

Customer Query Builder Overview

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The Customer Query Builder is a tool that enables SedonaOffice Users to create custom queries based on your company's data that is stored in the SedonaOffice database. A Customer Query Builder report design builds a SQL query behind the scenes to be able to display selected data. To be able to use this tool effectively, Users should have a good working knowledge of the SedonaOffice application and how data is entered, linked, and stored.

All reports are based on data elements that relate to Customers and data directly related/linked to them.

This tool is used to produce a list of information based on the criteria selected by the User when designing the query for the report. The Customer Query Builder does not perform any mathematical calculations. Query results may be exported to and opened with a spreadsheet-type application such as Microsoft Excel, where totals, subtotals, or calculations may be added. This reporting tool is referred to as the CQB.

After designing a report query, the User may save the query to be used again in the future. Reports may be printed or exported to a .csv file format which may be opened using Microsoft Excel or any other third-party software application capable of interpreting the .csv file format.

The Customer Query Builder is secured by User Group Permissions; a User may have access to design queries but may or may not have the permissions to export and/or print the report results. The Security for this tool is designed to keep your data safe. System Administrators should think very carefully about possible repercussions before granting export and printing permissions to any User Group.

Once a report query is completed and the User is satisfied with the design, it may be saved for future use if needed. Report query designs may be saved to a local hard drive or in a public folder on a file server. If other Users will be allowed to generate the report whenever needed, it will typically be saved on a file server in a folder to which the intended Users have access. Just keep in mind if another User is granted access to generate a report they are also able to modify the report query design and save it with the original query file name. If the report query design needs to be preserved, a Master copy of the report query should be saved in a secure location.

Note: There are several other Query Builders available in the SedonaOffice application. All of the Query Builders operate off the same principles as the Customer Query Builder. Once you understand the concepts, you may apply these to designing reports with the other Query Builders. As of the publication of this online help, the following Query Builders are available - access to each is controlled by User permissions.

Customer Query Builder, AP Query Builder, GL Query Builder, Parts Query Builder, Job Query Builder, and Sales Tax Query Builder.

When designing a new report query, Users should determine what information is to be displayed on the report. It is helpful to lay out on a sheet of paper what the desired results are for the finished report.

Below is a list of questions to consider when designing a report query.

- What is the intended use of the report? This will help in deciding which data fields will need to be included in the design of the report query.
- What information is needed on the report (which fields in which tables)?
- What specific pieces of information are required – only certain types of customers etc.? This will help in creating

filter selections for the report query.

- How is the report to be sorted? The CQB allows the User to select sorting options for how the data in the query results will be listed.

Follow the links below for more Customer Query Builder topics.

[User Group Security](#)

[Understanding the Customer Query Builder](#)

[Customer Query Builder Function Buttons](#)

[Designing a Report Query](#)
