

How to Make an Export File for Importing into Company Rate Increase

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There will be times when accounts will need to be either excluded from a rate increase or only the accounts on a list get a rate increase. The steps below will show how to pull the accounts needed to use in the Import List tab in Company Rate Increase.

Overview

Depending on what accounts are needed will depend on how the accounts will be searched. In this example the list will be certain Master Accounts that will not get a rate increase.

Steps:

1. In SedonaOffice – Click on Query – Click on Customer Query

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2. When the Query Builder Form opens – Double click on Customer Name to show in the List to Display

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3. Right click on Customer Number in the left field list and pull into the middle form area, if looking for multiple customer numbers will need to add a few times

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4. Click on Relation and select the correct one that is needed, in this example the list needs to be all Master and Subaccounts starting with certain numbers, so the Relation will be Starts With.

5. Add the Starting numbers in the Criteria

6. Since more than one type of information needs to be in the list, the 1st 2 numbers will use Or so the Query Builder will pull all of each number that is starting with that number

7. After filled in – Click on the Green Arrow at the bottom of the Query Builder

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8. After data is pulled, can verify and then Click on Export to export the list

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9. Save the file as a CSV file where SedonaOffice can access to use in Company Rate Increase using Imported File at a later time. Can see that document on how to import.

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