

How to get a list of Customers Preference for Cycle Invoice Delivery in QueryBuilder

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This documentation will go over how to get a list of customers with their preference on how to send cycle invoices.

Overview

The Customer Query Builder is a powerful tool to supplement the existing reports offered. In this document we will go over how to setup a simple query that can be exported or just viewed from the screen. The query can also be saved and used over and over when needed.

Steps

1. In SedonaOffice, Click on Query – then click on Customer Query



2. Fill in the Fields to Display with the data needed as in the example screenshot below. You can double click on the fields from the left of the screen to show in the Fields to Display



3. Select the Criteria to search by – located in the middle of the upper screen. Left click on the field and drag/drop into the center window.

4. Use the dropdown in Relation to change the different operators (Is Not Null, = , or >)

5. Fill in the Criteria as needed

6. Click on the Green Arrow to display the data that was entered to search

7. To save the data – Click on Save Button and save to a directory that can be accessed by SedonaOffice

8. To Export the data – Click on the Export Button and follow the prompts on how you want to export. CSV is best to use so you can open in Excel.
9. To Open a saved SQF file – Click on Open button after opening the Query Builder – go to the directory where you saved the SQL file and open.

Additional Help Available

For additional explanation on how to use Query Builder:

<https://sedonaoffice.perennialsoftware.com/SedonaOffice%20Help%202015/Index.htm>

Type in Customer Query Builder in keyword(s) area – Click on Phrase – Click on Search

Click on Customer Query Builder that is in the list



This page will give you a basic overview of Customer Query Builder. Click on the Customer Query Builder link in the middle to take you to a more in-depth overview on how to use the tool.

