xkzero

GETX SEARCH FOR SAGE 100: THE GUIDE

How to find anything–and get tasks done *fast*–in Sage 100

Today you can master Sage 100 like never before. Literally. *Today*.

The mastery of our business tools can differentiate us from our competitors. Sage 100 is no different. But wielding the power of Sage 100 like a pro can take years. Until GetX. In fact, no other add-on to Sage 100 will impact a business more universally–and more quickly–than GetX. Anyone that interacts with Sage 100 will get more done–faster AND more accurately. In short, GetX puts Sage 100 at your mercy, to bend at will to create personalized processes that save tons of time and make working in Sage 100, well, *fun*.

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APPROACH	What is it about GetX search that makes everyone more productive in Sage 100? "Find" out here.
METHODS	A reference of the powerful ways you search Sage 100 for that exact thing you are looking for.
EXAMPLES	Some samples of how to solve common problems, as found on the Sage 100 Idea site.
INSTALLING	How to install and uninstall a free trial of GetX Universal Search for Sage 100.

APPROACH

Even with all the powerful ways that GetX can scour Sage 100, the real value is not in what you can find–but what you can do with the results once they are found.

1. Search

2. Done

Approach to GetX
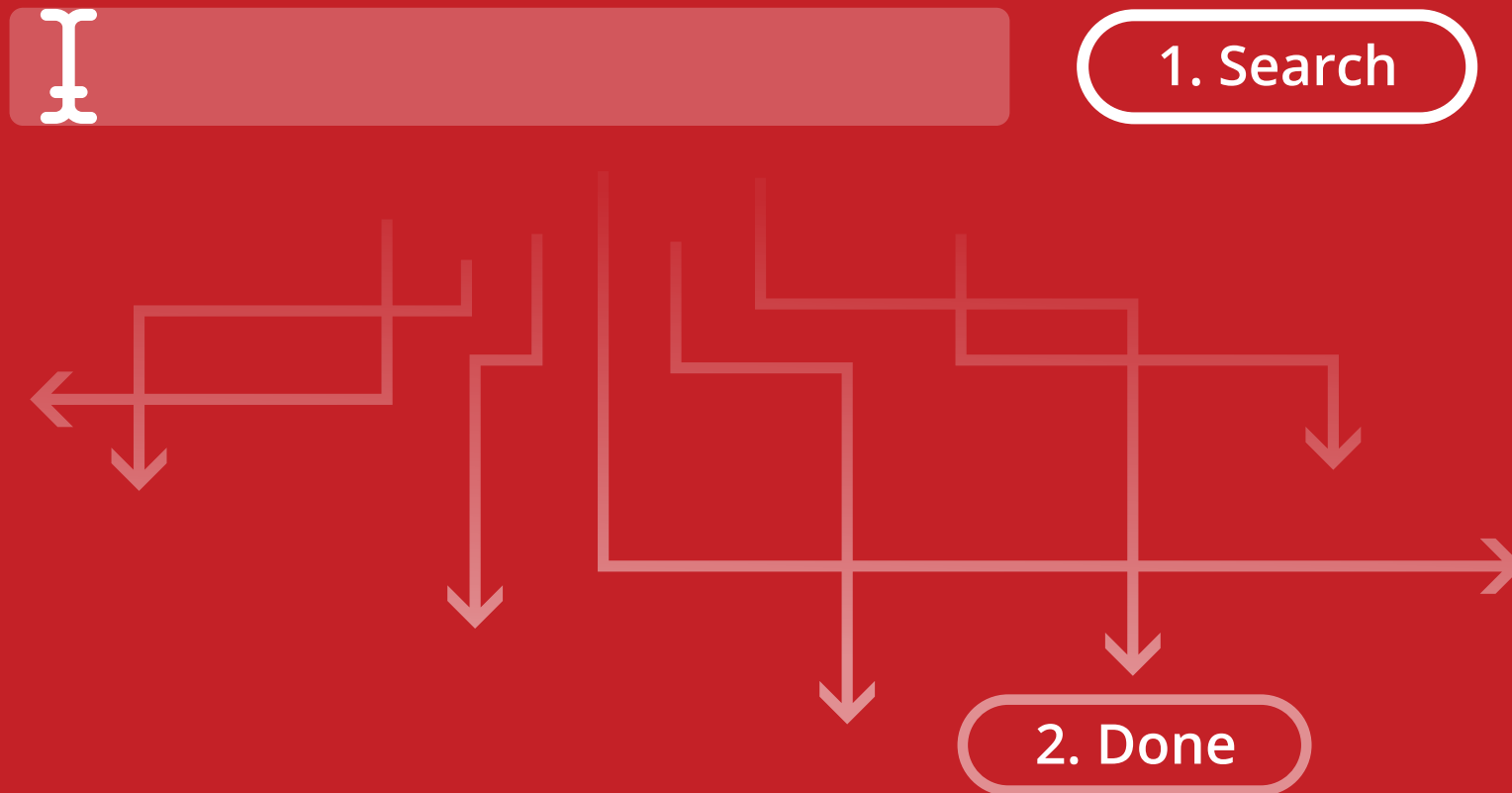
"Universal Search for Sage 100" is the shortest way to describe GetX. But search is only but the start. It's how it allows you to finish anything that makes it so empowering.
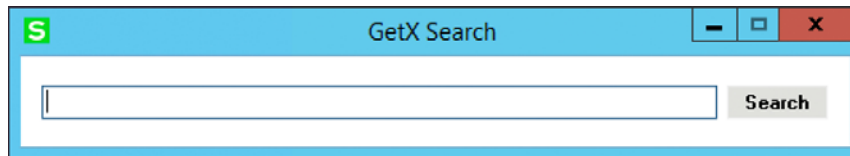

START HERE

Search for simple word or amount, or use powerful search options to dig deep.

FINISH HERE

Left pane: The search results are organized by company, module, then tab/field. Just click a segment to show only those reults.

Right pane: The results of your search (and selected segment) are listed here. Each result shows you where your search data was found and **offers links to related Sage 100 locations and tasks**.
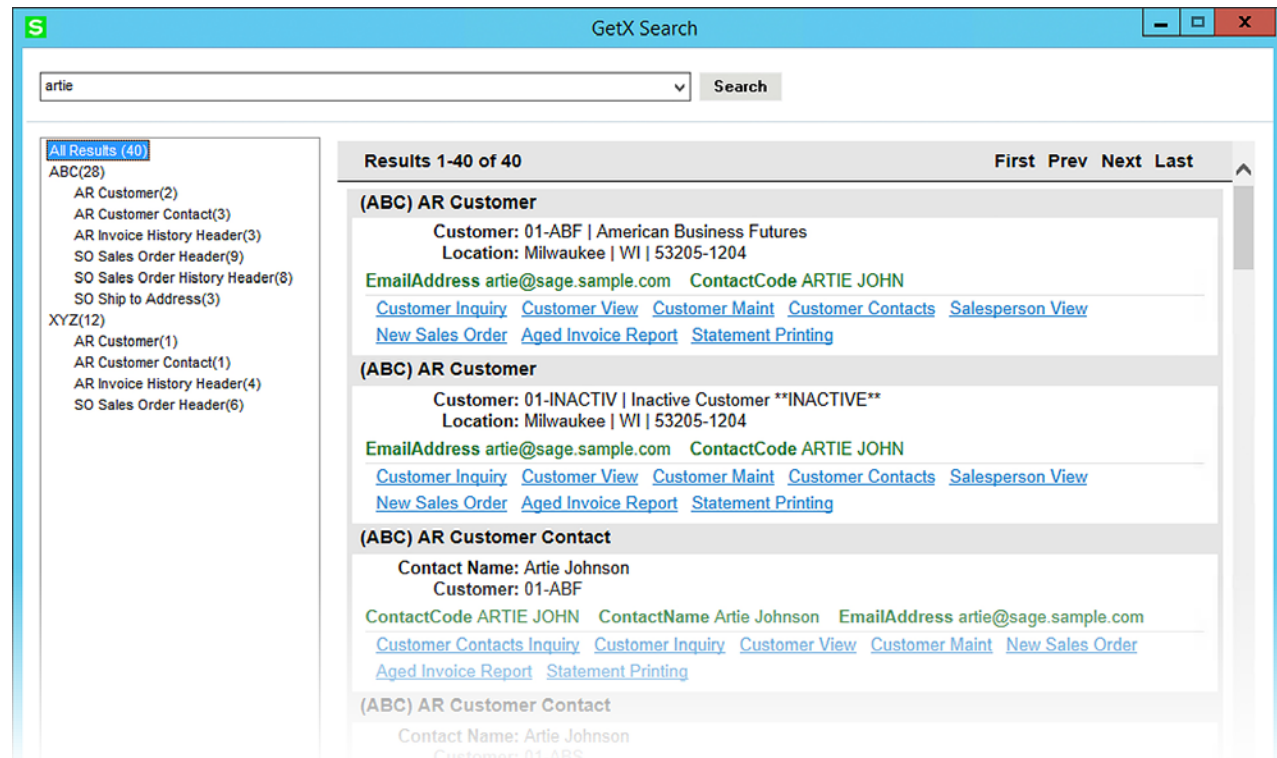
METHODS

Tips to mastering the powerful search options of GetX search for Sage 100. The (Sage 100) world is your oyster.

There are numerous ways to search your Sage 100 ERP system with GetX by xkzero. Here, we illustrate simple methods to use words or numbers to find the information you need.

This quick guide shows you how to efficiently search using a keyword, phrase, wildcard, proximity or range, and how to conduct a search when you know a telephone number, numeric value, percentage or date.

Note that if you've installed the Sage-supplied ABC company demo data you can try these searches yourself.

SEARCH METHODS

Keyword

In the entity search field, simply type a word, just like this:

> invoice

Since GetX is case insensitive, a search for invoice or Invoice or INVOICE returns the same results.

Exact Phrase

To search for an exact phrase, surround the words with quotation marks, like this:

"ruby lane"

Omit Word

To omit results containing a certain word, add the minus sign (-) OR the word "not" before the undesired word. For example, here are two ways to search for an entity that contains "new" but not "york:"

new -york

or

new NOT york

Search for Required Words

To require that a word is included in the result, type a plus sign (+) or the word "and" before it.

Here are two ways to search for an entity that contains the city or state "New York," you will need to ask GetX to find both "new" AND "york":

+new +york

 or

new AND york

Search for Any Words

If you would like to search for any entity that contains any of a list of words, but not necessarily grouped together, such as "american" or "business" or "futures," search like this:

american business futures

or

american OR business OR futures

Wildcard

Wildcards are symbols in a search field that represent one or more occurrences of any character. You might use wildcards when unsure of the spelling of a word (e.g., Smith or Smythe) or do not know if the word was initially abbreviated (e.g., corp or corporation).

To perform a multiple character wildcard search use the "*" symbol.

Here's how to search for any word that starts with "corp" in the entity, and may contain 0 or multiple characters:

corp*

This will return entities with words such as these: "Corporation" and "CORP" and "corps"

To perform a single character wildcard search use the "?" symbol.

If you only want to see words with 0 or 1 additional letters, search like this:

corp?

This will return entities with words such as these: "Corp" and "Corps" ,
but will not return entities with longer words like these: "Corporation" or "corpus"

Wildcards can be used in the middle of words as well.

To request results in which one of the middle letters is unknown, search like this:

te?t

This method will return results such as these: "test" and "text" and "tent"

To request results in which one or more of the middle letters is unknown, search like this:

te*t

This method will return results such as these: "test" and "text" "tent" and "tenant"

Leading Wildcards

A leading wildcard allows for the search of a word that starts with any value but ends with the specified value.

<u>Search for any word that ends with "land" like this:</u>

> *land

> This will return results such as these: "Woodland" and "Oakland" and "Roland" and just "Land"

IMPORTANT NOTE: Using the leading wildcard method can cause the search engine to slow down. Therefore we have added an option in the GetX system settings to turn on/off leading wildcards.

Proximity Matching

GetX finds words that are a within a specific distance away from each other within the entity.

<u>Search for "invoices" and "american" within 10 words from each other like this</u>:

> "invoices american"~10

> Notes: Exact matches are proximity zero (~0).
> Word transpositions (american invoices OR invoices american) are proximity 1 (~1).

Range Queries

Range Queries let you match entities that contain values between the lower and upper bounds specified. This is especially useful when searching by date range.

Search for an entity that has a date between 1/1/2002 and 1/1/2003 like this:

[20020101 TO 20030101]

GetX INDEXING RULES

GetX takes an entire record from each entity and builds a single text data element. It then breaks up that element up into words—separating text when it encounters a space or any character that is not a letter or number. It indexes those words for each record of an entity.

Some data types are formatted in specific ways to enable standardized searches, as such:

Date Fields

Dates are formatted as YYYYMMDD.

EXAMPLE: Oct 27, 1983 is formatted like this: 19831027

Numeric Fields

Numerics are retained as absolute values (no negative sign) in the format in which they are defined in the Sage data tables. For example, most Amount fields in Sage are formatted to 2 decimal places. A FreightAmt in AR_ InvoiceHeader that equals 97.6 will be indexed as 97.60.

Percentage fields and some cost fields are usually formatted to 3 decimal places. So, if the CommissionRate in AR_ InvoiceHeader equals 8.5 it will be indexed as 8.500

Wildcards can be used to search numeric fields.

<u>To search for 100.20 it may be best to search for this</u>:

100.2*

This will return for values such as 100.20 and -100.25. It will also find any text word that starts with "100.2" such as a memo that mentions the local radio station "100.2FM."

Telephone Fields

Telephone fields are stripped of all special characters such as these: + – ( ) [ ]

So, <u>when looking for an entity by phone number</u>, do not use special characters. Instead, <u>search like this</u>:

4145554787

This will result in returns for "(414) 555-4787" as well as "414.555.4787."

EXAMPLES

Tips to mastering the powerful search options of GetX search for Sage 100. The (Sage 100) world is your oyster.

TRY THEM! Try these example searches by installing GetX and Sage-supplied ABC, EEC, and XYZ company demo data.

Example GetX searches (Solving Sage 100 Idea Site requests)

Sage 100 Idea Site Request	SOLUTION: GetX search for...	in Company...	and find/select action...
Enter customer PO# then directly access sales	ts0420	ABC	access SO
Ability to access contacts without first selecting	artie, or "artie johnson"	XYZ	Aged Invoice Report
Ability to access ship-to's without first selecting	racine	ABC	Start new sales order
(faster access to) Item Vendor Maintenance	cont	ABC	Item Vendor Maint.
Ad hoc search of UDF fields			
Search by email address in customer masterfile	mary@sage.sample.com	ABC	Customer/Statement Printing
Speed up inquiries			
Search within a search (multiple criteria at once)	"lamp" "walnut" then lamp AND walnut then lamp NOT walnut	ABC	Item Inquiry
Google search engine ("like GetX!")	any demo data		
Serial number search field	jan90 and 100035	ABC	AR Lot Serial Trans History

Example GetX searches (Solving Sage 100 Idea Site requests)

Sage 100 Idea Site Request	SOLUTION: GetX search for...	in Company...	and find/select action...
Vendor / customer – expand search criteria	concrete	EEC	AP Vendor
Search invoice history by Job Number	remodel	EEC	AP Invoice History Inquiry
Global search across all master records	american	all!	anything!
Item code searches when only Alias Item No. is	two	ABC	IM Alias Item
Search by check number in AP	1666	ABC	AP Check History Header
Enhance search by inventory item description field	""24.5""	ABC	IM Item
Provide ability to search extended description	desktop and special	XYZ	IM Ext Description
Ability to find Vendor Alias item number	p150586	MFG	Im Item Vendor
Quick look ups (default to F2) for inventory, customers, etc.			
Lookup an item on a particular sales order quickly when you know the item number and the sales order number	hon* and 105	ABC	Sales order entry

Example GetX searches (Solving Sage 100 Idea Site requests)

Sage 100 Idea Site Request	SOLUTION: GetX search for...	in Company...	and find/select action...
Alias look up – find the part number based solely	10486DX4 or 4230-58BRD	XYZ	Item Alias
Look up customer information by customer	ABF or Maverick	ABC	AR Customer
AR – look up Invoices paid based on the customer check number	10255	ABC	AR Inv History Inquiry
Search customer memos	payment	ABC	ABF memo to AR staff
Search customer by zip code	92554	EEC	FARWEST (EEC)
Search customer by phone number	(213) 455-4545	XYZ	AR Customer
Search inventory by other fields	black	ABC	Item - Category 1
Ability to search for inventory by country (as user			
Search for comments in sales order	"damaged goods"	ABC	SO Sales Order Detail
Identify duplicates (customer name, vendor name,	american (or american~)	all!	AR Customer

Example GetX searches (Solving Sage 100 Idea Site requests)

Sage 100 Idea Site Request	SOLUTION: GetX search for...	in Company...	and find/select action...
Search for Memo Attachment	us351*	Not part of standard demo data. You'll have to create an attachment.	AP Vendor Vendor
Inventory "smart part search"; auto-fill is based on	24.5 AND 20	ABC	IM Item
Search large item database with easier 'contains'	config*	XYZ	IM Ext Description
Search invoice history by ship-to address	"5411 Kendrick"	ABC	AR Inv History Header
Option to search item by number, description or long description	configuration	XYZ	IM Item Master
Search GL Transactions by dollar amount	908.84	ABC	GL Account Transactions View
Search by Vendor and Customer Alias part number	two	ABC	SO Sales Order Detail
Search for customer name allowing for spelling errors	mavric~	ABC	New Sales Order
Search for Date Range of Check Numbers	202001* to 202005*	ABC	AP Check History Header

Example GetX searches (Solving Sage 100 Idea Site requests)

Sage 100 Idea Site Request	SOLUTION: GetX search for...	in Company...	and find/select action...
Ability to search by item code sales order history	ARS-9401	ABC	SO Sales Order History Detail
Search for Jobs	saddle	EEC	JC Job
Search for items containing quote marks ("")	24.5" (type as ""24.5"")	ABC	IM Item
Ability to look up an item by image	lamp	ABC	PO Receipt History Detail
Lookup Items and Misc. Items from one location	gadget	ABC	IM Misc Item

INSTALLING GETX

Installing and setting up GetX search for Sage 100. Also contains information on uninstalling GetX. Like you'd ever want to uninstall it.

Installing and setting up GetX Search for Sage 100 ERP is a very straightforward process and can be performed successfully by anyone familiar with typical Sage 100 ERP installation procedures. Allow just 15-20 minutes to complete all the steps.

Prerequisites to installing GetX:

1. Get administrative access to the server where Sage 100 ERP is installed.
2. Obtain a network login and password and a Sage 100 ERP login and password. You need both of these logins to set up the indexing engine post-install. Make sure they have passwords that do not change frequently. Also, both logins should have administrative rights.
3. Ensure your server meets the requirements of Microsoft .NET 2.0 or higher. Most servers current with MS service updates will already satisfy this need.

Installation Steps

To successfully install GetX Search for Sage 100:

1. Download the appropriate version from www.xkzero.com/erp-search. The installer will work with Sage 100c, including Standard, Advanced and Premium versions.
2. Install GetX like any other Sage 100 ERP module. (This must be performed on the Sage 100 ERP server.)
3. Activate the GetX Module in Company Maintenance for each company for which you wish to perform data searches.

4. Visit Role Maintenance and make appropriate settings for user role groups.

5. Visit **Modules/GetX /Setup/System Settings**. Make any changes to the defaults, as appropriate, and click on "Register" to obtain your initial 30-day free license.

6. Visit **Modules/GetX/Setup/GetX Setup Wizard**. Make any changes to the defaults as appropriate.

7. Browse the ..\MAS90\GX folder and run **GetXIndexService.exe**. Right-click and select "Run as administrator." Enter valid network login and password.

8. Set the timer to indicate how frequently you wish to index data. Run the initial indexing.

Note: The initial indexing may take some time, potentially an hour or more, depending on the size of your database and the caliber of your server. **Subsequent indexing will take place silently, behind the scenes** by setting up the timer during the installation process.

At the conclusion of your trial period, if you choose to proceed without GetX for Sage 100 ERP, you can uninstall the application. After the uninstall steps, we have added some helpful notes, so please read all the way down.

To uninstall GetX:

1. <u>Remove the Scheduled Task for indexing</u>. NOTE: If you have never set up GetX for indexing, you can skip this step.

You can remove "indexing as a Scheduled Task" either through the Sage 100 server, or via Windows.

Sage 100 Server Option:
Log onto the Sage 100 server.
- Navigate to the GX folder where MAS90 is installed: …\MAS90\GX\Service\
- Right-click 'GetXIndexingService.exe' and 'Run As Administrator'
- Under 'Windows Service' set the Schedule to 'Never' and hit 'OK'

Windows Option:
- From Windows 'START' go to Control Panel > Administrative Tools > Tasks Scheduler
- Delete 'GetXIndexingService'

2. Once the service is removed, you can <u>remove the module like any other Sage 100 module</u>, following these steps:

    a) From Sage Desktop go to Library Master > Company Maintenance

    b) Select a company where GetX is Activated and hit 'Remove.' Check the box for GetX and then hit 'Proceed.' Repeat for all companies for which GetX is activated.

NOTE: The 'Remove' button is disabled for the company for which you are currently logged in. You may need to switch your user to another company.

    c) Go to Library Master > Setup > System Configuration. Hit the 'Uninstall' button on upper right. Select 'G/X' and hit 'Delete.'

To clean up any remaining files, remove the ...\MAS90\GX folder.

*** NOTE: On occasion, Sage 100 will not allow you to delete the company data for GetX even though you are not in that particular company. If this is the case, as a precaution, you can manually delete the data. To do so, we recommend renaming the folder ...\MAS90\MAS_ZZZ\GXZZZ (where ZZZ is the 3 letter company code). Then, if everything goes well you can delete it.

Once this is done you should be able to Uninstall the module from System Configuration.

Contact us at info@xkzero.com or 847.416.2009 with any questions!

"If you want to look up something really quickly...use GetX"

"My only complaint is that my Sage partner didn't tell me about GetX sooner!"

"[GetX] puts every bit of your information at your fingertips in an easy search format. The fun begins when you start figuring out how many ways GetX will save you money!"

"I feel like a kid on Christmas morning. This solves everything I struggled with in Sage 100"

"I don't know what I'd do without GetX at this point"

"I would describe this as a game changer"

"This is a killer app"

◆ **xkzero**

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The list goes on.

Contact us today or visit xkzero.com/erp-search