

How To Open a Customer When it Will Not Open from the Search

12/10/2024 8:04 am EST

Issue:

A newly added customer is unable to be found using the Search function.

The screenshot shows the 'New Customer Setup' window with the 'Customer Information' tab selected. The 'Customer Detail' section contains the following fields: 'Number' with the value '50414', 'Name' with the value '123Test', 'Customer Status' set to 'Active', and 'Customer Type' set to 'Retail'. On the right side, there are three unchecked checkboxes: 'Create New Job', 'Show Explorer', and 'Create New System'.

Typing in the number for the newly created customer will not pull it up.

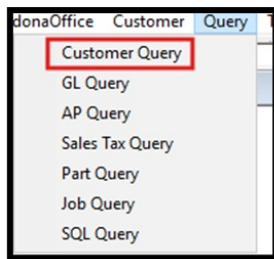
The screenshot shows the 'SedonaOffice Search - Sedona Security' window. The 'AR Search' tab is active. Under 'AR Search Criteria', there are buttons for 'Add Criteria' and 'Clear Criteria', and a status '3 search criteria defined'. The 'Search For:' dropdown is set to 'Customer' with the value '50414' entered. Below this, there are checkboxes for 'Name' (checked), 'Number' (checked), 'Site' (unchecked), and 'Bill To' (unchecked). The 'AR Search Results' section shows an empty table with headers: 'Customer #', 'Name', and 'Additional Name'.

Resolution:

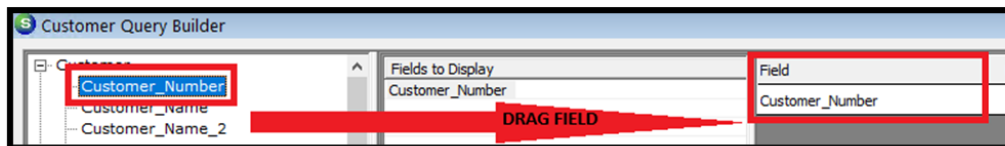
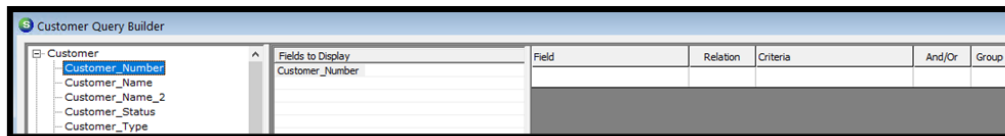
When this happens, it may be due to not setting up a site for the customer when they are created.

To open the customer:

- Go to Customer Query



- When the Customer Query Builder opens, there will be an automatically populated Customer Number field in the Fields to Display area.
- Drag another Customer Number variable to the Blank field in the middle.



- Keep the Equal sign (=) for the Relation field

Field	Relation	Criteria	And/Or	Group
Customer_Number	=		And	1

- Type in the customer number in the Criteria field and then use the Green Arrow at the bottom of the window

Field	Relation	Criteria	And/Or
Customer_Number	=	50414	And

☐ Distinct rows
 Criteria Rows: 9999

RMR as of:

12/2/2024

➡

- If nothing is returned, then in the Criteria Rows field the number may need to be increased from what is by default, usually 50, to 99999

Field	Relation	Criteria	And/Or
Customer_Number	=	50414	And

☐ Distinct rows
 Criteria Rows: 9999

- The customer number should appear in the query list

Fields to Display	Field	Relation	Criteria
Customer_Number	Customer_Number	=	50414

☐ Distinct rows
 Criteria Rows: 9999

Customer_Number
50414

- Double click the customer number. This should open the customer account

50414 123Test

- 123Test
 - Customer Information
 - Payment Options
 - Bill To
 - 123Test
 - Contacts
 - Sites
 - (1) 123Test
 - Systems
 - Contacts