Customer Query Builder Function Buttons

Last Modified on 11/27/2023 11:25 am EST

Across the bottom of the CQB Report Design form are a series of function buttons. The definition of each Function Button is shown below.

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Mail Merge Button

SedonaOffice offers a feature that allows a User to create Mail Merge letters based on the CQB query results. This feature uses the functionality within Microsoft Word's Mail Merge function. Once the letters have been generated, the customer's Sedona Event Log is updated with the title of the letter and the date generated for tracking purposes.

To use this feature, Microsoft Word must be installed on the user workstation that is generating the Mail Merge Letters. Clicking the Mail Merge button will open a list of template letters that have been saved to the Template Server with a template type of Customer Query.

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SQL Button

Clicking the SQL button will display the SQL code that is generated when designing a report query.

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Clear Button

The Clear button is used to remove any report query design selections so that the User may begin working on a new report query.

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Open Button

Clicking the Open button will open the Windows File Explorer to locate and retrieve a previously saved report query design file.

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Save Button

Clicking the Save button will open the Windows File Explorer to specify a file name and location for saving a report query design file.

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Export Button

Clicking the Export button will open the Windows File Explorer to specify a file name and location for exporting the results of a report query into a .csv file format.

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Preview Button

Clicking the Preview button will open the report query results in report preview mode. The User is prompted to type in a title for the report and specify whether the report should be displayed in portrait or landscape view. Due to space limitations on a printed report, all data fields specified on the report query design may not be displayed in the report preview. Only the columns that will fit on the page will be displayed. If a report query results are exported to a .csv file, all selected data fields will be exported.

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Close Button

Clicking the Close button will exit the Customer Query Builder. If the current report query has not yet been saved, all work will be lost. The User will not be prompted to save the report query before exiting the CQB. Make certain to save the report query design before clicking this button.

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