



# i4Query®

i4Query is a browser-based data query tool for the **infoware** family of products. After logging in, subject to security requirements you can select fields and define queries to run on all of **Infoware's** databases.

## i4Query — Powerful Web-Based Data Querying for Infoware

### What Is i4Query?

A browser-based data query tool purpose-built for the Infoware product suite—delivering fast, secure, and intuitive access to operational data without requiring SQL knowledge.

### What is an I4 Excel Plugin?

I4 excel plugins are an extension of i4query to allow you to define formulas; pivot tables, pivot charts; graphs and all the excel power to analyse your data. Once initial template created you can refresh time and again to review i4 plugin data with your latest data.

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### Key Benefits

- **No SQL Required**

Query data across multiple Infoware database tables using a simple, guided interface.

- **Faster, Smarter Decision-Making**

Access real-time, accurate data whenever you need it. Especially with i4 plugins.

- **Secure by Design**

All queries respect existing Infoware security settings and user permissions.

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### Powerful Query Builder

- Select any **primary table** and access **logically joined related tables**.
  - Build complex conditions with up to **99 query lines**.
- Combine criteria with **AND/OR logic** and **bracketed expressions**.
  - Leverage flexible relationship operators: **equals (eq), less than (lt), greater than (gt), contains (co)**.
  - Compare **field-to-field**, not just field-to-value.

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### Flexible Results Management

- Customise **column order**, hide columns, or reorder fields.
  - Multi-level **sorting** (ascending/descending).

- Generate **totals** or **summary-only views**.
- Suppress detailed records for streamlined reporting.

### Seamless Export & Excel Integration

- Download results in **CSV** for Excel or BI tools.
- **Use the i4Query Excel Web Query Plug-in to:**
  - Auto-run and refresh saved queries directly from Excel.
  - Combine dynamic data feeds with **PivotTables**.
  - Build either **fixed reports** or **parameter-driven reports**.

### Outcome

i4Query transforms how teams access and use Infoware data—reducing IT workload, empowering users, and enabling fast, accurate, cost-effective reporting across the business

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i4 Excel Plugin – Combine i4 Queries with Excel's Pivot tables for very powerful, cost effective report writing via the web.



## **Features at a Glance**

- ✓ Great data query interface to **infoware** family of products
- ✓ Simple interface to query data across multiple database tables – no SQL or other more complex commands to learn
- ✓ Sort results to multiple levels
- ✓ Move or hide columns of result page to suit
- ✓ Option to total numeric columns
- ✓ Option to generate summary totals only
- ✓ Microsoft® Excel can read infoware i4 Query data tables to create very powerful and flexible user defined reporting.
- ✓ Can apply specific user restrictions to fields and field values
- ✓ Can access all documents linked to a transaction – both **infoware** generated and external documents
- ✓ Web enabled

## 1. Access

To access i4Query you need Microsoft Edge. You must also have session cookies enabled on your Browser. Current versions of Chrome and Firefox are also supported.

### 1.1 If i4Query is installed on your server

If i4Query is installed on your server you require a URL similar to the following (except your domain name or IP address and the path will be slightly different):

<https://isw.satsof.com/cgi-bin/ssfpcgi/clrdemo/rec/wwgen/syapps?newlogin=y>

If you are unsure of this URL contact either your system administrator or Infoware Services support. You also need a login and password.

### Handy Hint

Add your login page URL to your Favourites in your browser.

### 1.2 Test Drive i4Query

If you would like to test drive i4Query, visit [www.infowareservices.com.au](http://www.infowareservices.com.au) and click on login.



Welcome to Infoware Services

## 2. Login

You need to provide a login name and password to gain access to your list of **infoware**'s i4 browser applications including i4Query.

If test driving from [www.infowareservices.com.au](http://www.infowareservices.com.au) then enter **"user1"** into **"User ID:"** field and **"test"** into **"Password:"** field then click the **"Login"** button.

If accessing your own server, enter a valid username and password. If you do not know your login and password see your system administrator.



### User Login

User ID:

Password:  [Forgot Password?](#)

Depending on your access, the menu bar at the top of the page displays a number of **infoware**'s applications. Select the **i4 Query** option.



### i4 Query

-- Select Database --

-- Select My Saved Query --



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### 3. Tutorial

#### 3.1 Select Database & Fields

Your system administrator controls the list of database files that you have access to. Due to security reasons most users will NOT have access to all database files.

**Naming conventions of infoware file names are:**

Prefix	Database	File Type	Description
bm	Bill of materials	mast	Master file (except GL Chart of accounts is called glchart).
cb	Cash Book	tran	Transaction file
cr	Creditors	prm	1 record parameter file
db	Debtors	work	Work file of unconfirmed transactions (unless multiple files per application)
fa	Fixed Asset	branch	Branch Maintenance {8,2}
gl	General Ledger	company	Company Maintenance {8,1}
iv	Inventory	<b>Example:</b> Debtor transaction file is called <b>dbtran</b> . Job Cost Master file is called <b>jcmast</b> .	
jc	Job cost		
py	Payroll		
sy	System Wide		
tm	Transware		
wm	Warehousing		

### Handy Hint

You can type into the box instead of scrolling through all the different database files.

i4Query allows you to choose the primary database table to query. Selecting the down arrow will show the database files that can be accessed.

Before constructing a query, you need to think about what is the lowest level of detail that you require and choose that database file as the primary database to query. Other related databases will be available which have some reference code within the primary database selected. E.g. you wish to display debtor invoices for specific debtors. The invoices are the main data for the query so the Debtors Transactions file would be the primary database for the query, which is linked back to the Debtors Masterfile.

Filename



In this example select “**Debtors Transactions (dbtran)**”.



**i4 Query**

Search: d OR Import Query

Code	Description
crwthld	Creditors Withholding Codes (crwthld)
<b>dbadst</b>	<b>Debtors Archive Distributions (dbadst)</b>
dbatrn	Debtors Archive Transactions (dbatrn)
dbdel	Debtors Delivery Addresses (dbdel)
dbdist	Debtors Distributions (dbdist)
dbgltr	Debtors GL Dissections (dbgltr)
dblic	Debtors License Fees (dblic)
dblica	Debtors License New Act Grps (dblica)
dblicc	Debtors License Categorys (dblicc)
dblich	Debtors Summary Licence Hist (dblich)
dbmast	Debtors Masterfile (dbmast)
dbndbk	Debtors Non-Debtor Receipts (dbndbk)
dbprm	Debtors Parameters (dbprm)
dbsala	Debtors Sales Analysis A1 Codes (dbsala)
dbsalas	Debtors Sales Analysis A2 Codes (dbsalas)
dbsalb	Debtors Sales Analysis B1 Codes (dbsalb)
dbsalbs	Debtors Sales Analysis B2 Codes (dbsalbs)
dbtran	Debtors Transactions (dbtran)

Once the Database file “Debtors Transactions” has been selected, i4Query refreshes to show the available database files and fields to select. Logically joined files are automatically listed. In this example as you are querying the Debtor Transaction file, you may also wish to select fields from the Branch Masterfile (e.g. branch name) and Debtors Masterfile (e.g. debtor name, account balance, debtor phone number etc).



**i4 Query**

Debtors Transactions (dbtran) ✕

-- Select Saved Query -- CTRL-Click fields to select/deselect.

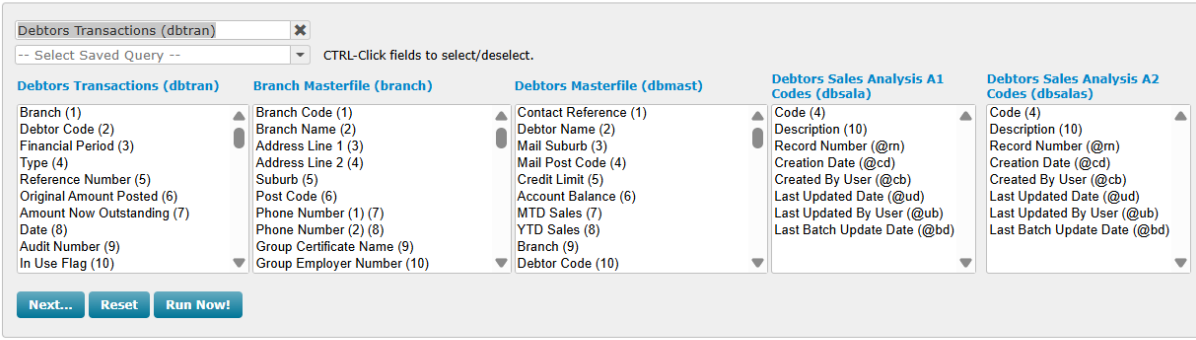
**Select Saved Query** (arrow pointing to dropdown)

**Database Dictionary Link** (arrow pointing to CTRL-Click fields to select/deselect.)

Debtors Transactions (dbtran)	Branch Masterfile (branch)	Debtors Masterfile (dbmast)
Branch (1)	Branch Code (1)	Contact Reference (1)
Debtor Code (2)	Branch Name (2)	Debtor Name (2)
Financial Period (3)	Address Line 1 (3)	Mail Suburb (3)
Type (4)	Address Line 2 (4)	Mail Post Code (4)
Reference Number (5)	Suburb (5)	Credit Limit (5)
Original Amount Posted (6)	Post Code (6)	Account Balance (6)
Amount Now Outstanding (7)	Phone Number (1) (7)	MTD Sales (7)
Date (8)	Phone Number (2) (8)	YTD Sales (8)
Audit Number (9)	Group Certificate Name (9)	Branch (9)
In Use Flag (10)	Group Employer Number (10)	Debtor Code (10)

**Next...** **Reset** **Run Now!**

## i4 Query



Debtors Transactions (dbtran) x

-- Select Saved Query -- CTRL-Click fields to select/deselect.

Debtors Transactions (dbtran)	Branch Masterfile (branch)	Debtors Masterfile (dbmast)	Debtors Sales Analysis A1 Codes (dbsala)	Debtors Sales Analysis A2 Codes (dbsalas)
Branch (1)	Branch Code (1)	Contact Reference (1)	Code (4)	Code (4)
Debtor Code (2)	Branch Name (2)	Debtor Name (2)	Description (10)	Description (10)
Financial Period (3)	Address Line 1 (3)	Mail Suburb (3)	Record Number (@m)	Record Number (@m)
Type (4)	Address Line 2 (4)	Mail Post Code (4)	Creation Date (@cd)	Creation Date (@cd)
Reference Number (5)	Suburb (5)	Credit Limit (5)	Created By User (@cb)	Created By User (@cb)
Original Amount Posted (6)	Post Code (6)	Account Balance (6)	Last Updated Date (@ud)	Last Updated Date (@ud)
Amount Now Outstanding (7)	Phone Number (1) (7)	MTD Sales (7)	Last Updated By User (@ub)	Last Updated By User (@ub)
Date (8)	Phone Number (2) (8)	YTD Sales (8)	Last Batch Update Date (@bd)	Last Batch Update Date (@bd)
Audit Number (9)	Group Certificate Number (9)	Branch (9)		
In Use Flag (10)	Group Employer Number (10)	Debtor Code (10)		

Next... Reset Run Now!

## 3.2 Select Saved Query

“**Select Saved Query**” selection box provides access to load previously saved queries. [Any changes made to previously saved queries are temporary unless you save the changes \(last](#)

### Handy Hint

The standard Windows mouse click options for selecting fields apply.

To select a **contiguous range** of fields <click> on the first desired field and <Shift-click> on the last field. (This option should be performed before all other field selections, as range selections will clear all other field selections in the database table).

<Ctrl-click> on individual fields to select **multiple** fields.

To De-select a chosen field then <Ctrl-click>

[step in i4Query](#)).

In this example from the Debtor Transaction table select fields 1 to 8 (Branch, Debtor Code, Financial Period, Type, Reference Number, Original Amount Posted, Amount Now Outstanding and Date fields).

From the Debtor Masterfile table, select Debtor Name and Telephone fields.

### Handy Hint

#### Online Data Dictionary - Option to view screen formats

i4 Query lists all the fields available for each of the database tables relating to the initial table selected. Above each of these lists is the database name (e.g. “*Debtor’s Master file*”).

A challenge on some of the files with a large number of fields (especially master files) is trying to find the desired fields.

An easy option to find a field(s) in a database file is to click on the Database name link at the top of the field list e.g. by clicking **Debtors Master (dbmast)**. i4Query opens a new window with the **data entry screens** for the Debtors master file with the field numbers displayed (*see screen below*).

### 3.3 Online Data Dictionary

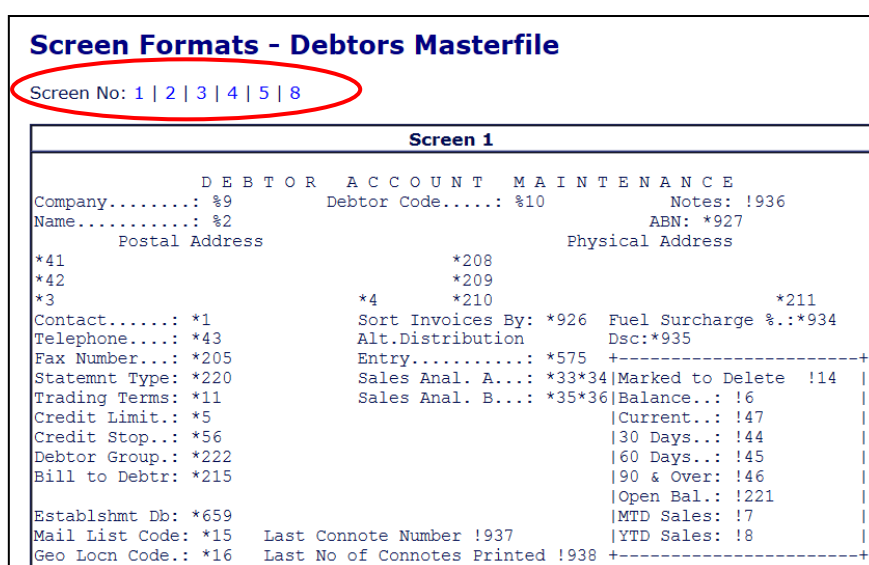
The data entry screens are listed exactly as they appear in **infoware**. i4 Query reads the same screen files as **infoware** to list the fields. It shows the application screens numbered 1-8 that are available for the Debtors Masterfile in this example.

This can be used to find a field within **infoware**, as you know where it appears on the **infoware** screen. The field numbers are prefixed by either:-

- \* - an asterisk (optional field)
- ! - exclamation mark (display only field that cannot be edited on this screen), or
- % - a percentage sign (a mandatory field)

*In the above example, Telephone is field 43.*

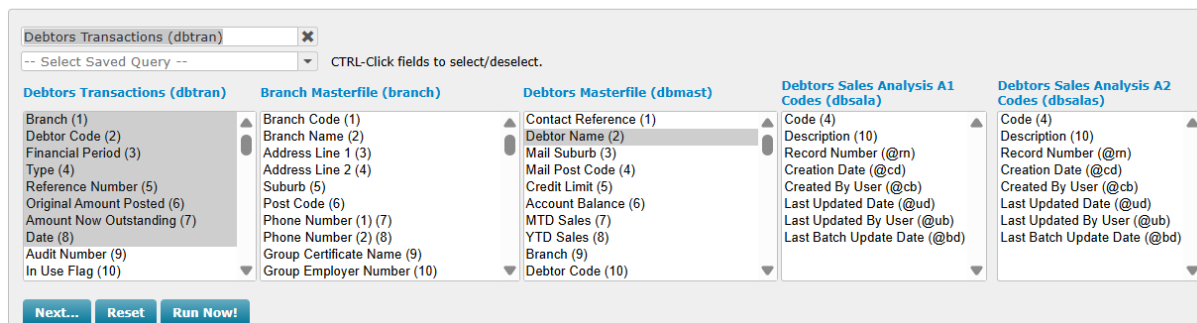
Having obtained the field number from this window you can **close this window** and return to



the i4Query screen. You can then select the appropriate field(s) from that database table.

After you have selected the required fields, i4Query should appear as follows with the selected fields highlighted.

#### i4 Query



The quickest way to select a range of fields in the example is:

**In Debtor Transaction table,**  
 <Click> on first field – Branch.

<Shift> <click> on last field in range – Date.

***In Debtors Masterfile table,***

<click> on table “Debtors Masterfile” link to find the Telephone field is field 43 in data dictionary. Close Screen Formats window.

<click> first field (Debtor Name (2)) then scroll down to Telephone (43) field and

## Handy Hint

3 ways to navigate using the scroll bar are:

- click on up or down arrow and it will take you back or forward 1 line
- click above or below scroll cursor and it will jump you back or forward 1 screen
- drag scroll cursor to approximately where you wish to be in data table.

<ctrl><click>.

### **IMPORTANT:**

You must select all fields that you want to display **OR** that you wish to use in your selection criteria.

Once you have selected all the fields you wish, click on the **[Next]** button under the list of fields. Alternatively, if you have loaded a saved i4Query, or you want to select all data from a file (very rare!), you can also click on the **[Run Now!]** button to execute the query immediately.

### 3.4 i4Query Column Order

The i4Query Column Order screen will then be displayed:



#### i4 Query - Column Order

Field Name	Col. Name	Col. No	Total?	Sort Ord.	Subtot?	Descend?
dbmast- Debtor Name	Debtor Name	1	<input type="checkbox"/>	▼	<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Branch	Branch	2	<input type="checkbox"/>	▼	<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Debtor Code	Debtor Code	3	<input type="checkbox"/>	▼	<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Financial Period	Financial Period	4	<input type="checkbox"/>	▼	<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Type	Type	5	<input type="checkbox"/>	▼	<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Reference Number	Reference Number	6	<input type="checkbox"/>	▼	<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Original Amount Posted	Original Amount Posted	7	<input type="checkbox"/>	▼	<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Amount Now Outstanding	Amount Now Outstanding	8	<input type="checkbox"/>	▼	<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Date	Date	9	<input type="checkbox"/>	▼	<input type="checkbox"/>	<input type="checkbox"/>

Display Totals Only?

Next... Reset Run Now!

Back to Fields

#### 3.4.1 Column Number

If there are 2 fields with the same column number, i4Query will decide which field is listed first, and the other field(s) with the same column number will be listed immediately following.

### Handy Hint

While i4 Query will display fields with the same column number after each other, it is mandatory that the column numbers are unique if you are going to use i4 Query in i4 Excel plugin. More than 1 field with the same column number may list in a different order when i4 Query is run at different times. This will cause issues in i4 Excel plugin if the order of each field keeps changing.

#### 3.4.2 Hide Column

#### 3.4.3 Total

#### 3.4.4 Display Totals Only

### 3.5 Sort Order

The results of i4 Query will not be sorted – unless you specifically define the sort order.

The following example will sort data by Branch, Debtor Code then Date.



#### i4 Query - Column Order

Field Name	Col. Name	Col. No	Total?	Sort Ord.	Subtot?	Descend?
dbmast- Debtor Name	Debtor Name	1	<input type="checkbox"/>	↓	<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Branch	Branch	2	<input type="checkbox"/>	↓	<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Debtor Code	Debtor Code	3	<input type="checkbox"/>	2 ↓	<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Financial Period	Financial Period	4	<input type="checkbox"/>	1 ↓	<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Type	Type	5	<input type="checkbox"/>	↓	<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Reference Number	Reference Number	6	<input type="checkbox"/>	↓	<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Original Amount Posted	Original Amount Posted	7	<input type="checkbox"/>	↓	<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Amount Now Outstanding	Amount Now Outstanding	8	<input type="checkbox"/>	↓	<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Date	Date	9	<input type="checkbox"/>	3 ↓	<input type="checkbox"/>	<input type="checkbox"/>

Display Totals Only?

Next... Reset Run Now!

Back to Fields

### Handy Hint

If the result is going to be more than 2000 records and the end result is going to be viewed in Excel, then it will be more efficient to sort the results in Excel and leave the Sort Order blank. Sort Orders are effective for defining the sort order for smaller lists such as lists of debtors, employees etc., or producing your own subtotalled reports from within i4 Query.

#### 3.5.1 Subtotal

Sometimes you may wish to subtotal records e.g. subtotal a list of invoices by branch and debtor. If you wish to do this, then tick the Subtotal field for these fields. You will also need to define Sort Order fields as these will usually be the same as the Subtotal fields. If you are going to use Excel’s pivot tables then do NOT select any subtotal fields.

#### 3.5.2 Descend

If you sort on any fields, the results will be sorted in ascending order [0-9, a-z]. By selecting the “Descend?” option for any Sorted field, then this field will be sorted in Descending order [z-a, 9-0] instead.

Once you have made changes required, click the [Next] button to proceed.

## 3.6 i4Query – Selection Criteria

The **i4Query – Selection Criteria** screen will then be displayed.



### i4 Query - Selection Criteria

And /Or	( 's	Field	Rel	Value	)'s	Index Val	Excel Plugin Prompt
		dbtran- Type (2,DBTTY)		in			
		dbtran- Date (6,DMY)	le	150125			

Use dbtran Index:

No. of Selection Lines:

This page allows you to define the selection criteria for this query *e.g. selecting only invoices before a given date*. By default you are allowed 5 selection lines. If you need more lines, change the **Number of Selection Lines** field accordingly and select [**Refresh**]. A maximum of 99 lines may be used for a query.

By default, the selection lines are joined by the 'AND' condition which means that all Selection Criteria lines must be satisfied for a record to be selected. If you wish to check for *either* a condition A or a condition B, you may join the lines using the 'OR' condition by selecting 'OR' from the 'AND/OR' column. If it is left blank, i4Query assumes the condition is 'AND'.

The next column allows you to **define brackets** to join lines together. For example, a more complex query may require a debtor code = A and a transaction type = IN (for invoice), or a debtor code = B and transaction type CH for cheque. You would have an open bracket prior to the debtor code lines and closing brackets after the transaction type values. This would then give you a report of all debtor A's invoices and debtor B's cheques.

In the **field column** you will need to select the field that you wish to compare. The size of the field and the type of data type is shown in parentheses after the field name.

**Note: the fields previously selected are the only fields that can be queried.**

### 3.6.1 Rel Operators

REL	DESCRIPTION
eq or blank	Equals to (the same as, but only for as many characters as entered if a text field)
ne	Not equal to (different)
lt	Less than (lower than)
le	Less than or equal to (lower than or the same as)
gt	Greater than (higher than)



ge	Greater than or equal to (higher than or the same as)
co	Contains (searches if field contains the value anywhere in the field)



The following calendar examples show how each of the ‘Rel’ column options will select data. This also applies to numeric and alpha fields. Dates are in DDMMYY format.

Using the **EQ or blank** option, such as “EQ 160125” will only select data for the date 16<sup>th</sup> January 2025. For example:

December 2024						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

January 2025						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

February 2025						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

Using the **NE** option, such as “NE 160112” will select all days except for the 16<sup>th</sup> January 2025. For example:

December 2024						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

January 2025						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

February 2025						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

Using the **GT** option, such as “GT 160125” will select data after the specified date. For example:

December 2024						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

January 2025						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

February 2025						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	



Using the **GE** option, such as “GE 160125” will select data after and including the specified date. For example:

December 2024						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

January 2025						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

February 2025						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

Using the **LT** option, such as “LT 160125” will select data before the specified date. For example:

December 2024						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

January 2025						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

February 2025						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

Using the **LE** option, such as “LE 160125” will select data before and including the specified date. For example:

December 2024						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

January 2025						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

February 2025						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

### 3.6.2 How do I define a range?

For this example, we will define a range of dates from the 15<sup>th</sup> December 2024 to 16<sup>th</sup> January 2025. This is performed by entering two (2) lines on the **i4Query – Selection Criteria**.



#### i4 Query - Selection Criteria

And /Or	('s	Field	Rel	Value	)'s	Index Val	Excel Plugin Prompt
	▼	dbtran- Date (6,DMY)	▼ ge ▼	151224		▼	
	▼	dbtran- Date (6,DMY)	▼ le ▼	160125		▼	
	▼		▼			▼	
	▼		▼			▼	
	▼		▼			▼	

Use dbtran Index:

No. of Selection Lines:

Using the **GE** option, “GE 151224” will select data after and including the specified date. Using the **LE** option, “LE 160125” will select data before and including the specified date. Combined, these will select data for the dates below:

December 2024							January 2025							February 2025						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6	7				1	2	3	4							1
8	9	10	11	12	13	14	5	6	7	8	9	10	11	2	3	4	5	6	7	8
15	16	17	18	19	20	21	12	13	14	15	16	17	18	9	10	11	12	13	14	15
22	23	24	25	26	27	28	19	20	21	22	23	24	25	16	17	18	19	20	21	22
29	30	31					26	27	28	29	30			23	24	25	26	27	28	

**WARNING:** If your query produces a result with more than a few thousand lines then it may take your browser some time to display it. As a result the i4results page is limited to 5000 records [parameter setting]. When you select Convert to CSV or use i4 plugin options the FULL data result is supplied.

### 3.6.3 Comparing Two Fields

Normally a field is compared with a value e.g. a date [field] eq [relationship] 160125 [value]. Sometimes you may wish to compare two fields. Any relationship with an “f” at the end is comparing two fields rather than a field and a value.



#### i4 Query - Selection Criteria

And /Or	( 's	Field	Rel	Value	)'s	Index Val	Excel Plugin Prompt
	▼	dbtran- Type (2,DBTTYP)	▼ eq ▼	in		▼	
And ▼	▼	dbtran- Date (6,DMY)	▼ le ▼	160125		▼	
	▼	dbtran- Original Amount Posted (11,.2)	▼			▼	
	▼		▼			▼	
	▼		▼			▼	

Use dbtran Index:

No. of Selection Lines:

- eq
- ne
- lt
- le
- gt
- ge
- co
- lik
- eqf
- nef
- ltf
- lef
- gtf
- gef
- cof
- likef

InfowareServices  
Copyright © 2025 | Oct 13, 2025 11:14:59 | 9085041

**Example:** both the debtors’ transaction [dbtran] and creditors’ transaction [crtran] data tables contain 2 fields – the transaction’s original amount and the amount currently outstanding. When a transaction is paid the amount outstanding is 0.00.

If you wish to display a list of PARTIALLY paid transactions you would enter Selection Criteria as follows:

First, when you are comparing fields you MUST KNOW THE FIELD NUMBER. The field number is in brackets. In this example Amount Now Outstanding is field 7.

*If you wish to compare to a field, the field in the Value Column must always be in the primary [main] data table, as you are entering the field you need to relate to first, in the Field Column which may be in a different data table.*



### i4 Query

Debtors Transactions (dbtran) ✕

-- Select Saved Query -- ▼ CTRL-Click fields to select/deselect.

Debtors Transactions (dbtran)	Branch Masterfile (branch)	Debtors Masterfile (dbmast)
Branch (1)	Branch Code (1)	Contact Reference (1)
Debtor Code (2)	Branch Name (2)	Debtor Name (2)
Financial Period (3)	Address Line 1 (3)	Mail Suburb (3)
Type (4)	Address Line 2 (4)	Mail Post Code (4)
Reference Number (5)	Suburb (5)	Credit Limit (5)
Original Amount Posted (6)	Post Code (6)	Account Balance (6)
Amount Now Outstanding (7)	Phone Number (1) (7)	MTD Sales (7)
Date (8)	Phone Number (2) (8)	YTD Sales (8)
Audit Number (9)	Group Certificate Name (9)	Branch (9)
In Use Flag (10)	Group Employer Number (10)	Debtor Code (10)

**Next...** **Reset** **Run Now!**

The first line of the following Selection Criteria selects only transactions where the Amount Outstanding is “ne” 0 [i.e. transactions that are not fully paid].

The second line due to the relationship “nef” interprets the 7 as “field 7”. For example: Original amount posted “nef” [not equal to field] 7 Amount Outstanding [i.e. partially paid transactions].



### i4 Query - Selection Criteria

And /Or	('s	Field	Rel	Value	)'s	Index Val	Excel Plugin Prompt
		dbtran- Amount Now Outstanding (11,2)	ne	0			
		dbtran- Original Amount Posted (11,2)	nef	7			

Use dbtran Index: ▼

No. of Selection Lines: 5 **Refresh**

**Next...** **Reset** **Run Now!**

**Back to Fields**

**Other examples of comparing 2 fields in infoware include: List Debtors where account balances > Credit limit.** Fields are Credit Limit (5) and Account Balance (6)



### i4 Query

✕

-- Select Saved Query --
CTRL-Click fields to select/deselec

**Debtors Masterfile (dbmast)**

- Contact Reference (1)
- Debtor Name (2)
- Mail Suburb (3)
- Mail Post Code (4)
- Credit Limit (5)
- Account Balance (6)
- MTD Sales (7)
- YTD Sales (8)
- Branch (9)
- Debtor Code (10)

**Branch Masterfile (branch)**

- Branch Code (1)
- Branch Name (2)
- Address Line 1 (3)
- Address Line 2 (4)
- Suburb (5)
- Post Code (6)
- Phone Number (1) (7)
- Phone Number (2) (8)
- Group Certificate Name (9)
- Group Employer Number (10)

Next...
Reset
Run Now!

The following Selection Criteria selects records where Credit Limit “gtf” [greater than field] field number 6 [Debtor Account Balance].



#### i4 Query - Selection Criteria

And /Or	('s	Field	Rel	Value	)'s	Index	Val	Excel	Plugin	Prompt
		dbmast- Credit Limit (6,0)	gtf	6						

Use dbmast Index:

No. of Selection Lines:  Refresh

Next...
Reset
Run Now!

[Back to Fields](#)

In data table IV Branch Stock Items (ivmastbr), you may wish to list products where physical and financial quantities differ [i.e. products where there are outstanding deliveries not yet matched against a supplier’s invoice].

**Fields** are Qty on Hand (Physical) (19) and Qty (Financial) (45).



#### i4 Query - Selection Criteria

And /Or	('s	Field	Rel	Value	)'s	Index	Val	Excel	Plugin	Prompt
		ivmastbr- Qty on Hand (Physical) (8,F)	nef	45						

Use ivmastbr Index:

No. of Selection Lines:  Refresh

Next...
Reset
Run Now!

[Back to Fields](#)



Once you have entered all the selection criteria for the report, click on the **[Next]** button to move to the Save/Run selection screen.

Going back to our example, your screen should look like this before you click **[Next]**.



### i4 Query - Selection Criteria

And /Or	('s	Field	Rel	Value	)'s	Index Val	Excel Plugin Prompt
		dbtran- Type (2,DBTTYP)		in			
		dbtran- Date (6,DMY)	le	150125			

Use dbtran Index:

No. of Selection Lines:

## 3.7 Save/Run Selection

The following example is being saved under a new name “overdue invoices”



### Save/Run Selection

Selection Name:

And/Or New Name:

Having defined the selection criteria for this query, it is possible to save the query with a name. This allows you to load the criteria and rerun (optionally changing the query) for later queries.

#### 3.7.1 Save Options

- If you don't wish to save the query then just leave the Name field blank and click the **[Save/Run]** button to continue.
- If you do wish to **save the query**, enter a new name in the **'And/Or New Name'** field.
- If you wish to overwrite an already saved query, select the existing query from the **'Selection Name'** box and optionally give it a new name. You cannot overwrite queries created by other users.



Once you have selected an existing Selection Name or entered a new name then click the **[Save/Run]** button to save the selection and run the query.

### 3.7.2 Running the Query



#### Running Query...

Phase 1:	0%
Phase 2:	0%

### 3.8 i4Query Result

**i4 Query - overdue invoices**    Selection Criteria    User: infoware    Date: 13/10/25  
Time: 13:49:34

Download CSV    Excel Plugin    Plugin Access    Export Query    Refine Query

Debtor Name ↑	Branch ↑	Debtor Code ↑	Financial Period ↑	Type ↑	Reference Number ↑	Original Amount Posted	Amount Now Outstanding	Date ↑
Debtor 42 INFSER	42	INFSER	202507	IN	427369	1372.80	1372.80	31/07/2022

1 Matching Records Found

Download CSV    Excel Plugin    Plugin Access    Export Query    Refine Query

After the query is completed, the ‘i4Query Result’ is listed. You can click the ‘**Selection Criteria**’ link (at top of page) to see the selection criteria used to produce this query.

#### 3.8.1 Column Controls

**Column No List:** by selecting the down arrow button, a list of available column numbers will be displayed. Selecting another column will move this column to a new position. This is a temporary change to the Results page. The original i4Query does not have its field column order changed. Make permanent changes to the column order when defining the query on the Column Order page.

If the “**Hide Column**” option is chosen the column is then hidden on results page but the data still remains in results page (just not visible). If the user presses the **Refresh** option, the hidden column will reappear. Similarly if the Download CSV option is selected to transfer data into spreadsheet, the hidden column data will be included. This is important to understand if emailing an i4Query results page that may have hidden column data that is confidential – it may “re-appear” if ‘Refresh Page’ or ‘Download CSV’ option is chosen. The correct method if you wish to completely stop a field from showing on the results page is to use the “Hide” column number on the *i4Query Column Order page* not the Hide Option on i4Query Results page.

**Field Name:** The order of the initial Results data is not sorted unless you have defined a Sort Order [see Section 3.5]. Clicking on one of the field name links will dynamically sort the data by that column value. Example below has now been sorted by the “Debtor Name”.

#### 3.8.2 Sorting Results

**i4 Query - overdue invoices**    User: infoware    Date: 13/10/25  
Time: 13:58:58

Download CSV    Excel Plugin    Plugin Access    Export Query    Refine Query

Branch ↑	Debtor Code ↑	Financial Period ↑	Type ↑	Reference Number ↑	Original Amount Posted	Amount Now Outstanding	Date ↑	Audit Number
42	3PRIPRO	202508	IN	15435	666.11	666.11	12/08/2025	5251
42	3PRIPRO	202509	IN	15436	223.00	223.00	22/09/2025	5251
42	4BUNTRA	202508	IN	15432	1367.23	1367.23	12/08/2025	5251
42	4BUNTRA	202508	IN	15433	1211.11	1211.11	12/08/2025	5251
42	INFSER	202507	IN	427369	1372.80	1372.80	31/07/2022	5251
42	INFSER	202508	IN	15434	281.22	281.22	12/08/2025	5251
42	INFSER	202509	IN	15437	432.12	432.12	23/09/2025	5251

7 Matching Records Found

Download CSV    Excel Plugin    Plugin Access    Export Query    Refine Query



If you click on the column header more than once then the data sort sequence toggles between **ascending** and **descending** order.

### 3.9 Speed Up Your i4 Query

By default, i4 Query scans all records in the data table. Refer to the following link to speed up your i4 Queries (& i4 plugins):

[http://www.satsof.com.au/infotip\\_9\\_Using\\_Indexes\\_in\\_i4Query.pdf](http://www.satsof.com.au/infotip_9_Using_Indexes_in_i4Query.pdf)

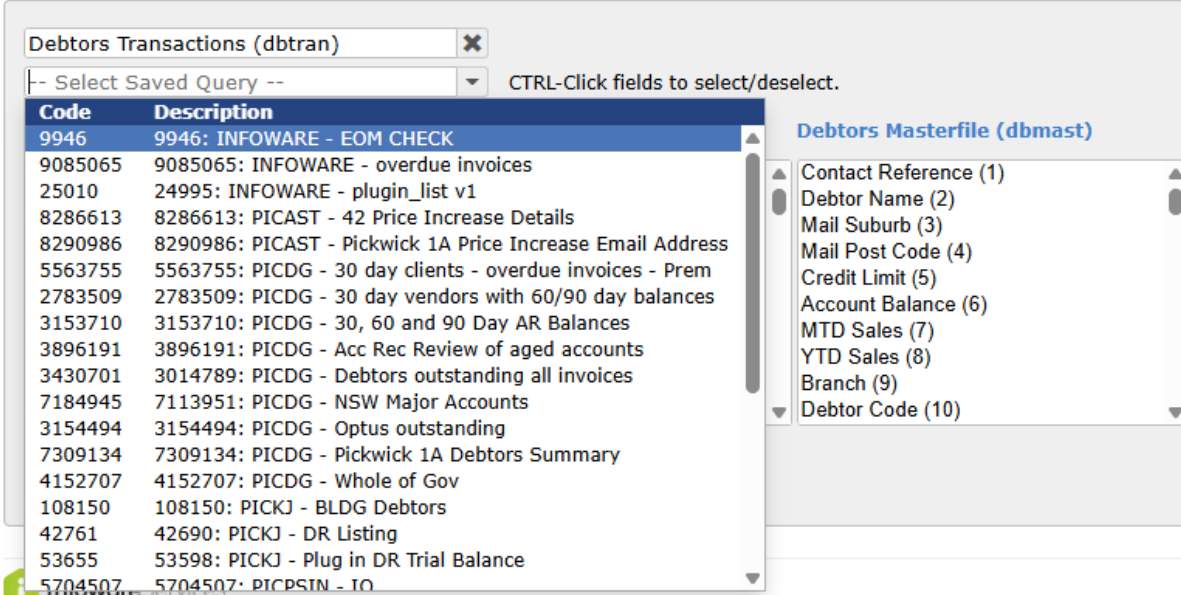
### 3.10 Delete i4 Queries

You may delete i4 Query(s) you have created. Any i4 Excel Plugins created from this query will fail after the i4 Query is deleted.

Select the saved i4 Query:



#### i4 Query



The screenshot shows the 'Debtors Transactions (dbtran)' window. A dropdown menu is open, displaying a list of saved queries with columns for 'Code' and 'Description'. The selected query is '9946: INFOWARE - EOM CHECK'. To the right, the 'Debtors Masterfile (dbmast)' window is visible, showing a list of fields for the selected query, including 'Contact Reference (1)', 'Debtor Name (2)', 'Mail Suburb (3)', 'Mail Post Code (4)', 'Credit Limit (5)', 'Account Balance (6)', 'MTD Sales (7)', 'YTD Sales (8)', 'Branch (9)', and 'Debtor Code (10)'.

Code	Description
9946	9946: INFOWARE - EOM CHECK
9085065	9085065: INFOWARE - overdue invoices
25010	24995: INFOWARE - plugin_list v1
8286613	8286613: PICAST - 42 Price Increase Details
8290986	8290986: PICAST - Pickwick 1A Price Increase Email Address
5563755	5563755: PICDG - 30 day clients - overdue invoices - Prem
2783509	2783509: PICDG - 30 day vendors with 60/90 day balances
3153710	3153710: PICDG - 30, 60 and 90 Day AR Balances
3896191	3896191: PICDG - Acc Rec Review of aged accounts
3430701	3014789: PICDG - Debtors outstanding all invoices
7184945	7113951: PICDG - NSW Major Accounts
3154494	3154494: PICDG - Optus outstanding
7309134	7309134: PICDG - Pickwick 1A Debtors Summary
4152707	4152707: PICDG - Whole of Gov
108150	108150: PICKJ - BLDG Debtors
42761	42690: PICKJ - DR Listing
53655	53598: PICKJ - Plug in DR Trial Balance
5704507	5704507: PICPSIN - IO

Once the i4 Query is retrieved, then an option to Delete Query appears:



### i4 Query

Debtors Transactions (dbtran) ✕  
9085065: INFOWARE - overdue invoices ✕ CTRL-Click fields to select/deselect.

Debtors Transactions (dbtran)	Branch Masterfile (branch)	Debtors Masterfile (dbmast)
Branch (1)	Branch Code (1)	Contact Reference (1)
Debtor Code (2)	Branch Name (2)	Debtor Name (2)
Financial Period (3)	Address Line 1 (3)	Mail Suburb (3)
Type (4)	Address Line 2 (4)	Mail Post Code (4)
Reference Number (5)	Suburb (5)	Credit Limit (5)
Original Amount Posted (6)	Post Code (6)	Account Balance (6)
Amount Now Outstanding (7)	Phone Number (1) (7)	MTD Sales (7)
Date (8)	Phone Number (2) (8)	YTD Sales (8)
Audit Number (9)	Group Certificate Name (9)	Branch (9)
In Use Flag (10)	Group Employer Number (10)	Debtor Code (10)

Next... Reset Run Now!

Delete Query Plugin Access

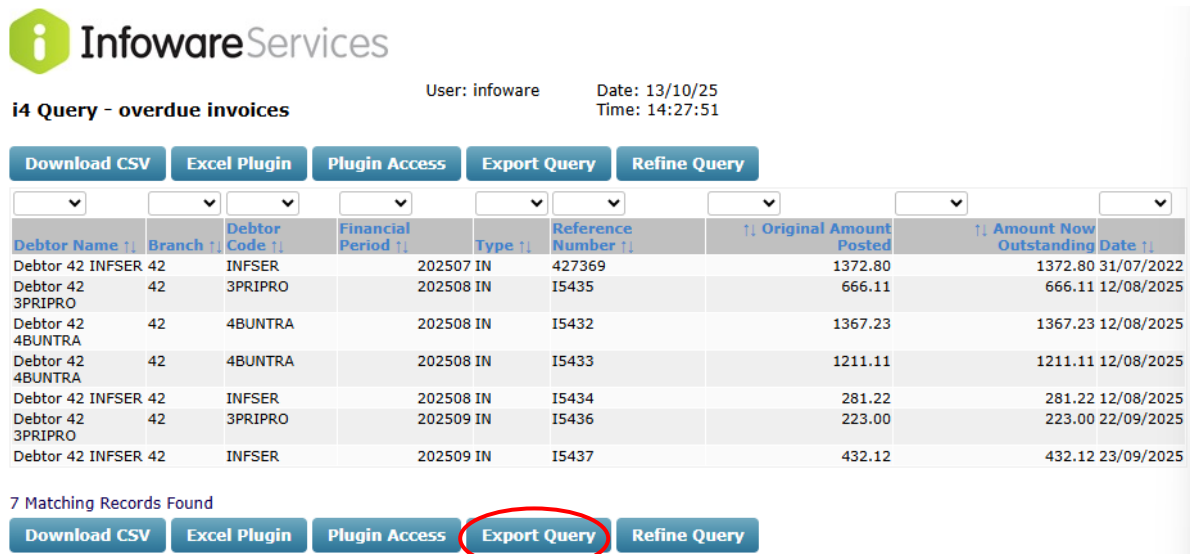
You can only delete i4 Queries created by yourself.

### 3.11 Copying i4 Queries

For infoware sites that run MULTIPLE Qualified areas you may wish to COPY an i4 Query definition from one qualified area to another.

#### 3.11.1 Export Query

On the results page there is an Export Query option.



The screenshot shows the InfowareServices interface for an i4 Query titled "overdue invoices". The user is "infoware" and the date is "13/10/25" with a time of "14:27:51". Below the header are several buttons: "Download CSV", "Excel Plugin", "Plugin Access", "Export Query", and "Refine Query". The "Export Query" button is circled in red. Below the buttons is a table with 7 columns: Debtor Name, Branch, Debtor Code, Financial Period, Type, Reference Number, Original Amount Posted, and Amount Now Outstanding. The table contains 7 rows of data. Below the table, it says "7 Matching Records Found" and the same set of buttons is repeated, with "Export Query" again circled in red.

Debtor Name	Branch	Debtor Code	Financial Period	Type	Reference Number	Original Amount Posted	Amount Now Outstanding	Date
Debtor 42 INFSER	42	INFSER	202507	IN	427369	1372.80	1372.80	31/07/2022
Debtor 42 3PRIPRO	42	3PRIPRO	202508	IN	15435	666.11	666.11	12/08/2025
Debtor 42 4BUNTRA	42	4BUNTRA	202508	IN	15432	1367.23	1367.23	12/08/2025
Debtor 42 4BUNTRA	42	4BUNTRA	202508	IN	15433	1211.11	1211.11	12/08/2025
Debtor 42 INFSER	42	INFSER	202508	IN	15434	281.22	281.22	12/08/2025
Debtor 42 3PRIPRO	42	3PRIPRO	202509	IN	15436	223.00	223.00	22/09/2025
Debtor 42 INFSER	42	INFSER	202509	IN	15437	432.12	432.12	23/09/2025

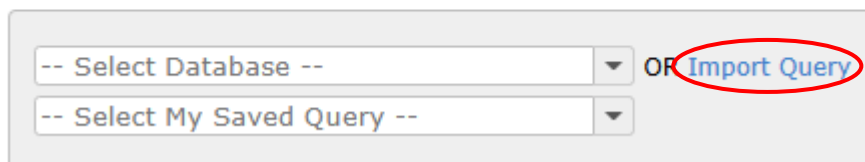
Select Export Query option.

#### 3.11.2 Import Query

Select i4 Query app as per normal. Before selecting the database, click Import Query.



### i4 Query



The screenshot shows the i4 Query interface with two dropdown menus: "-- Select Database --" and "-- Select My Saved Query --". To the right of the first dropdown is the text "OR" followed by the "Import Query" button, which is circled in red.

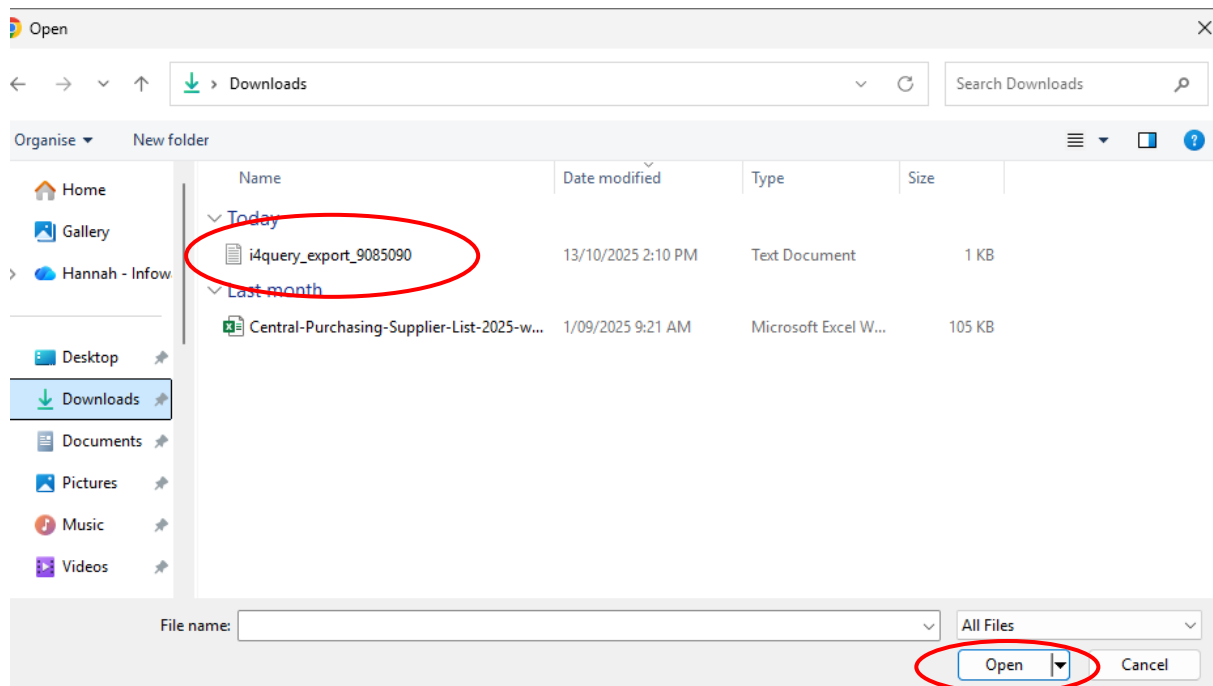
Then select Choose file.



### i4 Query



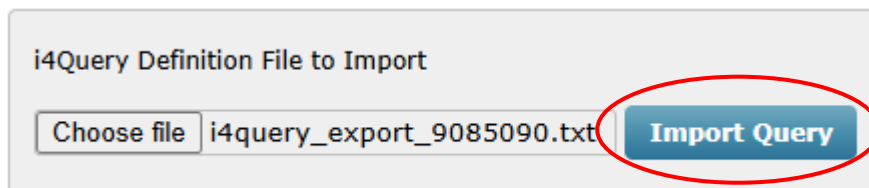
Find the i4 Query definition just saved.



Click on the i4 Query definition then Open. Select Import Query option.



### i4 Query



Congratulations! You have copied and now imported the i4 Query into another qualified area.



For sites that have multiple areas but are not fully qualified [e.g. ONE accounting area but different stock qualified areas for multiple business sites], contact infoware services for a technique in copying i4 Queries across partially qualified areas.

### 3.12 Import Results Page to Excel

The Results page can be printed, emailed and/or saved to your PC, as required. At the top and bottom of Results page are the following options:

[Download CSV](#) | [Refine Query...](#)

#### 3.12.1 Refine Query

This selection allows you to refine the current query and takes you back to the field selection page in section 3.1.

#### 3.12.2 Download CSV

If you click on the Download CSV (Comma Separated Values) link, i4Query will automatically convert the query result to a CSV file and download the file to your browser.

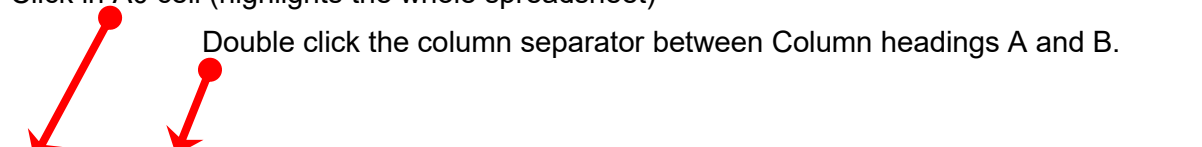
**If you are likely to repeat using the i4 query and analyse results in excel then you are strongly recommended to create an i4 Excel Plugin (see section 4 for detail).**

Once the file is downloaded, select **Open** (as you trust this specific source) to automatically open the Query Result CSV file in Excel (assuming that Excel is the default application for CSV files on your PC), or **Save** the file.

Excel will automatically display the data using the existing fixed column width. This will result in some data fields not displayed. Large numeric fields may appear “#####” in cells. To re-size all columns to fit the data in the Excel spreadsheet:

Click in A0 cell (highlights the whole spreadsheet)

Double click the column separator between Column headings A and B.



	A	B	C	D	E	F	G	H	I
1	Debtor Na	Branch	Debtor Co	Financial	Type	Reference	Original A	Amount N	Date
2	Debtor 42	42	INFSER	202507	IN	427369	1372.8	1372.8	#####
3	Debtor 42	42	3PRIPRO	202508	IN	I5435	666.11	666.11	#####
4	Debtor 42	42	4BUNTRA	202508	IN	I5432	1367.23	1367.23	#####
5	Debtor 42	42	4BUNTRA	202508	IN	I5433	1211.11	1211.11	#####
6	Debtor 42	42	INFSER	202508	IN	I5434	281.22	281.22	#####
7	Debtor 42	42	3PRIPRO	202509	IN	I5436	223	223	#####
8	Debtor 42	42	INFSER	202509	IN	I5437	432.12	432.12	#####
9									
10									

The columns are now spread out to see all data.

	A	B	C	D	E	F	G	H	I
1	Debtor Name	Branch	Debtor Code	Financial Period	Type	Reference Number	Original Amount Posted	Amount Now Outstanding	Date
2	Debtor 42 INFSER	42	INFSER	202507	IN	427369	1372.8	1372.8	31/07/2022
3	Debtor 42 3PRIPRO	42	3PRIPRO	202508	IN	I5435	666.11	666.11	12/08/2025
4	Debtor 42 4BUNTRA	42	4BUNTRA	202508	IN	I5432	1367.23	1367.23	12/08/2025
5	Debtor 42 4BUNTRA	42	4BUNTRA	202508	IN	I5433	1211.11	1211.11	12/08/2025
6	Debtor 42 INFSER	42	INFSER	202508	IN	I5434	281.22	281.22	12/08/2025
7	Debtor 42 3PRIPRO	42	3PRIPRO	202509	IN	I5436	223	223	22/09/2025
8	Debtor 42 INFSER	42	INFSER	202509	IN	I5437	432.12	432.12	23/09/2025
9									

### 3.13 User Restrictions to Fields

Restrictions can be placed on a user:

prevent access to specific field(s) e.g. prevent access to pay rate and amount in payroll transactions [but still have access to all other fields including hours]

restrict access to records based on field value(s) e.g. restrict access to inventory records only for a specific supplier [supplier can then have i4 plugins reviewing stock levels, sales data etc but securely lock down access so cannot view any other suppliers data].

Click on following for further details:

[http://satsof.com.au/infotip\\_8\\_i4Query\\_Field\\_Level\\_Security.pdf](http://satsof.com.au/infotip_8_i4Query_Field_Level_Security.pdf)

## 4. i4Query Plug-in to Excel Web Query

An exciting bit of **infoware** magic is that Excel spread sheets can refresh data via the web executing an i4 Query. This can be viewed and analysed via Excel's pivot tables. There's more on analysis of data in Handy Hints 5 and 10.

Excel can automatically execute an i4Query either when the spread sheet is opened or by selecting the Refresh Data option, using Excel's Web Query functions. The i4 Plugin embeds i4 Query within the Excel sheet. The queries can be fixed [provide list of all debtors on stop credit; list of current employees]; or variable – prompt(s) in Excel can pass requests back via embedded i4 Query to **infoware** to retrieve required transactions [all transactions for a nominated debtor; all transactions for nominated employee or user defined date range].

**You must save your query definition before the Excel Plugin option is available.**

An i4 excel plugin allows you to create an i4 query then imbed this into Plugin as a template to retrieve data from infoware. Important is you can then apply all of excels tools (formulas; pivot tables; charts, graphs etc) to analyse data. This is saved as a template – and data refreshed in the future as often as you like using the i4 plugin. You can even pass prompts from plugin to i4 database (date range; specific debtor or group or gl account etc) to make dynamic.

It is critical that your company adopts internal policies for the creation and distribution of i4 plugins. If you send i4plugins to other parties (internal/external) then you are sending a snip of your data from when the i4 plugin was last refreshed. This is the same as if a price list or financials or hardcopy/offline list of product margins are emailed to another party. This is not a new risk but the management of existing risks of what may be judged commercial risks that already exist in your business.

If you believe there is a risk you wish to block then an i4 access key can be deleted which immediately prevents any refresh of data for the plugin.

If an employee leaves then you must **disable** the i4 user – besides that they can no longer log in; this means they any i4 excel plugin cannot be refreshed in future. You should have termination procedures that they return all copies of i4 plugin or any other data from your business (get legal advice on the wording).

**You can either delete or disable an employee.** The benefit of disabling is if they come back you can re-renewable and all of their old access is immediately restored including access to any i4 plugins with perpetual access keys.

### 4.1 i4 plugin access key

#### 4.1.1 What is an access key?

An access key is a random infoware generated access key specific for a user to access an individual i4 query embedded in i4 plugin.

This supersedes earlier versions which required user password to access i4 plugin.

Access keys are dynamically generated; encrypted; nonvisible and secure.

If you generate a new access key immediately it will be different to prior key generated.

## 4.1.2 How do I create an access key?

### Prerequisite:

You have created; saved and run an i4 query as per section 3

An i4 access key should be generated and copied to your clipboard for following creation of an i4 plugin.

After you have saved then run i4 query: then select [Plugin Access](#)



Select  Expand Button

### Access Key Maintenance

*Access key 238313 Deleted.*

Application:	<input type="text" value="i4 Query"/>	<input type="button" value="X"/>
User ID:	<input type="text"/>	<input type="button" value="v"/>
Query ID:	<input type="text" value="dbtran - SAT - Sales (97287)"/>	<input type="button" value="X"/>
<input type="button" value="Search"/>		<input type="button" value="Clear"/>

### Query 97287 - Sales



### Create New Access Key



Now let's create access key

Select user from For User list that access key is to be generated.

For no admin users you must enter up to 365 days for access key – then access key must be renewed. This enforces review of different user access to different data via i4 plugin as employee position changes,

Admin users can leave field blank and the access key will never expire

Select 

### Create New Access Key

For User:  ✕

Expiry Days:

**Add**

**i4 Query**

Access key now displays (in light blue section) as follows:

**Copy the Access Key to your clipboard, (it is used in following section in creating i4 plugin.)**

**Take care not to accidentally copy any trailing spaces as this will invalidate access key.**

The user that has an i4 access is added to the list at bottom of this page.

### Access Key Maintenance

*New access key for user DARYL and i4Query ID 97287 has been created. Please store this key securely as it cannot be recovered. If lost a new key will need to be issued.*

**238316.1W0pgIYn6O9lLwZS90YZgnCmwklnyO7zV1x3yInh**

*Use this entire key as the password/access key in your i4Query Excel Plugin parameters.*

Application:  ✕

User ID:

Query ID:  ✕

**Search** **Clear**

#### Query 97287 - Sales

–

#### Create New Access Key

For User:  ✕

Expiry Days:

**Add**

Key ID	User	Application	Query ID	Exp Date	Exp Time	Last Date	Last Time
✕ 238316	DARYL - Daryl Northfield	i4 Query	97287 - Sales				

**i4 Query**

### 4.1.3 Can I edit/change an access key?

Not possible otherwise breach of data security

### 4.1.4 How Do I delete access key?

Select the access key from the list of access keys and select delete option

Key ID	User	Application	Query ID	Exp Date	Exp Time	Last Date	Last Time
238316	DARYL - Daryl Northfield	i4 Query	97287 - Sales				

### 4.1.5 What if I Need to create a new i4 access key?

First delete the existing key as per 4.1.4  
Then create new key as per 4.1.2

## 4.2 Create Excel Plugin



i4 Query - overdue invoices User: infoware Date: 13/10/25  
Time: 14:27:51

Download CSV **Excel Plugin** Plugin Access Export Query Refine Query

Debtor Name	Branch	Debtor Code	Financial Period	Type	Reference Number	Original Amount Posted	Amount Now Outstanding	Date
Debtor 42 INF SER	42	INF SER	202507	IN	427369	1372.80	1372.80	31/07/2022
Debtor 42 3PRIPRO	42	3PRIPRO	202508	IN	15435	666.11	666.11	12/08/2025
Debtor 42 4BUNTRA	42	4BUNTRA	202508	IN	15432	1367.23	1367.23	12/08/2025
Debtor 42 4BUNTRA	42	4BUNTRA	202508	IN	15433	1211.11	1211.11	12/08/2025
Debtor 42 INF SER	42	INF SER	202508	IN	15434	281.22	281.22	12/08/2025
Debtor 42 3PRIPRO	42	3PRIPRO	202509	IN	15436	223.00	223.00	22/09/2025
Debtor 42 INF SER	42	INF SER	202509	IN	15437	432.12	432.12	23/09/2025

7 Matching Records Found

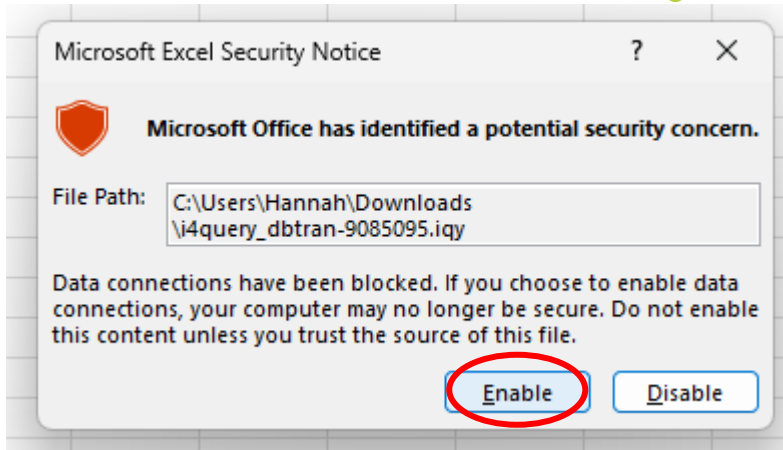
Download CSV **Excel Plugin** Plugin Access Export Query Refine Query

**Recent download history** ✕

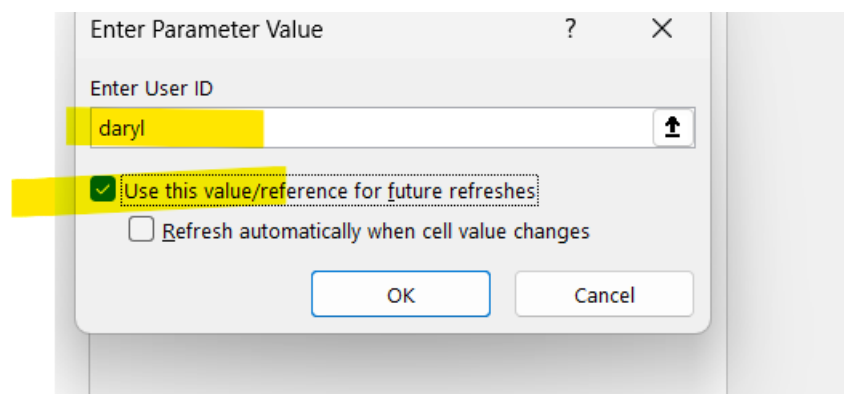
**i4query\_dbtran-9085095.iqy** 📁 📄  
 239 B • Done

### 4.2.1 Opening the Plugin

Select Enable



The User ID is your login name for I4 plugin

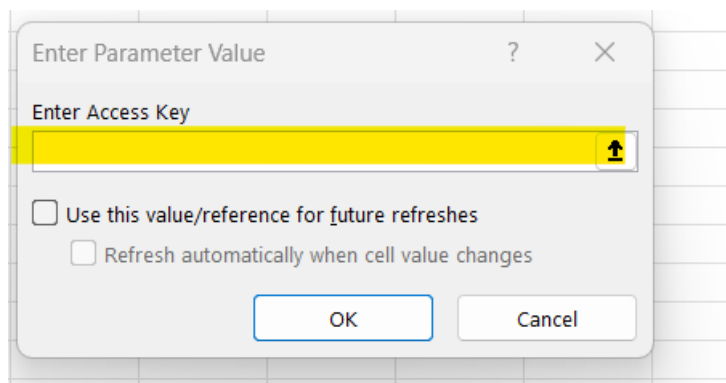


#### 4.2.2 Login and Access Key

Paste you access key (from 4.1.2) into access key

238316.1WOpGIYn6O9lLwZS90YZgnCmwklnyO7zV1x3ylnh

Ok

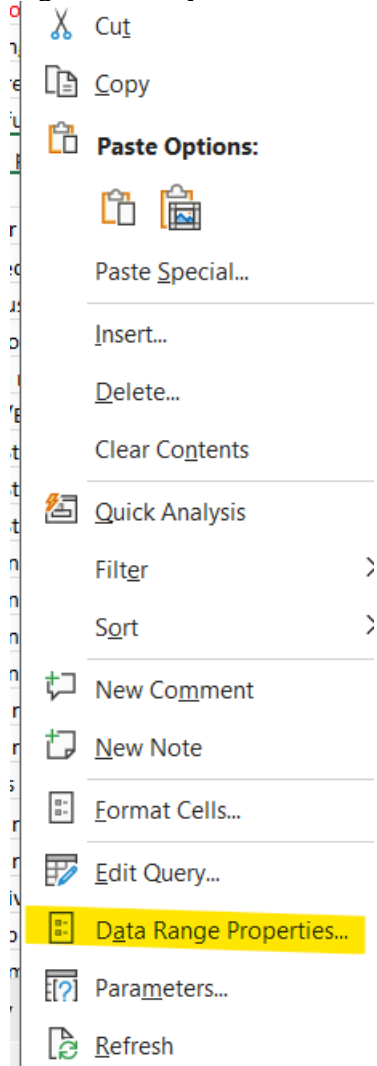


Executing the query via Excel will take the same time as it does to execute through i4Query.

The data will be automatically loaded into your spreadsheet.

### **4.2.3 Data Range Properties**

Right-click anywhere on the resultant data and select **[Data Range Properties]**.



Use the below recommended Data Range Properties.

For explanations of Data Range Properties view: [https://www.infowareservices.com.au/wp-content/uploads/2026/04/infotip\\_14\\_i4\\_Plugin\\_The\\_Magic\\_configuration\\_bit.pdf](https://www.infowareservices.com.au/wp-content/uploads/2026/04/infotip_14_i4_Plugin_The_Magic_configuration_bit.pdf)

Save password

Refresh control

Enable background refresh

Refresh every  minutes

Refresh data when opening the file

Remove external data from worksheet before closing

Data formatting and layout

Include field names  Preserve column sort/filter/layout

Include row numbers  Preserve cell formatting

Adjust column width

If the number of rows in the data range changes upon refresh:

Insert cells for new data, delete unused cells

Insert entire rows for new data, clear unused cells

Overwrite existing cells with new data, clear unused cells

Fill down formulas in columns adjacent to data

OK Cancel

## 4.3. i4 plugin Parameters

### 4.3.1 Defining Parameters

E.g. prompt for a debtor code, a stock code, a GL account and/or a period range, then only select these transactions.

This is easily handled in i4 Query by adding Excel Plugin Prompt definitions on i4 Query – Selection Criteria page.

The third line following requests data for a specific debtor code *bigcus* - the Excel Plugin prompt will be asked when you refresh data in Excel i4 Plugin and the value entered will REPLACE the value *bigcus*.

## i4 Query - Selection Criteria

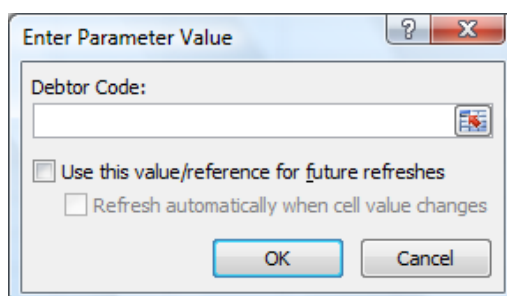
And /Or	( 's	Field	Rel	Value	)'s	Index Val	Excel Plugin Prompt
	▼	dbtran- Type (2,DBTTYP)	▼ eq ▼	in	▼	▼	
And ▼	▼	dbtran- Date (6,DMY)	▼ le ▼	160125	▼	▼	
	▼	dbtran- Debtor Code (10,AU)	▼	bigcus	▼	▼	Debtor Code:
	▼		▼		▼	▼	
	▼		▼		▼	▼	

Use dbtran Index: ▼

No. of Selection Lines: 5

If you change your plugin prompt, you need to re-create your plugin.

When you recreate the i4 plugin following previous steps, the following prompt is now asked:



Enter Parameter Value

Debtor Code:

Use this value/reference for future refreshes

Refresh automatically when cell value changes

### 4.3.2 Plugin Rules

- (i) i4 Query MUST be saved before creating an i4 plugin. You cannot create a temporary i4 plugin [not save it] then create an i4 plugin.

## Handy Hint

Did you know if you change an i4 Query this will automatically reflect next time you refresh your Excel plugin! (Except for Plugin Prompt changes)

If you have built pivot tables in Excel plugin worksheet, you may ADD new fields to the end of i4 Query list. You should not delete or change the order of i4 Query fields – or if you do you will have to rebuild a new i4 plugin and associated pivot tables [as the data fields values will be changed if you delete or change the column values].

Take data security seriously. We STRONGLY recommend there are separate i4 users with restricted data access. You can even restrict access to specific fields or specific field values. Review link:

[http://satsof.com.au/infotip\\_8\\_i4Query\\_Field\\_Level\\_Security.pdf](http://satsof.com.au/infotip_8_i4Query_Field_Level_Security.pdf)

#### 4.4 **The Pivot Table Part**

For detail on how to define pivot tables & charts to analyse your data then view

##### [Auto-charting from Infoware](#)

##### [Create Pivot Table in 4 Easy Steps](#)

You can view notes plus any documents stored in infoware (infoware generated or externally saved as Creditor invoices)

##### [i4 Plugin Document Links](#)

If you have any questions or suggested improvements to this document email [support@satsof.com.au](mailto:support@satsof.com.au)

--- END OF DOCUMENT ---

Have fun! You can now have Excel spreadsheets that give you automatic up to date lists of debtors on stop credit, current employee lists, sales analysis and rankings etc. etc. This saves some users even becoming familiar with i4Query – as long as they can open a spreadsheet!