

Customer Query Builder Basics in SedonaOffice

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Below will show how to add fields into Customer Query Builder to get a customer list. These steps have been used completed in SedonaOffice version 6.2.0.14.

OVERVIEW

This document goes over how to do a basic setup in QueryBuilder to get a list of customer accounts. The fields can be added or removed as needed.

Steps:

1. In SedonaOffice tool bar – Click Query – Click Customer Query

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2. When the Customer Query Builder window opens, click on the following fields to add them to the 1st frame Fields to Display.

Customer – Customer_Number (default)

Customer – Customer_Name

Customer – Customer_Type

System – System_Type

Contacts – Bill_Contact – Bill_Contact_E-Mail

Contacts – Site_Contact – Site_Contact_E-Mail

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3. Drag and drop what criteria to search on into the Middle frame. If none, leave blank

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4. Drag and drop what field to sort the data into 3^d frame Order By

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5. Click on the Green Arrow at the bottom of the window to run the query

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6. The results will be shown in the bottom of the window.

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7. The results can be double-clicked on to go directly to that record in SedonaOffice.

8.The results can also be exported to use in a Spreadsheet or other document - Click on Export Button to save the results.

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9.The Query can also be saved by clicking on the Save button and then Opened again later if needed by clicking on the Open button

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