Unit4 ERP WEB Enquiries

Guide for Users
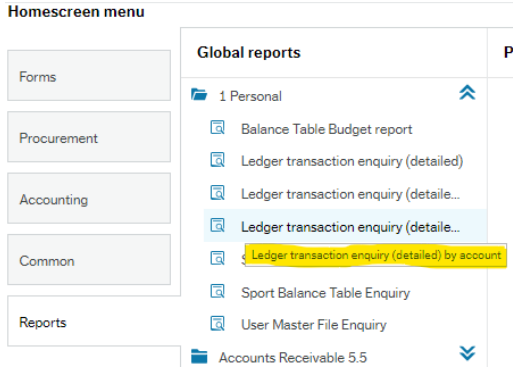
Cyngor **Sir Gâr**
**Carmarthenshire**
County Council

Enquiries

Depending on what kind of menu access you have on the system, you may have access to certain enquiries with in certain menus, but most reports can be found in the Reports menu

You may expand the folders by clicking on the double arrow next to the name of the folder.

To see the full name of an enquiry, hover the curser over the enquiry and a box will come up with the full name on.
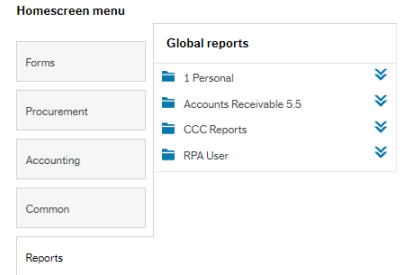
Please feel free to search the wide range of ready-made reports that are in these folders. You cannot overwrite these.

Each enquiry will have different selection criteria and search results. Open an enquiry to have a look at it.

Use the selection criteria to search.
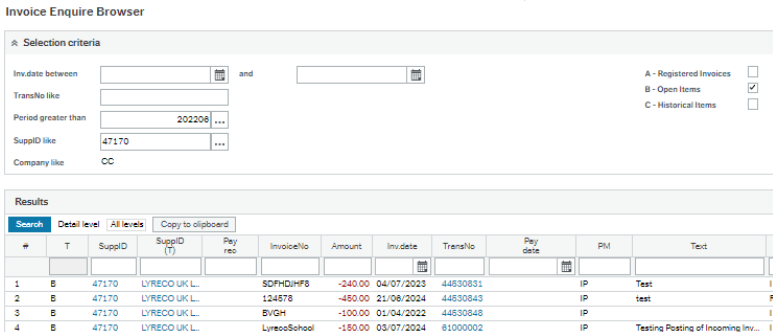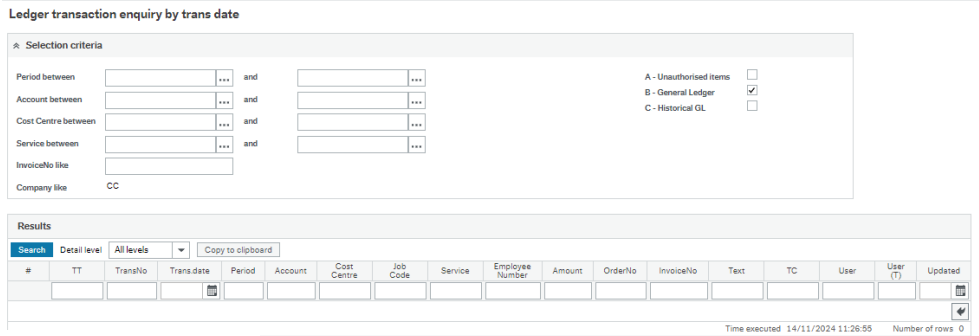
When you run your search, any blue highlighted field can be clicked on and looked at further.

When in the drill down menu, if there have been any documents attached to the transaction, you may access them using the paperclip icon in the right-hand corner of the menu.
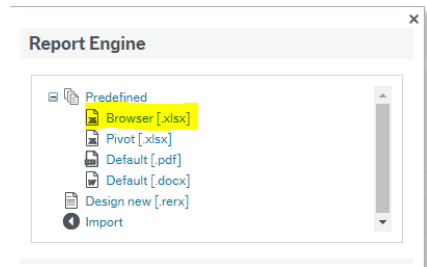

If you find a suitable enquiry and one you would like to use often, you may favourite it.

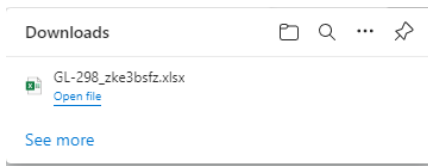While you have the enquiry open, press the heart icon to favourite it.

This will then appear in your favourites on your main menu
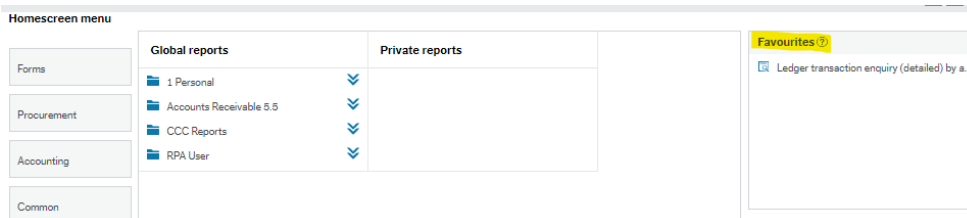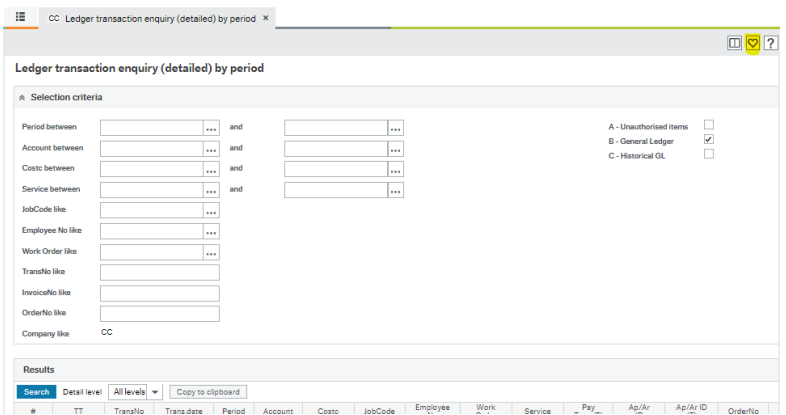
To export the results of report, press the export button and select Browser(.xlsx)


When the file is ready a download screen will appear, to open the file , click on **Open File** (this will be in blue an underlined)

General Ledger Enquiries

To search the ledger, the best place to find an appropriate report is in *CCC Reports – A. General Reports - General Ledger Enquiries*. There are many ledger transaction enquiries, to see the full name of them, hover your curser over the enquiry and a box will come up with the full name on.

Each ledger transaction enquiry will have different selection criteria and search results. Open an enquiry to look at this.
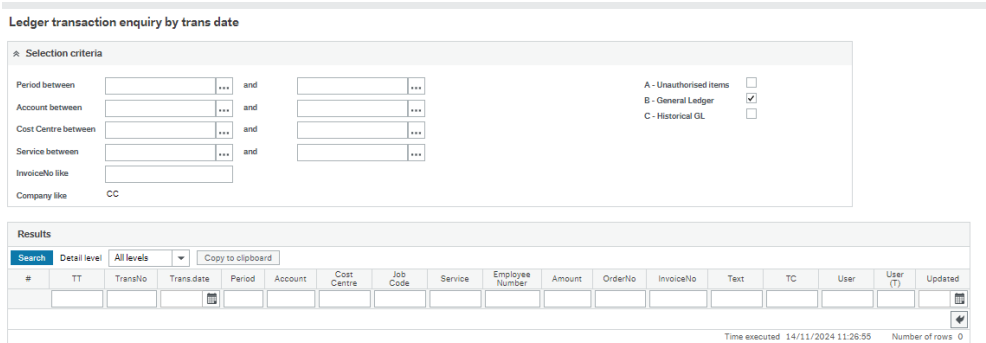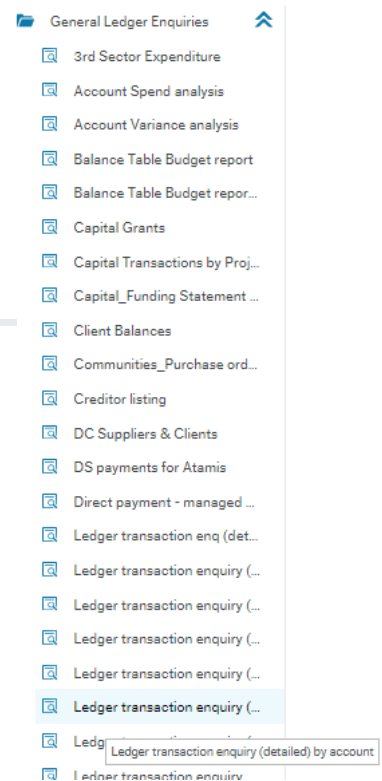

Use the selection criteria to search on the ledger. The more you put in here, the closer the results will be to what you are looking for.

On the right-hand side of the search setup screen, you will see check boxes with the following options:

A-Unauthorised items - when this is checked the results will bring up transactions currently sitting for approval in workflow.

B – General Ledger – this will show all transactions which have been posted to the Ledger

C – Historical GL – this will show the same as General Ledger above.
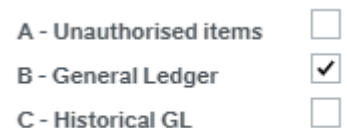
When you are happy with your search criteria, click **Search** under the Results section of the screen to bring up the results, these will show at the bottom of the screen.

Where the results are highlighted in blue, you can click on these to "drill down" and show more information about that field.

When in the drill down menu, if there have been any documents attached to the transaction, you may access them using the paperclip icon in the right-hand corner of the menu.

To go back to the previous screen, either click on the arrow or the name of the ledger report you have searched in (in blue below). Please note that if you click the X on the tab, this will close down the whole search screen, and you will have to start again.
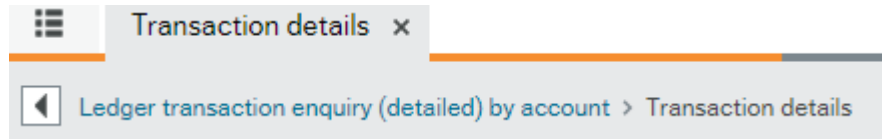
Accounts Payable Enquiries

To enquire on supplier invoices, go to *Reports- CCC Reports – A.General Reports – Accounts Payable.* Here you will find invoice enquiries and open and historical enquires for suppliers. Please feel free to open and test out what enquiry will work best for you.

If you would like to enquire on purchase orders/requisitions, go to *Reports – CCC Reports – A.General Reports – Purchasing*.

If you have access to the Procurements Menu, there are also a number of enquires sections in this menu that may appear useful to yourself:
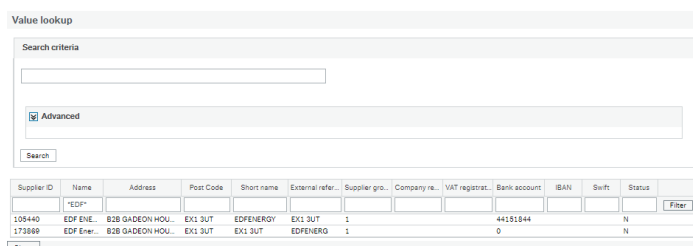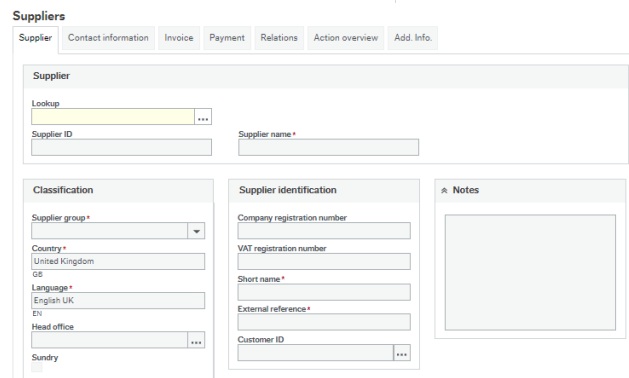*Supplier Enquiry*

In Procurement – Supplier information, you may open the Supplier Masterfile to search for on a supplier
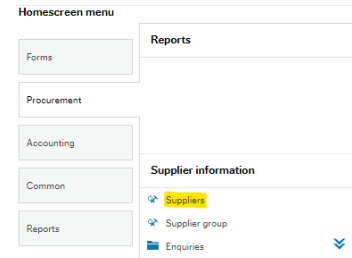
To enquire, you may either start typing the name of the supplier in the lookup field or press the triple dot button next to the lookup field to open up value lookup.

In the value look up screen, you will be able to enquire on different aspects of a supplier. Open the advanced sections to find more fields to enquire on too.
If you only know part of a supplier's name or any other aspect, place your enquiry between asterisks as shown in the example below:

Please note that if you do not have access to this screen, there will be a supplier enquiry in the Reports Menu

Requisition Enquiry

If you would like to find out if a requisition has been processed into a PO, you can use the 'Default Requisition' enquiry that is located in *Reports – CCC Reports – A.General Reports – Purchasing.*
Using the selection criteria, enter the requisition number and press search, it will then bring up the requisition and if it has been transferred into a PO, there will be a PO number in the Purchase order column. If there isn't a number in this field, then the requisition is either still awaiting approval or is in the queue to be transferred.

You may also use this enquiry to find a requisition relating to a PO, all you do it enter the Purchase order number in the search criteria and it will bring up the requisition number in the results tables.

Goods Receipt Enquiry

If you would like to find out if a PO has been goods receipted go to *Reports – CCC Reports – A.General Reports – Purchasing* and open *Delivery Status Enquiry*. You may also use your search bar in the top right-hand corner to search for the enquiry instead.

You can search for the order number and if there have been any goods receipts against the PO, they will appear when you press search.
You may also search using a goods receipt number you have to check what PO it is for

Workflow Enquiry

If you would like to check the workflow status of a Requisition or Invoice, you may use the enquiries located in Reports – CCC Reports – A.General Reports – Purchasing – Workflows Currently in Progress.
These are the enquiries that will be most useful:
Workflow Purchase Invoices in Progress – Purchase invoices that have entered workflow due to being over the 2.5% tolerance
Workflow Requisitions in Progress – Requisitions that are awaiting approval before being transferred into POs.
Workflow Supplier Invoices – Non order invoices that are in workflow

Using Workflow requisition in progress as an example, when you are in the enquiry screen, you may enter the requisition no in the selection criteria field. Tick the Active and Historical tick boxes as this will being up the requisition regardless of whether it is in workflow or not.
When you press search it will tell you the status of the workflow, you may open the workflow status to show you the workflow map

Purchase order enquiries

Purchase order details enquiry can be found in Procurement – Purchase Orders – Enquiries - Purchase details
You may search by order number, supplier id, requested by etc.

When you have found the purchase order you are looking for, you may open the purchase order and get a copy of the purchase order by pressing on the highlighted purchase order number then pressing the paperclip icon.

There are also other purchase order enquiries in *Reports – CCC Reports – A.General Reports – Purchasing* such as outstanding purchase orders, purchase order details and multiple line purchase order details.

Invoice Enquiries

The best enquiry for invoices is Invoice Enquire Browser that is located in *Report – CCC Reports – A.General Reports – Accounts Payable*

Ensure you have ticked the A, B and C tick boxes to bring up invoices in all statuses.

You can then enquire on any invoice details you have e.g. transaction number, invoice number, supplier id etc.

When your search results appear, you will be able to see the payment date. If this is blank, the invoice hasn't been paid yet. You may use the workflow enquiries as explained above to enquire further.
You may also open the transaction number and look at the invoice in document archive by using the paperclip icon. Ensure you have opened the transaction first.

Further enquiries

If you have any questions or require assistance finding an appropriate enquiry in relation to accounts payable, please email CR Finance P2P

Accounts Receivable Enquiries

To enquire on customer invoices, go to *Reports – CCC Reports – A.General Reports – Accounts Receivable*

If you have access, you may use the enquires in *Reports - Accounts Receivable 5.5*.

Workflow Enquiry

To enquire about the status of a sales order, go to *Customer and sales – Sales Orders* and open *Workflow enquiry.*
To enquire about the authorisation of a finished sales order, you can you *Workflow user log – Sales orders.*

Workflow enquiry – Sales orders
When using this enquiry, you can open the workflow and see the map.
You can enter the sales order numbers in the OrderNo filed and search to see the status of the order.

Workflow user log – Sales order
When using this enquiry, you can see who has approved finished sales orders.
Enter the sales order number in the OrderNo field and you can see who has approved the order but looking at the Task Owner field.

Further Queries

If you have any questions or require assistance finding an appropriate enquiry in relation to accounts receivable , please email Debtors

Contact Us

General Enquiries – Systems

Accounts Payable (Supplier Invoices) Enquiries – P2P or Creditors

Accounts Receivable (Customer Invoices) Enquiries – Debtors