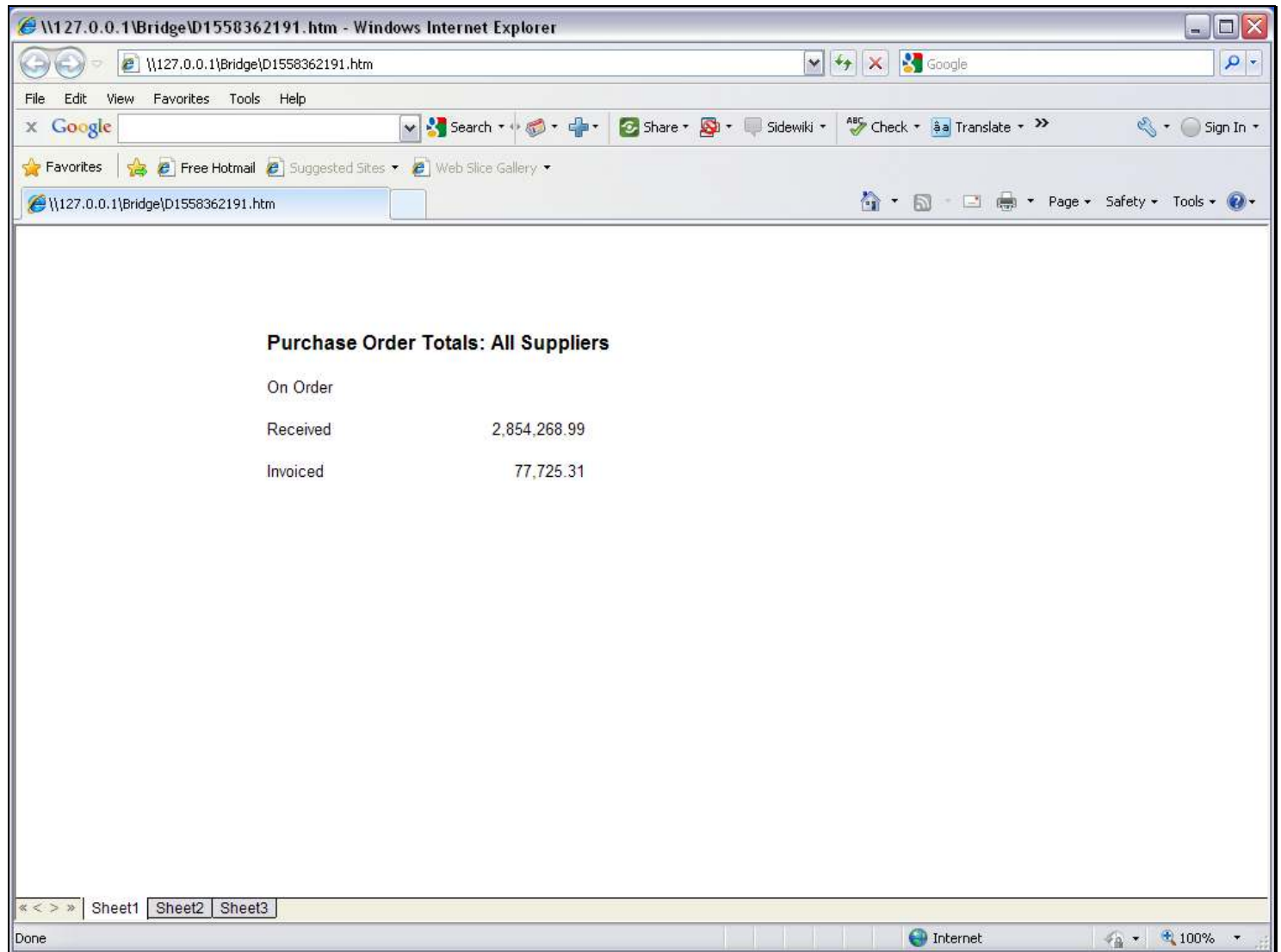
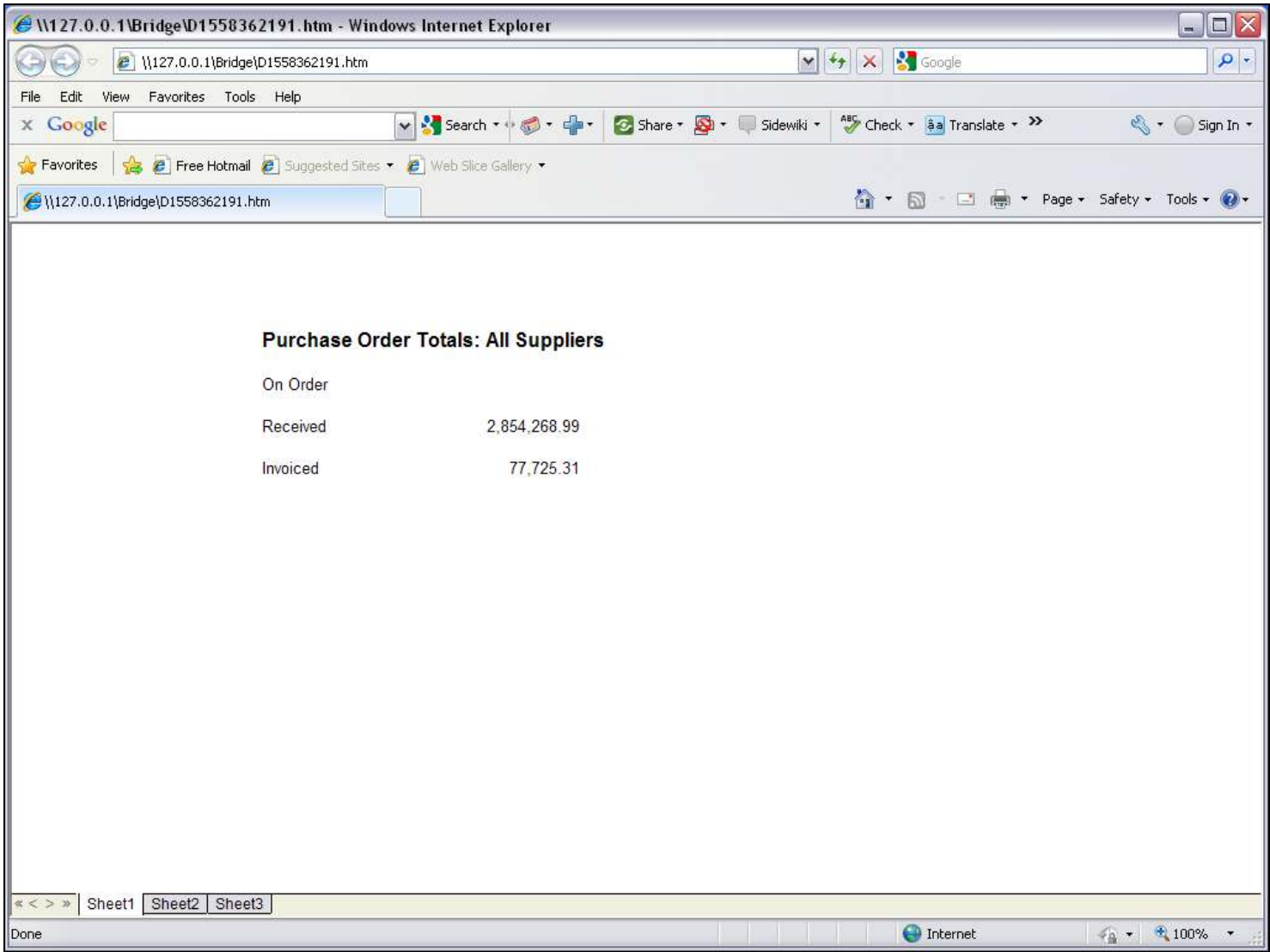


Slide 1 - Slide 1**Slide notes**

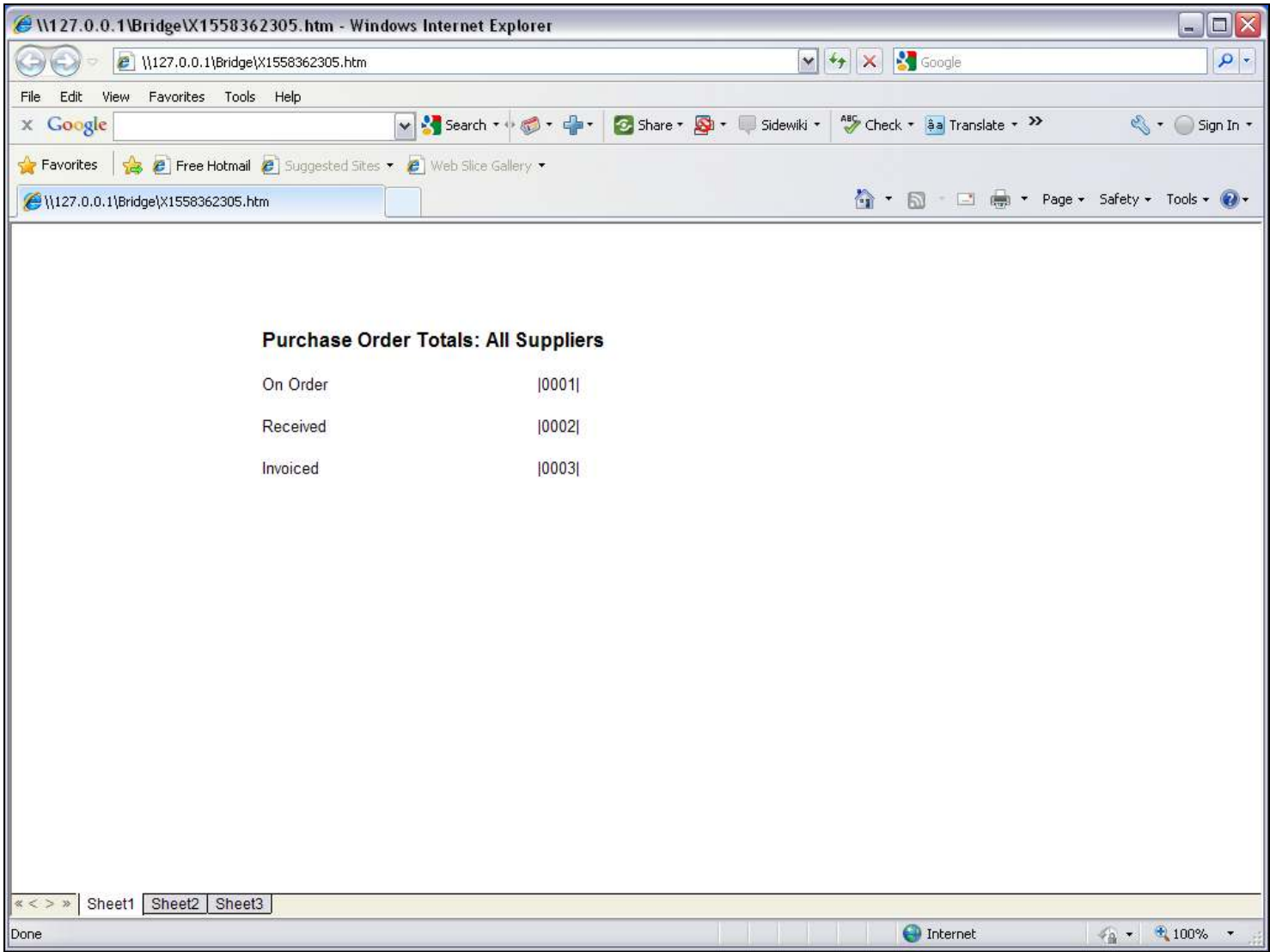
In this tutorial, we want to show how to use the Template for a 'Number from the Accounts'. It is a powerful Tag Template that does not require the Data Source to be listed for the Report, because it is listed on the Template itself, and it will operate on any IES Business Accounts, including Ledger, Assets, Stock, Suppliers, etc. In this example Report, we see the Purchase Order totals, but the 'On Order' Amount has not been done yet.

Slide 2 - Slide 2



Slide notes

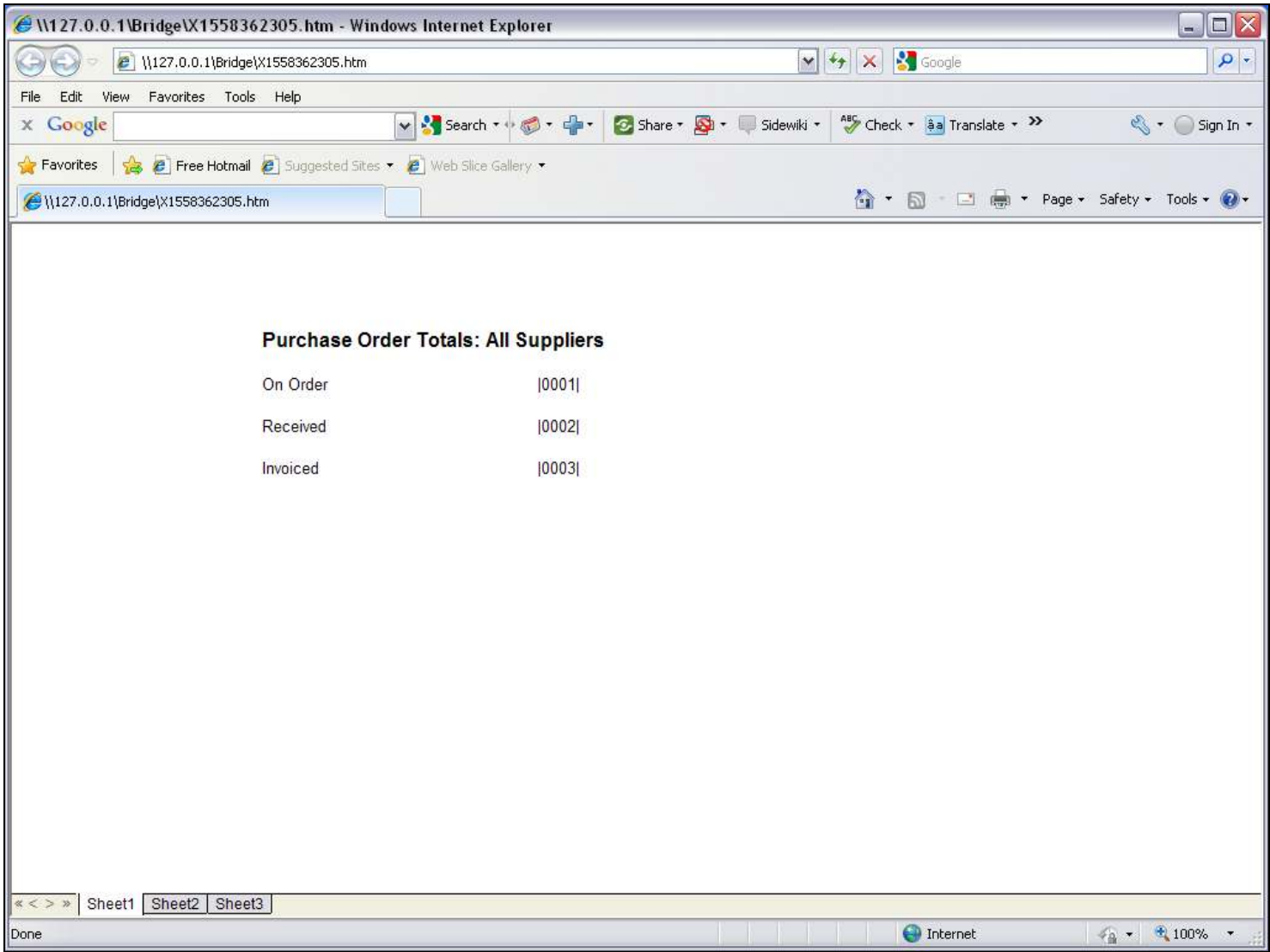
Slide 3 - Slide 3



Slide notes

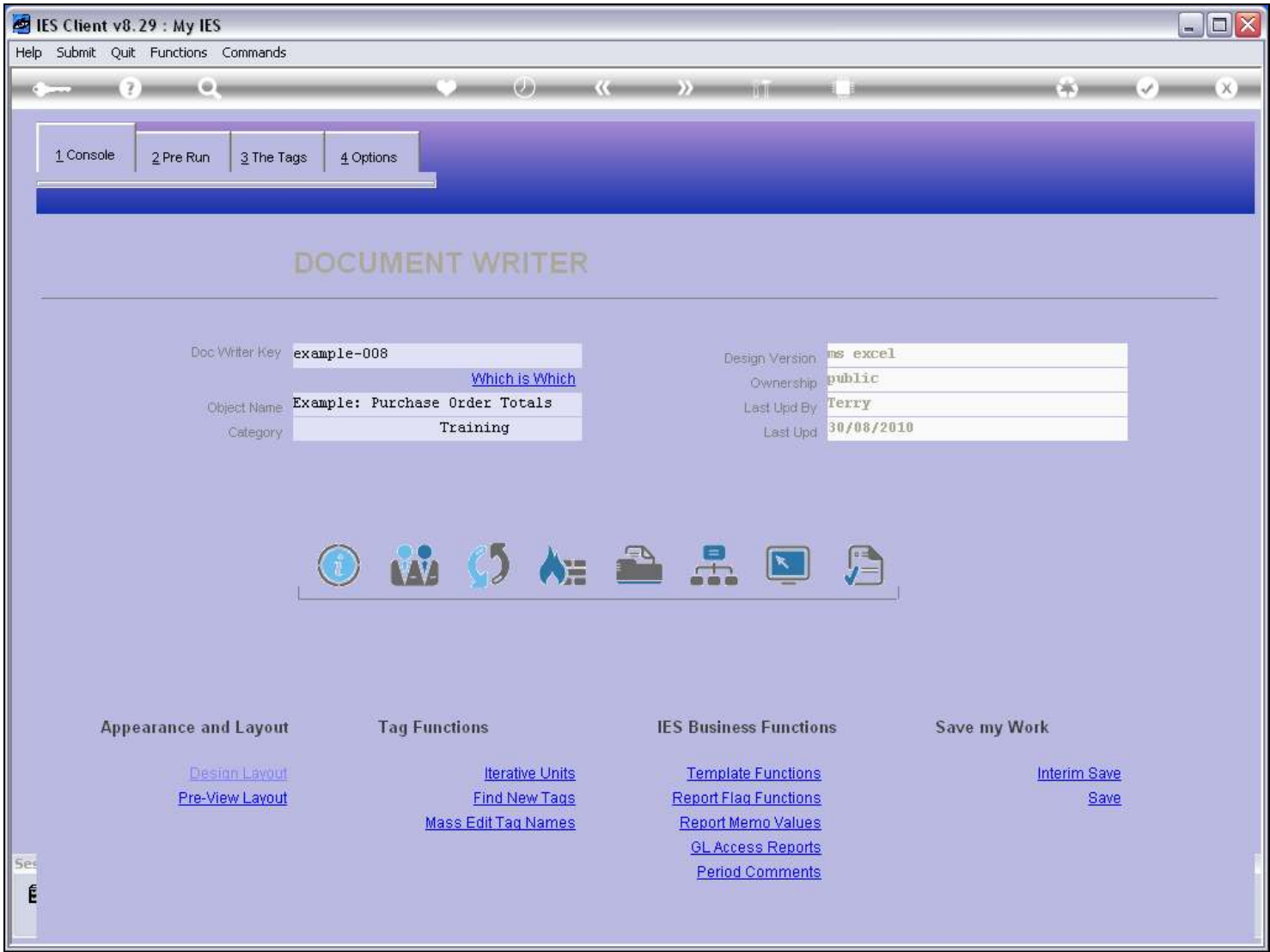
In the Report Layout, it is Tag 1 that we still need to do.

Slide 4 - Slide 4



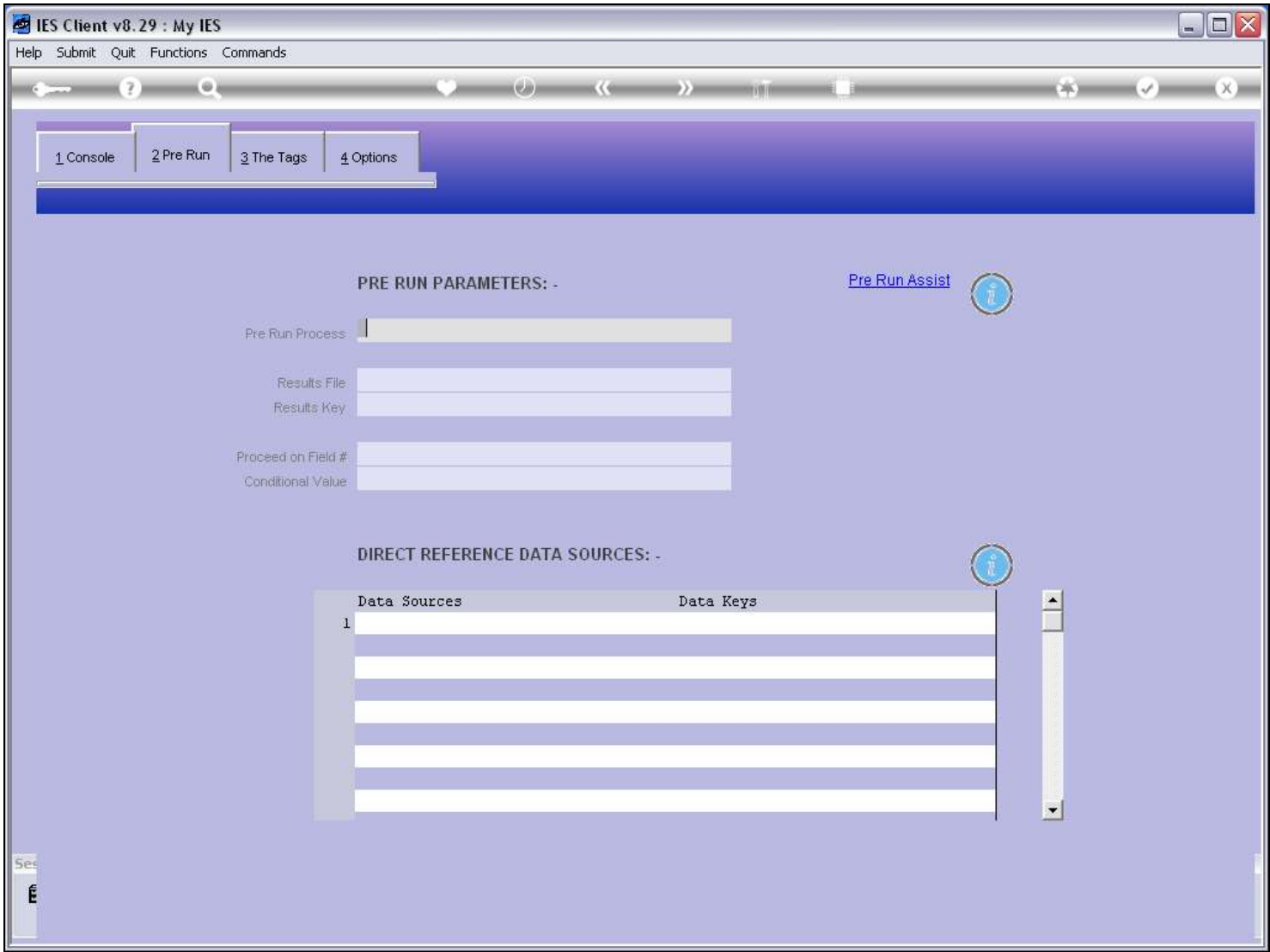
Slide notes

Slide 5 - Slide 5



Slide notes

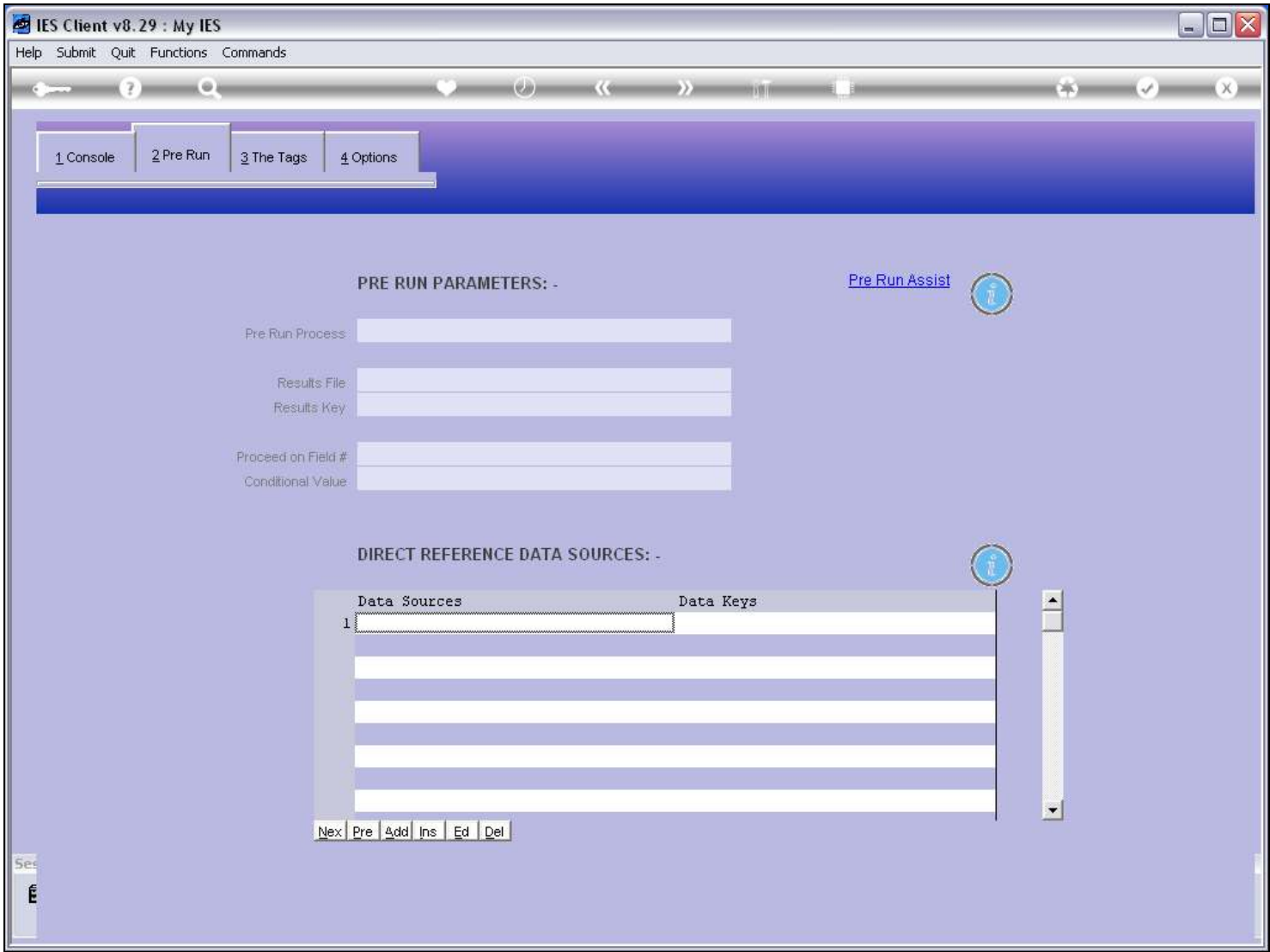
Slide 6 - Slide 6



Slide notes

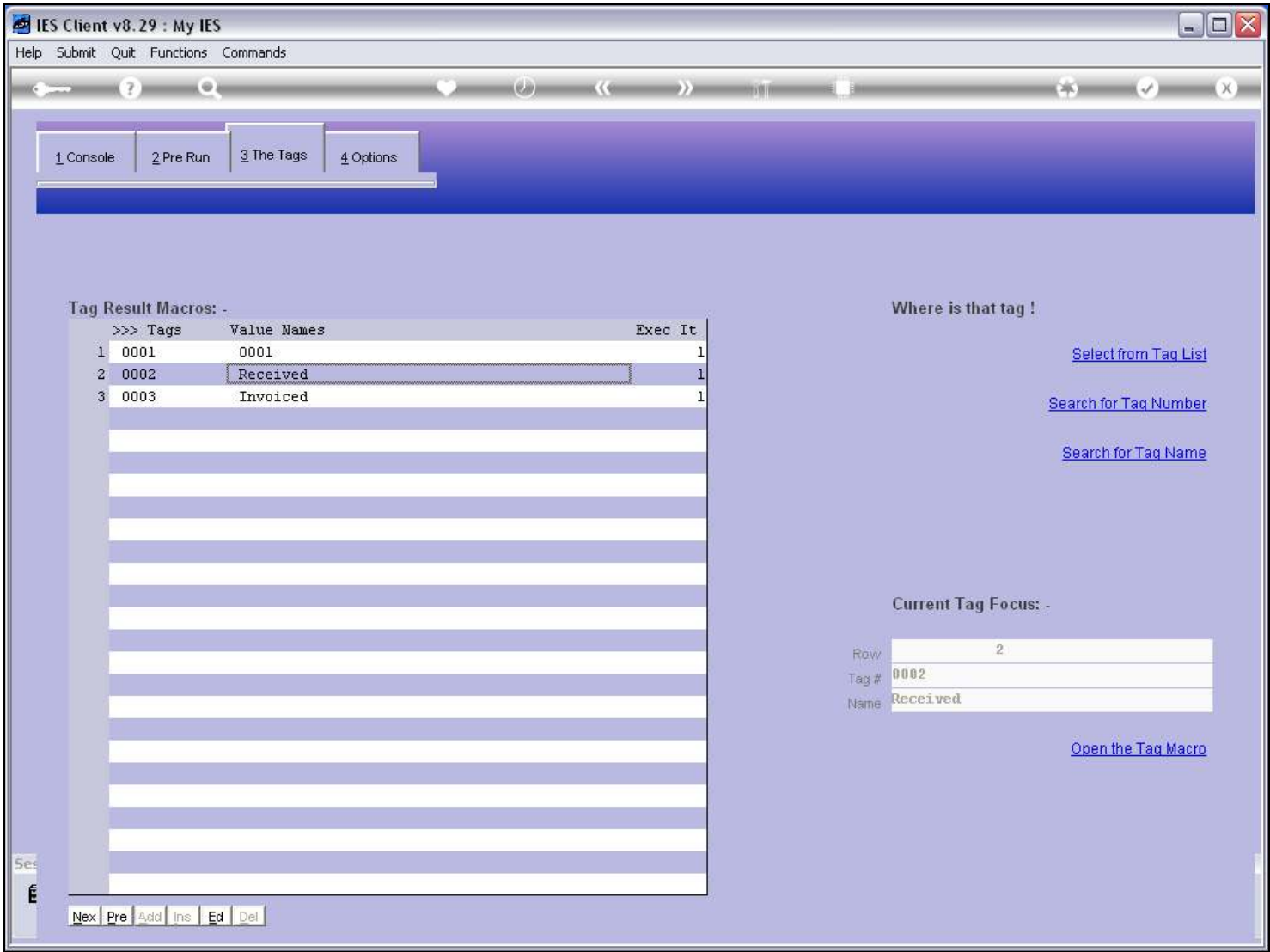
Note that we do not need any Data Sources listed here, unless of course we may need it for other parts of the Report.

Slide 7 - Slide 7



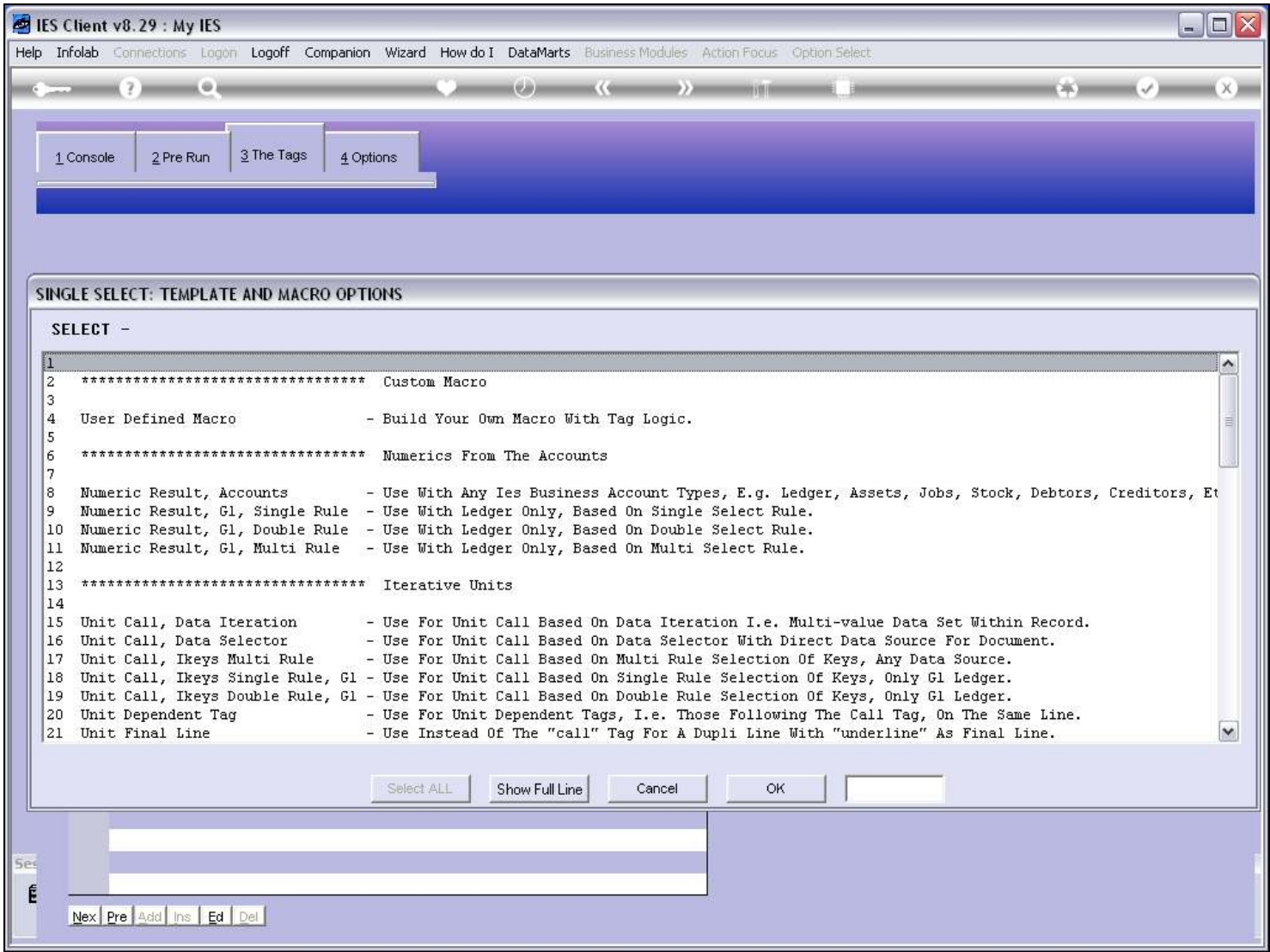
Slide notes

Slide 8 - Slide 8



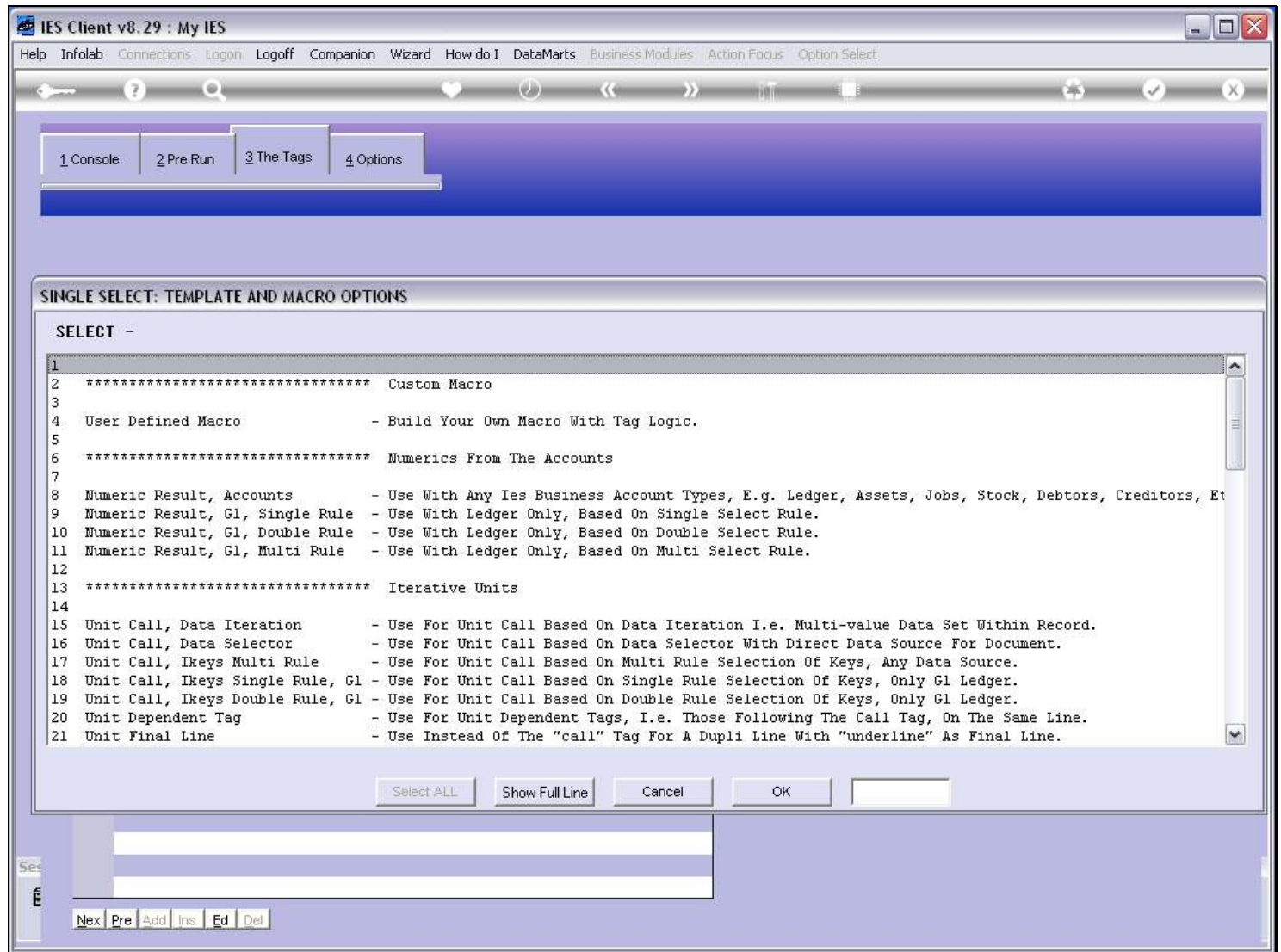
Slide notes

Slide 9 - Slide 9



Slide notes

Slide 10 - Slide 10



Slide notes

Slide 11 - Slide 11

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

Name0001

Data Source Name

Data Field Name

Data Name OR Literal (see help)

Names Operation1: no operation

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Mask

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Remove Template

Copy Template

Reveal Logic

Save

Data Selection: -

And / Or	DataName	Value	Value
1			

Slide notes

Slide 12 - Slide 12

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

Name0001

Data Source Name

Data Field Name

Data Name OR Literal (see help)

Names Operation1: no operation

Remove Template

Copy Template

Reveal Logic

Save

Data Selection: -

And / Or	DataName	Value	Value
1			

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Mask

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

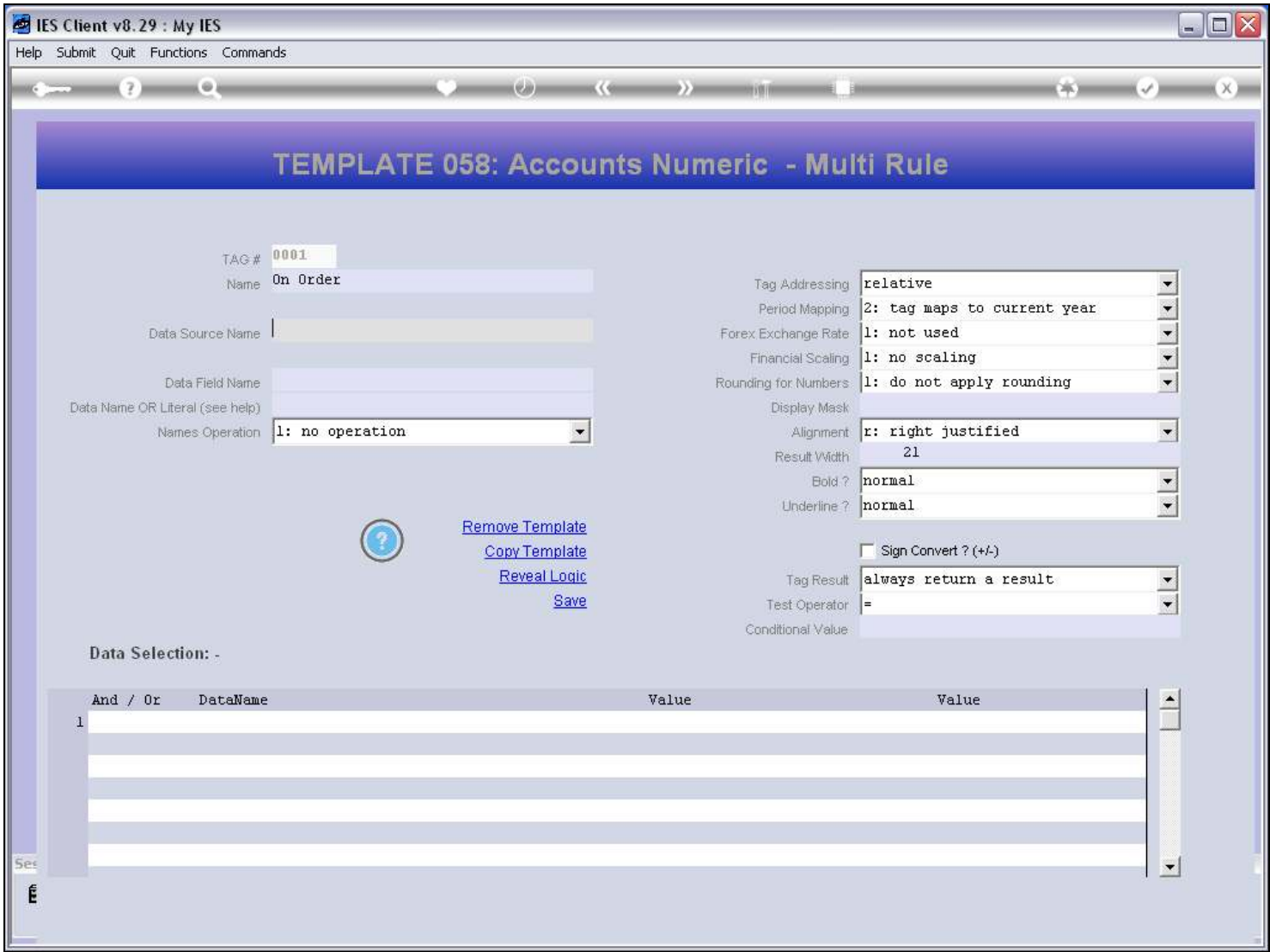
Tag Resultalways return a result

Test Operator=

Conditional Value

Slide notes

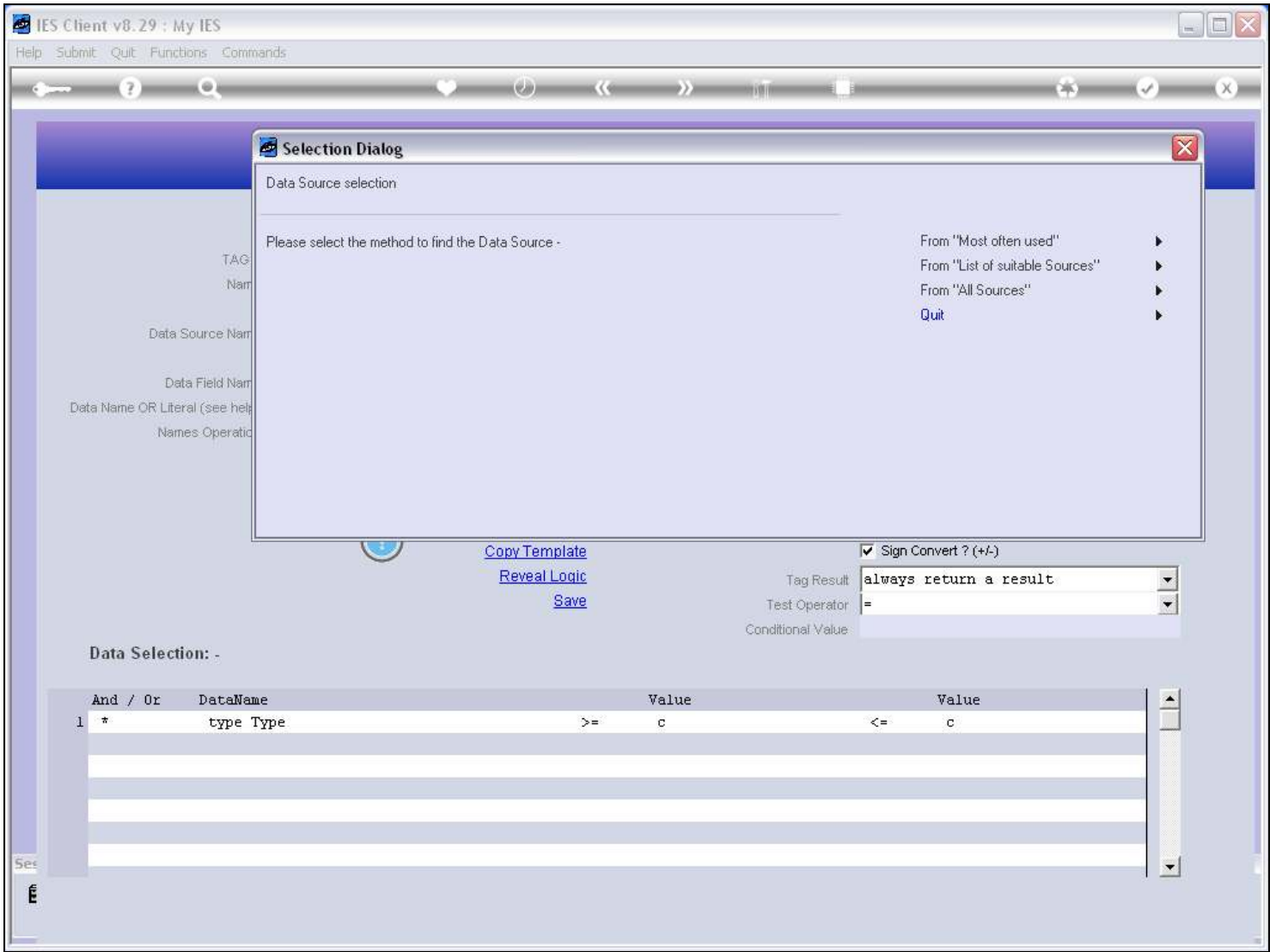
Slide 13 - Slide 13



Slide notes

We have to select a Data Source on the Template itself. For this, we may use the metadata lookup if we do not already know the Data Source Name.

Slide 14 - Slide 14



Slide notes

Slide 15 - Slide 15

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source Name

Data Field Name

Data Name OR Literal (see help)

Names Operation

1: no operation

?

[Remove Template](#)

[Copy Template](#)

[Reveal Logic](#)

[Save](#)

Data Selection: -

And / Or	DataName	Value	Value
1			

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Mask

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Slide notes

Slide 16 - Slide 16

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source Name

Data Field Name

Data Name OR Literal (see help)

Names Operation1: no operation

Remove Template

Copy Template

Reveal Logic

Save

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Mask

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Data Selection: -

And / Or	DataName	Value	Value
1			

Slide notes

Slide 17 - Slide 17

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Name

Data Name OR Literal (see help)

Names Operation1: no operation

Remove Template

Copy Template

Reveal Logic

Save

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Mask

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Data Selection: -

And / Or	DataName	Value	Value
1			

Slide notes

Slide 18 - Slide 18

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Name

Data Name OR Literal (see help)

Names Operation1: no operation

Lookup ?

Recent Values

Remove Template

Copy Template

Reveal Logic

Save

Data Selection: -

And / Or	DataName	Value	Value
1			

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Mask

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Slide notes

Slide 19 - Slide 19

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Name

Data Name OR Literal (see help)

Names Operation1: no operation

Lookup ?

Recent Values

Remove Template

Copy Template

Reveal Logic

Save

Data Selection: -

And / Or	DataName	Value	Value
1			

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Mask

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Slide notes

The Data Name can also be looked up.

Slide 20 - Slide 20

IES Client v8.29 : My IES

Help Infolab Connections Logon Logoff Companion Wizard How do I DataMarts Business Modules Action Focus Option Select

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG # 0001

SINGLE SELECT: *OBJECT NAME (DICT) :ATT:STRUCTURE :HEADER (PROM)

SELECT ONLY 1

1	Act-bf	0	Month B/f	Actual, Current Month Brought Forward
2	Act-bf-fx	0	Month B/f Fx	Actual, Current Month Brought Forward, Forex
3	Act-ccur	0	Cr Movem Current	Current Month, Credit Movement, Actual
4	Act-ccur-fx	0	Cr Movem Current Fx	Current Month, Credit Movement, Actual, Forex
5	Act-cur	0	Actual	Actual, Current Month
6	Act-dcur	0	Dt Movem Current	Current Month, Debit Movement, Actual
7	Act-dcur-fx	0	Dt Movem Current Fx	Current Month, Debit Movement, Actual, Forex
8	Act-ptd	0	Actual Ytd	Actual Year To Date
9	Act-ptd-fx	0	Actual Ytd Fx	Actual Year To Date, Forex
10	Acti-cur	0	Act Invest	Actual, Current Month, Investment Column
11	Acti-ptd	0	Act Inv Ptd	Actual Year To Date, Investment Column
12	Actiq-cur	0	Q Act Inv	Quantity, Current Month, Investment Column
13	Actiq-ptd	0	Q Act Inv Ptd	Quantity Year To Date, Investment Column
14	Actq-cur	0	Qty Act	Quantity, Current Month
15	Actq-ptd	0	Qty Act Ptd	Quantity Year To Date
16	Actt-cur	0	Act Trust	Actual, Current Month, Trust Column
17	Actt-ptd	0	Act Tr Ptd	Actual Year To Date, Trust Column
18	Acttq-cur	0	Q Act Trust	Quantity, Current Month, Trust Column
19	Acttq-ptd	0	Q Act Tr Ptd	Quantity Year To Date, Trust Column
20	Bti-cur	0	Act Bti	Actual, Current Month: Bank + Trust + Invest
21	Bti-ptd	0	Bti Ptd	Actual Year To Date: Bank + Trust + Invest

Select ALL Show Full Line Cancel OK

Slide notes

Slide 21 - Slide 21



Slide notes

Slide 22 - Slide 22

IES Client v8.29 : My IES

Help Infobab Connections Logon Logoff Companion Wizard How do I DataMarts Business Modules Action Focus Option Select

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG # 0001

SINGLE SELECT: *OBJECT NAME (DICT) :ATT:STRUCTURE :HEADER (PROM)

SELECT ONLY 1

4	Act-ccur-fx	0	Cr Movem Current Fx	Current Month, Credit Movement, Actual, Forex
5	Act-cur	0	Actual	Actual, Current Month
6	Act-dcur	0	Dt Movem Current	Current Month, Debit Movement, Actual
7	Act-dcur-fx	0	Dt Movem Current Fx	Current Month, Debit Movement, Actual, Forex
8	Act-ptd	0	Actual Ytd	Actual Year To Date
9	Act-ptd-fx	0	Actual Ytd Fx	Actual Year To Date, Forex
10	Acti-cur	0	Act Invest	Actual, Current Month, Investment Column
11	Acti-ptd	0	Act Inv Ptd	Actual Year To Date, Investment Column
12	Actiq-cur	0	Q Act Inv	Quantity, Current Month, Investment Column
13	Actiq-ptd	0	Q Act Inv Ptd	Quantity Year To Date, Investment Column
14	Actq-cur	0	Qty Act	Quantity, Current Month
15	Actq-ptd	0	Qty Act Ptd	Quantity Year To Date
16	Actt-cur	0	Act Trust	Actual, Current Month, Trust Column
17	Actt-ptd	0	Act Tr Ptd	Actual Year To Date, Trust Column
18	Acttq-cur	0	Q Act Trust	Quantity, Current Month, Trust Column
19	Acttq-ptd	0	Q Act Tr Ptd	Quantity Year To Date, Trust Column
20	Bti-cur	0	Act Bti	Actual, Current Month: Bank + Trust + Invest
21	Bti-ptd	0	Bti Ptd	Actual Year To Date: Bank + Trust + Invest
22	Cbti-cur	0	Act Cbti	Accrual (committed + Actual), Current Month
23	Cbti-ptd	0	Accrual Ytd	Accrual (committed + Actual), Year To Date
24	Cbti-ptd-fx	0	Accrual Ytd Fx	Accrual (committed + Actual), Year To Date, Forex

Select ALL

Show Full Line

Cancel

OK

Slide notes

Slide 23 - Slide 23

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Name

Data Name OR Literal (see help)

Names Operation1: no operation

Remove Template

Copy Template

Reveal Logic

Save

Data Selection: -

And / Or	DataName	Value	Value
1			

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Mask

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Slide notes

Slide 24 - Slide 24

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Name

Data Name OR Literal (see help)

Names Operation1: no operation

Remove Template

Copy Template

Reveal Logic

Save

Data Selection: -

And / Or	DataName	Value	Value
1			

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Mask

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Slide notes

Slide 25 - Slide 25

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operation1: no operation

Remove Template

Copy Template

Reveal Logic

Save

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Mask

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Data Selection: -

And / Or	DataName	Value	Value
1			

Slide notes

And then we may optionally use another Data Name, or a Direct Number, and perform an operation on the 2 Values.

Slide 26 - Slide 26

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operation1: no operation

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Mask

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Remove Template

Copy Template

Reveal Logic

Save

Data Selection: -

And / Or	DataName	Value	Value
1			

Slide notes

Slide 27 - Slide 27

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operation

1: No Operation

1: No Operation

2: Multiply

3: Divide

4: Add

5: Subtract

Copy Template

Reveal Logic

Save

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Mask

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Data Selection: -

And / Or	DataName	Value	Value
1			

Slide notes

Slide 28 - Slide 28

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operation1: No Operation

Remove Template

Copy Template

Reveal Logic

Save

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Mask

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Data Selection: -

And / Or	DataName	Value	Value
1			

Slide notes

No default display mask is provided. We need to select the mask to use.

Slide 29 - Slide 29

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operation1: No Operation

Remove Template

Copy Template

Reveal Logic

Save

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Mask

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Data Selection: -

And / Or	DataName	Value	Value
1			

Slide notes

Slide 30 - Slide 30

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operation1: No Operation

Remove Template

Copy Template

Reveal Logic

Save

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Mask

Alignment1: right

Result Width

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Data Selection: -

And / Or	DataName	Value	Value
1			

Slide notes

Slide 31 - Slide 31

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operation1: No Operation

Remove Template

Copy Template

Reveal Logic

Save

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Mask

Alignment1: right

Result Width

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

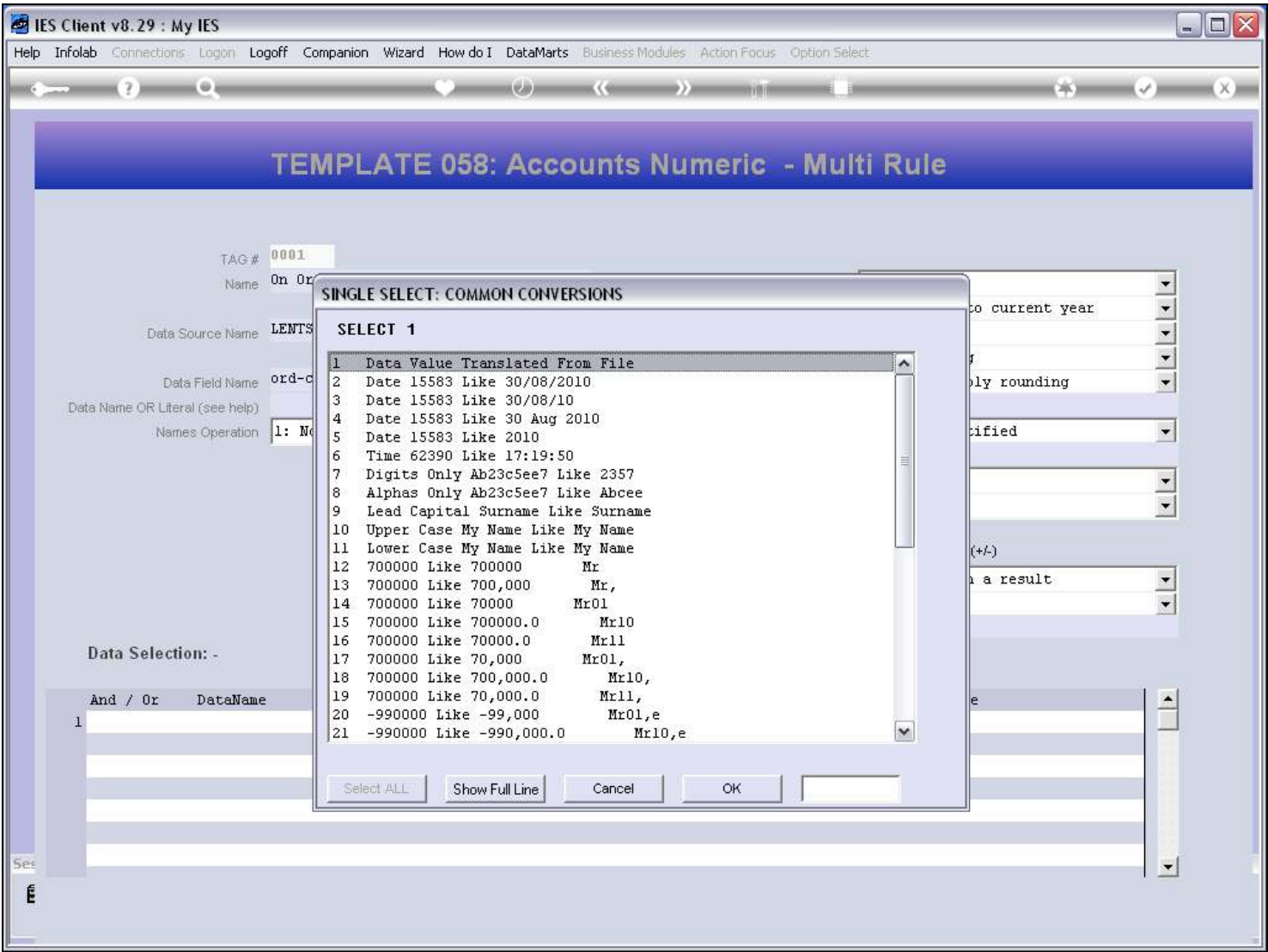
Conditional Value

Data Selection: -

And / Or	DataName	Value	Value
1			

Slide notes

Slide 32 - Slide 32



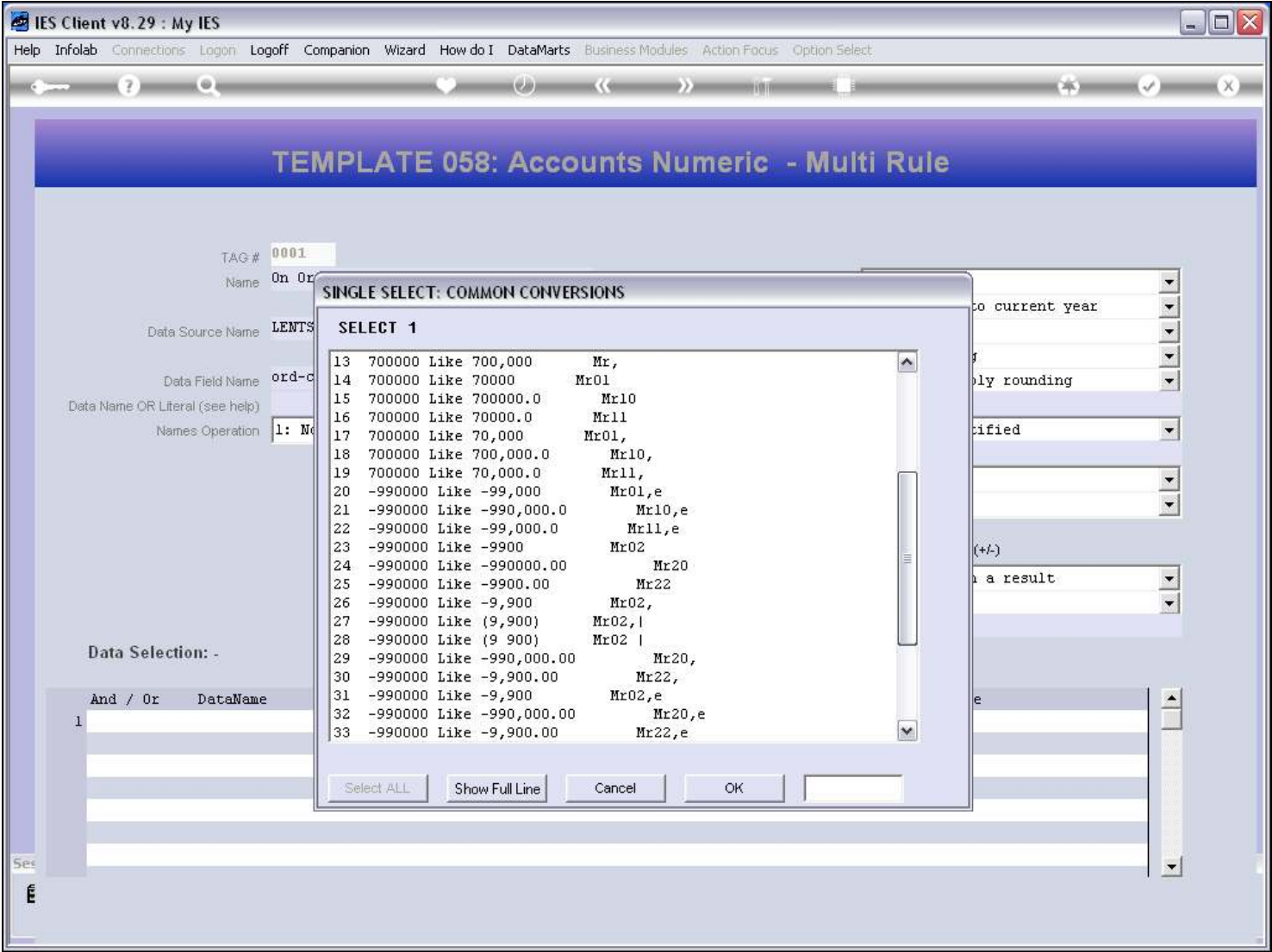
Slide notes

Slide 33 - Slide 33



Slide notes

Slide 34 - Slide 34



Slide notes

Slide 35 - Slide 35

IES Client v8.29 : My IES

HelpInfolabConnectionsLoginLogoutCompanionWizardHow do IDataMartsBusiness ModulesAction FocusOption Select

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operation1: No Operation

Remove Template

Copy Template

Reveal Logic

Save

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Mask

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Data Selection: -

And / Or	DataName	Value	Value
1			

Slide notes

IES Client v8.29 : My IES

Help Lookup Back 1 Field Restart Line Edit Mini Menu Submit Field Quit

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG # 0001

Name On Order

Data Source Name LENTS CUSTOMER REGISTER

Data Field Name ord-cur Ordered

Data Name OR Literal (see help)

Names Operation 1: No Operation

Tag Addressing relative

Period Mapping 2: tag maps to current year

Forex Exchange Rate 1: not used

Financial Scaling 1: no scaling

Rounding for Numbers 1: do not apply rounding

Display Mask mr22,

Alignment r: right justified

Result Width 21

Bold ? normal

Underline ? normal

☐ Sign Convert ? (+/-)

Tag Result always return a result

Test Operator =

Conditional Value

[Remove Template](#)

[Copy Template](#)

[Reveal Logic](#)

[Save](#)

Data Selection: -

And / Or	DataName	Value	Value
1	#		

See

Lex Pre Add Ins Ed Del

Slide notes

Slide 37 - Slide 37

IES Client v8.29 : My IES

Help Lookup Back 1 Field Restart Line Edit Mini Menu Submit Field Quit

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operation1: No Operation

Remove Template

Copy Template

Reveal Logic

Save

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Maskmr22,

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Data Selection: -

And / Or	DataName	Value	Value
1 *			

Se

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Slide notes

At the Data Selection, we need a minimum of 1 Rule Line, but we can use many Lines if we need to. On the 1st Rule Line, the 'and / or' operator choice does not apply, therefore the system inserts a star.

Slide 38 - Slide 38

IES Client v8.29 : My IES

Help Lookup Back 1 Field Restart Line Edit Mini Menu Submit Field Quit

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operation1: No Operation

Remove Template

Copy Template

Reveal Logic

Save

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Maskmr22,

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Data Selection: -

	And / Or	DataName	Value	Value
1	*		>=	<=

Se

ExePreAddInsEdDel

Slide notes

We can use any suitable Data Names from the Source, to state our selection rules, and we work with from / to value ranges. The Data Names can be looked up also.

Slide 39 - Slide 39

IES Client v8.29 : My IES

Help Lookup Back 1 Field Restart Line Edit Mini Menu Submit Field Quit

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TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operation1: No Operation

?

[Remove Template](#)

[Copy Template](#)

[Reveal Logic](#)

[Save](#)

Data Selection: -

	And / Or	DataName	Value	Value
1	*	type Type	>=	<=

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Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Maskmr22,

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Slide notes

All Supplier Accounts in the source called 'LENTS' are flagged with type 'C'.

Slide 40 - Slide 40

IES Client v8.29 : My IES

Help Lookup Back 1 Field Restart Line Edit Mini Menu Submit Field Quit

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TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operation1: No Operation

?

[Remove Template](#)

[Copy Template](#)

[Reveal Logic](#)

[Save](#)

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Maskmr22,

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Data Selection: -

	And / Or	DataName	Value	Value
1	*	type Type	>=	<=

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Slide notes

Slide 41 - Slide 41

IES Client v8.29 : My IES

Help Lookup Back 1 Field Restart Line Edit Mini Menu Submit Field Quit

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TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operation1: No Operation

?

[Remove Template](#)

[Copy Template](#)

[Reveal Logic](#)

[Save](#)

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Maskmr22,

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Data Selection: -

	And / Or	DataSource	Value	Value
1	*	type Type	>= c	<=

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Slide notes

Slide 42 - Slide 42

IES Client v8.29 : My IES

Help Infoblab Connections Login Logout Companion Wizard How do I DataMarts Business Modules Action Focus Option Select

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operation1: No Operation

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Maskmr22,

Alignmentr: right justified

SINGLE SELECT: NEXT RULE

SELECT

1 And

2 Or

Select ALL

Show Full Line

Cancel

OK

Data Selection: -

	And / Or	DataName	Value	Value
1	*	type Type	>= c	<= c
2				

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Slide notes

Slide 43 - Slide 43

IES Client v8.29 : My IES

Help Infoblab Connections Login Logout Companion Wizard How do I DataMarts Business Modules Action Focus Option Select

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operation1: No Operation

Remove Template

Copy Template

Reveal Logic

Save

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Maskmr22,

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Data Selection: -

	And / Or	DataName	Value	Value
1	*	type Type	>= c	<= c
2				

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Slide notes

By selecting all Supplier Accounts, we need no further rules in this case, because we want the Purchase Order Totals for all Suppliers.

Slide 44 - Slide 44

IES Client v8.29 : My IES

Help Lookup Back 1 Field Restart Line Edit Mini Menu Submit Field Quit

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TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operation1: No Operation

?

[Remove Template](#)

[Copy Template](#)

[Reveal Logic](#)

[Save](#)

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Maskmr22,

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Data Selection: -

	And / Or	DataName	Value	Value
1	*	type Type	>= c	<= c
2	and			

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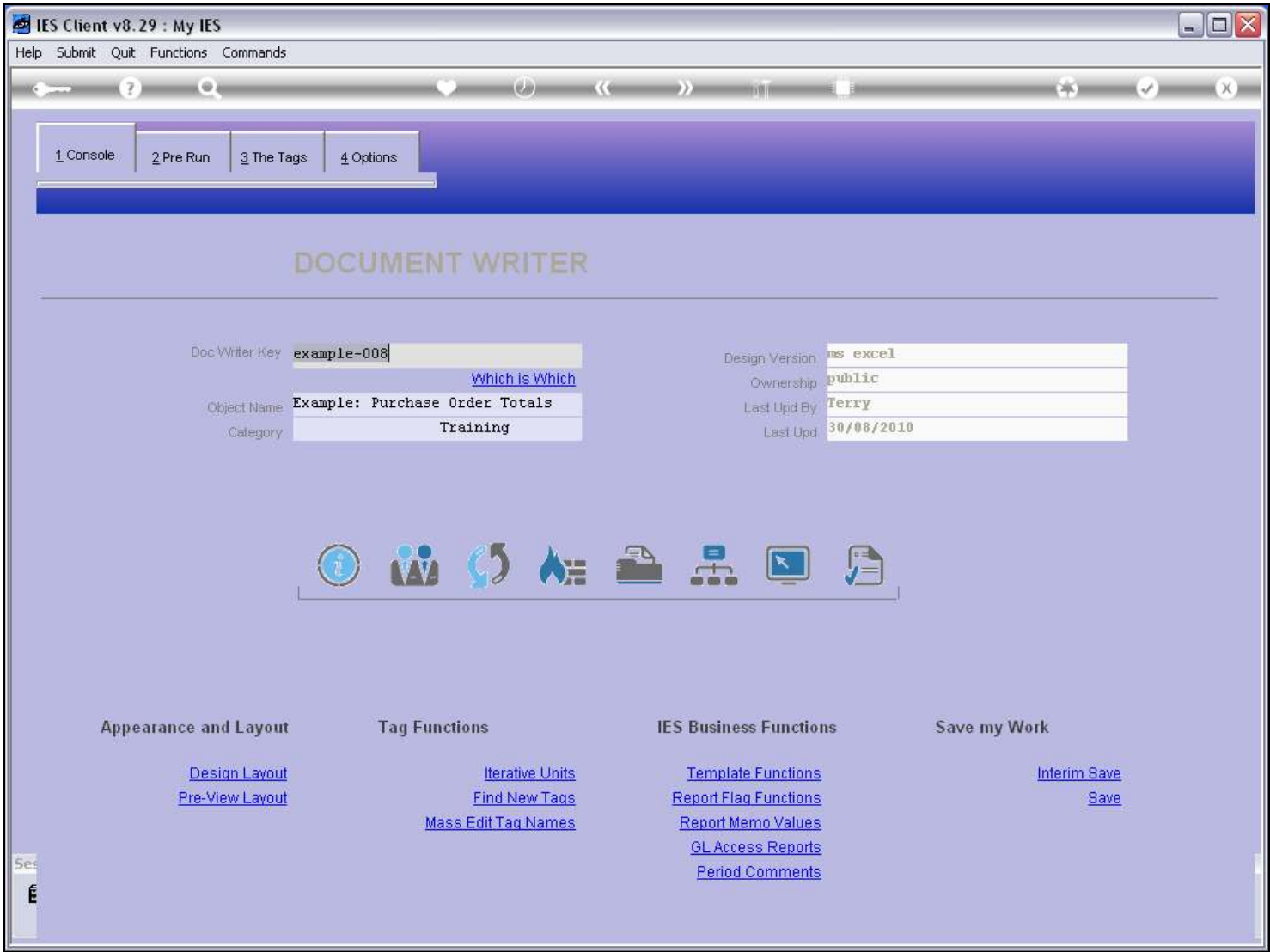
Slide notes

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Slide notes

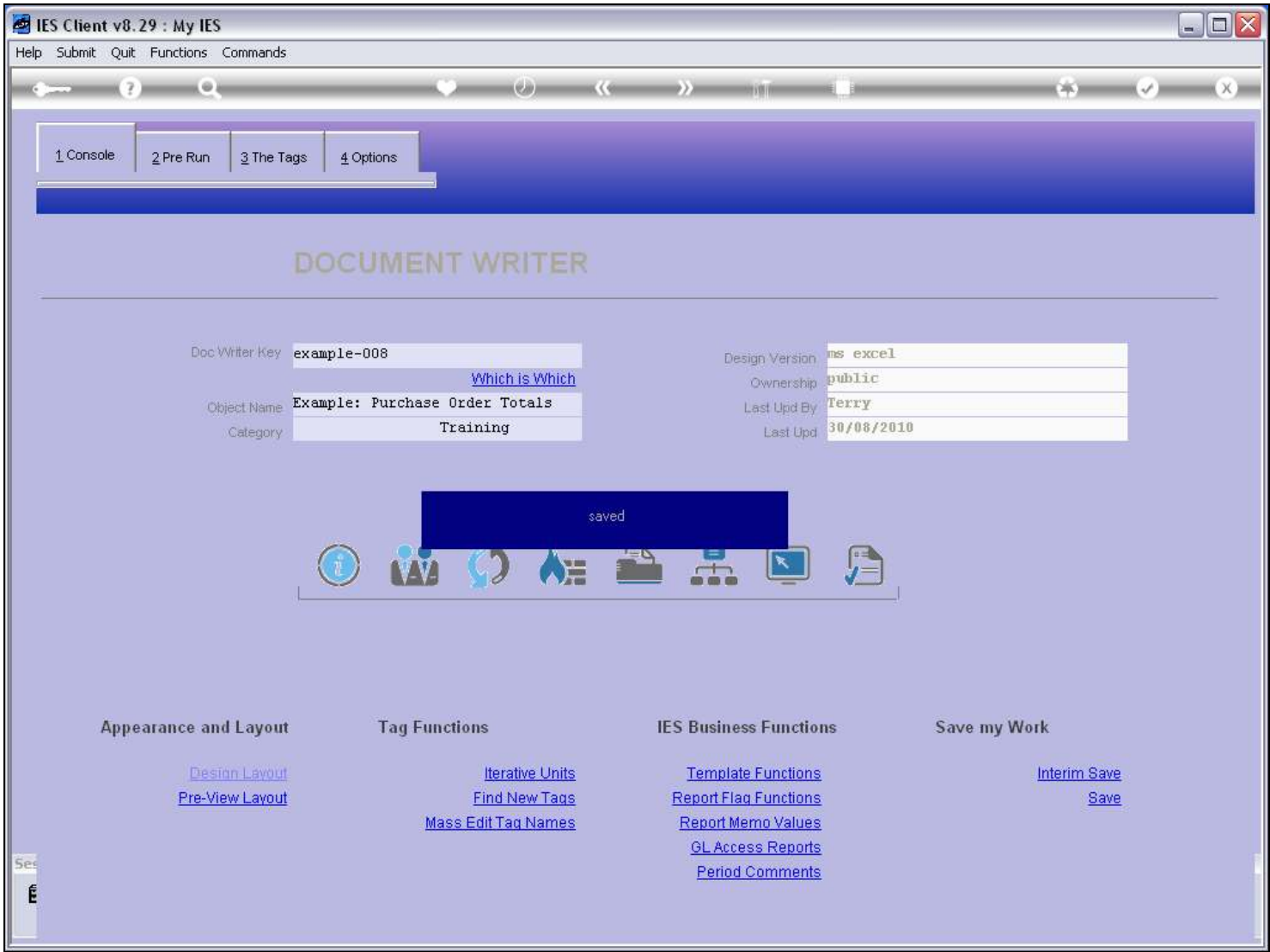
Page 46 of 69

Slide 47 - Slide 47



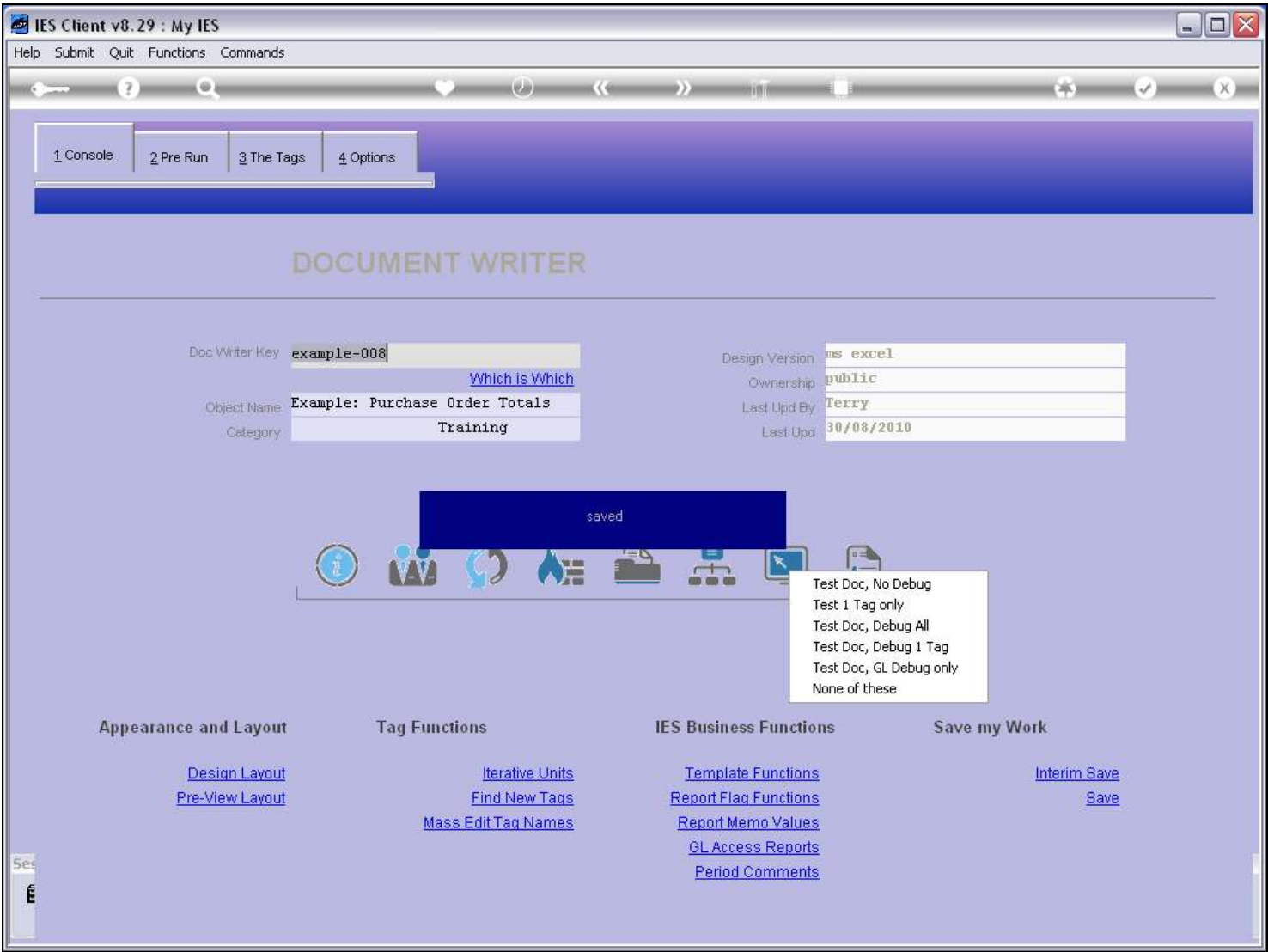
Slide notes

Slide 48 - Slide 48



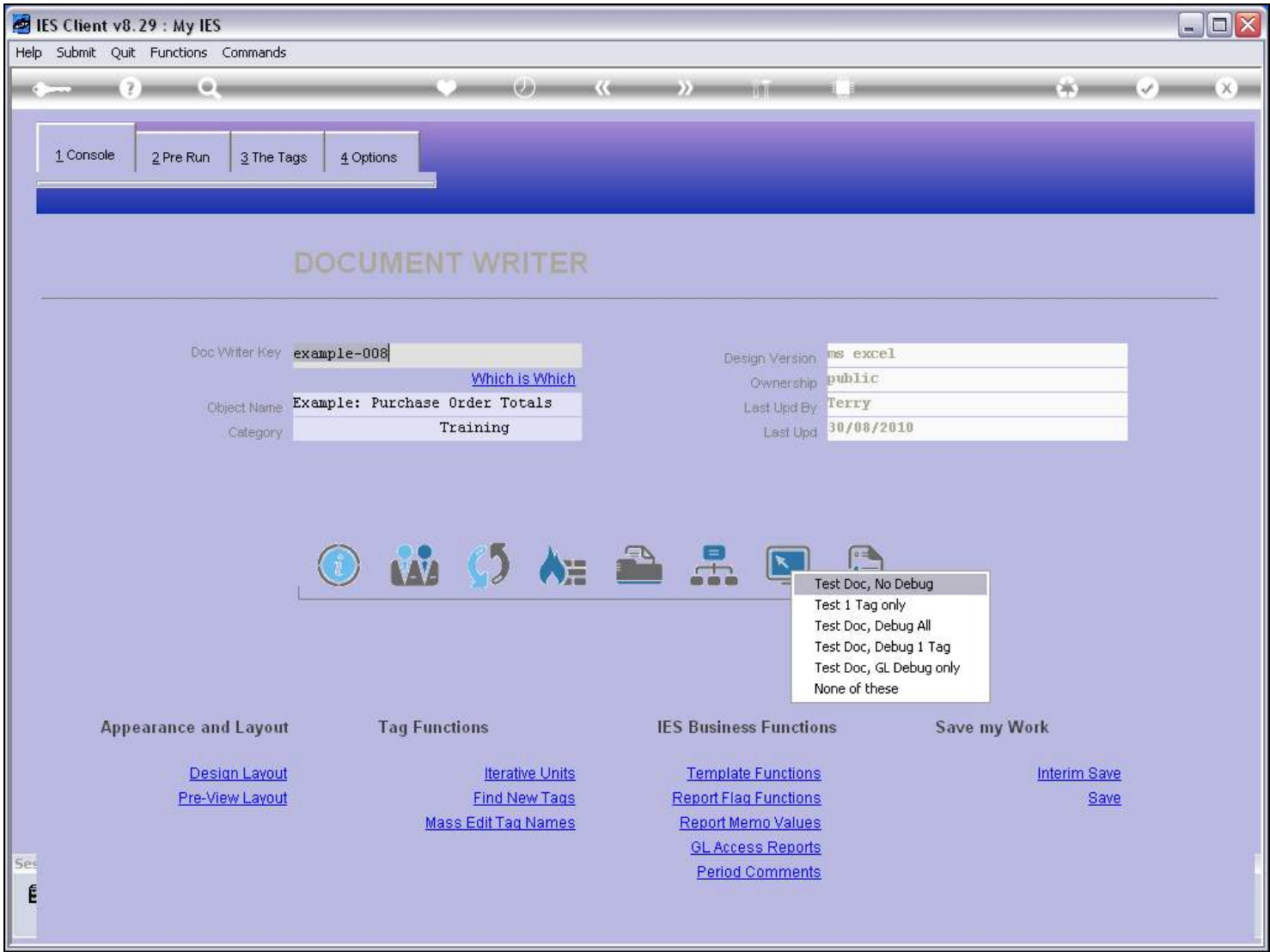
Slide notes

Slide 49 - Slide 49

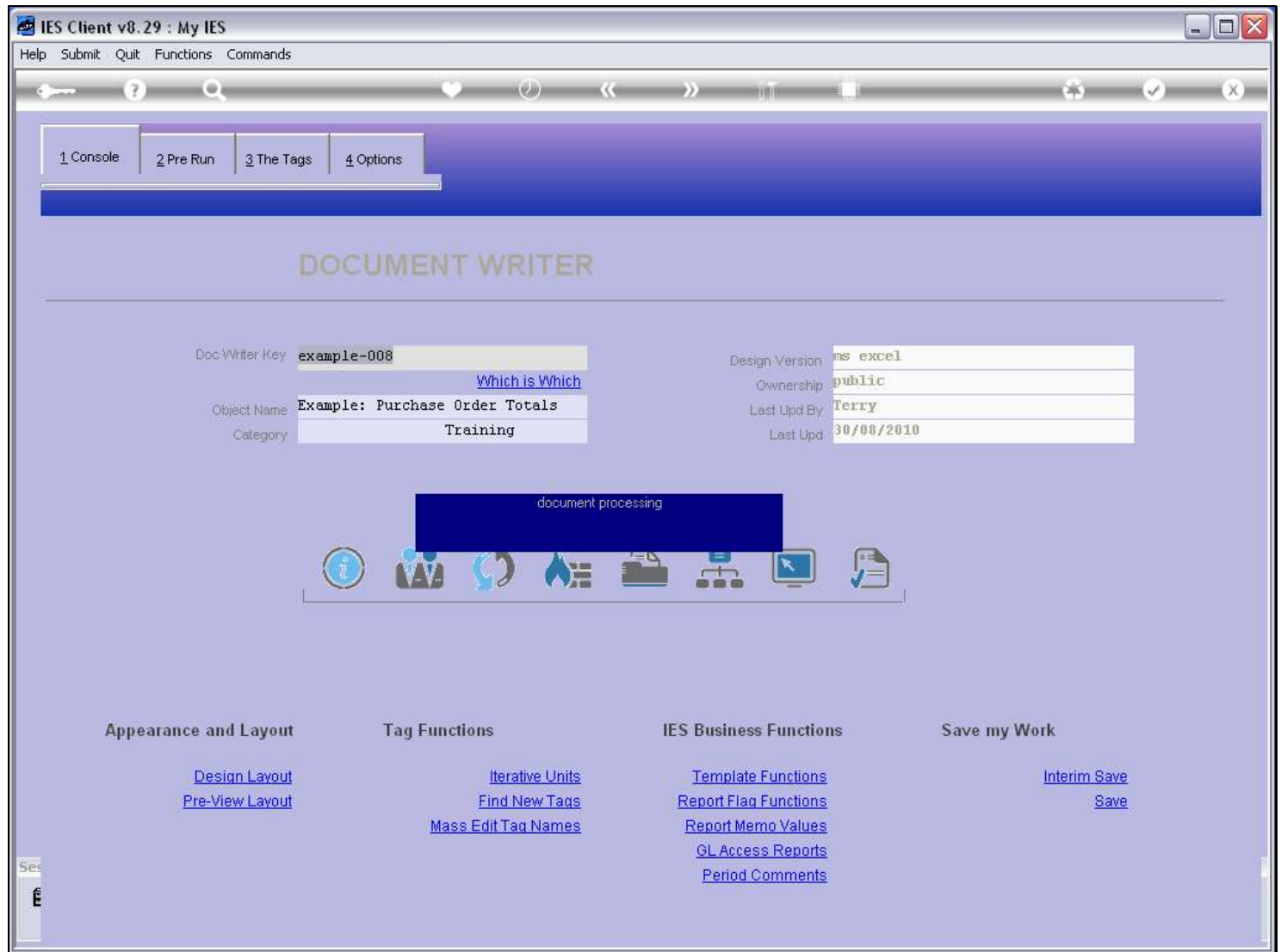


Slide notes

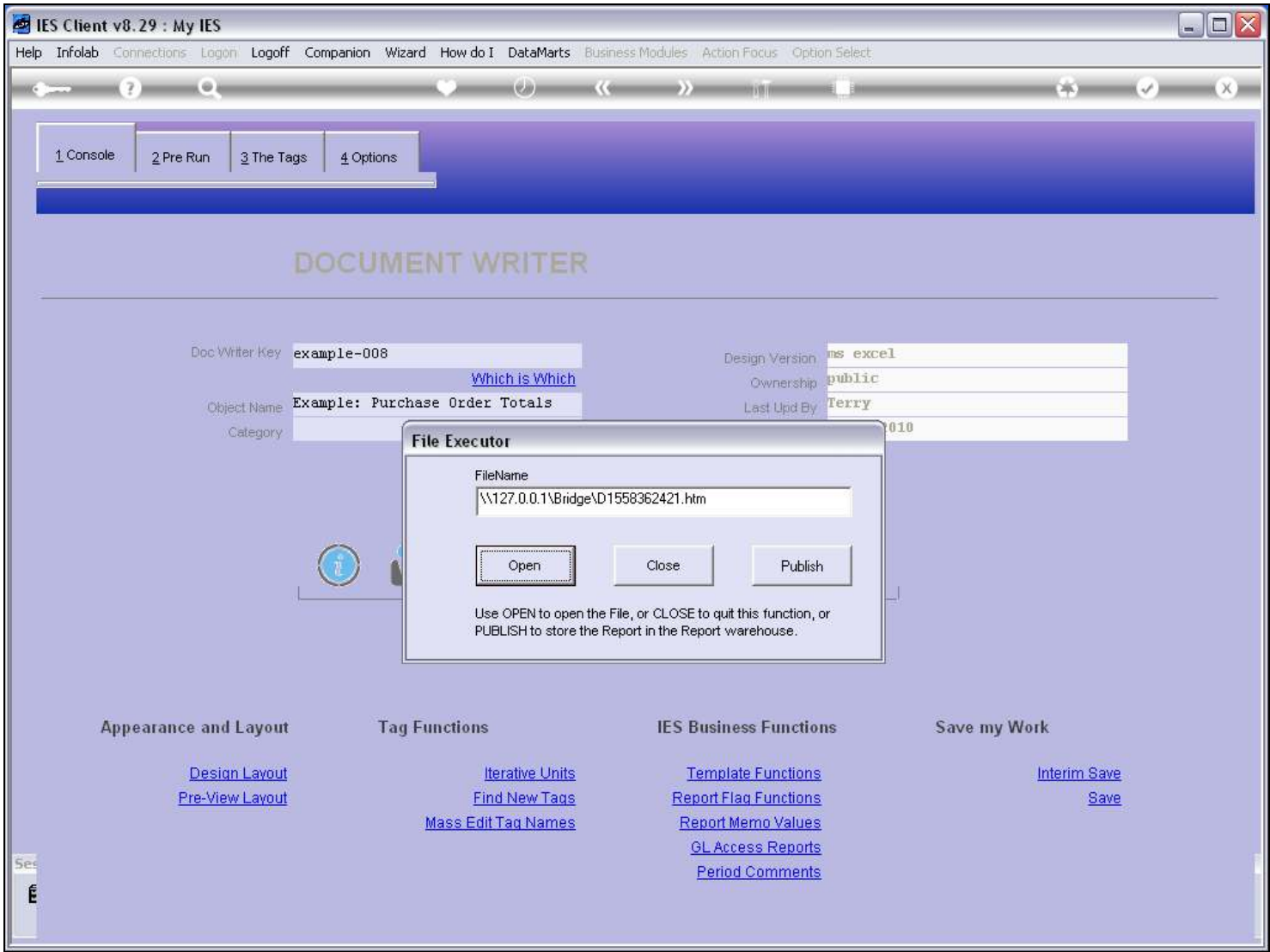
Slide 50 - Slide 50



Slide notes

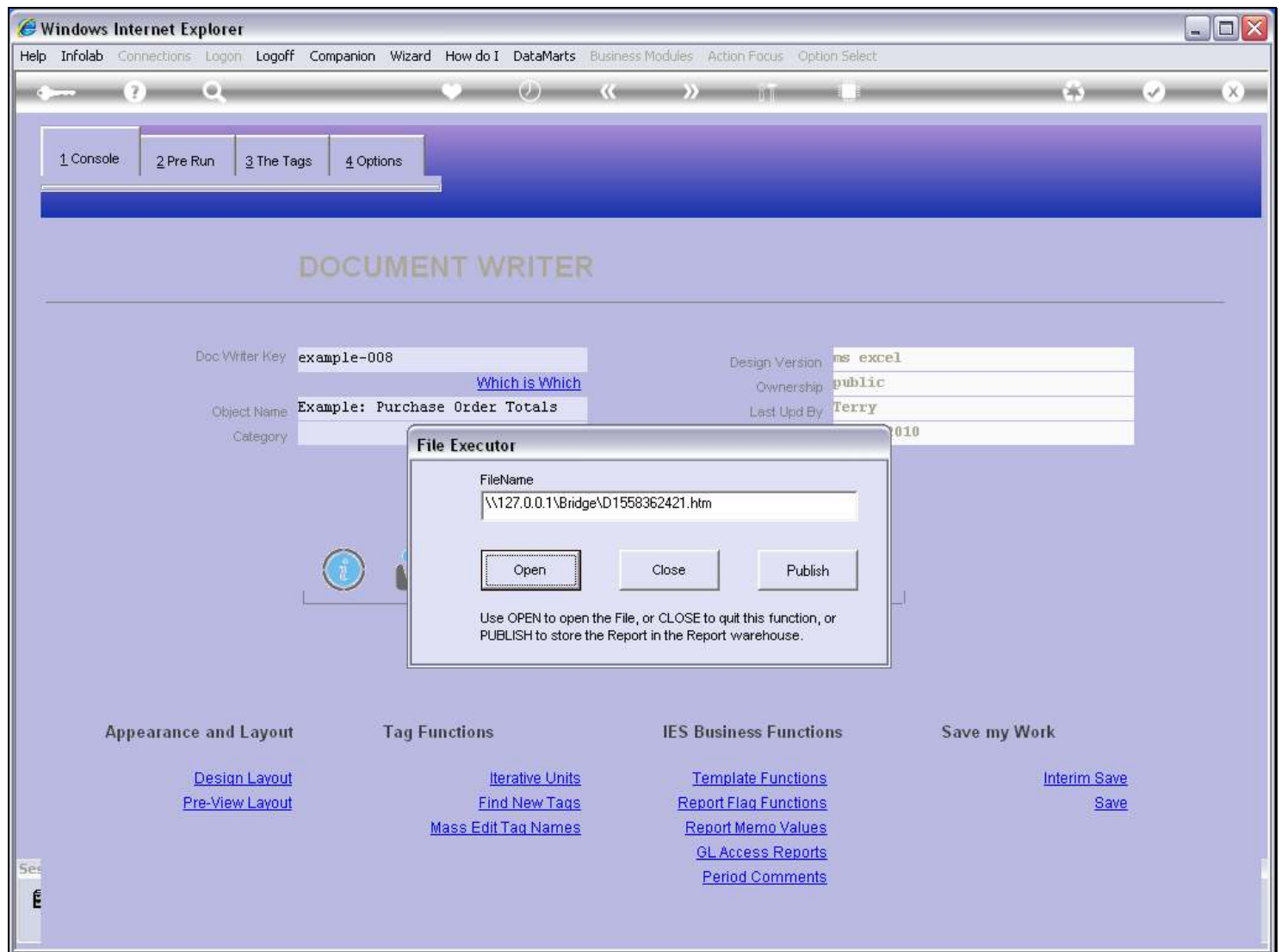
Slide 51 - Slide 51**Slide notes**

Slide 52 - Slide 52

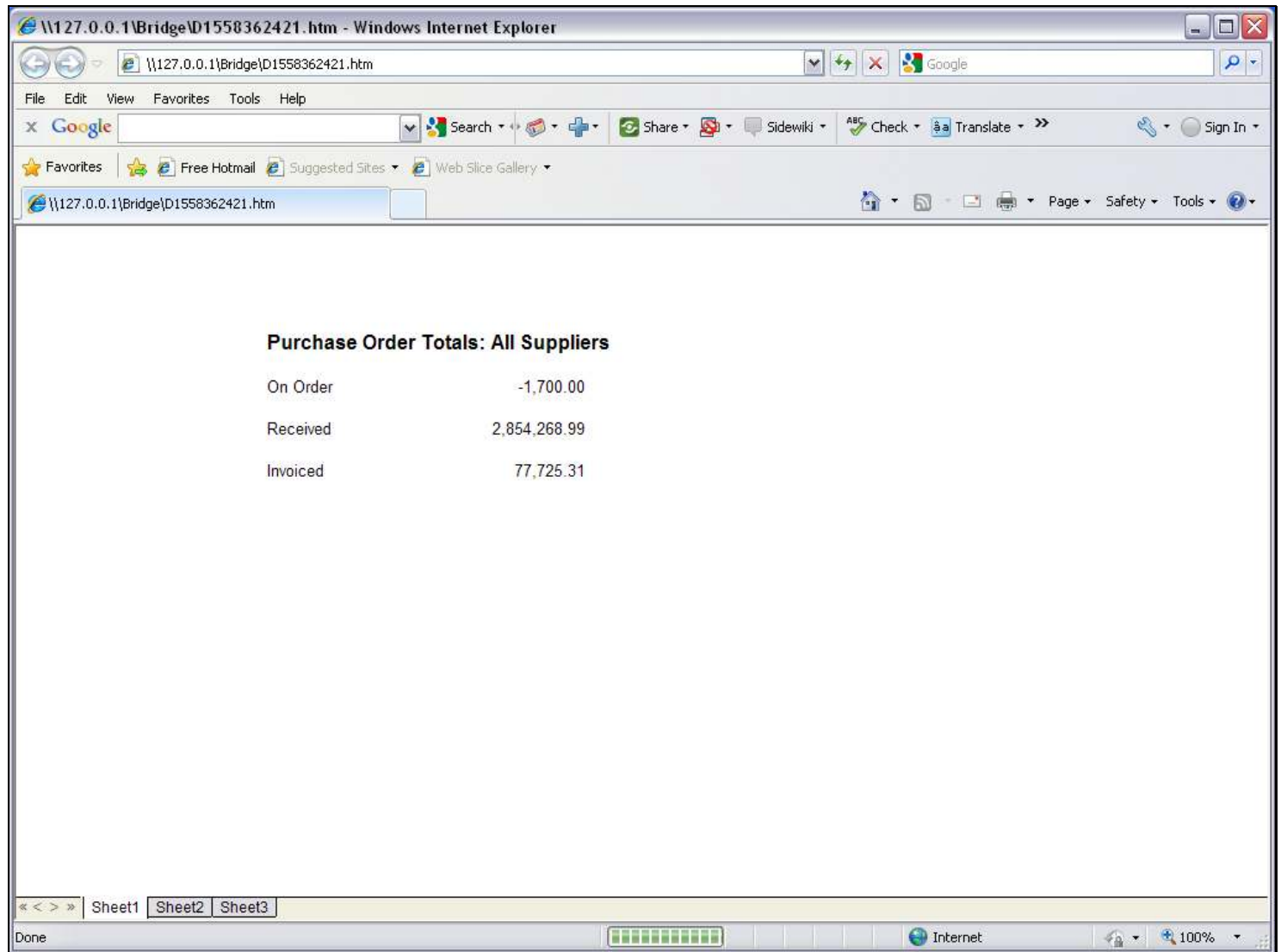


Slide notes

Slide 53 - Slide 53



Slide notes

Slide 54 - Slide 54**Slide notes**

When we test, we see that the Number comes up as a Negative. This is correct, because the Supplier Accounts are credited with Order Amounts. However, we'd like to see a positive here, so we will apply a Sign Convert function on the answer.

Slide 55 - Slide 55

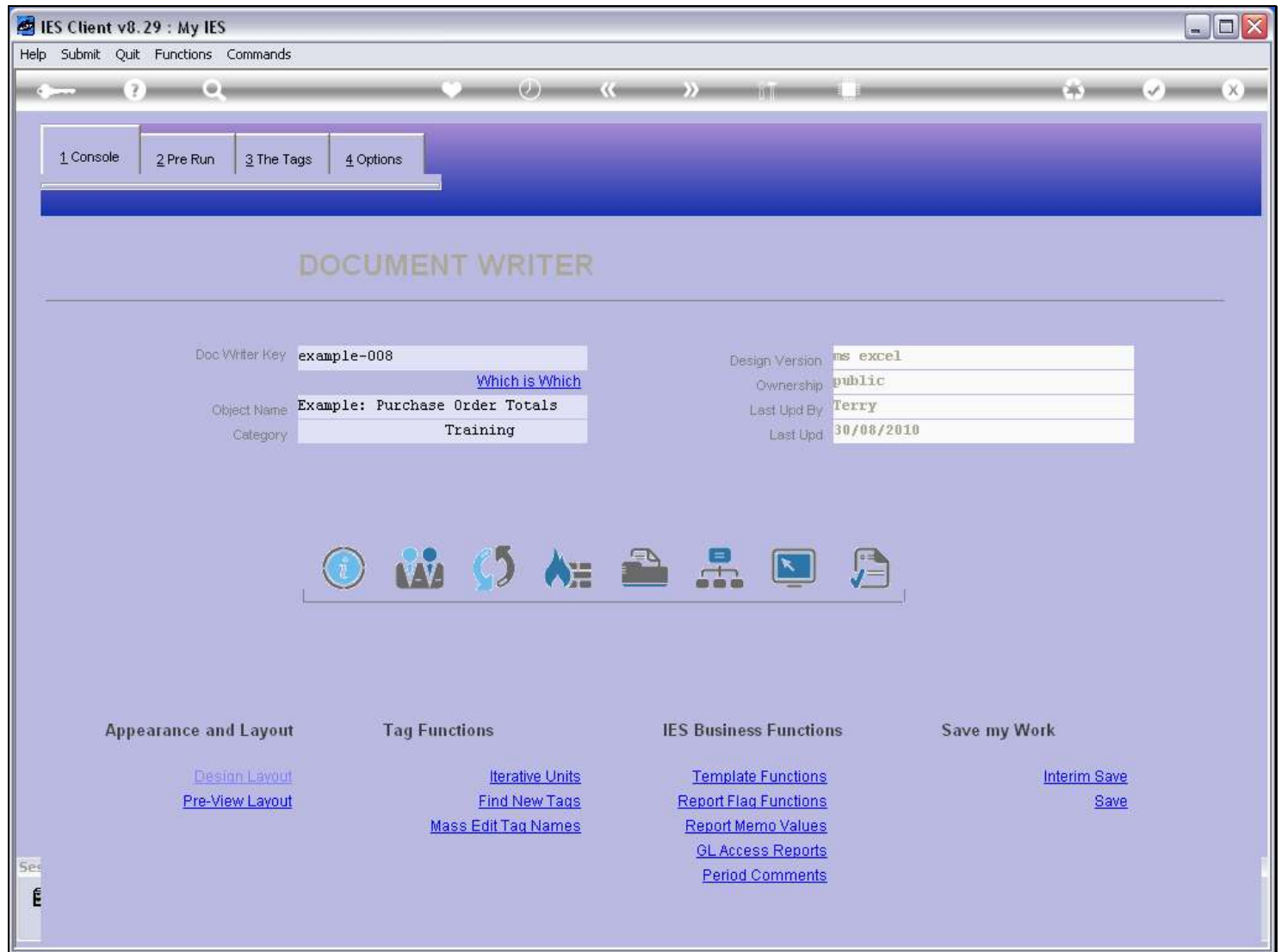
The screenshot shows a Windows Internet Explorer browser window. The address bar displays the URL `\\127.0.0.1\Bridge\ID1558362421.htm`. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar contains various icons for navigation and search. The main content area displays the following text:

Purchase Order Totals: All Suppliers

On Order	-1,700.00
Received	2,854,268.99
Invoiced	77,725.31

The status bar at the bottom shows the word "Done" on the left and "Internet" on the right, along with a zoom level of 100%.

Slide notes

Slide 56 - Slide 56**Slide notes**

[illegible]

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Slide 58 - Slide 58

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operationl: no operation

Remove Template

Copy Template

Reveal Logic

Save

Tag Addressingrelative

Period Mapping2: tag maps to current year

Forex Exchange Rate1: not used

Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Maskmr22,

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Data Selection: -

	And / Or	DataName	Value	Value
1	*	type Type	>= c	<= c

Slide notes

Page 58 of 69

Slide 59 - Slide 59

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

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Reveal Logic

Save

Data Selection: -

	And / Or	DataName	Value	Value
1	*	type Type	>= c	<= c

Tag Addressingrelative

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Rounding for Numbers1: do not apply rounding

Display Maskmr22,

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☐ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Slide notes

Slide 60 - Slide 60

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

TEMPLATE 058: Accounts Numeric - Multi Rule

TAG #0001

NameOn Order

Data Source NameLENTS CUSTOMER REGISTER

Data Field Nameord-cur Ordered

Data Name OR Literal (see help)

Names Operationl: no operation

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Data Selection: -

	And / Or	DataName	Value	Value
1	*	type Type	>= c	<= c

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Financial Scaling1: no scaling

Rounding for Numbers1: do not apply rounding

Display Maskmr22,

Alignmentr: right justified

Result Width21

Bold ?normal

Underline ?normal

☒ Sign Convert ? (+/-)

Tag Resultalways return a result

Test Operator=

Conditional Value

Slide notes

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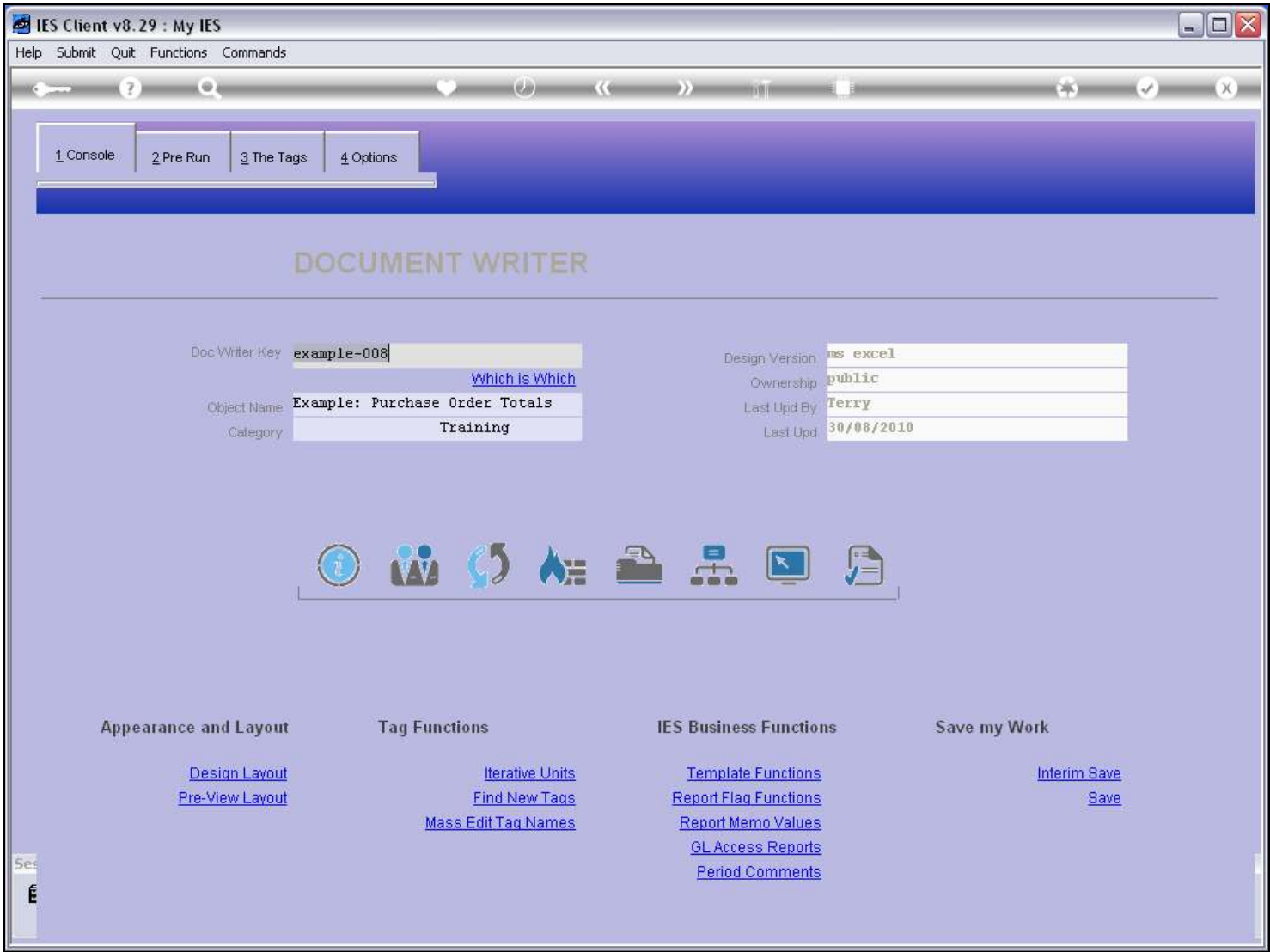
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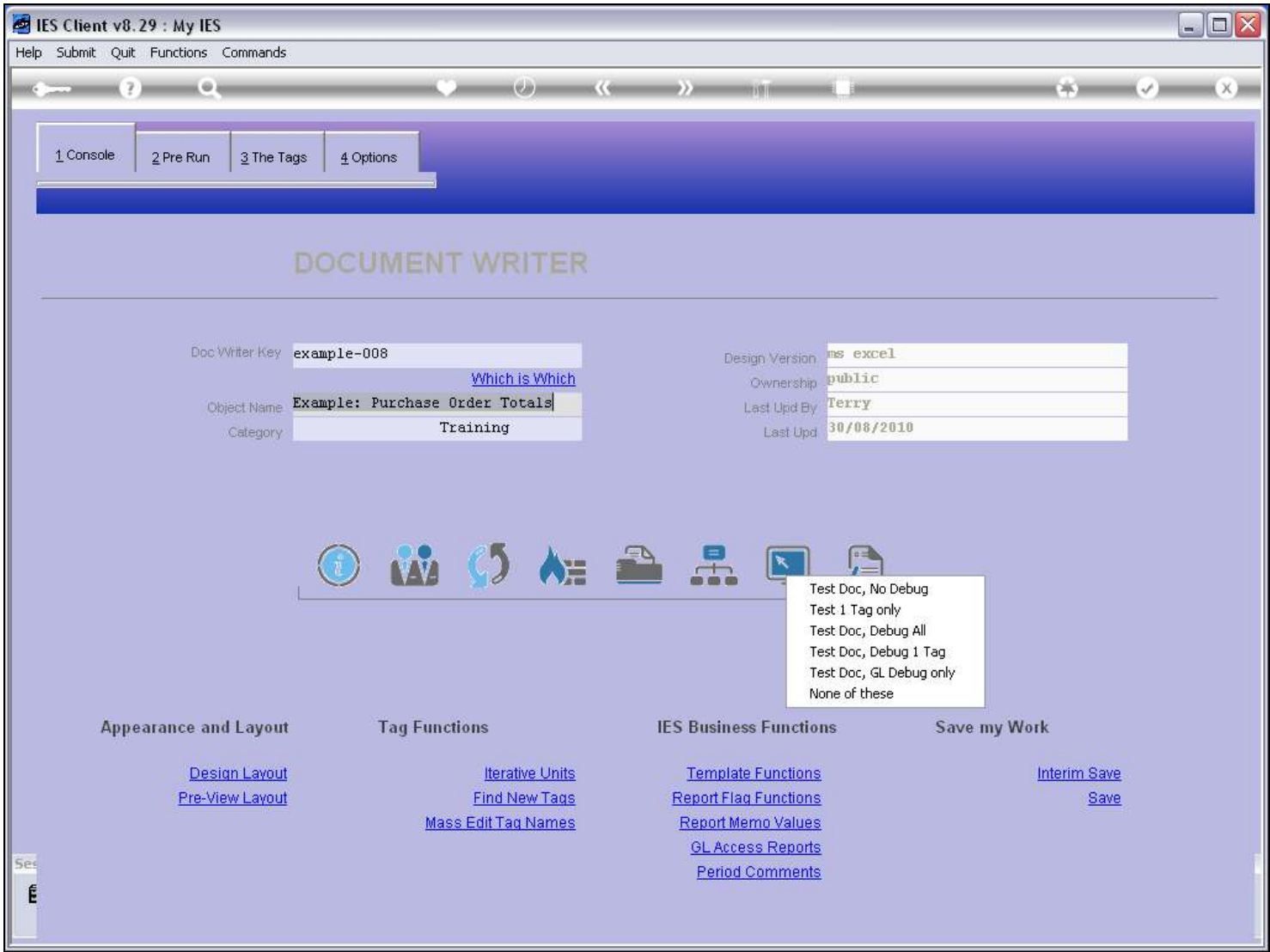
Slide notes

Slide 63 - Slide 63



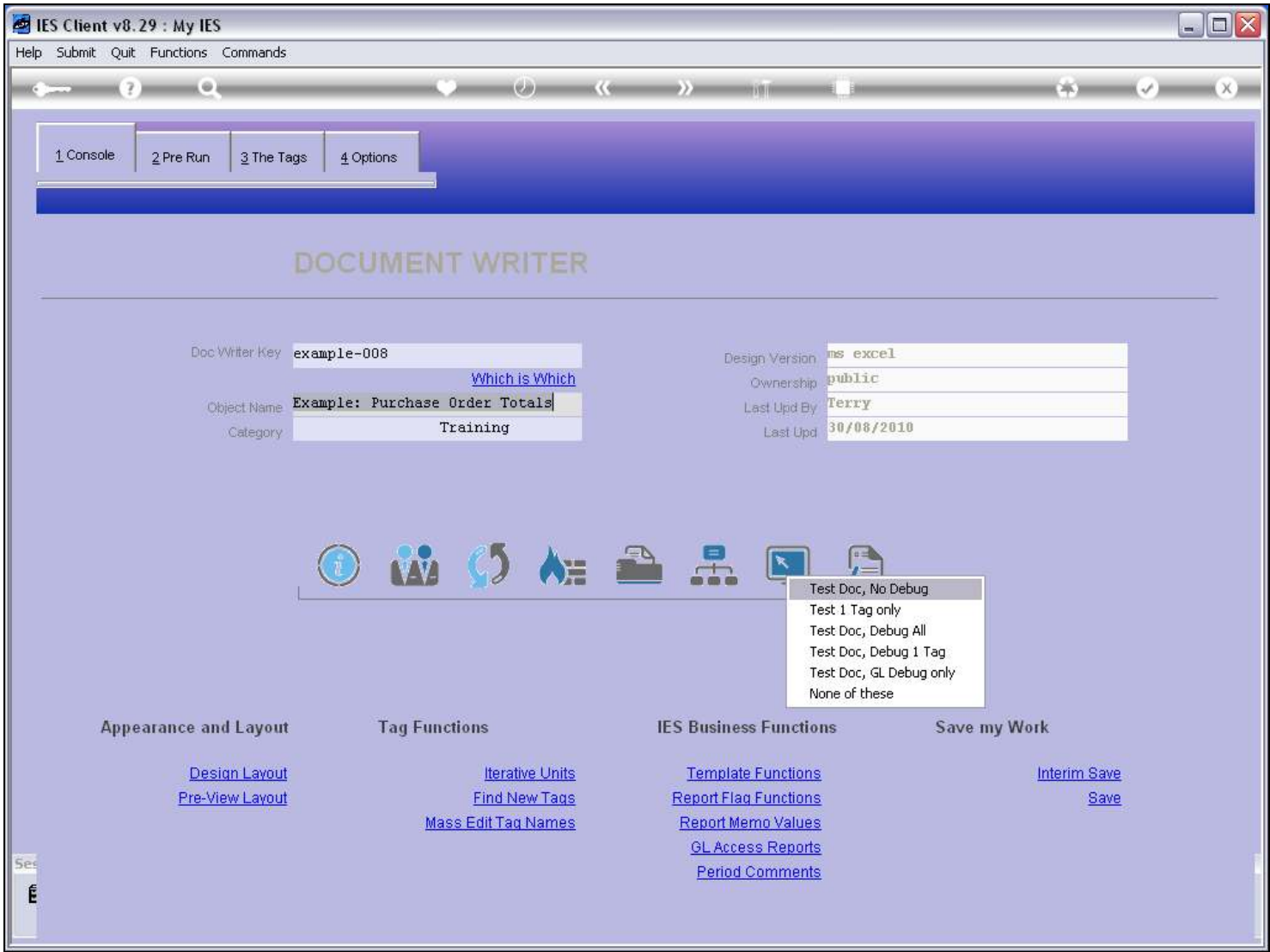
Slide notes

Slide 64 - Slide 64



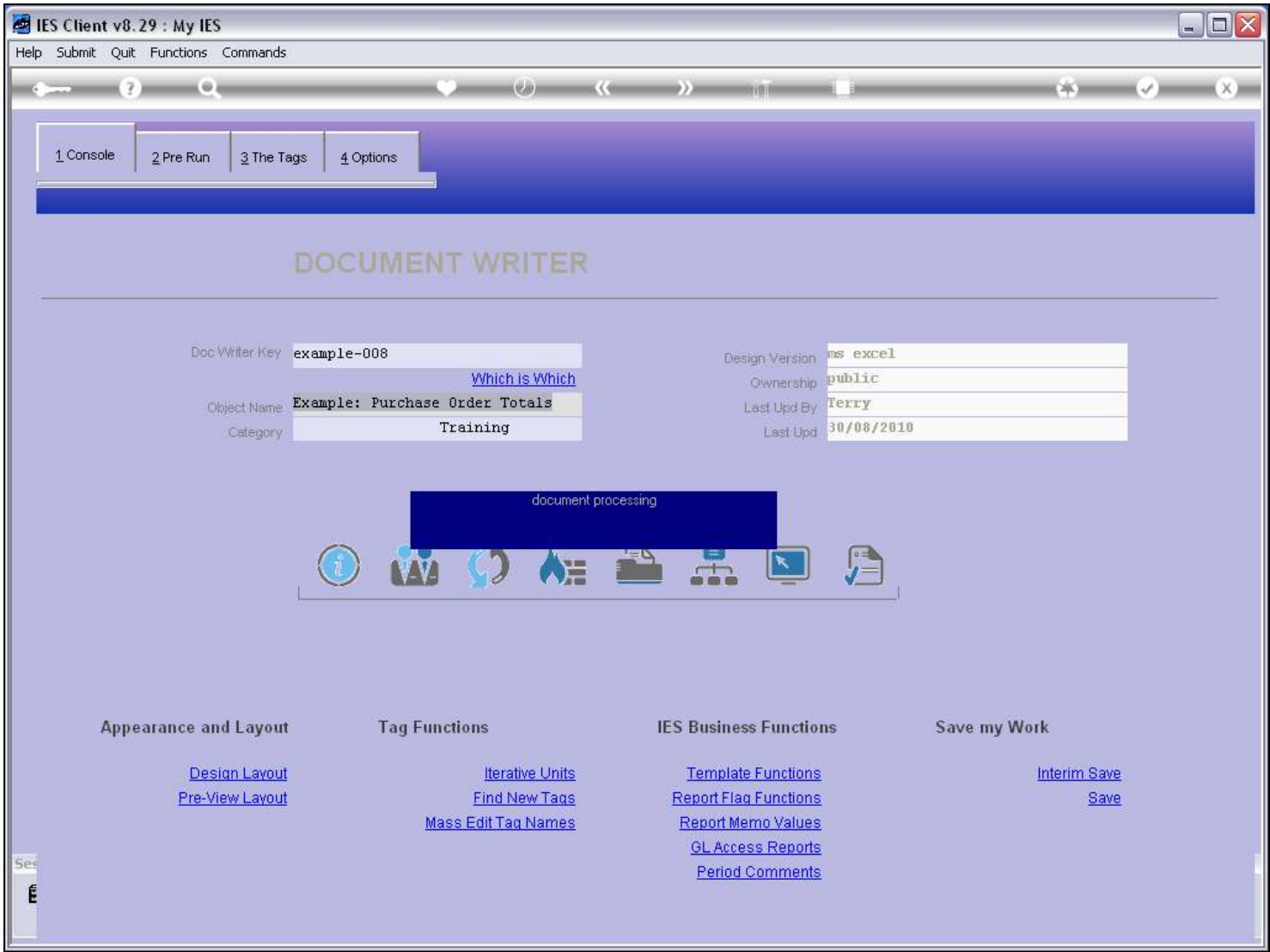
Slide notes

Slide 65 - Slide 65



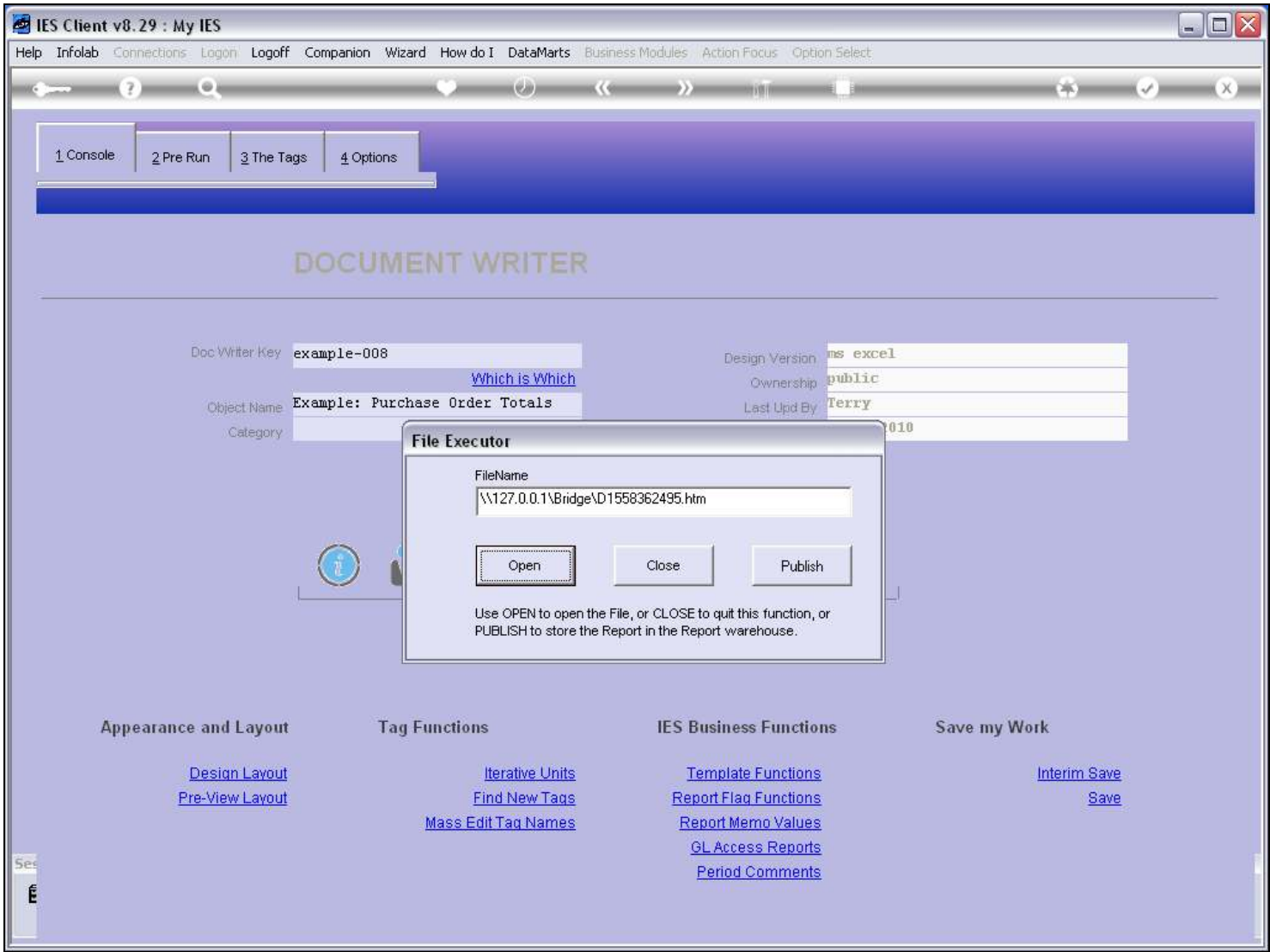
Slide notes

Slide 66 - Slide 66



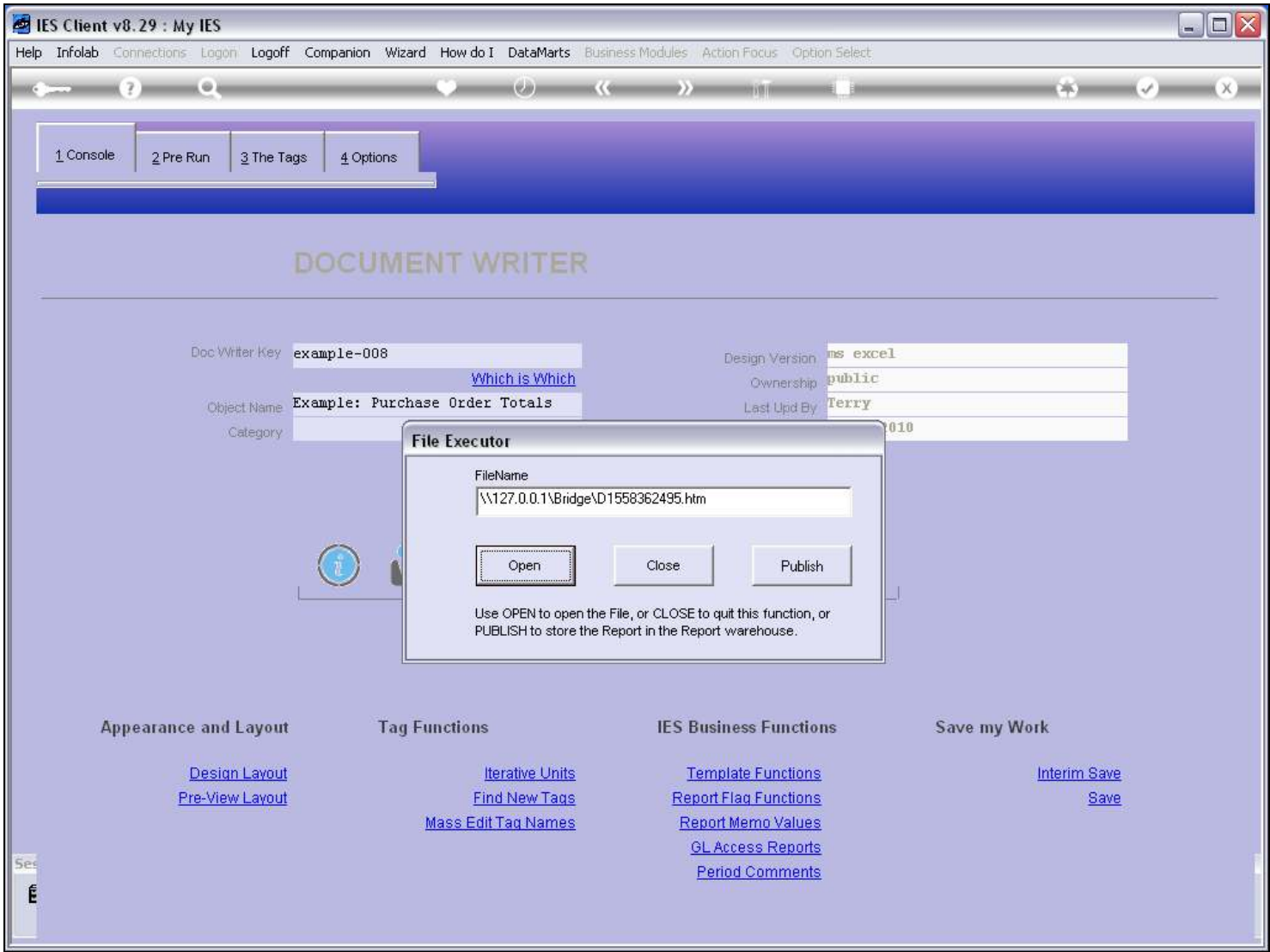
Slide notes

Slide 67 - Slide 67



Slide notes

Slide 68 - Slide 68



Slide notes

Slide 69 - Slide 69

Purchase Order Totals: All Suppliers

On Order	1,700.00
Received	2,854,268.99
Invoiced	77,725.31

Slide notes

This time, the Amount shows the way we want it to. So this is our example of how to use the Template for 'Number from the Accounts'.