How to use the query generator in SAP Business One (Query Wizard)

If you want to know how to use the query generator in SAP Business One, the Query Wizard is the tool to use. It gives you easy access to the database and a simple way to build user-defined reports. It guides you step by step through selecting tables and fields, adding a parameter, previewing results, and saving the query. You don't need SQL knowledge.

This guide builds a Business Partner query, adds a parameter for BP Type, and saves the query so you can run it again later.

Prerequisites

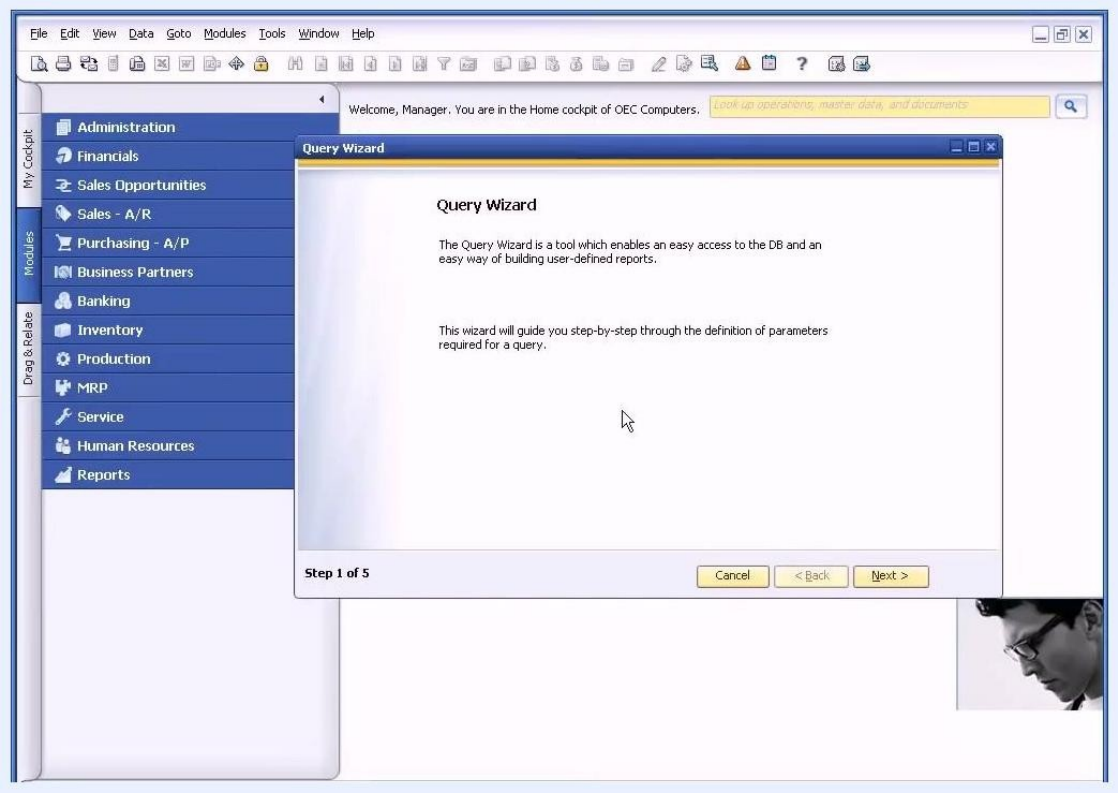
- You are logged in to SAP Business One as a user, for example Manager.
- You can reach the Query Wizard from the menu or toolbar.

Steps

1. Open the SAP Business One main screen

Confirm you are on the main screen. A navigation panel on the left lists modules such as Administration, Financials, Sales Opportunities, Sales - A/R, Purchasing - A/P, Business Partners, Banking, Inventory, Production, MRP, Service, Human Resources, and Reports.

A welcome message at the top reads "Welcome, Manager. You are in the home cockpit of OEC Computers." A search bar lets you look up operations, master data, and documents.

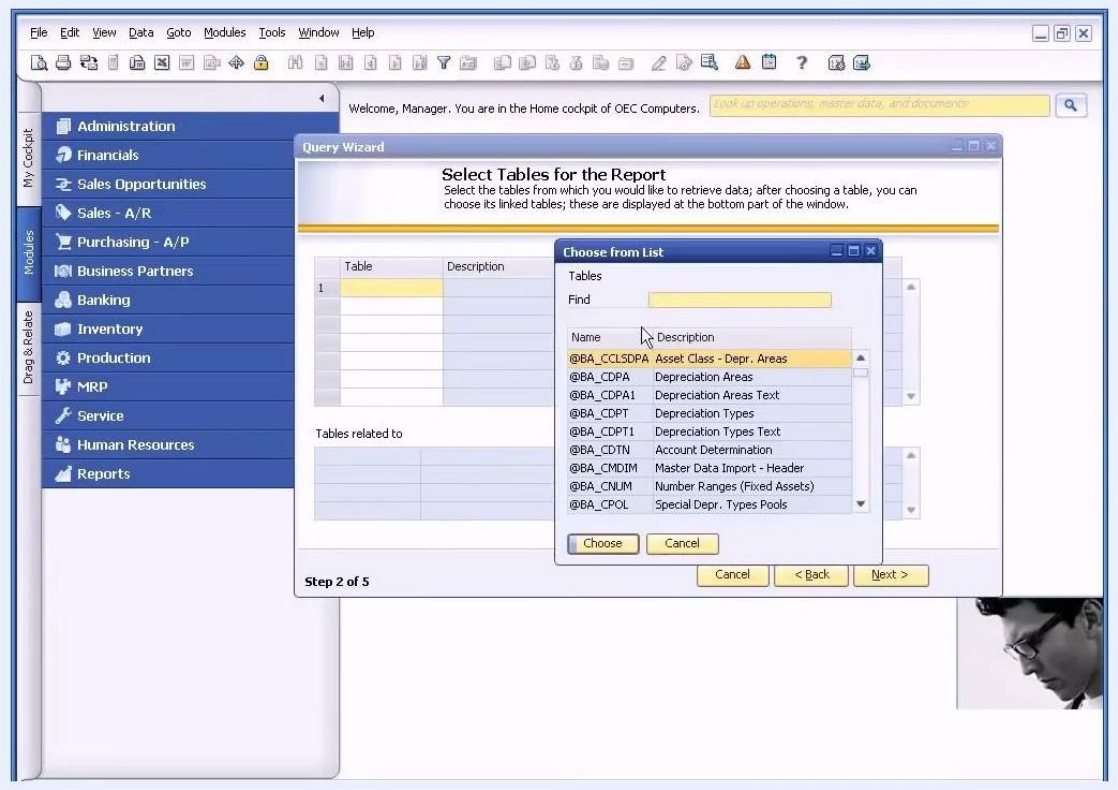


SAP Business One main screen with the navigation panel and welcome message

2. Launch the Query Wizard

Locate the Query Wizard in the menu or toolbar and open it. The introduction screen explains that the wizard enables easy access to the database and an easy way to build user-defined reports. It also says the wizard guides you step by step through the parameters a query requires.

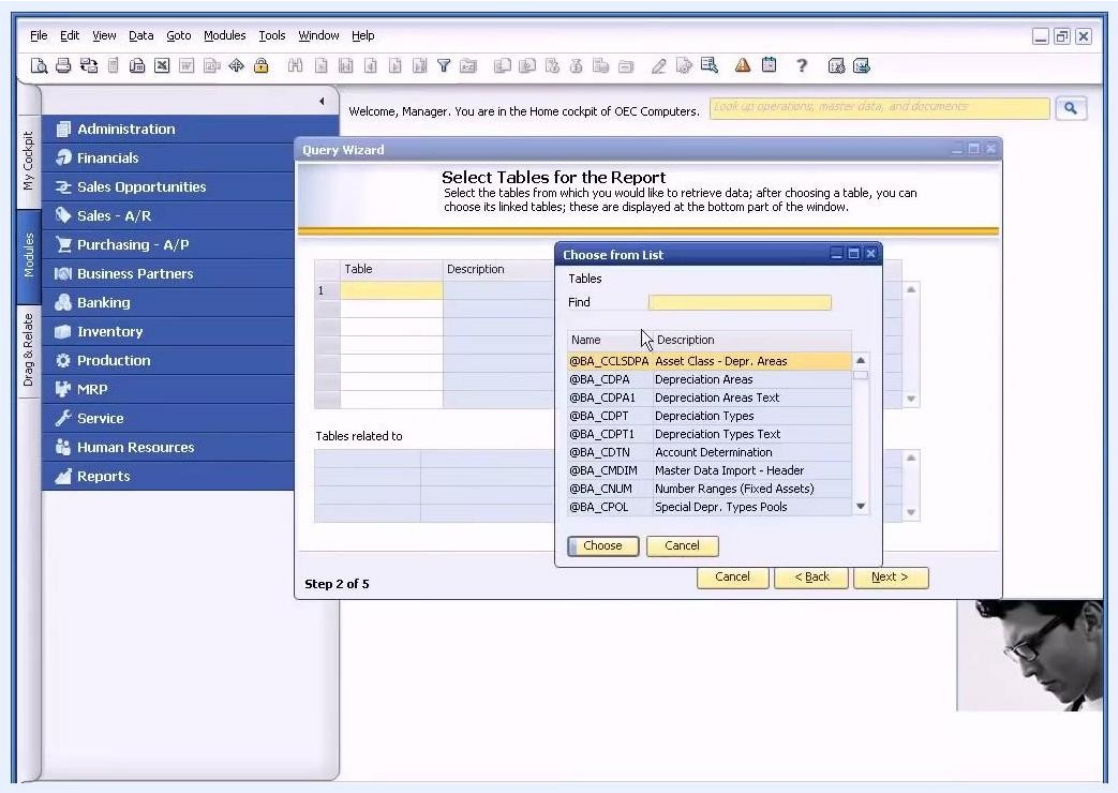
The wizard shows that you are on Step 1 of 5. Click **Next >** to continue.



Query Wizard introduction screen, Step 1 of 5

3. Search for tables to include in the report

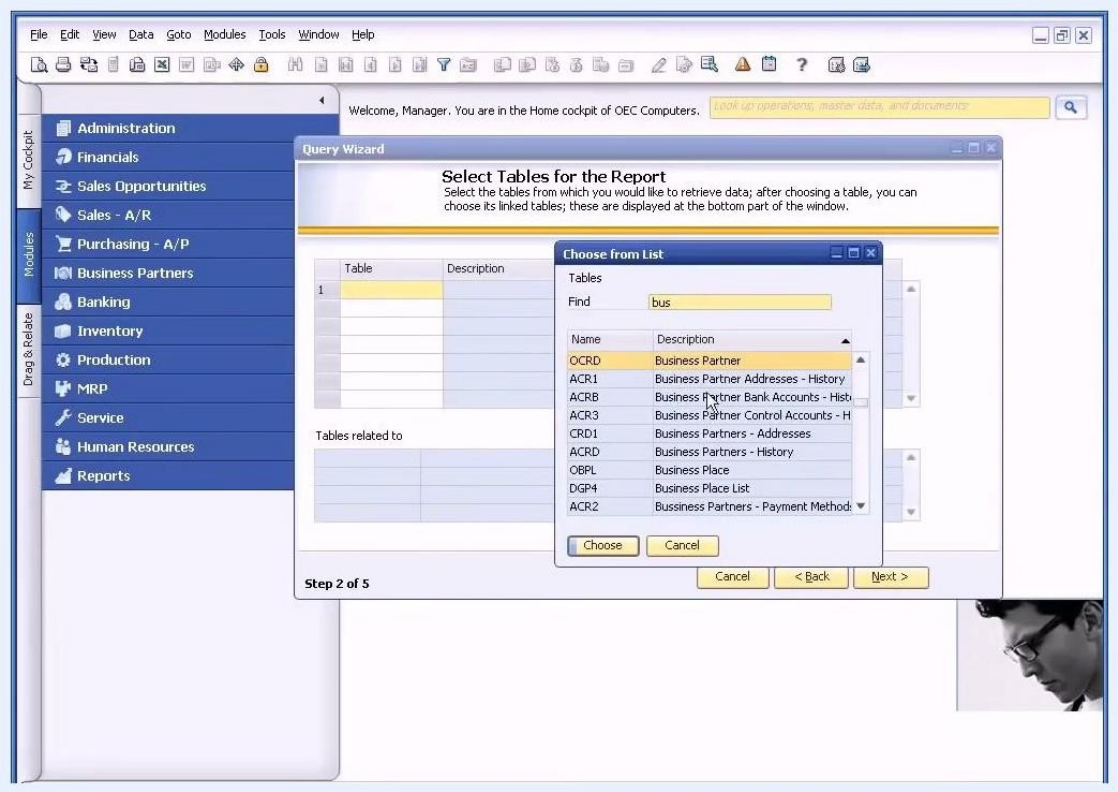
In Step 2 of 5, the wizard prompts you to select tables for your report. Open the "Choose from List" dialog. In the "Find" field, start typing the description of the table you need, for example "business partners". The list filters as you type and shows the matching tables.



Filtering the table list by description in the Choose from List dialog

4. Choose the Business Partner table

Find the table with the technical name **OCRD** and the description **Business Partner**, and select it. Below the list, the wizard displays related tables such as Business Partner Addresses, Bank Accounts, and Control Accounts.

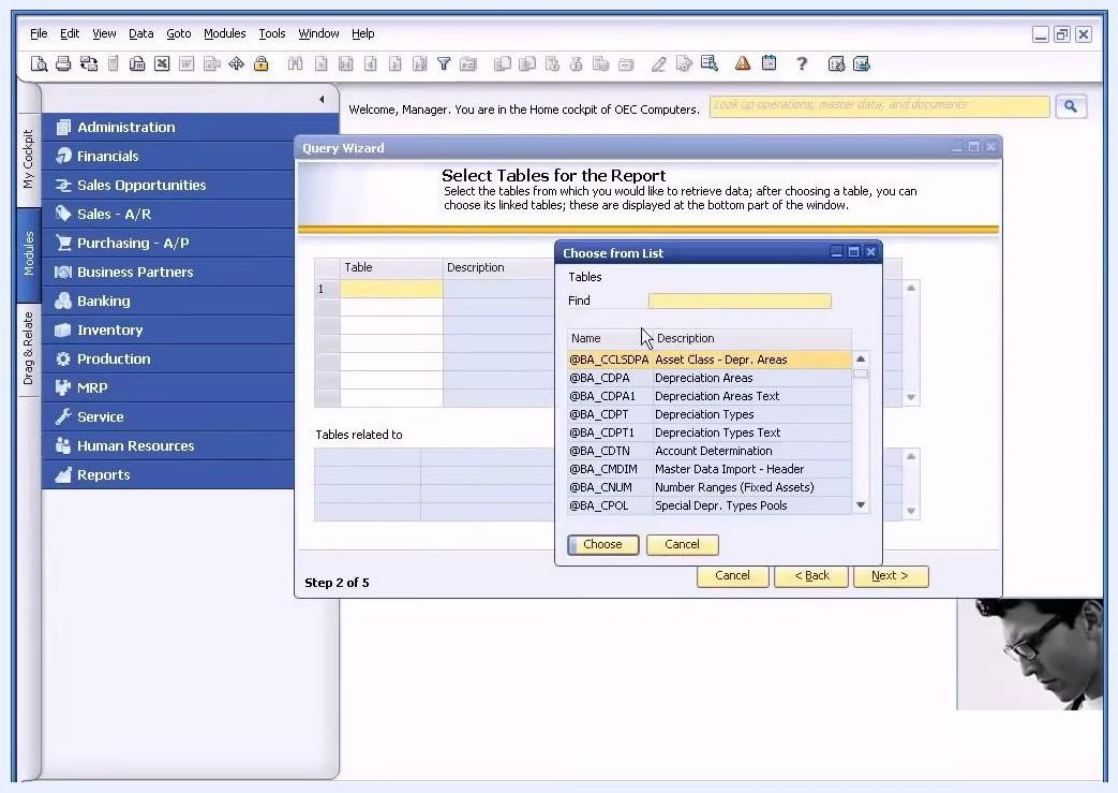


Business Partner table (OCRD) selected in the Choose from List dialog

5. Add related tables

Double-click any related table you want to include, such as **Card Groups** (technical name **OCRG**). The selected tables appear in the main list for the report.

The related tables for your selection, such as Card Groups, Payment Terms, Price Lists, and Commission Groups, appear below the list. Click **Next >** to continue.



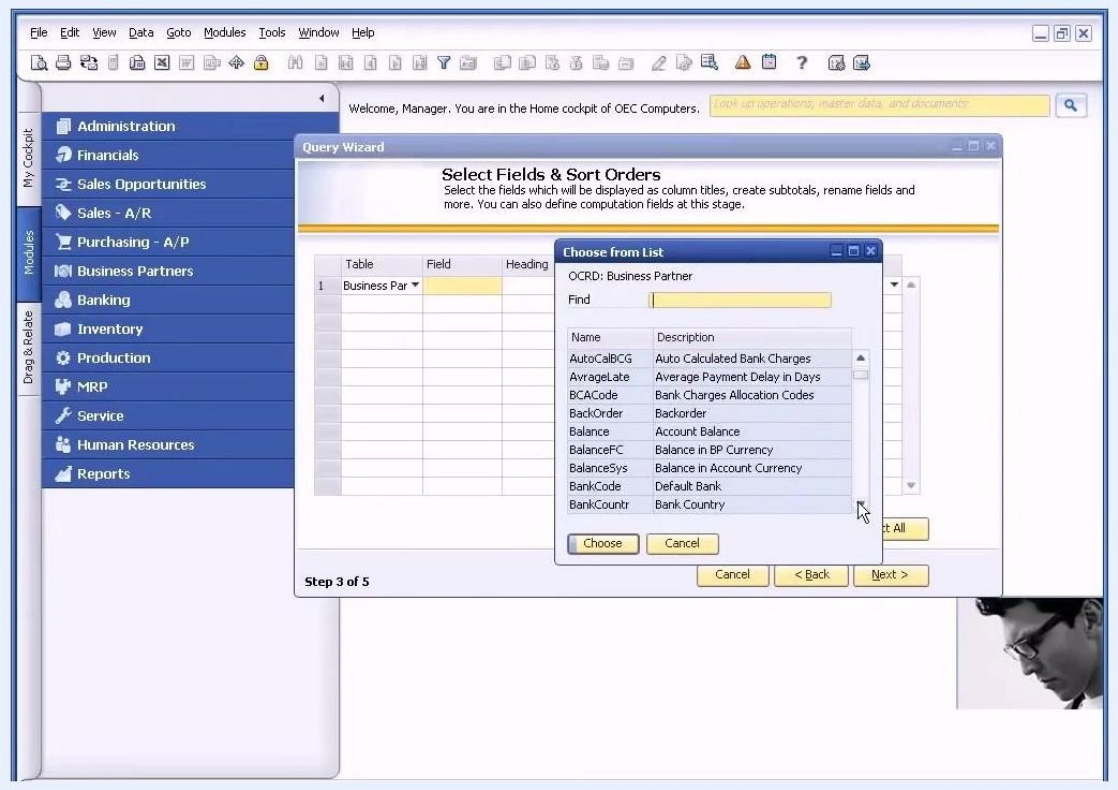
Business Partner and Card Groups tables selected, ready for the next step

6. Select fields for the report columns

In Step 3 of 5, you select the fields to display as column titles. Open the "Choose from List" dialog for the Business Partner table and scroll through the available fields. Hold down the **Control** key to select several fields at once. This example uses:

- **Balance** (Account Balance)
- **CardCode** (BP Code)
- **CardName** (BP Name)
- **CardType** (BP Type)

- **CntctPrsn** (Contact Person)



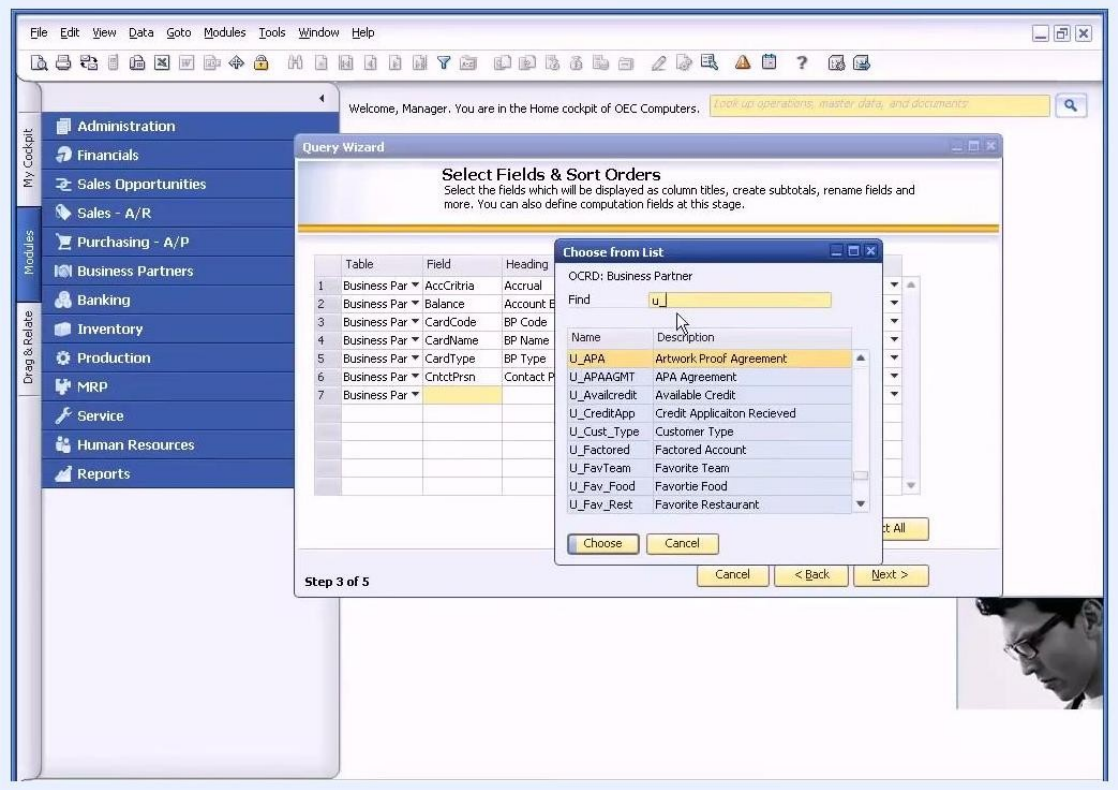
Selecting multiple fields from the Business Partner table

7. Include user-defined fields

To add user-defined fields, type **U_** in the "Find" field. The wizard performs a smart lookup and lists all user-defined fields, such as:

- **U_APA** (Artwork Proof Agreement)
- **U_APAAGMT** (APA Agreement)
- **U_AvailCredit** (Available Credit)
- **U_CreditApp** (Credit Application Received)
- **U_Cust_Type** (Customer Type)
- **U_FavTeam** (Favorite Team)
- **U_Fav_Food** (Favorite Food)
- **U_Fav_Rest** (Favorite Restaurant)

Select the user-defined fields you want in your report.

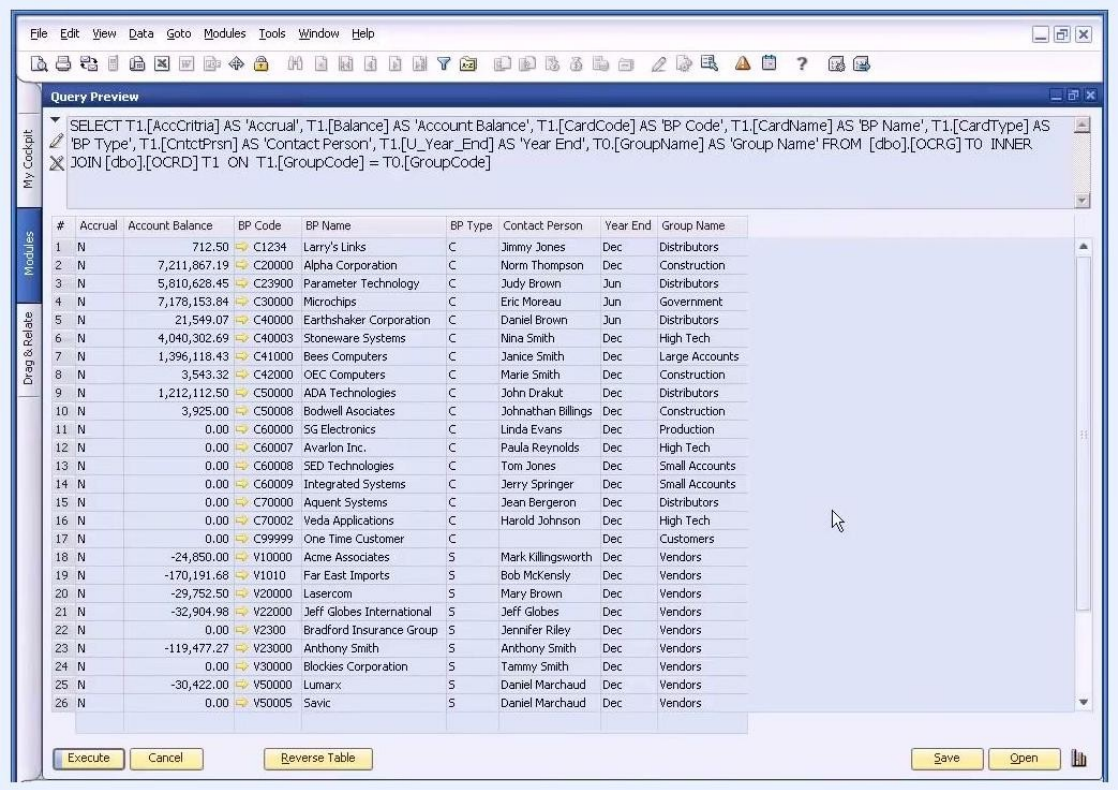


User-defined fields filtered and displayed for selection

8. Switch to a related table and add its fields

To include fields from a related table such as Card Groups, open the drop-down menu in the "Table" column of the "Select Fields & Sort Orders" step. Change the table from "Business Partner" (OCRD) to "Card Groups" (OCRG).

Select the field you want from the Card Groups table, such as **Group Name**. Then click **Next >**.



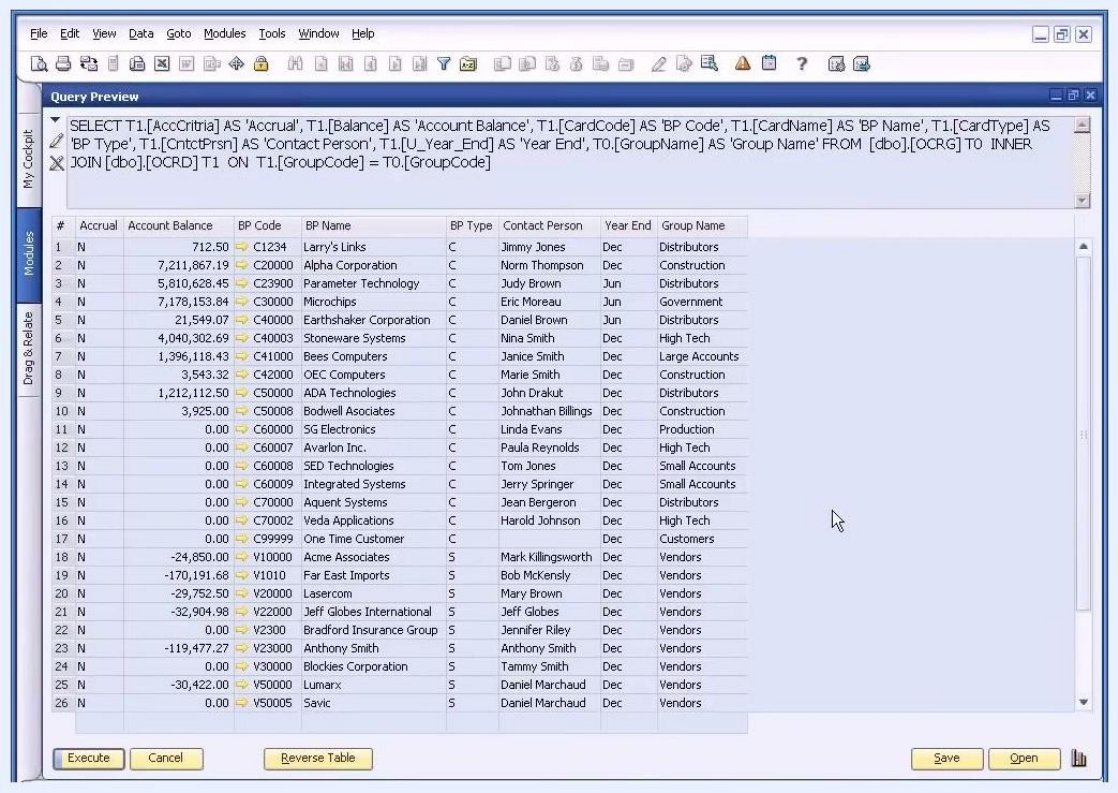
#	Accrual	Account Balance	BP Code	BP Name	BP Type	Contact Person	Year End	Group Name
1	N	712.50	C1234	Larry's Links	C	Jimmy Jones	Dec	Distributors
2	N	7,211,867.19	C20000	Alpha Corporation	C	Norm Thompson	Dec	Construction
3	N	5,810,628.45	C23900	Parameter Technology	C	Judy Brown	Jun	Distributors
4	N	7,178,153.84	C30000	Microchips	C	Eric Moreau	Jun	Government
5	N	21,549.07	C40000	Earthshaker Corporation	C	Daniel Brown	Jun	Distributors
6	N	4,040,302.69	C40003	Stoneware Systems	C	Nina Smith	Dec	High Tech
7	N	1,396,118.43	C41000	Bees Computers	C	Janice Smith	Dec	Large Accounts
8	N	3,543.32	C42000	OEC Computers	C	Marie Smith	Dec	Construction
9	N	1,212,112.50	C50000	ADA Technologies	C	John Drakut	Dec	Distributors
10	N	3,925.00	C50008	Bodwell Asociates	C	Johnathan Billings	Dec	Construction
11	N	0.00	C60000	SG Electronics	C	Linda Evans	Dec	Production
12	N	0.00	C60007	Avarlon Inc.	C	Paula Reynolds	Dec	High Tech
13	N	0.00	C60008	SED Technologies	C	Tom Jones	Dec	Small Accounts
14	N	0.00	C60009	Integrated Systems	C	Jerry Springer	Dec	Small Accounts
15	N	0.00	C70000	Aquent Systems	C	Jean Bergeron	Dec	Distributors
16	N	0.00	C70002	Veda Applications	C	Harold Johnson	Dec	High Tech
17	N	0.00	C99999	One Time Customer	C		Dec	Customers
18	N	-24,850.00	V10000	Acme Associates	S	Mark Killingsworth	Dec	Vendors
19	N	-170,191.68	V1010	Far East Imports	S	Bob McKensly	Dec	Vendors
20	N	-29,752.50	V20000	Lasercom	S	Mary Brown	Dec	Vendors
21	N	-32,904.98	V22000	Jeff Globes International	S	Jeff Globes	Dec	Vendors
22	N	0.00	V2300	Bradford Insurance Group	S	Jennifer Riley	Dec	Vendors
23	N	-119,477.27	V23000	Anthony Smith	S	Anthony Smith	Dec	Vendors
24	N	0.00	V30000	Blockies Corporation	S	Tammy Smith	Dec	Vendors
25	N	-30,422.00	V50000	Lumarx	S	Daniel Marchaud	Dec	Vendors
26	N	0.00	V50005	Savic	S	Daniel Marchaud	Dec	Vendors

Selecting the Card Groups table (OCRG) from the Table drop-down

9. Preview the query results

After you click **Next >** and **Finish**, the "Query Preview" window shows the raw data results. The columns include Accrual, Account Balance, BP Code, BP Name, BP Type, Contact Person, Year End, and Group Name.

The SQL statement the wizard generated appears at the top of the window. Scroll to view all returned records. If needed, click **Reverse Table** to change the order of the displayed data.



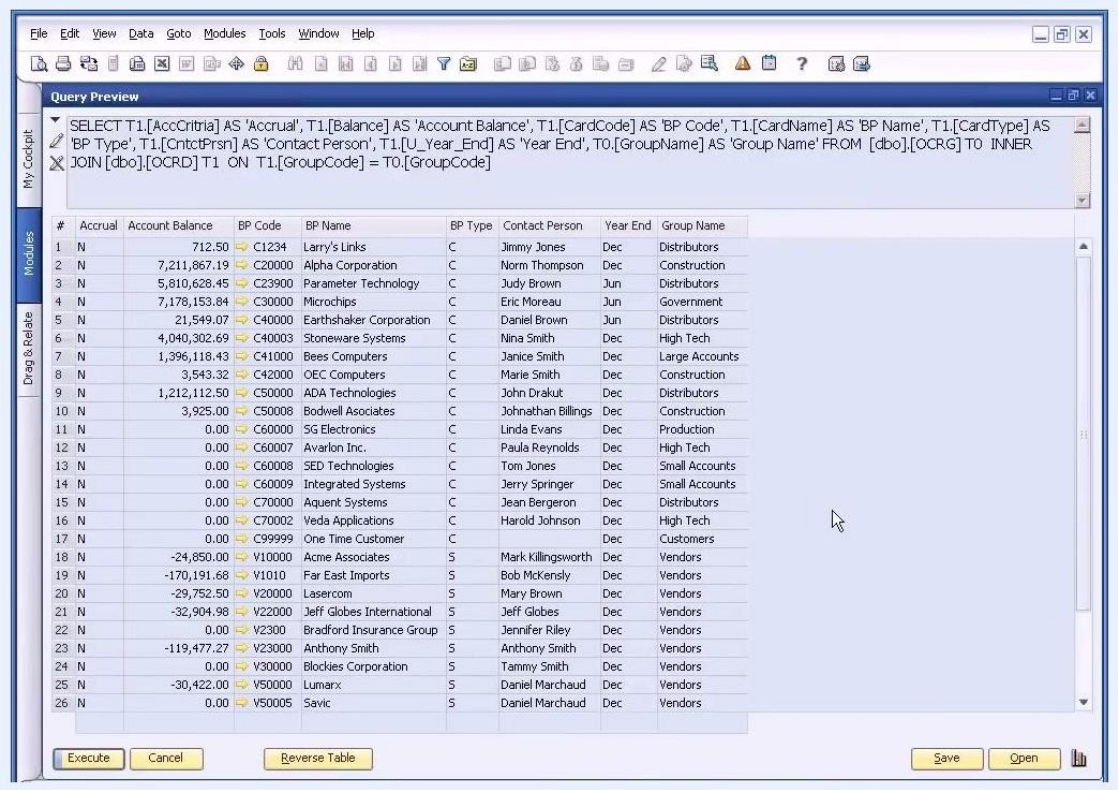
Query Preview window showing raw data results and the generated SQL statement

10. Add a parameter to filter the query

To filter results dynamically, for example by Business Partner type, click **Back** to return to the "Conditions and Relations" step. Then set up the condition:

- On the "Display Conditions" tab, select the **OCRD** (Business Partner) table.
- In the "Field" column, choose **CardType** (BP Type).
- Set "Condition" to **Equal**.

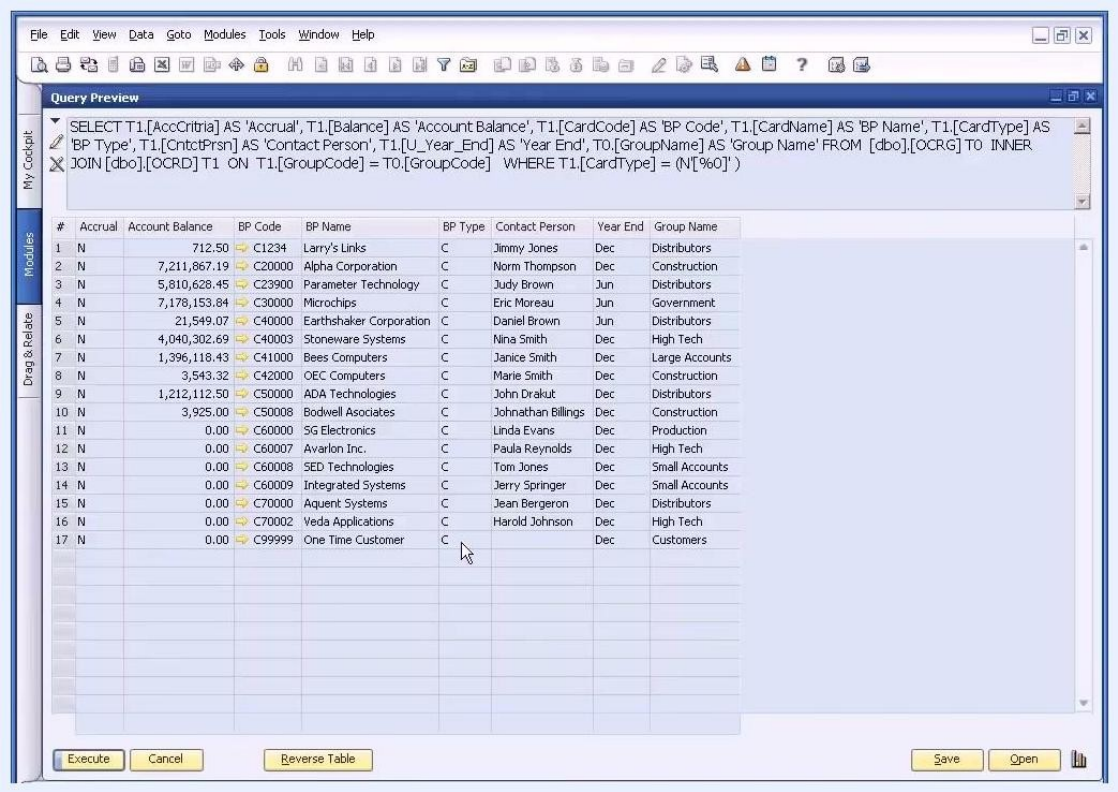
- In the "Field/Value" column, enter **[%0]**. This defines a parameter that prompts for input each time the query runs.



Adding a BP Type parameter in the Conditions and Relations step

11. Review the generated SQL script

Go to the final step of the wizard. The "Query Wizard completed" screen displays the full SQL statement, including the BP Type parameter. Check that all fields and conditions are correct, then click **Finish**.



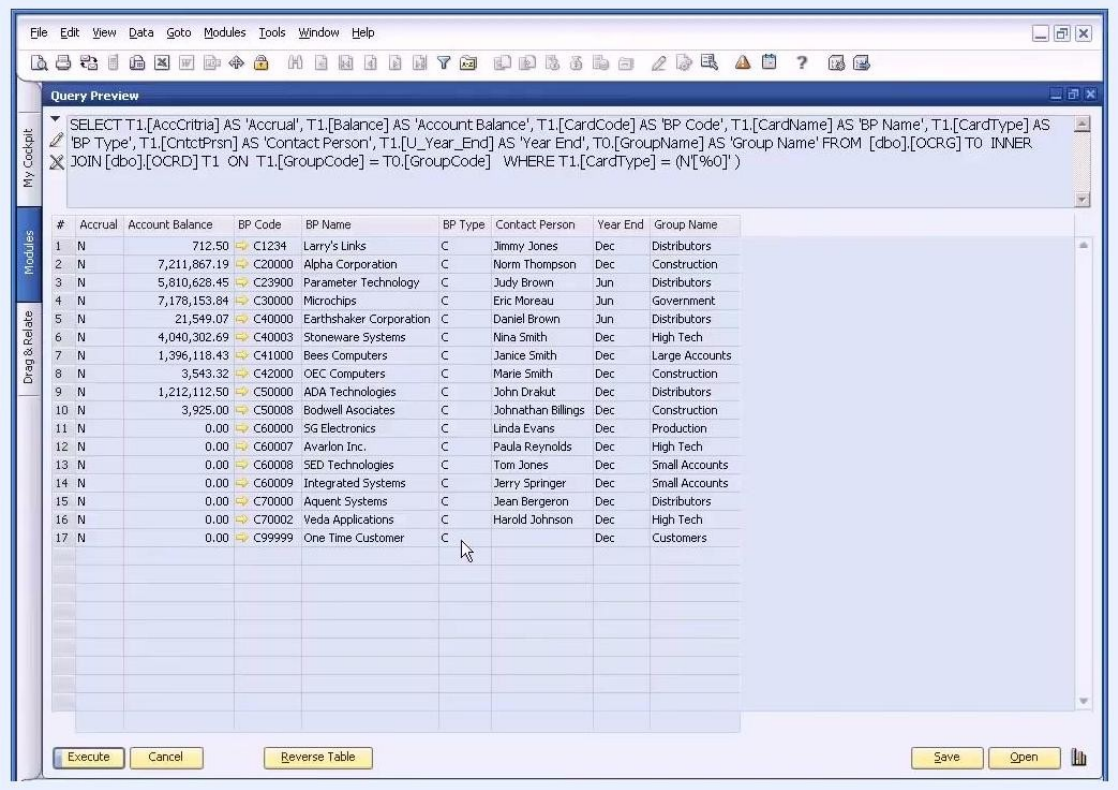
Query Wizard completed screen showing the generated SQL statement with the parameter

12. Run the query with a parameter

When you finish the wizard, the "Query - Selection Criteria" dialog appears. In the **BP Type** field, select a value:

- "C" for Customers
- "V" for Vendors
- "S" for Suppliers
- "L" for Leads

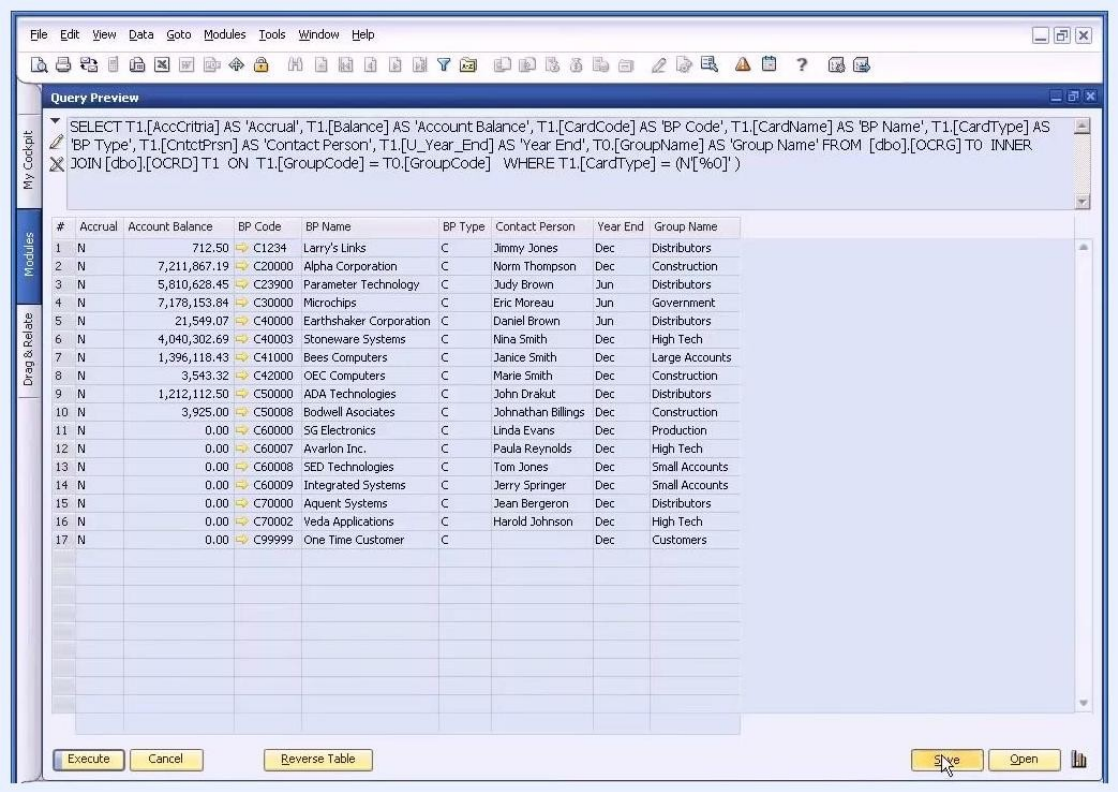
Click **OK** to run the query with that parameter.



Query - Selection Criteria dialog prompting for the BP Type parameter

13. View the filtered results and save the query

The "Query Preview" window now shows only the records that match the selected BP Type, for example Customers. Review the filtered results. To keep the query for future use, click **Save**.



Query Preview window showing filtered results for Customers with the Save button highlighted

14. Name and store the query

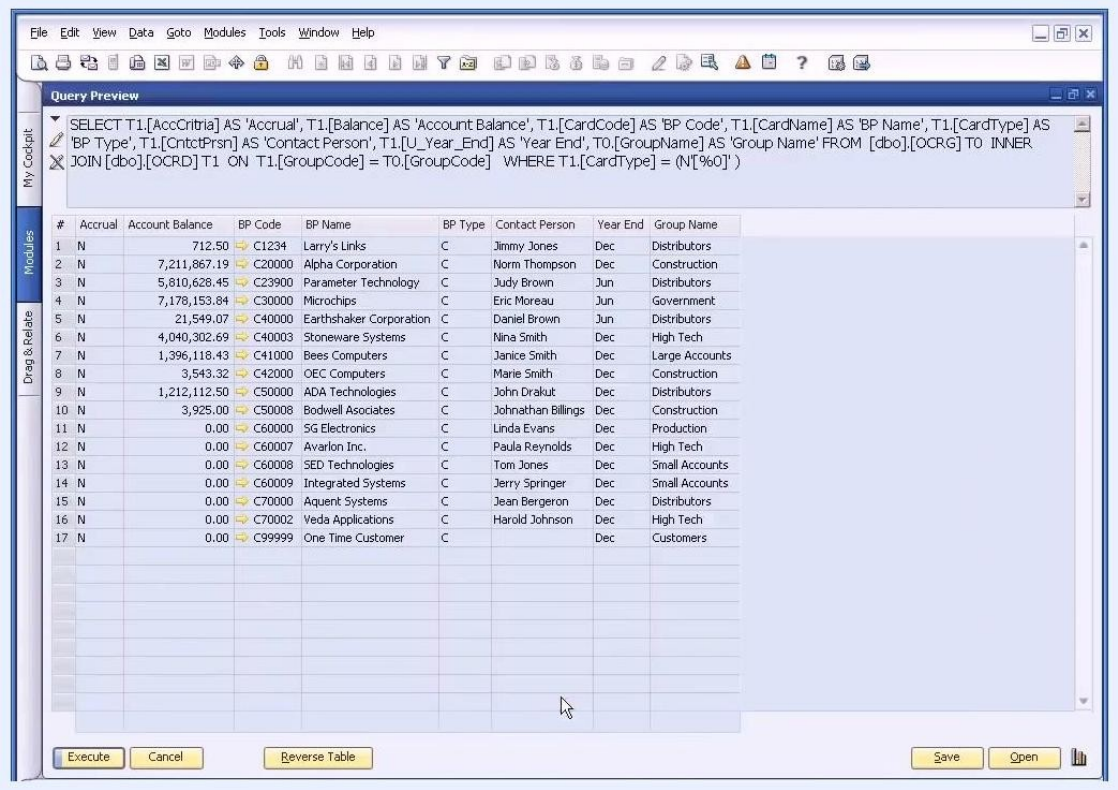
When prompted, choose the **General** folder to store the query. Enter a name, such as **BP query** (Business Partner query). Confirm to save the query.

15. Run the saved query later

To run the saved query again, follow these steps:

1. Open the **Query Manager** from the toolbar.
2. Go to the **General** folder.
3. Select the **BP query** you saved.
4. When prompted, enter a different BP Type, for example "V" for Vendors, and click **OK**.

The query runs and displays the data filtered by your parameter selection.



Query Preview window showing results from the saved query run with a different parameter

Summary

You now know how to use the query generator in SAP Business One. The Query Wizard lets you select tables, standard fields, and user-defined fields, and add related tables. You can preview results, add a parameter to filter dynamically, and save the query in the General folder. You can then run it again from the Query Manager with a different parameter, such as another BP Type, without writing SQL.