



## 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*.

Type **OCRD** in the highlighted field at the top left of the window, then press *Tab*.

Double-click to select the following table fields. **Tip:** Double-click the column header *Name* to see the table fields listed alphabetically:

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

Create the following condition so that the system displays only customer master records:

Click in the *Where* area on the right.

Double-click to select the CardType field.

Type = **'C'** to complete the *Where* clause.

The *Where* clause should now read: **T0.[CardType] = 'C'**

Choose *Execute*.

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

Save the query so you can run it again:

In the **Query Preview** window, choose *Save*.

In the **Save Query** window, choose *Manage Categories*.

Enter **Marketing** in the *Category Name* field.

Choose *Select All*.

Choose *Add*.

Choose *OK*.

In the **Save Query** window, select the *Marketing* category.

Enter **Direct Shipment** in the *Query Name* field.

Choose *Save*.

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**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.

To find out the field names for the report, you can use system information:

- Open up a blank A/R invoice document and toggle on *View > System Information*.
- Hold your mouse over the following fields and write down the database field name that shows in the system information area:

Name in Document	Database Field Name
<i>Document No.</i>	
<i>Customer</i>	
<i>Name</i>	
<i>Posting Date</i>	
<i>Total</i>	<b>DocTotal</b>

**Note:** When you hold your mouse over the Total field, the field name 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. If you closed the Query Generator window, choose *Tools* → *Queries* → *Query Generator*.

Type **OINV** in the *Table* field and press **Tab**.

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:

Click in the *Where* clause and create the conditions to filter the data:

Choose the *Conditions* button. A window will open to the right of the Query Generator window.

Select the **Document Date** field

In the Conditions window:

- Double-click the **Greater or Equal** condition to select it for the query
- Double-click the variable [%0] to select it for the query

Type 'and' after the selected variable in the *Where* clause.

Add a filter for invoices that are open (that is, **DocStatus** = 'O')

The *Where* clause should read:

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

Choose **Execute**.

Enter the **Posting Date** in the Selection Criteria window and run the query.

The system displays the result.

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To display the column total, choose CTRL 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)

Choose *Tools* → *Queries* → *Query Generator*.

**Tip:** If the Query Generator window is open from the last query, you can enter a new query from here. Choose the **X** button to clear out the previous table selection.

Enter **OQUT** in the *Table* column and press *Tab*.

Enter **OSLP** in the *Table* column and press *Tab*.

Enter **QUT1** in the *Table* column and press *Tab*.

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 DocStatus, 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**'.

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