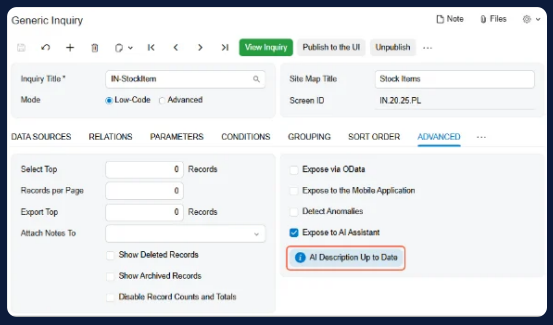
Acumatica
The Cloud ERP

Generic Inquiries

Extract exactly the data you need and make it available to reports, dashboards, pivot tables, Excel, and OData-based BI tools with no coding and no separate security model to maintain.



How Generic Inquiries work for you

A Generic Inquiry extracts exactly the records you need, with no coding required — wizards walk you through the tables and fields.

- Reach any data in Acumatica, including customized fields.
- Publish to a screen, export to Excel, or format for OData.
- Feed dashboards, pivot and grouped views, and BI tools from one query.
- Drill into transactions or email contacts from a filtered result set.
- Write queries faster and with fewer errors.

From system of record to system of intelligence

Acumatica AI reads your business data through this same layer.

- **AI Assistant** answers plain-language questions and turns answers into reusable dashboard widgets.
- **AI agents** draw on multiple inquiries to take defined actions on eligible records.
- **MCP servers** expose published inquiries as read-only tools for assistants like Claude or ChatGPT.
- **Governance** holds: permissions honored, sensitive fields masked, every AI action tracked.

Key business benefits

Access any data in Acumatica and make it available for reports, dashboards, Excel files, or OData.

No coding required. Select the information you need from the database tables using the Generic Inquiry writer.

Data security. Inquiries enforce all security rules, and DAC-level security limits self-service users to authorized data.

Create inquiries quickly and accurately. Write queries faster and with fewer errors using Acumatica's Generic Inquiry Query Language (GIQL).

Related resources

Generic Inquiry Toolkit

LEARN MORE →

Reporting and BI Video

LEARN MORE →

> "Being able to create generic inquiries and dashboards to see the data we want in the way that we want has given us much more visibility into all aspects of our operations. We can look at the big picture and specific details to help us plan and problem-solve."
>
> – Elizabeth Horwitz, ERP Production System Administrator, William S. Haynes Flute Co.

> CUSTOMER STORIES

GENERIC INQUIRIES AND ACUMATICA AI

The query layer AI reads through

Generic Inquiries are how Acumatica AI reaches your data — the same inquiry that feeds a dashboard defines what AI Assistant, AI agents, and MCP-connected tools can see.

AI Assistant

Ask complex questions in plain language, get answers as text, charts, or tables, and save them as dashboard widgets — with the source inquiry visible behind each.

Open ecosystem via MCP

Administrators expose published Generic Inquiries as callable tools, so assistants like Claude or ChatGPT answer straight from Acumatica — read-only.

Trusted governance

Every request runs under the user's existing access rights and is logged, and selected fields can be masked before data reaches an LLM.

Capabilities

Real-time information

Inquiries query live data, so results reflect the current state of the business at the moment you run them.

Data warehousing

Store results of large, complex, or frequently used inquiries in a dedicated table, refreshed on a schedule or on demand. Dashboards, OData, MCP, and pivot views load faster too.

Reusable and easy to modify

Copy an inquiry for a new purpose or adjust the one you have. Edit the form view and arrange elements, then check the change immediately.

Pivot tables

Create multiple pivot tables for each inquiry to reorganize and summarize results. Toggle between table and pivot views and share them across teams.

Grouped table views

Organize results into expandable hierarchies with subtotals, totals, and calculated values. Save a shared view for the team.

Display totals

Request total values on any inquiry, including average, max, min, and sum.

Navigation side panels

Add a side panel to show the details of a selected record on the same screen. Panels can be resized, maximized, or minimized.

Highlighted and color-coded results

Highlight rows or columns based on conditions you specify — won opportunities in green, unowned in yellow, late in red.

Reusable filters

Build complex ad hoc filters, save them, and apply them again later so recurring questions take one click.

Excel export with parameters

Export to Excel as a Data sheet plus a Parameters sheet recording the parameters used, or save an export as a report for the Acumatica Report Designer.

OData and BI tools

Format inquiry output for OData so BI tools such as Microsoft Power BI can aggregate it with data from other sources.

Email and external URLs

Send targeted email to contacts from a filtered result set, and navigate from a row straight to an external URL.

Secure data access

Inquiries honor existing Acumatica security policies. DAC-level security lets business users build their own inquiries while seeing only authorized data.

Mobile access

Reach dashboards, reports, and Generic Inquiries from secure mobile devices.

ABOUT ACUMATICA

Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices, and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future.

For more information on Acumatica, visit **www.acumatica.com** or follow us on **LinkedIn**.

Version 20261116

©2026 Acumatica