

14th ANNUAL USERS CONFERENCE January 25 – 27, 2016 | Bonita Springs, FL

Using Query Builders

Presented by: Matt Howe



Table of Contents

Customer Query Builder Overview	3
Understanding the Customer Query Builder	5
Data Groups	7
Fields to Display	8
Filters	9
Sorting	11
Report Query Results	12
Function Buttons	13
Designing a Report Query	17

Customer Query Builder Overview

The *Customer Query Builder* is a tool that enables SedonaOffice Users to create custom queries based on your company's data that is stored in the SedonaOffice database. A Customer Query Builder report design builds a SQL query behind the scenes to be able to display selected data. To be able to use this tool effectively, Users should have a good working knowledge of the SedonaOffice application and how data is entered, linked and stored.

All reports are based on data elements that relate to Customers and data directly related/linked to them.

This tool is used to produce a list of information based upon the criteria selected by the User when designing the query for the report. The Customer Query Builder does not perform any mathematical calculations. Query results may be exported to and opened with a spreadsheet type application such as Microsoft Excel, where totals, subtotals or calculations may be added. This reporting tool is referred to as the CQB.

After designing a report query, the User may save the query to be used again in the future. Reports may be printed or exported to a .csv file format which may be opened using Microsoft Excel or any other third-party software application capable of interpreting the .csv file format.

The Customer Query Builder is secured by User Group Permissions; a User may have access to design queries but may or may not have the permissions to export and/or print the report results. The Security for this tool is designed to keep your data safe. System Administrators should think very carefully about possible repercussions prior to granting export and printing permissions to any User Group.

Once a report query is completed and the User is satisfied with the design, it may be saved for future use if needed. Report query designs may be saved to a local hard drive or in a public folder on a file server. If other Users will be allowed to generate the report whenever needed, it will typically be saved on a file server in a folder to which the intended Users have access. Just keep in mind if another User is granted access to generate a report they are also able to modify the report query design and save with the original query file name. If the report query design needs to be preserved, a Master copy of the report query should be saved in a secure location.

Note: There are several other Query Builders available in the SedonaOffice application. All of the Query Builders operate off the same principles as the Customer Query Builder. Once you understand the concepts, you may apply these to designing reports with the other Query Builders. As of the publication of this document, the following Query Builders are available - access to each is controlled by User permissions.

Customer Query Builder, AP Query Builder, GL Query Builder, Parts Query Builder, Job Query Builder, and Sales Tax Query Builder.

When designing a new report query, Users should determine what information is to be displayed on the report. It is helpful to layout on a sheet of paper what the desired results are for the finished report.

Below is a list of questions to consider when designing a report query.

• What is the intended use of the report? This will help in deciding which data fields will need to be included in the design of the report query.

- What information is needed on the report (which fields in which tables)?
- What specific pieces of information are required only certain types of customers etc.? This will help in creating filter selections for the report query.

• How is the report to be sorted? The CQB allows the User to select sorting options for how the data in the query results will be listed.

Understanding the Customer Query Builder

Before attempting to design any report query, it is important to understand the structure of the CQB Design form and how it operates. The CQB Report Query Designer is divided into five major elements which are briefly described below.

B: Customer Cancel Cancel Cancel Collection Fields to Display Field Relation Customer_Number Customer_Number Customer_Number Fields to Display Fields to Displ	And/Or Srou	Corder By	
EFT Site Site Site_Contract Site_Contact Site_Contact Site_Contact System Recurring Equipment Invoice_Item Credit_Item Service_Userdef Service_Dispatch Service_Other Inspection)
Site Site_Recurring User_Defined Aging Bill_Contact Site_Contact Site_Contact Site_Contact Site_Contact Site_Contact Data Groups Ledger Service_Userdef Service_Dispatch Service_Objeatch Service_Other Inspection)
Site_Recurring User_Defined Aging Bill_Contact Site_Contact System Recurring Equipment Invoice_Item Credit_Item Ledger Service_Userdef Service_Oispatch Service_O			_
User_Defined Aging Bill_Contact Site_Contact System Recurring Equipment Invoice_ Invoice_ Invoice_ Credit Credit_ Credit_Item Ledger Service_Dispatch Service_Dispatch Service_Other Inspecton		A Sector Andrea	
Aging Bill_Contact System Recurring Equipment Invoice_Item Credit_ Credit_ Credit_ Credit_ Credit_ Credit_ Credit_ Credit_ Credit_ Credit_ Credit_ Credit_ Credit_ Service_Dispatch Service_Dispatch Service_Part Service_Other Inspection		A Sector Andrea	
Bill_Contact Site_Contact Site_Contact Site_Contact Site_Contact Site_Contact Site_Contact Site_Contact Site_Contact Data Groups Service_Dispatch Service_Dispatch Service_Dispatch Service_Dispatch Service_Dispatch Service_Other Inspection		A Sector Andrea	
Site_Contact System Recurring Equipment Invoice Invo	2	A Sector Andrea	
Recurring Equipment Invoice_Item Credit_Credit_Credit_Item Ledger Service_Userdef Service_Dispatch Service_Dispatch Service_Other Inspection		A Sector Andrea	
Equipment Invoice Invoice Invoice Ited Credit Credit Credit Credit Credit Credit Service Service Service Service Part Service Part Service Dispatch Service Ser	2	A Sector Andrea	
Invoice Invoice_Item Credit_Item Ledger Service_Dispatch Service_Part Service_Part Service_Other Inspection	2	A Sector Andrea	1
Invoice Invoice Invoice Item Credit Credit Credit Invoice Item Groups Service Service Service Service Service Distinct rows I I Criteria Bows: 1000 Distinct rows I Criteria Bows: 1000	-	A Sector Andrea	
Credit Uata IIII Credit_Item edger Service_Userdef Service_Part Service_Part Service_Other Inspection		11	
readit_tem edger Service_Userdef Service_Dispatch Service_Part Service_Other nspection			
Service_Userdef Service_Userdef Service_Part Service_Other Inspection			_
Service Service_Userdef Service_Dispatch Service_Part Service_Other Inspection			
Service_Userdef Service_Dispatch Service_Part Service_Other Inspection			
Service_Dispatch Service_Other Inspection			
Service_Part Service_Other Inspection			
Inspection			
Query Results			
CS_System			
Deposit			
Master_Account			
Documents Cycle			
5750 C			
as of: 0 Rows Returned		[

Data Groups – The Data Groups is the primary component of any report. This section is where individual fields are selected that will be included in the final report results. As each Data Group is expanded, a list of all fields available in the Data Group is displayed. For some of the larger Data Groups, Sub groups have been added. IE. Under customer you will find Bill_ fields are now in their own sub group. This feature is to help find fields and does not alter the functionality of the Query Builder. Fields may be selected from one or multiple data groups. Fields and data groups are regularly added to this list to meet the needs of the users and changes in the database.

Fields to Display – As fields are selected from the Data Groups, they are displayed in this area of the Design form. Fields selected may be moved up or down until the fields are listed in the order in which it is desired they appear on the final report. The first field to display of any query builder is fixed and cannot be moved or deleted.

Filters – The Filters section allows the User designing the report query to include or exclude data by using built-in operators.

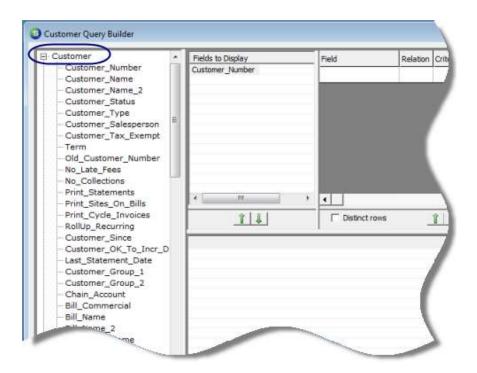
Sorting – This section allows the User to select the order in which the data is displayed on the finished report. Sort options are based on one or more of the fields selected from the Data **Group.** If no sorting is specified, sorting defaults to the first field in the fields to display.

Data Groups

The Data Groups displayed in the Report Query Design form allow the creation of reports based on many data elements. The list of Data Groups displayed pertains to data which is related to Customers. There are no Data Groups available for creating reports for Jobs at this time as Jobs has its own query builder. If a User takes the time to review the Database Explorer they will find there are fields in a data table that are not listed in any CQB Data Group; this is by design. From time to time the CQB is enhanced to add additional fields; when this occurs mention is made in the Release Notice for the software version where the enhancement was made. Please read each release notice to keep current on any new field additions to the CQB.

When the tree of a Data Group is expanded, all the fields available to include on a report are listed below the Data Group name. Some of the field names are quite long; a horizontal scroll bar is provided at the bottom of the Data Groups to display more of the field name. Fields to be included on the report are selected by double-clicking on the field name or by dragging the field name into the Fields to Display area of the Report Designer.

In the illustration below the *Customer* Data Group has been expanded; only a partial list of the available field names is displayed. Use the vertical scroll bar to move up or down to display more data fields.



Fields to Display

As fields are selected from the Data Groups they are listed in the *Fields to Display* section of the Report Query Designer form. The Customer Number field is a field that will appear on all report queries and may not be removed; this is by design since all data fields in the CQB are somehow related to a customer.

The report query results will display and print the data fields in the order in which they are listed in this section. The User may move fields up or down in the fields list by clicking the green up or down arrow located below the *Fields to Display* area.

If the User needs to remove a field that was previously selected, highlight the field name, rightclick and select the *Delete* option.

Customer	* Fields to Display	the second se	Field	Relation	Criteria
- Customer_Number - Customer_Name	Customer_Numb Bil_Postal_Name		Customer_Status	0	CANC
- Customer_Name_2	Bil_Address_1		Bill_Is_Primary	-	Y
 Customer_Status Customer_Type Customer_Salesperson Customer_Tax_Exempt Term Old_Customer_Number No_Late_Fees No_Collections Print_Statements Print_Sites_On_Bills Print_Cycle_Invoices RollUp_Recurring Customer_Since Customer_OK_To_Incr_D Last_Statement_Date Customer_Group_1 	Bil_Address_2 Bil_City Bil_State_Abbret Bil_Postal_Code		↓ ☐ Distinct rows	-	111 °

Filters

Filters are used to include or exclude records from the report query. Each Filter is based on a Data Field to which a *Relation* is applied and criteria selected from a drop-down list or typed in by the User.

For example a report query is being designed to create a list of customers that are actively being billed for recurring services. This list will be used to send out a letter notifying the customer the company is now accepting automated credit card payments. A filter may be created which will include only customers where the customer status is equal to AR (Active Recurring). Below is how this filter would be created.

	 Fields to Display 	Field	Relation	Criteria	And/Or	Group	Order By
- Customer_Number - Customer Name	Customer_Number Bill_Postal_Name	Customer_Status	\diamond	CANC	And	1	Bil_State_Abbreviatio Bil_City
Customer_Name_2	Bil_Address_1 Bil_Address_2	Bill_Is_Primary	-	Y	And	1	Bit_City
Customer_Type Customer_Tax_Exempt Term Old_Customer_Number No_Late_Tees No_Collections Print_Statements Print_Sites_On_Bills Print_Cycle_Invoices RollUp_Recurring Customer_Since Last_Statement_Date	BIL_City BIL_State_Abbreviation BIL_Postal_Code	,					
- Customer_Group_1	11	T Distinct rows	1 I Criteria	<u>Rows:</u> 1000			11
- Customer_Group_2 - Chain_Account - Bill_Commercial - Bill_Name - Bill_Name_2 - Bill_Postal_Name - Bill_Adress_1							(

Since this report query results is going to be a mailing list, and a customer may have multiple Bill To addresses, the report query should only include the Primary Bill To Address otherwise the customer could possibly receive the same letter at multiple addresses. An additional filter can be added to only include Primary Bill To addresses.

Customer	 Fields to Display 	Field	Relation	Criteria	And/Or	Group
- Customer_Number - Customer_Name	Customer_Number Bill Postal Name	Customer_Status	0	GANC	And	1
- Customer_Name_2	Bill_Address_1 Bill_Address_2	Bill_Is_Primary	-	Y	And	1
Customer_Status Customer_Type Customer_Salesperson Customer_Tax_Exempt Term Old_Customer_Number No_Late_Fees No_Collections	Bil_City Bil_State_Abbreviation Bil_Postal_Code			Υ.	J	

Listed below are the *Relation* types available when creating filters.

- = Equal to
- <> Not Equal To
- > Greater Than (used with numeric or date type fields)
- Less Than (used with numeric or date type fields)

>=	Greater Than or Equal To (used with numeric or date type fields)
<=	Less Than or Equal To (used with numeric or date type fields)
Is Null	The field is empty
Is Not Null	The field contains any value
Starts With	The value entered is found at the beginning of the field
Ends With	The value entered is found at the end of the field
Contains	The value entered is found anywhere in the data
Between	The value is a range - selecting this operator will prompt for a beginning range value and an ending range value; this is typically used for filtering on a specific date range.

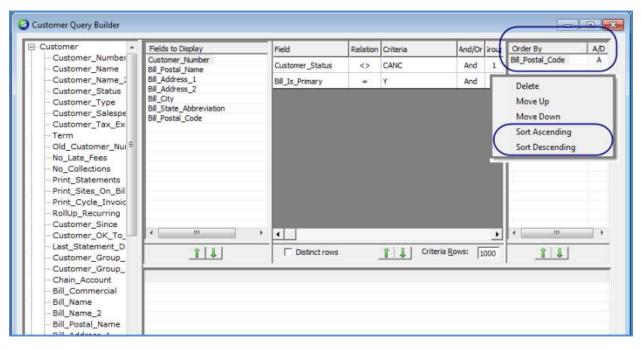
And/Or determines how a filter line relates to the line below it. In our example we want both conditions to apply so we choose Customer_Status <> Canc "And" Bill To is primary = Y. Some filters are more complex and need the group set to show the query builder what you want. For example, what if we wanted and customer in the postal codes 48501, 48502 or 48503 and that those customers not be cancelled. We could set Customer_Status <> Canc And Postal code = 48501 Or Postal code = 48502 Or Postal code = 48503. This seems logical except that SQL does all And operations before any Or operations. So in effect we have (Customer_Status <> Canc And Postal code = 48501) Or Postal code = 48502 Or Postal code = 48502. This means that customers in 48501 would have to be not cancelled but any customer in 48502 or 48503 would be accepted. In high school algebra that using parenthesis can change the order thins are processed in. So if we could change our filter to look like this Customer_Status <> Canc And (Postal code = 48501 Or Postal code = 48502 Or Postal code = 48503) SQL would see that the postal code checks are to be handled together. The group setting allows us to do this. By placing the postal codes filters into a separate group from the Customer Status check, we tell the query builder to add parenthesis around the postal code checks.

Field	Relation	Criteria	And/Or	Group
Customer_Status	<>	CANC	And	1
Bill_Postal_Code	=	48501	Or	2
Bill_Postal_Code	=	48502	Or	2
Bill_Postal_Code	=	48503	And	2
Distinct rows	14	Criteria <u>R</u> ows: 1	00	

Sorting

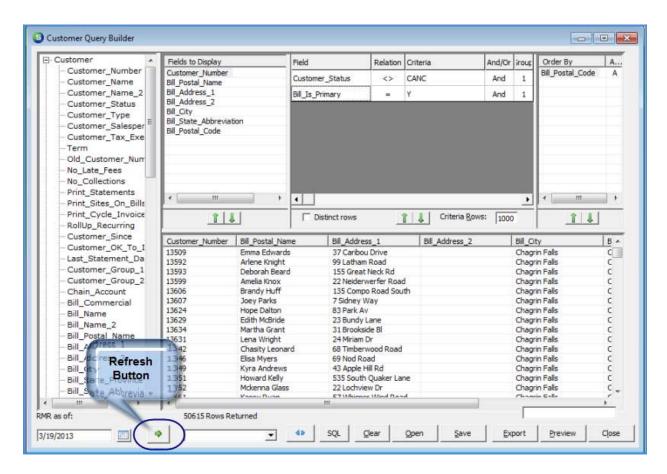
This section of the Report Query Designer allows the User to select the order in which the data is displayed on the report. Sort options are based on one or more of the fields selected from the Data Group.

Working the same example used the Filters section on the previous page, the report query may be sorted on zip code so that the letters printed out may be bundled in this order to receive a lower postage rate. Drag and drop the Bill_Postal_Code field into the Sorting area of the Report Designer form. By right-clicking on an *Order By* field, the User may select to sort the field in ascending or descending order. The default sort order is ascending order.



Report Query Results

Once data fields have been selected, filters created and sort options have been selected the User will be ready to see the report query results. Click the *Refresh Results* button (green arrow) located at the lower left of the Report Designer form. The Report Results grid will fill in with the data specified in the report query.



Double clicking on any row in the results grid will open that customer (or part, job, etc. for the other query builders.)

Function Buttons

Across the bottom of the CQB Report Design form are a series of function buttons.

- Customer	Fields to Display		Field		Relation	Criteria	1	And/Or	irous	Order By	A
Customer_Number	Customer_Number		Oustome	r Status	<>	CANC		And	1	Bill_Postal_Code	A
- Customer_Name	Bil_Postal_Name				1						
	Bill_Address_1 Bill_Address_2		Bil_Is_P	rimary	=	Y		And	1		
Customer_Status	Bill City										
- Customer_Type	Bill State Abbreviat	ion									
	Bill_Postal_Code										
- Term											
-Old_Customer_Num											
No_Late_Fees											
No_Collections											
Print_Statements	- m		4						Þ	4 [m	1.6
Print_Sites_On_Bills	1941								-	1000 anti-	
- Print_Cycle_Invoice	111		I Di	stinct rows	19	141	Criteria Rows	: 1000	1	14	
RollUp_Recurring		<u>ц</u>	1					1.000			
Customer_Since	Customer Number	Bill Postal Nar		Bill Addres	e 1	R	I Address 2		Bill Cit	bu .	8 4
- Customer_OK_To_I	13509	Emma Edward		37 Caribou		1.01	IL HOULEDS E		States and states and	in Falls	C
- Last_Statement_Da	13592	Arlene Knight	2	99 Latham						in Falls	c
Customer_Group_1	13593	Deborah Bear	d	155 Great							
									Chagr	in Falls	C
Customer_Group_2	13599	Amelia Knox		22 Neiderv	erfer Road	6				in Falls in Falls	C C
Customer_Group_2 Chain_Account	13599 13606	Amelia Knox Brandy Huff			erfer Road Road Sou				Chagn		
		Brandy Huff Joey Parks			Road Sou				Chagr Chagr Chagr	in Falls in Falls in Falls	c c c
Chain_Account Bill_Commercial	13606 13607 13624	Brandy Huff Joey Parks Hope Dalton		135 Compo 7 Sidney W 83 Park Av	Road Sou /ay				Chagr Chagr Chagr Chagr	in Falls in Falls in Falls in Falls	C C C C C
Chain_Account Bill_Commercial Bill_Name	13606 13607 13624 13629	Brandy Huff Joey Parks Hope Dalton Edith McBride		135 Compo 7 Sidney W 83 Park Av 23 Bundy I	Road Sou /ay ane				Chagr Chagr Chagr Chagr Chagr	in Falls in Falls in Falls in Falls in Falls	с сссс с
- Chain_Account - Bill_Commercial - Bill_Name - Bill_Name_2	13606 13607 13624 13629 13634	Brandy Huff Joey Parks Hope Dalton Edith McBride Martha Grant		135 Compo 7 Sidney W 83 Park Av 23 Bundy I 31 Brooksi	ane ane Bi				Chagr Chagr Chagr Chagr Chagr Chagr	in Falls in Falls in Falls in Falls in Falls in Falls	000000
Chain_Account Bill_Commercial Bill_Name Bill_Name_2 Bill_Postal_Name	13606 13607 13624 13629 13634 13631	Brandy Huff Joey Parks Hope Dalton Edith McBride Martha Grant Lena Wright		135 Compo 7 Sidney W 83 Park Av 23 Bundy I 31 Brooksio 24 Miriam I	Road Sou /ay ane de Bl Or				Chagr Chagr Chagr Chagr Chagr Chagr Chagr	in Falls in Falls in Falls in Falls in Falls in Falls	000000
Chain_Account Bill_Commercial Bill_Name Bill_Name_2 Bill_Postal_Name Bill_Address_1	13606 13607 13624 13629 13634 13631 13642	Brandy Huff Joey Parks Hope Dalton Edith McBride Martha Grant Lena Wright Chasity Leona	rd	135 Compo 7 Sidney W 83 Park Av 23 Bundy I 31 Brooksi 24 Miriam (68 Timbery	Road Sou /ay ane de Bl Dr wood Road				Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr	in Falls in Falls in Falls in Falls in Falls in Falls in Falls	~~~~~~~
- Chain_Account - Bill_Commercial - Bill_Name - Bill_Name_2 - Bill_Postal_Name - Bill_Address_1 - Bill_Address_2	13606 13607 13624 13629 13634 13631 13642 13646	Brandy Huff Joey Parks Hope Dalton Edith McBride Martha Grant Lena Wright Chasity Leona Elisa Myers	979.S	135 Compo 7 Sidney W 83 Park Av 23 Bundy I 31 Brooksi 24 Miriam I 68 Timbery 69 Nod Ro	Road Sou lay ane de Bl Or wood Road ad				Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr	in Falls in Falls in Falls in Falls in Falls in Falls in Falls in Falls	
Chain_Account Bill_Commercial Bill_Name Bill_Name_2 Bill_Posta_Name Bill_Address_1 Bill_Address_2 Bill_Address_2	13606 13607 13629 13634 13631 13631 13642 13646 13649	Brandy Huff Joey Parks Hope Dalton Edith McBride Martha Grant Lena Wright Chasity Leona Elisa Myers Kyra Andrews	979.S	135 Compo 7 Sidney W 83 Park Av 23 Bundy I 31 Brooksi 24 Miriam I 68 Timbery 69 Nod Ro 43 Apple H	o Road Sou Jay de Bl Or wood Road ad ill Rd	th			Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr	in Falls in Falls in Falls in Falls in Falls in Falls in Falls in Falls in Falls	
Chain_Account Bill_Commercial Bill_Name Bill_Name_2 Bill_Name_1 Bill_Address_1 Bill_Address_2 Bill_City Bill_City Bill_State_Province	13606 13607 13624 13629 13634 13631 13642 13646 13649 13651	Brandy Huff Joey Parks Hope Dalton Edith McBride Martha Grant Lena Wright Chasity Leona Elisa Myers Kyra Andrews Howard Kelly		135 Compo 7 Sidney W 83 Park Av 23 Bundy I 31 Brooksi 24 Miriam I 68 Timbery 69 Nod Ro 43 Apple H 535 South	o Road Sou Jay ane de Bl Or wood Road ad ill Rd Quaker Lar	th			Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr	in Falls in Falls in Falls in Falls in Falls in Falls in Falls in Falls in Falls in Falls	
- Chain_Account - Bill_Commercial - Bill_Name - Bill_Name_2 - Bill_Postal_Name - Bill_Address_1 - Bill_Address_2 - Bill_City - Bill_State_Province - Bill_State_Abbrevia +	13606 13607 13624 13629 13634 13631 13642 13642 13646 13649 13651 13652 13652	Brandy Huff Joey Parks Hope Dalton Edith McBride Martha Grant Lena Wright Chasity Leona Elisa Myers Kyra Andrews		135 Compr 7 Sidney W 83 Park Av 23 Bundy I 31 Brooksi 24 Miriam (68 Timbery 69 Nod Ro 43 Apple H 535 South 22 Lochvie 57 Misinga	o Road Sou Jay ane de Bl Or wood Road ad ill Rd Quaker Lar	th ne			Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr	in Falls in Falls in Falls in Falls in Falls in Falls in Falls in Falls in Falls	
- Chain_Account - Bill_Commercial - Bill_Name - Bill_Name_2 - Bill_Postal_Name - Bill_Address_1 - Bill_Address_2 - Bill_City - Bill_State_Province	13606 13607 13624 13629 13634 13631 13642 13646 13649 13651 13655	Brandy Huff Joey Parks Hope Dalton Edith McBride Martha Grant Lena Wright Chasity Leona Elisa Myers Kyra Andrews Howard Kelly Mckenna Glass		135 Compr 7 Sidney W 83 Park Av 23 Bundy I 31 Brooksi 24 Miriam (68 Timberv 69 Nod Ro 43 Apple H 535 South 22 Lochvie	ane ane de Bl or vood Road ad ill Rd Quaker Lar w Dr	th ne			Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr Chagr	in Falls in Falls in Falls in Falls in Falls in Falls in Falls in Falls in Falls in Falls	

Mail Merge Button

SedonaOffice offers a feature which allows a User to create Mail Merge letters based on the CQB query results. This feature uses the functionality within Microsoft Word's Mail Merge function. Once the letters have been generated, the customer's Sedona Event Log is updated with the title of the letter and the date generated for tracking purposes.

To use this feature, Microsoft Word must be installed on the user workstation that is generating the Mail Merge Letters. Clicking the Mail Merge button will open a list of template letters that have been saved to the Template Server with a template type of Customer Query if the template server is selected in the mail merge menu. Otherwise a open file dialog will open allowing you to load any previously prepared document.

	SQL	<u>C</u> lear	<u>O</u> pen	<u>S</u> ave	<u>E</u> xport	Preview	Close
Mail Me	rge						

SQL Button

Clicking the *SQL* button will display the SQL code that is generated when designing a report query. This can be particularly handy when working with other utilities that use queries such as SedonaSync.

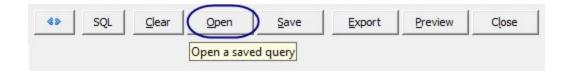
Clear Button

The *Clear* button is used to remove any report query design selections so that the User may begin working on a new report query. The User will <u>not</u> be prompted to save the report query prior to being cleared. Make certain to save the report query design prior to clicking this button.

4>	SQL	Clear	<u>O</u> pen	<u>S</u> ave	Export	Preview	Close
		Clear Field	d display, crit	eria and sort			

Open Button

Clicking the *Open* button will open the Windows File Explorer to locate and retrieve a previously saved report query design file.



Save Button

Clicking the *Save* button will open the Windows File Explorer to specify a file name and location for saving a report query design file.

٠.	SQL	Clear	<u>O</u> pen	Save	<u>Export</u>	Preview	Close
				Save a query f	for later use		

Export Button

Clicking the *Export* button will open the Windows File Explorer to specify a file name and location for exporting the results of a report query into a .csv file format.



Preview Button

Clicking the *Preview* button will open the report query results in report preview mode. The User is prompted to type in a title for the report and specify whether the report should be displayed in portrait or landscape view. Due to space limitations on a printed report, all data fields specified on the report query design will display but may not be truncated in the report preview. Te relative width of the columns on the report will be the same as the relative column width from the query results. If the report query results are exported to a .csv file, all selected data fields will be exported in their full width.

45	SQL	<u>C</u> lear	<u>O</u> pen	<u>S</u> ave	Export	Preview	Close
				P	review a repor	t of the first ei	ght columns

Close Button

Clicking the *Close* button will exit the Customer Query Builder. If the current report query has not yet been saved, all work will be lost. The User will **not** be prompted to save the report

query prior to exiting the CQB. Make certain to save the report query design prior to clicking this button.

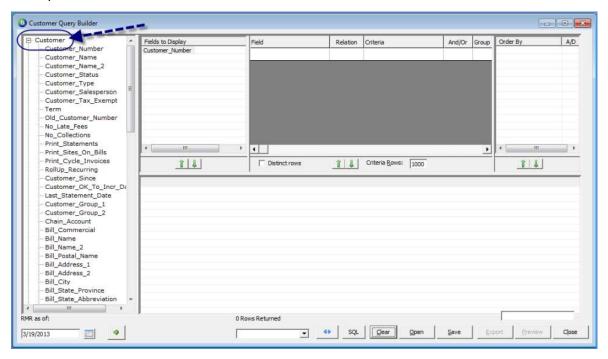
٩٥	SQL	<u>C</u> lear	<u>O</u> pen	<u>S</u> ave	Export	Preview	Close
						Exit Custome	er Query form

Designing a Report Query

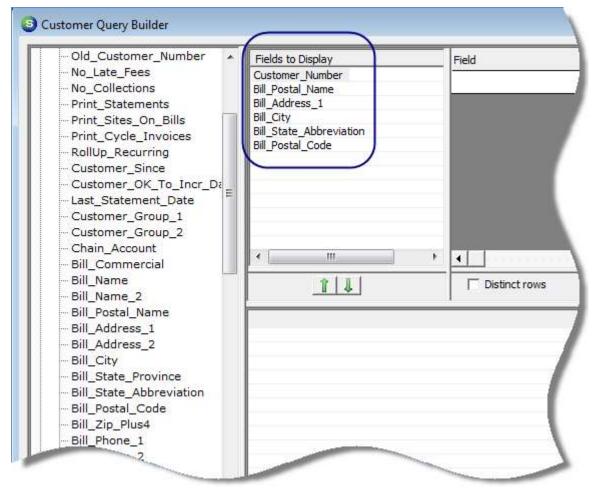
This section will walk through the step by step creation of a simple report query, the printing of the query results and saving the report query design to a file. The end result of this sample report will be a list containing customer names and addresses for customers that are actively being billed for recurring services. The primary sort for the report will be on the zip code field with a secondary sort on the city field. The report will only include a customer's primary billing address.

1. Open the CQB Report Query form. From the Main Application Menu select Query / Customer Query.

2. The CQB Query Design form will be displayed. Expand the tree of the Customer Data Group. To expand a Data Group either click the "+" to the left of the Data Group or double-click on the Data Group.



3. Select the data fields to be displayed in the report results by either double-clicking on the data field or by dragging and dropping the data field into the *Fields to Display* area of the Query Design form.



4. Next Filters will be added to the report query design. For the first filter, drag and drop the Customer_Status field from the Customer Data Group into the Filter area. The Relation field will default to "="; do not change this selection. In the Criteria column select *AR* from the drop-down list then click the tab key on the keyboard.

For the second filter, drag and drop the Bill_is_Primary field from the Customer Data Group into the Filter area. Again the Relation field will default to "="; do not change this selection. In the Criteria column select Y from the drop-down list then click the tab key on the keyboard.

Customer	 Fields to Display 	Field	Relation	Criteria	0	And/Or	Group	Order B
Customer_Number Customer_Name	Customer_Number Bill Postal Name	Customer_Status	=			And	1	
Customer_Name_2	Bill_Address_1	1		ANR	U	8		
Customer_Status	Bill_City Bill_State_Abbreviation		¢	AR				
Customer_Type	Bill_Postal_Code	1		OTHER				
Customer_Salesperson Customer_Tax_Exempt								
Term								
Old_Customer_Number								
No_Late_Fees		_						
No_Collections Print_Statements		HE ALL OF						1
Print_Sites_On_Bills	×	. K 🖌						•
Print_Cycle_Invoices	14	Distinct rows	111	Criteria Rows: 10	00			-
RollUp_Recurring			1 4		00			l
Customer_Since								
- Customer_OK_To_Incr_Da								

5. Next a Sorting selection will be added to the report query design. Drag and drop the Bill_Postal_Code field from the Customer Data Group into the Sorting area.

-No_Collections	Fields to Display	Field	Relation	Criteria	And/Or	irout	Order By	A/D
Print_Statements Print_Sites_On_Bills	Customer_Number Bill_Postal_Name	Customer_Status	=	AR	And	1	Bill_Postal_Code	A
Print_Cycle_Invoices	Bill_Address_1	Bill_Is_Primary	=	Y	And	1	1	
- RollUp_Recurring	Bill_City		23 8			-		
- Customer_Since	Bill_State_Abbreviation Bill_Postal_Code							
Customer_OK_To_Inc	Din_rostar_code							
-Last_Statement_Date								
Customer_Group_1								
- Customer_Group_2		_						
- Chain_Account								
- Bill_Commercial								
Bill_Name	< III.	F 4				•	0	
Bill_Name_2						1		
Bill_Postal_Name	1 1	Distinct rows		1 L Crit	teria <u>R</u> ows:	000	1 4	
Bill_Address_1		1				e		
Bill_Address_2				/				
- Bill_City			-					
- Bill_State_Province								
Bill_State_Abbreviatio								
Bill_Postal_Code	and the second se							
Bill_Zip_Plus4								
Bill_Phone_1								

6. The report query design is now complete. Next click the *Refresh* button to return the requested data rows.

No_Collections	Fields to Display	1	Field		Relation	Criteria	And/Or	srout	Order By	A/D
Print_Statements Print Sites On Bills	Customer_Number Bill Postal Name		Custome	r Status	-	AR	And	1	Bil_Postal_Code	A
- Print_Cycle_Invoices	Bill Address 1		Bill Is Pr	in and	-	Y	And	1		
-RollUp Recurring	Bil_City		Dat 15_PI	mary	-	1	Anu			
Customer Since	Bill_State_Abbreviatio	n								
Customer OK To Inc	Bil_Postal_Code									
Last_Statement_Date										
Customer_Group_1										
Customer_Group_2										
- Chain_Account										
Bill_Commercial										
Bill_Name	e 111		4							
Bill_Name_2								•		_
Bill_Postal_Name	14		I Di	stinct rows		1 Criteria	Rows: 1	000	14	
Bill_Address_1		40)		in an				56979I I		
Bill_Address_2	Customer_Number	Bill Postal N	lame	Bil Address	1	Bill City	Bil	State	Abbrevia Bill Post	al_Code
Bill_City	13524	Gino Johnso	n	12 Belmont P	Road	-	N/	Ą	-	-
Bill_State_Province	22213	Abigail Walla		9 Juniper Ln		Chagrin Falls	OH		44022	
Bill_State_Abbreviatio	22294	Ashley Fulle		677 Flanders		Chagrin Falls	OH		44022	
Bill_Postal_Code	4751-24	Chagrin Falls				Chagrin Falls	OF		44022	
-Bill_Zip_Plus4	9073	Cameron Wi		18 Sunset Te		Chagrin Falls	OH		44022	
-Bill_Phone_1	10006	Johnny Rob		58 Sheep Hil		Chagrin Falls	OH		44022	
Bill_Phone_2	27136	Emilie Morris		97 Hawthor		Chagrin Falls	OH		44022	
Bill Fax	37539	Hugo Harper	E ::	7 New Cast		Chagrin Falls	OH		44022	
- Bill Email	47534	Luke Allison		64 Pierce Bo		Chagrin Falls	OH		44022	
Email Invoice	46948	Ivy Wall		210 Parker S		Chagrin Falls	OH		44022	
2월 - 이 2월 20일 - 2월 20일 전 20	11978-101	Oscar Phelp		16695 Chillic			OH		44022	
- Bill_Is_Primary	11978-123	David Marks		38 High Hill F		Chagrin Falls	OF		44022	
Bill_Inactive	11978-124	Barry Stpien		353 Washing			OH		44022	
Customer_RMR	4751-1	Chagrin Falls				Chagrin Falls	OH		44022	
- Customer_Branch +	4751-2	Chagrin Falls		500 Old Farr		Chagrin Falls	OH		44022	
III STATE TO DESCRIPTION AND AND AND AND AND AND AND AND AND AN	1	The serve Leste	- 7 104 6	ATE WARE	aton C+	III.	7.1	· · · · ·	220111	12
- III +										

7. When a report query is printed, the column titles for each selected field will display and print the exact field name that was selected from the Data Groups. The User has the option of changing the field title names to be more presentable on a printed report.

To change a field name column header, in the Report Query Results area, click on the column title to be changed. The user will have a choice of totaling the column or edit the column header. Choose edit column header. An edit box will be displayed where the User will type in the words that will be displayed for the selected data field column. Click enter or the *OK* button to save. Any modifications made to column titles will be saved with the Report Query Design file.

- No_Collections *	Fields to Display		Field	Relation	Criteria	And/Or	irout	Order By	A/D
Print_Statements Print_Sites_On_Bills	Customer_Number Bill Postal Name		Customer_Status	=	AR	And	1	Bill_Postal_Code	A
- Print_Cycle_Invoices	Bil Address 1		Bill Is Primary	-	Y	And	1		
-RollUp_Recurring	Bill_City		bil_15_Primary		1	Ariu			
- Customer_Since	Bil_State_Abbreviation	10							
Customer_OK_To_Inc	Bil_Postal_Code								
- Last_Statement_Date									
Customer_Group_1									
Customer_Group_2									
- Chain_Account									
-Bill_Commercial	L								
- Bill_Name	×		4				1.1		
Bill_Name_2	1201 <u> </u>		•				•		_
-Bill_Postal_Name	1 4		Distinct rows		1 Criter	ia Rows: 1	000	11	
- Bill_Address_1		R/ II.	1	9		100 100	00000		
-Bill_Address_2	Customer Number		Las .	_1	Bill City	Bi	State	Abbrevia Bill Postal	Code
Bill_City	13524	Edit Colu	mn Header 🌒 丿	Road		N/	-		-
Bill_State_Province	22213	Total this	Column	Edit Curt	omer Number			× ×	1
Bill_State_Abbreviatio	22294			cun cuso	oniei_ivumbei				
- Bill_Postal_Code	4751-24	Chagrin Falls Cameron Will		New Col	lumn Label				
Bill_Zip_Plus4	9073	Johnny Robe		11017 00	ann cacer			OK	
Bill_Phone_1	27136	Emilie Morris	97 Haw					Cancel	
-Bill_Phone_2	37539	Hugo Harper							
Bill_Fax Bill_Email	47534	Luke Allison	64 Piero						
	46948	Ivy Wall	210 Parl	Custome	~ #				
	11978-101	Oscar Phelps		Custome	¤#)				
Email_Invoice	11978-123 11978-124	David Marks Barry Stpierr		hington Av.	Chagrin Falls	OH	i	44022	-0
Email_Invoice Bill_Is_Primary		Chagrin Falls		arms Road	Chagrin Falls	OF		44022	
Email_Invoice Bill_Is_Primary Bill_Inactive	4751-1	Chogi in Fridas		arms Road	Chagrin Falls	OH		44022	
Email_Invoice Bill_Is_Primary Bill_Inactive Customer_RMR	4751-1 4751-2	Chaorin Falls				OL		84011	The Local
Email_Invoice Email_Is_Primary Bill_Inactive Customer_RMR Customer_Branch +-	4751-1 4751-2 4751-2	Chagrin Falls		hinatan Ct	Chanrin Ealle	C 16			
Email_Invoice Bill_Is_Primary Bill_Inactive Customer_RMR	4751-2 4751-3 4		OLLE ADEMA	hinaton Ct	Chaorin Ealle III				

8. Once you are satisfied with the Report Query Design, click the *Save* function button to save the Report Query for future use.

9. If the Report is to be printed to paper or printed to a file, click the *Preview* function button.

10. If the Report data is to be exported to a .csv file, click the *Export* function button.