Designing a Report Query

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This section will walk through the step-by-step creation of a simple report query, the printing of the query results, and saving the report query design to a file. The result of this sample report will be a list containing customer names and addresses for customers that are actively being billed for recurring services. The primary sort for the report will be on the zip code field with a secondary sort on the city field. The report will only include a customer's primary billing address.

1. Open the CQB Report Query form. From the Main Application Menu select Query / Customer Query.

2. The CQB Query Design form will be displayed. Expand the tree of the Customer Data Group. To expand a Data Group either click the "+" to the left of the Data Group or double-click on the Data Group.

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3. Select the data fields to be displayed in the report results by either double-clicking on the data field or by dragging and dropping the data field into the Fields to Display area of the Query Design form.

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4. Next Filters will be added to the report query design. For the first filter, drag and drop the Customer_Status field from the Customer Data Group into the Filter area. The Relation field will default to "="; do not change this selection. In the Criteria column select AR from the drop-down list then click the tab key on the keyboard.

For the second filter, drag and drop the Bill_is_Primary field from the Customer Data Group into the Filter area. Again the Relation field will default to "="; do not change this selection. In the Criteria column select Y from the drop-down list then click the tab key on the keyboard.

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5. Next a Sorting selection will be added to the report query design. Drag and drop the Bill_Postal_Code field from the Customer Data Group into the Sorting area.

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6. The report query design is now complete. Next, click the Refresh button to return the requested data rows.

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7. When a report query is printed, the column titles for each selected field will display and print the exact field name that was selected from the Data Groups. The User has the option of changing the field title names to be more presentable on a printed report.

To change a field name column header, in the Report Query Results area, double-click on the column title to be changed. An edit box will be displayed where the User will type in the words that will be displayed for the selected data field column. Click enter or the OK button to save. Any modifications made to column titles will be saved with the Report Query Design file.

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8. Once you are satisfied with the Report Query Design, click the Save function button to save the Report Query for future use.

9. If the Report is to be printed to paper or printed to a file, click the Preview function button.

10. If the Report data is to be exported to a .csv file, click the Export function button.