



**SedonaOffice Users Conference**  
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## **Query Builders**

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**PERENNIAL SOFTWARE**

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## Overview

SedonaOffice has a number of Query Builders to help you extract raw data from the database. There are six query builders, each emphasizing a different area of SedonaOffice. These are:

- Customer Management
- General Ledger
- Accounts Payable
- Sales Tax
- Parts
- Jobs

## Example 1 Sales Leads from Service Tickets

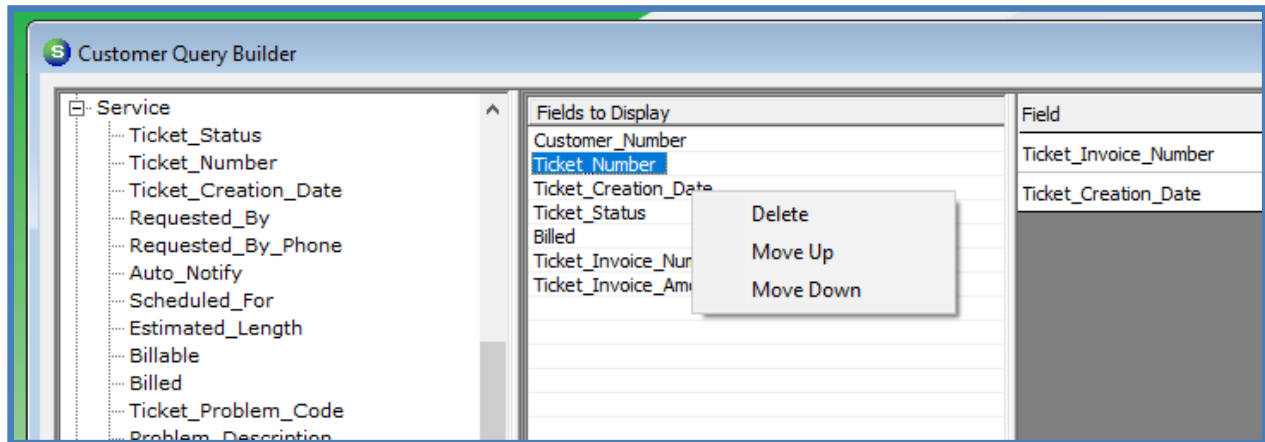
### Finding the Service Tickets

Building a query starts by selecting some fields to display. Let's start with a query to create sale leads. The idea behind this query is to search for service tickets that have been invoiced and create a list of customers that may be interested in adding a maintenance contract. We will begin by retrieving a list of Service tickets that meet our criteria.

Customer_Number	Ticket_Number	Ticket_Creation_Date	Ticket_Status	Billed	Ticket_Invoice_Number	Ticket_Invoice_Amount
1068	56987	7/6/2017	CL	Y	210410	\$37.41
1069	56988	6/21/2017	CL	Y	210290	\$122.91
1418	56988	7/6/2017	CL	Y	210411	\$74.81
1505	56776	6/6/2017	CL	Y	209142	\$187.04
1553	56973	7/5/2017	CL	Y	210414	\$214.62
1621	56939	6/27/2017	CL	Y	210421	\$411.47

## Adding in Customer Information

Now that we have a list of tickets, we can change our “Fields to Display”, to remove the fields we will not need and adding fields we will. Right clicking on a field allows us to remove it from the list. The fields we are keeping we want to move to the bottom, so, we click on the field and use the arrows below the fields to change the display order.



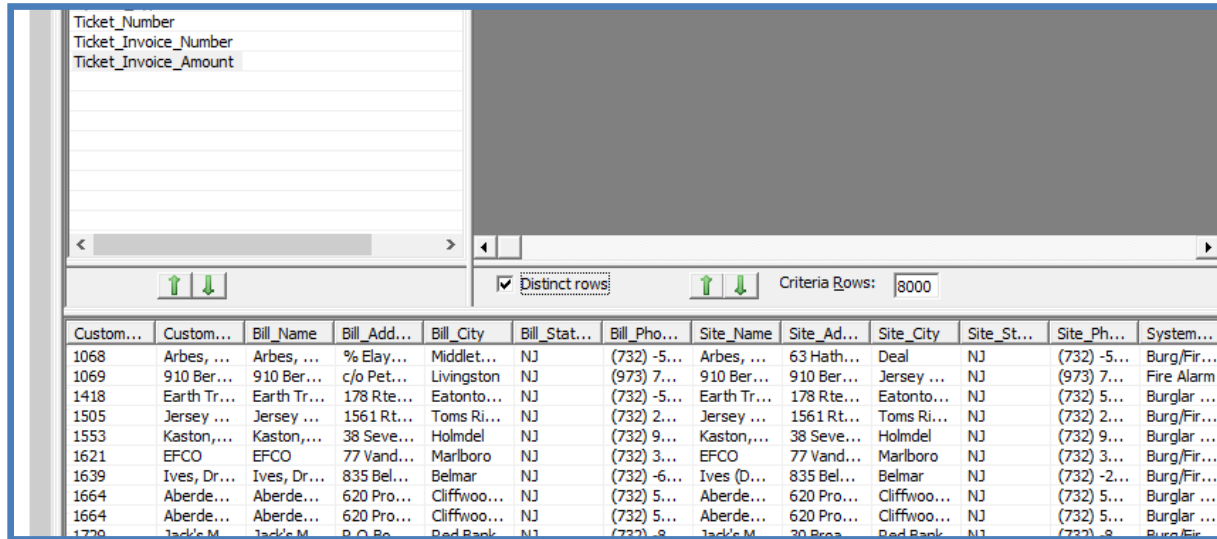
Clicking the green arrow returns the data that meets our criteria.

Custom...	Custom...	Bill_Name	Bill_Add...	Bill_City	Bill_Stat...	Bill_Pho...	Site_Name	Site_Ad...	Site_City	Site_St...	Site_Ph...	System...	Ticket_...	Ticket_I...	Ticket_I...
1068	Arbes, ...	Arbes, ...	% Elay...	Middlet...	NJ	(732) -5...	Arbes, ...	63 Hath...	Deal	NJ	(732) -5...	Burg/Fir...	56987	210410	\$37.41
1069	910 Ber...	910 Ber...	c/o Pet...	Livingston	NJ	(973) 7...	910 Ber...	910 Ber...	Jersey ...	NJ	(973) 7...	Fire Alarm	56898	210290	\$122.91
1418	Earth Tr...	Earth Tr...	178 Rte...	Eatonto...	NJ	(732) -5...	Earth Tr...	178 Rte...	Eatonto...	NJ	(732) 5...	Burglar ...	56988	210411	\$74.81
1505	Jersey ...	Jersey ...	1561 Rt...	Toms Ri...	NJ	(732) 2...	Jersey ...	1561 Rt...	Toms Ri...	NJ	(732) 2...	Burg/Fir...	56776	209142	\$187.04
1553	Kaston,...	Kaston,...	38 Seve...	Holmdel	NJ	(732) 9...	Kaston,...	38 Seve...	Holmdel	NJ	(732) 9...	Burglar ...	56973	210414	\$214.82
1621	EFCO	EFCO	77 Vand...	Marlboro	NJ	(732) 3...	EFCO	77 Vand...	Marlboro	NJ	(732) 3...	Burg/Fir...	56939	210421	\$411.47
1639	Ives, Dr...	Ives, Dr...	835 Bel...	Belmar	NJ	(732) -6...	Ives (D...	835 Bel...	Belmar	NJ	(732) -2...	Burg/Fir...	56908	210428	\$122.91
1664	Aberde...	Aberde...	620 Pro...	Cliffwoo...	NJ	(732) 5...	Aberde...	620 Pro...	Cliffwoo...	NJ	(732) 5...	Burglar ...	56915	210345	\$160.32
1664	Aberde...	Aberde...	620 Pro...	Cliffwoo...	NJ	(732) 5...	Aberde...	620 Pro...	Cliffwoo...	NJ	(732) 5...	Burglar ...	56979	210412	\$213.75
1729	Jack's M...	Jack's M...	P.O. Bo...	Red Bank	NJ	(732) -8...	Jack's M...	30 Broa...	Red Bank	NJ	(732) -8...	Burg/Fir...	56876	210283	\$122.91
1729	Jack's M...	Jack's M...	37A Bro...	Red Bank	NJ		Jack's M...	30 Broa...	Red Bank	NJ	(732) -8...	Burg/Fir...	56876	210283	\$122.91
1839	Kirschn...	Kirschn...	705 Aut...	Oakhurst	NJ	(732) -7...	Kirschn...	705 Aut...	Oakhurst	NJ	(732) -7...	Burg/Fir...	56974	210413	\$37.41
1953	Neptun...	Neptun...	c/o The ...	Midland ...	NJ	(201) 4...	Neptun...	2200 N...	Neptune	NJ	(732) 8...	Fire Alarm	56917	210416	\$229.78
2075	True & ...	True & ...	325 Nor...	Westfield	NJ	(908) 2...	True & ...	325 Nor...	Westfield	NJ	(908) 2...	Burg/Fir...	56856	210067	\$122.91
2337	Jumping...	Jumping...	210 Ju...	Neptune	NJ	(732) 9...	Jumping...	210 Ju...	Neptune	NJ	(732) 9...	Burg/Fir...	56924	210349	\$176.34
2337	Jumping...	Jumping...	210 Ju...	Neptune	NJ	(732) 9...	Jumping...	210 Ju...	Neptune	NJ	(732) 9...	Burg/Fir...	56952	210418	\$104.74
2392	Saint Lu...	Saint Lu...	535 Bro...	Long Br...	NJ	(732) -2...	Saint Lu...	535 Bro...	Long Br...	NJ	(732) -2...	Fire Alarm	56701	209141	\$190.00
2658	Unimac ...	Unimac ...	350 Mic...	Carlstadt	NJ	(201) 3...	Unimac ...	350 Mic...	Carlstadt	NJ	(201) 3...	Fire Alarm	56880	210287	\$149.62
2658	Unimac ...	Unimac ...	70 Out...	Garfield	NJ		Unimac ...	350 Mic...	Carlstadt	NJ	(201) 3...	Fire Alarm	56880	210287	\$149.62
2731	Whalen...	Whalen...	24 Suns...	Matawan	NJ	(732) 7...	Whalen...	24 Suns...	Matawan	NJ	(732) 7...	Burg/Fir...	56867	210282	\$181.65
2764	Cooks L...	Cooks L...	3899 Rt...	Old Bridge	NJ	(732) 6...	Cooks L...	333-34...	Jackson	NJ	(732) 2...	Fire Alarm	56937	210363	\$128.25
2764	Cooks L...	FT Asso...	107 Os...	Cranford	NJ	(908) 2...	Cooks L...	333-34...	Jackson	NJ	(732) 2...	Fire Alarm	56937	210363	\$128.25
2764	Cooks L...	Wok N Roll	351 No ...	Jackson	NJ	(732) 9...	Cooks L...	333-34...	Jackson	NJ	(732) 2...	Fire Alarm	56937	210363	\$128.25
2764	Cooks L...	A&M H...	353 E. ...	Jackson	NJ	(732) 7...	Cooks L...	333-34...	Jackson	NJ	(732) 2...	Fire Alarm	56937	210363	\$128.25
2764	Cooks L...	Sal's Pa...	335 Co...	Jackson	NJ	(732) 3...	Cooks L...	333-34...	Jackson	NJ	(732) 2...	Fire Alarm	56937	210363	\$128.25
2764	Cooks L...	Suecola...	1604 Ba...	Toms Ri...	NJ	(732) 7...	Cooks L...	333-34...	Jackson	NJ	(732) 2...	Fire Alarm	56937	210363	\$128.25
2764	Cooks L...	Lui's Pl...	No Con...	Jackson	NJ	(732) 8...	Cooks L...	333-34...	Jackson	NJ	(732) 2...	Fire Alarm	56937	210363	\$128.25

## Notes

## Removing Duplicates

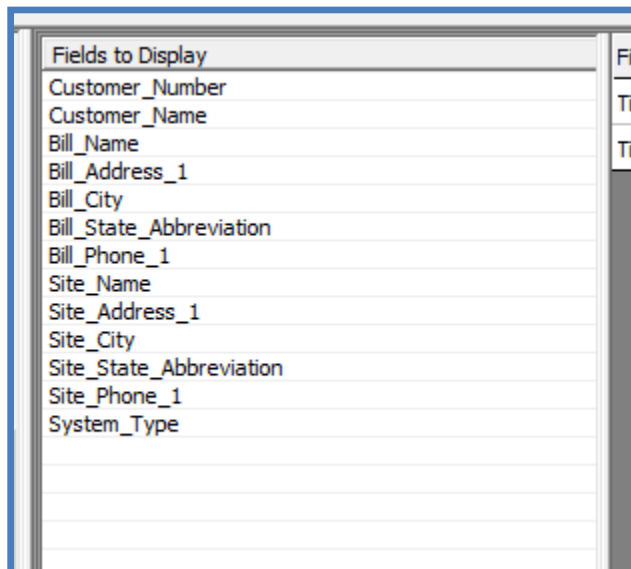
We have some customers listed twice and that maybe okay if we want to see the total tickets that meet our criteria. If so, we can just export this list and give it to the sales department. For our example, we will remove the duplicates. First, we will select “Distinct Rows” checkbox.



The screenshot shows a query builder interface. On the left, a list of fields is visible: Ticket\_Number, Ticket\_Invoice\_Number, and Ticket\_Invoice\_Amount. Below this, a table of results is displayed. The table has columns: Custom..., Custom..., Bill\_Name, Bill\_Add..., Bill\_City, Bill\_Stat..., Bill\_Pho..., Site\_Name, Site\_Ad..., Site\_City, Site\_St..., Site\_Ph..., and System... The table contains 13 rows of data. Above the table, there is a checkbox labeled 'Distinct rows' which is checked. To the right of the checkbox is a text box labeled 'Criteria Rows:' with the value '8000'.

Custom...	Custom...	Bill_Name	Bill_Add...	Bill_City	Bill_Stat...	Bill_Pho...	Site_Name	Site_Ad...	Site_City	Site_St...	Site_Ph...	System...
1068	Arbes, ...	Arbes, ...	% Elay...	Middlet...	NJ	(732) -5...	Arbes, ...	63 Hath...	Deal	NJ	(732) -5...	Burg/Fir...
1069	910 Ber...	910 Ber...	c/o Pet...	Livingston	NJ	(973) 7...	910 Ber...	910 Ber...	Jersey ...	NJ	(973) 7...	Fire Alarm ...
1418	Earth Tr...	Earth Tr...	178 Rte...	Eatonto...	NJ	(732) -5...	Earth Tr...	178 Rte...	Eatonto...	NJ	(732) 5...	Burglar ...
1505	Jersey ...	Jersey ...	1561 Rt...	Toms Ri...	NJ	(732) 2...	Jersey ...	1561 Rt...	Toms Ri...	NJ	(732) 2...	Burg/Fir...
1553	Kaston,...	Kaston,...	38 Seve...	Holmdel	NJ	(732) 9...	Kaston,...	38 Seve...	Holmdel	NJ	(732) 9...	Burglar ...
1621	EFCO	EFCO	77 Vand...	Marlboro	NJ	(732) 3...	EFCO	77 Vand...	Marlboro	NJ	(732) 3...	Burg/Fir...
1639	Ives, Dr...	Ives, Dr...	835 Bel...	Belmar	NJ	(732) -6...	Ives (D...	835 Bel...	Belmar	NJ	(732) -2...	Burg/Fir...
1664	Aberde...	Aberde...	620 Pro...	Cliffwoo...	NJ	(732) 5...	Aberde...	620 Pro...	Cliffwoo...	NJ	(732) 5...	Burglar ...
1664	Aberde...	Aberde...	620 Pro...	Cliffwoo...	NJ	(732) 5...	Aberde...	620 Pro...	Cliffwoo...	NJ	(732) 5...	Burglar ...
1720	Jad's M...	Jad's M...	P.O. Bo...	Red Bank	NJ	(732) 8...	Jad's M...	20 Broa...	Red Bank	NJ	(732) 8...	Burg/Fir...

This alone will not change our list as those Ticket Numbers, Invoice Numbers and Amounts make each row distinct. Therefore, we will remove those fields.



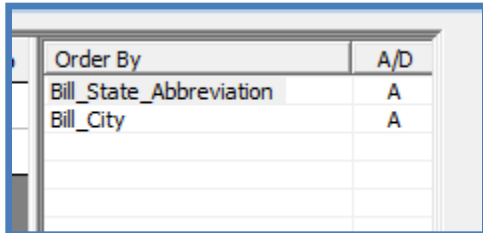
The screenshot shows a query builder interface with a list of fields to display. The fields are: Customer\_Number, Customer\_Name, Bill\_Name, Bill\_Address\_1, Bill\_City, Bill\_State\_Abbreviation, Bill\_Phone\_1, Site\_Name, Site\_Address\_1, Site\_City, Site\_State\_Abbreviation, Site\_Phone\_1, and System\_Type.

Fields to Display
Customer_Number
Customer_Name
Bill_Name
Bill_Address_1
Bill_City
Bill_State_Abbreviation
Bill_Phone_1
Site_Name
Site_Address_1
Site_City
Site_State_Abbreviation
Site_Phone_1
System_Type

No more duplicates.

## Adding Sorting

One more thing before we move on to our next example. Currently our list is sorted by Customer number, so for this example, we will sort by geographical order instead. To accomplish this, we will need to add the geographical fields to the “Order By” box.



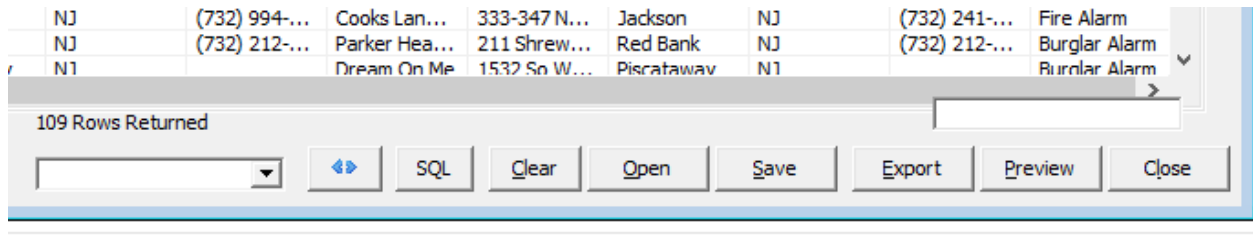
The “A” to the right of the field indicates the order, ascending or descending. Right-clicking the field allows us to change that.

Notes

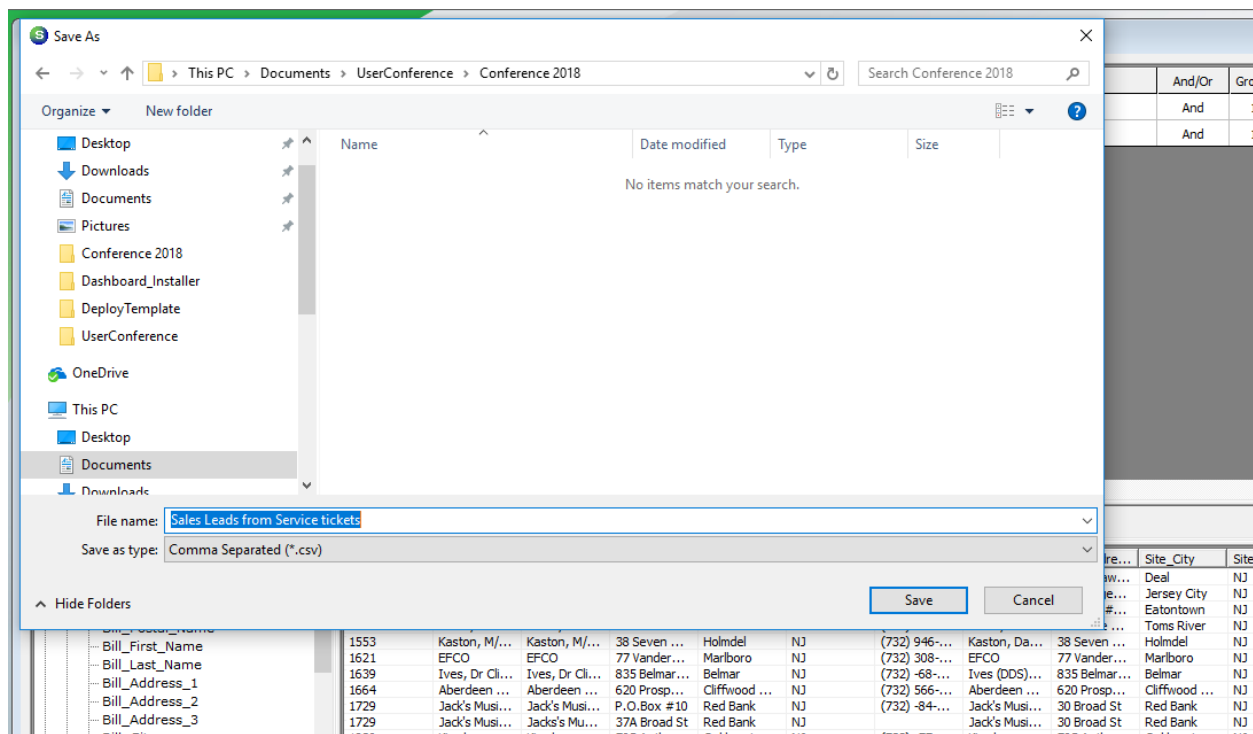


## Exporting

Finally, we need to export this so the sales department may use this information. Click on the “Export” button at the bottom of the query builder.



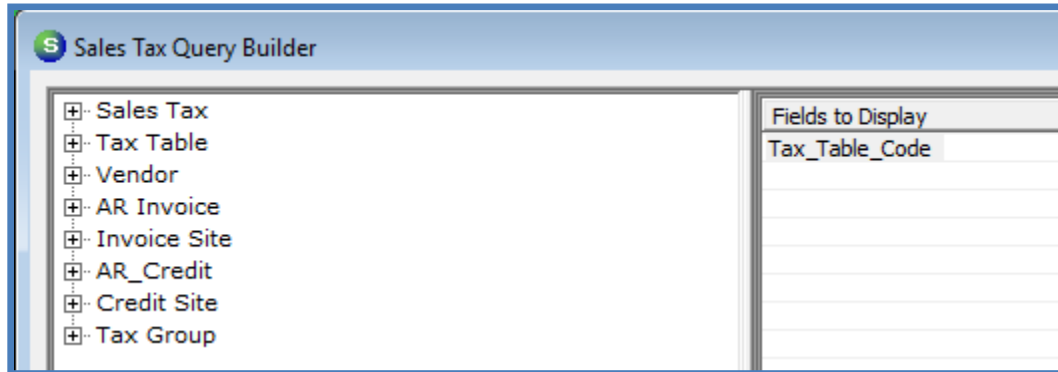
Choose the location and file name and you're done.



## Notes

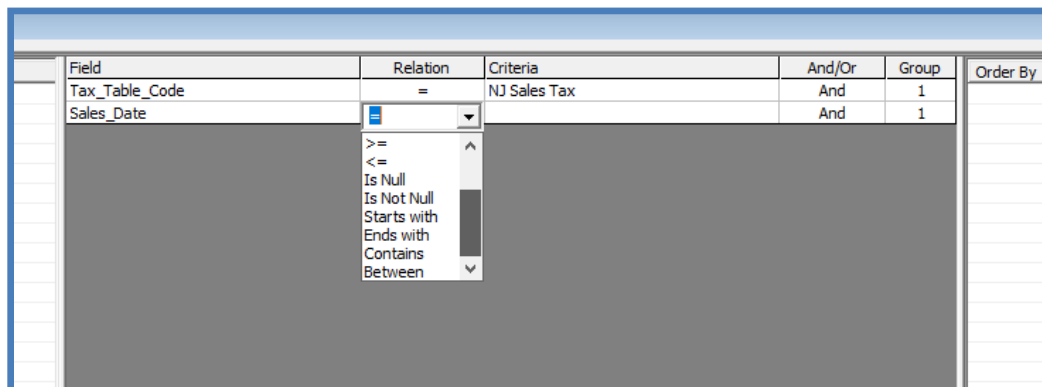
## Example 2 Custom Sales Tax Report

One of the lesser used query builders is the “Sales Tax Query Builder”. However, with each jurisdiction wanting different reports, this can be very useful. Whereas the “Customer Query Builder” is focused around customer information starting with the customer number, the “Sales Tax Query Builder” is based on tax table information.

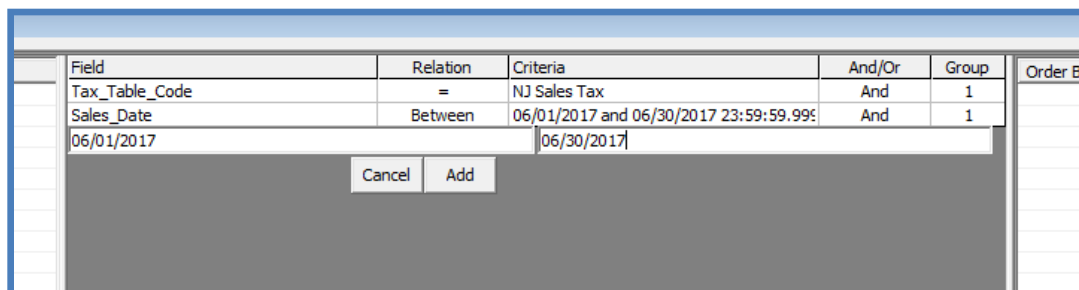


### Selecting a Date Range Using “Between”

We will begin by adding criteria to limit the data returned. We are going to set NJ Sales Tax as our taxes we are looking for and then we are going to set a date range for the sales date. Drag the “Sales\_Date” over to the criteria box then in the drop down choose “Between”.

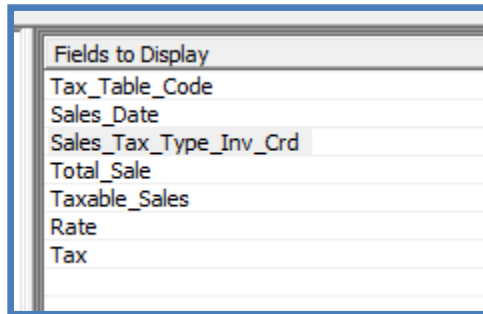


This brings up the between dialog where we will enter the beginning and ending dates.



## Notes

Now we need to decide what information we want to include in our report. The tax jurisdiction will have a list of requirements but for this demonstration, we will make up our own.



Running the query returns:

Tax_Table_Code	Sales_Date	Sales_Tax_Type_Inv_Crd	Total_Sale	Taxable_Sales	Rate	Tax
NJ Sales Tax	6/26/2017	Invoice	\$107.70	\$107.70	6.8750	\$7.40
NJ Sales Tax	6/2/2017	Invoice	\$65.00	\$65.00	6.8750	\$4.47
NJ Sales Tax	6/2/2017	Invoice	\$150.00	\$150.00	6.8750	\$10.31
NJ Sales Tax	6/6/2017	Credit	(\$1.52)	(\$1.52)	6.8750	(\$0.10)
NJ Sales Tax	6/6/2017	Credit	(\$1.27)	(\$1.27)	6.8750	(\$0.09)
NJ Sales Tax	6/7/2017	Invoice	\$200.00	\$200.00	6.8750	\$13.75
NJ Sales Tax	6/7/2017	Invoice	\$119.85	\$119.85	6.8750	\$8.24
NJ Sales Tax	6/7/2017	Invoice	\$8,600.00	\$8,600.00	6.8750	\$591.25
NJ Sales Tax	6/7/2017	Credit	(\$0.61)	(\$0.61)	6.8750	(\$0.04)
NJ Sales Tax	6/7/2017	Credit	(\$1.22)	(\$1.22)	6.8750	(\$0.08)
NJ Sales Tax	6/1/2017	Credit	(\$2.71)	(\$2.71)	6.8750	(\$0.19)
NJ Sales Tax	6/1/2017	Invoice	\$3,185.50	\$3,185.50	6.8750	\$219.00
NJ Sales Tax	6/1/2017	Credit	(\$2.30)	(\$2.30)	6.8750	(\$0.16)
NJ Sales Tax	6/1/2017	Credit	(\$2.30)	(\$2.30)	6.8750	(\$0.16)
NJ Sales Tax	6/1/2017	Credit	(\$805.00)	(\$805.00)	6.8750	(\$55.34)
NJ Sales Tax	6/5/2017	Credit	(\$2.42)	(\$2.42)	6.8750	(\$0.17)
NJ Sales Tax	6/5/2017	Credit	(\$1.78)	(\$1.78)	6.8750	(\$0.12)
NJ Sales Tax	6/5/2017	Credit	(\$6.24)	(\$6.24)	6.8750	(\$0.43)
NJ Sales Tax	6/5/2017	Credit	(\$2.40)	(\$2.40)	6.8750	(\$0.17)
NJ Sales Tax	6/5/2017	Credit	(\$11.45)	(\$11.45)	6.8750	(\$0.79)
NJ Sales Tax	6/5/2017	Credit	(\$0.49)	(\$0.49)	6.8750	(\$0.03)
NJ Sales Tax	6/5/2017	Credit	(\$1.23)	(\$1.23)	6.8750	(\$0.08)
NJ Sales Tax	6/5/2017	Credit	(\$1.23)	(\$1.23)	6.8750	(\$0.08)
NJ Sales Tax	6/5/2017	Invoice	\$702.50	\$702.50	6.8750	\$48.30
NJ Sales Tax	6/7/2017	Invoice	\$200.00	\$200.00	6.8750	\$13.75
NJ Sales Tax	6/7/2017	Invoice	\$540.00	\$540.00	6.8750	\$37.13

## Notes

## Totaling a Column

We can check our totals to see if we are where we expect to be. Left click on a column you wish to total and select "Total this Column".

Sales_Date	Sales_Tax_Type_Inv_Crd	Taxable_Sales	Rate
6/26/2017	Invoice	\$107.70	6.8750
6/2/2017	Invoice	\$65.00	6.8750
6/2/2017	Invoice	\$150.00	6.8750
6/6/2017	Credit	(\$1.52)	6.8750
6/6/2017	Credit	(\$1.27)	6.8750
6/7/2017	Invoice	\$200.00	6.8750
6/7/2017	Invoice	\$119.85	6.8750
6/7/2017	Invoice	\$8,600.00	6.8750
6/7/2017	Credit	(\$0.61)	6.8750
6/7/2017	Credit	(\$1.22)	6.8750
6/1/2017	Credit	(\$2.71)	6.8750
6/1/2017	Invoice	\$3,185.50	6.8750
6/1/2017	Credit	(\$2.30)	6.8750
6/1/2017	Credit	(\$2.30)	6.8750
6/1/2017	Credit	(\$805.00)	6.8750

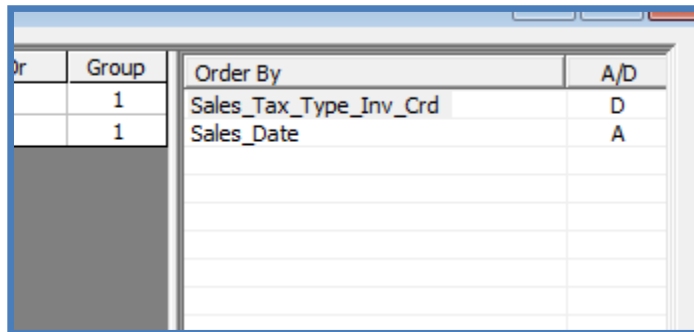
40)	6.8750	(\$0.17)
45)	6.8750	(\$0.79)
49)	6.8750	(\$0.03)
23)	6.8750	(\$0.08)
23)	6.8750	(\$0.08)
50	6.8750	\$48.30
00	6.8750	\$13.75
00	6.8750	\$37.13
		<b>196,408.10</b>

NOTE: Totaling a column is for display purposes only and will not be included in exports or printouts.

Notes

## More on Sorting

Let's add some sorting by invoice or credit and then by date.



Notice we set the Invoice credit sort to Descending. This is so the invoices will appear at the top of the list.

Tax_Table_Code	Sales_Date	Sales_Tax_Type_Inv_Crd	Total_Sale	Taxable_Sales	Rate	Tax
NJ Sales Tax	6/1/2017	Invoice	\$3,185.50	\$3,185.50	6.8750	\$219.00
NJ Sales Tax	6/2/2017	Invoice	\$65.00	\$65.00	6.8750	\$4.47
NJ Sales Tax	6/2/2017	Invoice	\$150.00	\$150.00	6.8750	\$10.31
NJ Sales Tax	6/2/2017	Invoice	\$140.00	\$140.00	6.8750	\$9.63
NJ Sales Tax	6/2/2017	Invoice	\$295.00	\$295.00	6.8750	\$20.28
NJ Sales Tax	6/2/2017	Invoice	\$165.00	\$165.00	6.8750	\$11.34
NJ Sales Tax	6/2/2017	Invoice	\$75.00	\$75.00	6.8750	\$5.16
NJ Sales Tax	6/2/2017	Invoice	\$115.00	\$115.00	6.8750	\$7.91
NJ Sales Tax	6/2/2017	Invoice	\$115.00	\$115.00	6.8750	\$7.91
NJ Sales Tax	6/2/2017	Invoice	\$135.00	\$135.00	6.8750	\$9.28
NJ Sales Tax	6/2/2017	Invoice	\$115.00	\$115.00	6.8750	\$7.91
NJ Sales Tax	6/5/2017	Invoice	\$2,950.00	\$2,950.00	6.8750	\$202.81
NJ Sales Tax	6/5/2017	Invoice	\$165.00	\$165.00	6.8750	\$11.34
NJ Sales Tax	6/5/2017	Invoice	\$3,900.00	\$3,900.00	6.8750	\$268.13
NJ Sales Tax	6/5/2017	Invoice	\$4,630.00	\$4,630.00	6.8750	\$318.31
NJ Sales Tax	6/5/2017	Invoice	\$702.50	\$702.50	6.8750	\$48.30
NJ Sales Tax	6/5/2017	Invoice	\$2,315.00	\$2,315.00	6.8750	\$159.16
NJ Sales Tax	6/5/2017	Invoice	\$110.85	\$110.85	6.8750	\$7.62
NJ Sales Tax	6/6/2017	Invoice	\$92.50	\$92.50	6.8750	\$6.36
NJ Sales Tax	6/6/2017	Invoice	\$675.00	\$675.00	6.8750	\$46.41
NJ Sales Tax	6/6/2017	Invoice	\$119.85	\$119.85	6.8750	\$8.24
NJ Sales Tax	6/6/2017	Invoice	\$115.00	\$115.00	6.8750	\$7.91
NJ Sales Tax	6/6/2017	Invoice	\$70.00	\$70.00	6.8750	\$4.81
NJ Sales Tax	6/6/2017	Invoice	\$35.00	\$35.00	6.8750	\$2.41
NJ Sales Tax	6/6/2017	Invoice	\$200.00	\$200.00	6.8750	\$13.75
NJ Sales Tax	6/6/2017	Invoice	\$260.00	\$260.00	6.8750	\$17.88

Now we can export it as before, open it in Excel and add any calculated columns or formatting.

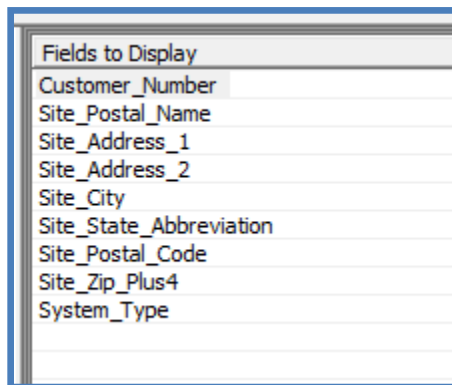
### Notes

## Example 3 Mailing List and Mail Merge

Let us say a particular jurisdiction has changed the requirements for fire alarms and you need to contact all of these customers. We are going to create a mailing list and a mail merge to do this. First, we need to select the fields we want.

### Creating the Query

We will begin by selecting the fields that will be needed to create our Mail Merge letters.



### Complex Criteria - And, Or and Groups

Then we need to set up the criteria. This is more complicated than before as we need to include only certain cities. In our example, we are only looking for sites where the state is Pennsylvania and is in the city of Quakertown or Philadelphia. The final criteria looks like this:

Field	Relation	Criteria	And/Or	Group
Customer_Status	<>	CANC	And	1
Site_State_Abbreviation	=	PA	And	1
System_Type	Contains	Fire	And	1
Site_City	=	Quakertown	Or	2
Site_City	=	Philadelphia	And	2

Notes

The first two lines are straightforward, as we have done previously. The third line uses a new “Relation” called “Contains”. It will include any records where the System Type contains the word “Fire”.

The next two lines also contain something new. They are using an “Or” instead of and “And” condition, and they are in a separate group. We need a little background in order to understand this.

$3 * 4 + 2 = ?$  18 or 14?

We know from our high school algebra class that we multiply before we add so the answer is 14. However, what if we wanted the answer to be 18? We would use parenthesis like so:

$3 * (4 + 2)$

We do what is in the parenthesis first. The logic of the query builder follows the same rules. We add before we or. So, PA and Quakertown or Philadelphia would give us customers from Quakertown in PA but also everyone in Philadelphia even little towns in other states named Philadelphia. So, we do this:

PA and (Quakertown or Philadelphia)

The group number tells the query builder where to put the parenthesis. Each group gets its own parenthesis.

Finally, the last row and/or only affects the next row so it does not matter what is in the last row.

Field	Relation	Criteria	And/Or	Group
Customer_Status	<>	CANC	And	1
Site_State_Abbreviation	=	PA	And	1
System_Type	Contains	Fire	And	1
Site_City	=	Quakertown	Or	2
Site_City	=	Philadelphia	And	2



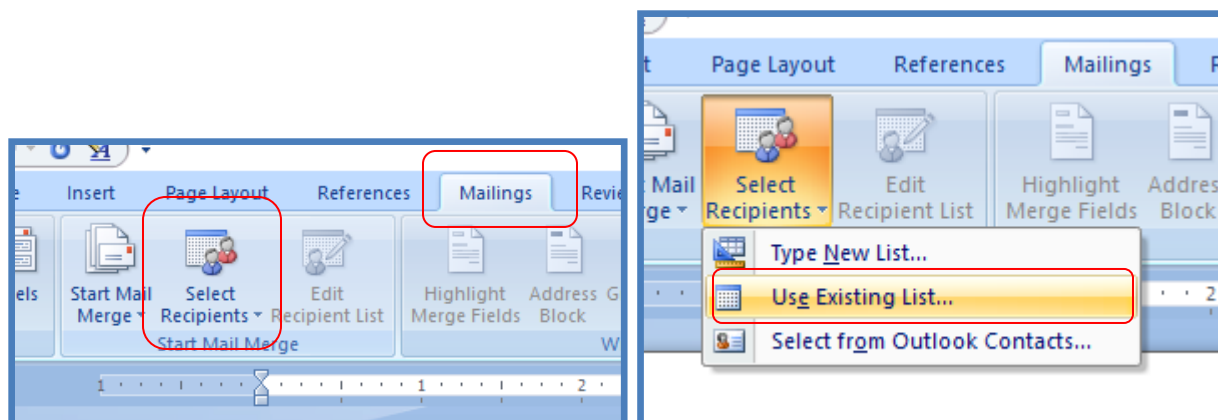
## Notes

## Creating the Word Document

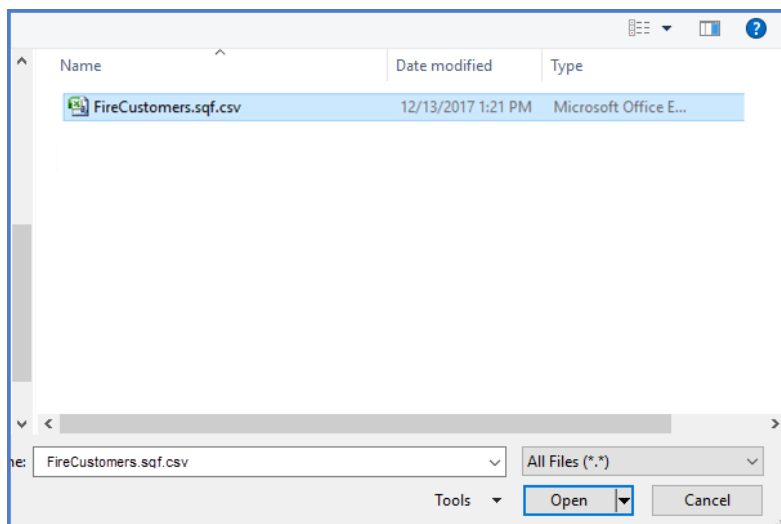
Now we will export the query results as before and then we will open Microsoft Word to create our Mail Merge letters.

Within the ribbon at the top of the Word application, choose the “Mailings” tab and then click on the “Select Recipients” button.

From the drop-down list, select Use Existing List.

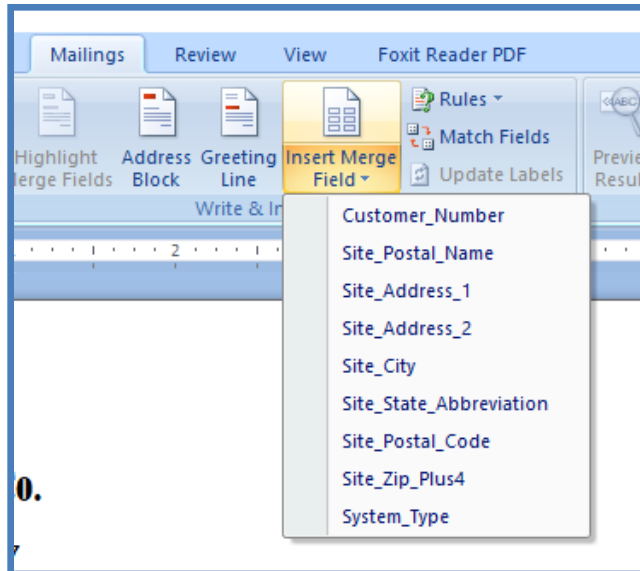


In the file search window, locate the exported query data and open that file.



## Notes

We can now create our letter. Type in the letter as you want it to appear. Adding fields at the points in the letter where you want data to appear.



For example:

**ABC Alarm Co.**

123 Main St.  
Flint MI 48507  
734-414-0760

«Site\_Postal\_Name»

«Site\_Address\_1»

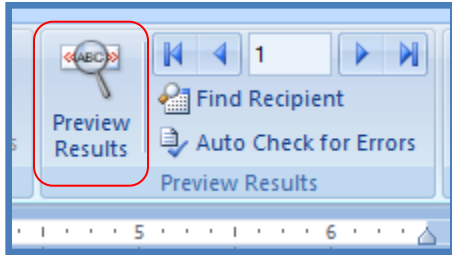
«Site\_City» «Site\_State\_Abbreviation» «Site\_Zip\_Plus4»

Dear Customer,

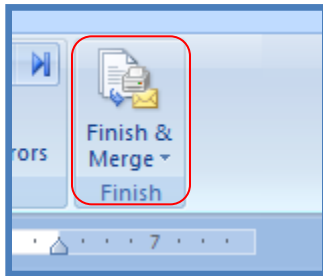
Your local fire Authority .... finish letter

Notes

You can preview what the letter will look like by clicking on “Preview Results” and use the slider to browse through the letters.



Once you are satisfied with your letter, click on “Finish and Merge” button.



The “Customer Query Builder” also supports creating templates and using the



button. However, most people find what we learned easier and more flexible.

Notes