

Pulling a List of All Notes for a Customer

Last Modified on 09/13/2024 3:39 pm EDT

There are times where customers need to output all the notes on an account. There is not a report or way to print out those notes from SedonaOffice. Below are the steps to take to get a list of all of the notes listed on the account.

Overview

The notes list will be all notes for a specific account unless you follow the directions to give all notes for all accounts.

Steps:

1. Click on the SQL button in SedonaOffice.

If you have to add a password you may not have access

2. Copy the script below changing the highlighted fields

a. Then Paste in the SQL Command window

b. Hit Enter key or click on the Green Arrow

SCRIPT:

- To only pull specific customer remove the double dash "--" that is in front of each Where and add the double dash "--" that is in front of Order By
- Change the Green Highlighted areas as needed

```
SELECT
Type='GEN','SVC/Job'=',c.Customer_Number,c.Customer_Name,cn.Note_Date,cn.UserName,cn.Notes

FROM AR_Customer_Notes cn

INNER JOIN AR_Customer c on c.Customer_Id = cn.Customer_Id

--WHERE c.customer_number = '48685-2'

UNION ALL

SELECT

Type='COL','SVC/Job'=',c.Customer_Number,c.Customer_Name, n.Note_Date, n.UserCode as
UserName,n.Notes

FROM AR_Collection_Notes n

INNER JOIN AR_Collection_Queue q on q.Collection_Queue_Id = n.Collection_Queue_Id

INNER JOIN AR_Customer c on c.Customer_Id = q.Customer_Id
```

```
--WHERE c.customer_number = '48685-2'
```

```
UNION ALL
```

```
SELECT
```

```
Type='JOB',j.Job_Code as'SVC/Job',c.Customer_Number,c.Customer_Name,jn.Entered_Date as  
Note_Date,jn.UserCode as UserName,jn.Notes
```

```
FROM OE_Job_Notes jn
```

```
INNER JOIN OE_Job j on j.Job_Id =jn.Job_Id
```

```
INNERJOIN AR_Customer c on c.Customer_Id =j.Customer_Id
```

```
--WHERE c.customer_number = '48685-2'
```

```
UNION ALL
```

```
SELECT
```

```
Type='SVC',CAST(t.Ticket_Number as varchar(50)) as 'SVC/Job',
```

```
c.Customer_Number,c.Customer_Name,sn.Entered_Date as Note_Date,sn.UserCode as UserName,sn.Notes
```

```
FROM SV_Service_Ticket_Notes sn
```

```
INNER JOIN SV_Service_Ticket t on t.Service_Ticket_Id =sn.Service_Ticket_Id
```

```
INNER JOIN AR_Customer c on c.Customer_Id =t.Customer_Id
```

```
--WHERE c.customer_number = '48685-2'
```

```
--Order by c.customer_number
```

□

3.Copy data Results to export out

a.Highlight the 1st line in the Results

b.Use Control+C to copy data

4.Paste data Results into Excel or Word

a.Open application to paste the data into

b.Then Control+V to Paste

□

c.You may still need to clean up or move Notes with multiple lines so in one cell, or can move under the other notes cell

Spreadsheet Cleaned Up:

□
