access a specific record is to enter the appropriate value in the form's key column, in this case, the customer **Number**[ENTER THE NUMBER OF ONE OF THE CUSTOMERS OPENED TODAY]. When you're done, press **Enter**.
However, you may not know the exact number of the customer you want to retrieve, offhand. In that case, you can try to locate the desired customer number by opening a Search list from this column. To locate and select the desired customer, click the arrow next to this column[POINT] or press **F6** to open a Search list. In this example, we want to locate the customer John Allan. So first we need to click the criterion tab until the **By Name** criterion appears. Now we can begin entering a few letters of the customer's name[TYPE "allan"] to narrow down the list of values from which to choose. Since the **Ignore Case** option is flagged at the bottom of the Search list[POINT], it doesn't matter whether we enter upper-case or lower-case letters. Once you have located the desired customer, press **Enter** to copy the relevant customer number into the form column, then press **Enter** a second time to retrieve the corresponding customer record.
However, you may wish to retrieve one or more customer records based on some other criterion or combination of criteria. You can define any combination of **query conditions** by

which to retrieve the desired data by switching from Data Entry mode into Query mode. We're going to do so now by pressing **F11**.

Designating Query Conditions (02:05-03:33)

A relatively simple type of query is one in which you seek to retrieve all records that contain **a particular** value in one or more specific columns. To do so, simply press **F11** and specify the desired value in the relevant column, either manually, by Choose list or by Search list[RECORD TODAY'S DATE IN THE Date COLUMN & CHOOSE AN Assigned user]. Press **Enter** to run the query.

Another type of query is one in which you seek to retrieve all records whose values in a given column **satisfy a certain condition**. For this you can use the asterisk (*) symbol, known as a **wildcard**, in conjunction with a string of characters. For example, you can retrieve all customers whose names end with Ltd[SEARCH FOR NAME *Ltd.]. Whereas the asterisk replaces an entire string of characters, the question mark is a wildcard that replaces a single character[IN Details TAB, SEARCH BY Branch "0?"]. Note that this kind of query condition is always case sensitive.

Following execution of the query, the retrieved records will be displayed on screen and you will move automatically from Query mode back to Data Entry mode. Since we are currently viewing the form in Full-Record Display Mode, we only see the first of the retrieved records. Use the **PgDn** key or the vertical scroll bar to view the rest of the retrieved records.

Searching Within Retrieved Records (03:34-04:25)

Now that you have retrieved a number of records, you may want to perform a search in order to locate a specific one. A search is carried out in a particular column; we're going to use the **Date Opened** column[MOVE TO Date opened COLUMN]. As with many other routine operations performed in ***Priority***, you can open a search window using either keyboard shortcuts, the commands in the top menu bar or a shortcut in the Tool Tray. Let's press **Ctrl+F3**, specify the desired value or pattern in the Search window[TODAY'S DATE] and press **Enter**. Once a search pattern has been defined, you can use the **Search Again** feature to repeat the search utilizing the last defined search pattern, so you can simply keep pressing **F3** to move through any customer records that were opened today.

Sorting Retrieved Records (04:26-05:00)

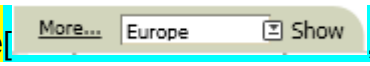
You can also press **F4** to toggle to Multi-Record Display Mode, and then sort the retrieved records. Clicking once on the title of any column gives you an ascending sort; click again and the data will be sorted in descending order. A small triangle appears below the column title[POINT], indicating how values are sorted. These sort conditions are temporary and will return to the default determined by the designer of the form each time you execute a new query.

Refreshing Retrieved Records (05:01-05:27)

While working with the retrieved records, you may at some point want to refresh the display. This is particularly useful in cases where more than one user may be working in the same

form, in parallel, and you want to ensure that you are viewing the most up-to-date records. In such a case, open the **Run** menu from the Top Bar and select **Refresh**, or simply press **Ctrl+M** to refresh the displayed records.

The Query Generator (05:28-07:57)

The Query Generator is a powerful tool that allows you to selectively retrieve a specific group of records in the form in which you are working. You can also store and reuse queries that are designed in the Query Generator. Let's move to the **Sales Orders** form, to better demonstrate the use of this tool[MENU PATH: Sales > Orders]. Next, we'll click **More**[

, LOCATED AT THE UPPER LEFT CORNER OF THE SCREEN] to open the Query Generator and design a new query.

Use the operators in the second column, in conjunction with data in the **Value** column, to define the query conditions for a given field. This value can also contain wildcards as needed. So, for example, we can search for orders that were placed this month[Date >= 'start of this month'], by customers whose name contains the string LLC[Cust Name = *LLC*]. If you use an equal sign (**=**) without specifying a value, you will retrieve all records that have no value in that column[Overall Discount% =].

You can also use the **Value** and **To Value** columns to define the query conditions as a closed range of values[Final Price = 1,000-10,000].

To retrieve all records that have been flagged in a particular check box, flag the box that appears in the **Value** column of the appropriate line[FLAG Closed]. To retrieve all open orders, that is, records that have **not** been flagged in this check box, select an equal sign (**=**) in the operator column (**without** flagging the box).

The **Sort** column is where you can **prioritize** your query results on multiple levels, in either **ascending** or **descending** order. For example, you can list the retrieved orders by the date they were placed[SPECIFY A 1 NEXT TO AN UPWARD-POINTING ARROW IN THE Date LINE], and determine that any orders that were placed on the same day should be listed in order of the highest final price[SPECIFY A 2 NEXT TO A DOWNWARD-POINTING ARROW IN THE Final Price LINE].

You can also flag the **Ignore Case** option at the bottom of the generator so that the search is not case-sensitive.

Click **OK** to run the query.

Saving Queries for Repeated Use (07:58-10:47)

If the query results did not include all of the desired orders, you can re-open the Query Generator and add to the data retrieved in the previous query, without overwriting it. Let's click the **Prev** button to call up the last query and we'll remove some of the criteria we defined last time[Cust Name = *]. The generator automatically saves the last five queries, so if you wanted to reuse the next-to-last query, you'd simply click **Prev** again, or press **Shift+**↑. Once you have finished specifying the desired conditions, click **Add** to display any results that meet these new criteria *in addition* to the records that you've already retrieved.

In addition, you can save up to nineteen queries of your own choosing for easy retrieval. Let's save each of the last two queries we ran[RETRIEVE USING Prev]. For each query, we'll record a name in the **Queries** field at the bottom of the generator and click **Save**. To call up the query, click on the drop-down button to the right of the **Queries** field and choose the saved query.

If you want to modify an existing query using the same name, simply save the revised query under the relevant name[APPROVE THE MESSAGE REQUESTING PERMISSION TO OVERWRITE THE OLD QUERY]. Alternatively, use the Query Design tool[CLICK Design] to rename or delete queries that you do not need.

Use the up and down arrows to the right of the Query Design screen to arrange the saved queries in the desired order[MOVE QUERY 1 TO POSITION NUMBER 2]. The number assigned to each of the first nine saved queries can later be used to run them directly from the form itself[EXIT THE QUERY GENERATOR]. Simply press **Ctrl+** plus the number assigned to the query in the **Query Design** screen[PRESS Ctrl+2]. You can also run any saved query from the form itself by choosing the desired query from the drop-down list at the top of the screen.

Occasionally, after retrieving a number of records, you may prefer to view only some of them. Press **F7** to "hide" one or more records so that they are not displayed on the screen. To view hidden records again, simply retrieve them anew. In this case, we'll simply click **Show** to rerun the selected query.

The Default Query (10:48-11:40)

You can choose one query that you always use with a particular form to be the default query. Let's return to the Query Generator and set one of our saved queries as the default[CLICK THE Design BUTTON, RIGHT-CLICK THE QUERY IN QUESTION AND SELECT Set as Default Query].

The number to the left of the query now appears in red, indicating that it has been set as the default[POINT, THEN CLICK OK AND EXIT THE QUERY GENERATOR]. You can run the default query in any form at any time by pressing **Ctrl+0** or by clicking the  button on the form's Tool Tray. The next time you enter the **Sales Orders** form, the default query will be executed automatically[DEMONSTRATE].

Default Queries in a Sub-level Form (11:41-13:50)

Let's move into a sub-level form, **Order Items**. As you can see, the queries that were saved for use in the upper-level form are no longer available now that we've moved to a different form[OPEN CHOOSE LIST AT TOP OF SCREEN]. Rather, all queries are saved for the particular form in which they were defined. Moreover, you'll notice that records appeared in this form as soon as we entered it. That's because a default query has been built into the system for this and most other sub-level forms in the system. In this case, the default query retrieves all order items that are linked to whatever order currently appears in the upper-level form.

What happens if the default query in a particular sub-level form retrieves hundreds, or even thousands of records? Performing such a large query may have a significant impact on performance. In such a case, you may want to tailor the default query for this form to retrieve only a sub-set of these records. Define and save the desired query as usual[Closed = "" AND Assigned to = me] and assign it any of the first nine positions within the list of saved queries. Next, click **Design** to access the Query Design screen, right-click the desired query and set it as the default. Let's exit the Query Generator, move back up to the **Sales Orders** form and re-enter the sub-level form. As you can see, the default query executes automatically.
If you later decide you want to delete this query, you can simply repeat the process and remove the check mark that appears by the words **Set as Default Query** and, finally, click **OK**.

Problems Retrieving Records (13:51-14:50)
You may sometimes find yourself in a situation in which you are trying to retrieve a record[RECORD TODAY'S Date AND PRESS Enter], yet fail to do so. The reason for this is generally because you forgot to enter Query mode; remember, when you first enter a form, you are by default in Data Entry mode. First, undo your actions[PRESS F7]. Then simply move to Query mode[PRESS F11], enter the data again and execute the query.
Similarly, keep in mind that you cannot add or update any data in the form while you are in Query mode[PRESS F11]. If you have entered Query mode and want to return to Data Entry mode without retrieving any data, simply press **Enter**.
This concludes our explanation of data retrieval in ***Priority*** forms.