Exercises

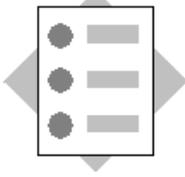**Unit: Customization Tools**

Topic: Queries

Note: the solutions are shown for the **Query Generator** only. Try using the **Query Wizard** as well to see which tool you prefer.

1-1   Customer List

This report displays a list of customers and addresses from the **OCRD** Business Partners table.

Choose *Tools → Queries → Query Generator.*

Enter the table name OCRD.

Double-click to select the following fields from the OCRD table. **Tip:** To see the table fields listed alphabetically, double-click the column header *Name*.

- CardCode
- CardName
- Address
- City (Bill-to city)
- ZipCode
- CntctPrsn

Create the following condition in the *Where* clause:

> **T0.[CardType] = 'C'**

Run the query.

Double-click the *BP Name* column in the header row to sort the customers alphabetically.

Save the query with the name ***Direct Shipment*** in a new category called Marketing.

Note: To run this saved query, choose ***Tools → Queries → User Queries → Marketing → Direct Shipment.***

1-2   Invoice list

This report displays a list of customer invoices posted after a certain date that is entered as a parameter when the query is run. The report uses the OINV invoice table.

Open a blank A/R invoice and use system information to write down the field names for the report:

Name in Document	Database Field Name
Document No.	
Customer	
Name	
Posting Date	
Total	**DocTotal**

Note: The Total field does not display in system information. This is because this field holds the currency symbol as well as the amount. The database field name is **DocTotal**.

In the Query Generator window, choose the **X** button to clear out the previous table selection.

Enter the OINV table.

Select the fields from the OINV table that you identified using system information.

In the *Where* clause you will use the variable [%0] to prompt the user to enter a date when running the query:

- Select the **Document Date** field to go in the Where clause
- Choose the *Conditions* button
- Double-click the *Greater or Equal* condition to select it for the query
- Double-click the variable **[%0]** to select it for the query
- Add a filter for invoices that are open (that is, **DocStatus** = 'O')

The *Where* clause should read:

T0. [Docdate] >= [%0] and T0.[DocStatus] = 'O'

Run the query.

Enter a posting date when prompted.

To display the column total, choose CRTL and double-click the *Document Total* column heading.

Save this query with the name '**Invoice List'** in a new Category called **Sales**.

1-3   List of Open Sales Quotations

This query will use the following tables:

- Sales Quotation (OQUT)
- Sales Quotation rows (QUT1)
- Sales Employee table (OSLP)

Select the tables **OQUT, OSLP** and **QUT1** in the *Table* column.

Select **SlpCode, CardCode ,and CardName** from the OQUT table.

Select the **SlpName** field from the OSLP table.

Select **ItemCode, Dscription** and **LineTotal** from the QUT1 table.

Tip: Double-click the *Name* heading to sort the field names alphabetically.

Enter the following condition in the *Where* clause so that only open quotations are used: *Table* **OQUT**, *Field* **DocStatu***s*, *Condition* **equal**, *Field/Value* '**O'**

Click in the *Sort by* clause select the **SlpCode** field so that the results are displayed in sales employee order.

Run the query.

Save the query in the **Sales** category with the name '**Open quotations'**.

1-4   Optional exercise: List of Open Sales Quotations (Crystal Reports)

Repeat the previous query using **Crystal Reports**.

Note: You need to have installed SAP Crystal Reports for SAP Business One and the integration with SAP Business One.