Customer Query Builder Basics in SedonaOffice

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Below will show how to add fields into Customer Query Builder to get a customer list. These steps have been used completed in SedonaOffice version 6.2.0.14.

OVERVIEW

This document goes over how to do a basic setup in QueryBuilder to get a list of customer accounts. The fields can be added or removed as needed.

Steps:

1.In SedonaOffice tool bar – Click Query – Click Customer Query

2.When the Customer Query Builder window opens, click on the following fields to add them to the 1st frame Fields to Display.

Customer – Customer_Number (default)

Customer – Customer_Name

Customer – Customer_Type

System – System_Type

Contacts – Bill_Contact – Bill_Contact_E_Mail

Contacts – Site_Contact – Site_Contact_E_Mail

3.Drag and drop what criteria to search on into the Middle frame. If none, leave blank

4.Drag and drop what field to sort the data into 3rd frame Order By

5.Click on the Green Arrow at the bottom of the window to run the query

6.The results will be shown in the bottom of the window.

7.The results can be double-clicked on to go directly to that record in SedonaOffice.

8.The results can also be exported to use in a Spreadsheet or other document - Click on Export Button to save the results.

9.The Query can also be saved by clicking on the Save button and then Opened again later if needed by clicking on the Open button