

# Code Snippets: Various Queries on Customer Data (HZ Tables)

Author: Anil Patil

Created: May 11, 2007

Product: TCA / Oracle Receivables

## Overview

There have been many instances where I have been asked by the Business Users to provide Customer Listing reports based on different parameters. The different requests typically are as follows

1. Customer listing with all Sites for a specific Org
2. A listing of only those Customer with whom we have had transactions in the last 'x' years
3. A listing of all Customer Sites that do not have any Business purpose associated with it
4. Customer Listing By Collector
5. Customer Listing along with Profile Class names and Collector names
6. And so on ...

We have the Standard Customer Listing Reports in the application. However these reports are not org stripped because the HZ\_CUST\_ACCOUNTS data is not org stripped plus the standard reports could not be used for all different flavors of the Business requests. In these cases, I used the following queries

## Queries

### Customer listing with all Sites for a specific Org

```
execute dbms_application_info.set_client_info('Org_id') ;
```

```
SELECT
  substrb(party.party_name,1,50)           Customer_Name ,
  cust.account_number                     Customer_Number ,
  substrb(look.meaning, 1, 8)             Site_Use      ,
  acct_site.cust_acct_site_id             Address_Id,
  substrb(loc.address1,1,30)              Address_Line_1,
  substrb(loc.city,1,15)                  City          ,
  substrb(loc.state,1,2)                  State         ,
  substrb(loc.postal_code,1,10)           Zip_Code     ,
  cust.status                             Cust_Status
FROM
  ar_lookups look,
  ar_lookups look_status,
  hz_cust_accounts cust,
  hz_parties party,
  hz_cust_site_uses site_uses,
  hz_cust_acct_sites acct_site,
  hz_party_sites party_site,
```

```

hz_locations loc
WHERE
    cust.cust_account_id           = acct_site.cust_account_id
  AND cust.party_id               = party.party_id
  AND acct_site.party_site_id     = party_site.party_site_id(+)
  AND loc.location_id(+)         = party_site.location_id
  AND acct_site.cust_acct_site_id = site_uses.cust_acct_site_id(+)
  AND look.lookup_type(+)        = 'SITE_USE_CODE'
  AND look.lookup_code(+)        = site_uses.site_use_code
  AND look_status.lookup_type(+) = 'CODE_STATUS'
  AND look_status.lookup_code(+) = nvl(cust.status, 'A')
ORDER BY
    party.party_name ;

```

### **Customer listing with only Identifying Addresses for a specific Org**

The IDENTIFYING\_ADDRESS\_FLAG column of HZ\_PARTY\_SITES table indicates if the Address is Identifying Address or not. (Values = Y or N).

(The Select and the From clause is the same as above query)

```

execute dbms_application_info.set_client_info('Org_id') ;

SELECT
    . . .
FROM
    . . .
WHERE
    cust.cust_account_id           = acct_site.cust_account_id
  AND cust.party_id               = party.party_id
  AND acct_site.party_site_id     = party_site.party_site_id(+)
  AND loc.location_id(+)         = party_site.location_id
  AND acct_site.cust_acct_site_id = site_uses.cust_acct_site_id(+)
  AND look.lookup_type(+)        = 'SITE_USE_CODE'
  AND look.lookup_code(+)        = site_uses.site_use_code
  AND look_status.lookup_type(+) = 'CODE_STATUS'
  AND look_status.lookup_code(+) = nvl(cust.status, 'A')
  AND party_site.identifying_address_flag = 'Y'
ORDER BY
    party.party_name ;

```

### **Listing of all Customer Sites that do not have any Business Purpose**

The SITE\_USE\_CODE of the HZ\_CUST\_SITE\_USES\_ALL table stores the 'Business Purpose' code of the site. If we need a listing of Customer sites that do not have any Business Purpose, we add the where clause of 'site\_uses.site\_use\_code is NULL' to the query. This listing was used for data cleanup purpose.

(The Select and the From clause is the same as above query)

```

execute dbms_application_info.set_client_info('Org_id') ;

SELECT
    . . .
FROM
    . . .
WHERE
    cust.cust_account_id           = acct_site.cust_account_id
  AND cust.party_id               = party.party_id
  AND acct_site.party_site_id     = party_site.party_site_id(+)
  AND loc.location_id(+)         = party_site.location_id
  AND acct_site.cust_acct_site_id = site_uses.cust_acct_site_id(+)
  AND look.lookup_type(+)        = 'SITE_USE_CODE'
  AND look.lookup_code(+)        = site_uses.site_use_code
  AND look_status.lookup_type(+) = 'CODE_STATUS'
  AND look_status.lookup_code(+) = nvl(cust.status, 'A')
  AND site_uses.site_use_code is NULL
ORDER BY
    party.party_name ;

```

### **Listing of all Customer with Primary Bill To Address**

The address with a 'Bill To' business purpose has the SITE\_USE\_CODE column of the HZ\_CUST\_SITE\_USES\_ALL table as 'BILL\_TO'

(The Select and the From clause is the same as above query)

```

execute dbms_application_info.set_client_info('Org_id') ;

SELECT
    . . .
FROM
    . . .
WHERE
    cust.cust_account_id           = acct_site.cust_account_id
  AND cust.party_id               = party.party_id
  AND acct_site.party_site_id     = party_site.party_site_id(+)
  AND loc.location_id(+)         = party_site.location_id
  AND acct_site.cust_acct_site_id = site_uses.cust_acct_site_id(+)
  AND look.lookup_type(+)        = 'SITE_USE_CODE'
  AND look.lookup_code(+)        = site_uses.site_use_code
  AND look_status.lookup_type(+) = 'CODE_STATUS'
  AND look_status.lookup_code(+) = nvl(cust.status, 'A')
  AND site_uses.site_use_code = 'BILL_TO'
  AND site_uses.primary_flag = 'Y'
  AND site_uses.status = 'A'
ORDER BY
    party.party_name ;

```

## **Listing of all Customer with Bill To Address with whom we had transaction in the last 1 year**

The BILL\_TO\_SITE\_USE\_ID of the RA\_CUSTOMER\_TRX\_ALL table stores the SITE\_USE\_ID of HZ\_CUST\_SITE\_USES\_ALL table.

(The Select and the From clause is the same as above query)

```
execute dbms_application_info.set_client_info('Org_id') ;

SELECT
    . . .
FROM
    . . .
WHERE
    cust.cust_account_id           = acct_site.cust_account_id
  AND cust.party_id               = party.party_id
  AND acct_site.party_site_id     = party_site.party_site_id(+)
  AND loc.location_id(+)         = party_site.location_id
  AND acct_site.cust_acct_site_id = site_uses.cust_acct_site_id(+)
  AND look.lookup_type(+)        = 'SITE_USE_CODE'
  AND look.lookup_code(+)        = site_uses.site_use_code
  AND look_status.lookup_type(+) = 'CODE_STATUS'
  AND look_status.lookup_code(+) = nvl(cust.status, 'A')
  AND SITE_USES.site_use_id in
    (SELECT distinct trx.bill_to_site_use_id from ra_customer_trx trx
     where trx.creation_date > sysdate - 365)
ORDER BY
    party.party_name ;
```

## **Listing of Customer's with Profile Class Name, Collector Name, Bill To Address**

```
execute dbms_application_info.set_client_info('Org_id') ;

SELECT
    substrb(party.party_name,1,50)           Customer_Name ,
    cust.account_number                     Customer_Number ,
    pc.name                                 Profile_Class_Name ,
    coll.name                               Collector_Name ,
    substrb(look.meaning, 1, 8)             Site_Use ,
    acct_site.cust_acct_site_id             Address_Id,
    substrb(loc.address1,1,30)              Address_Line_1,
    substrb(loc.city,1,15)                  City ,
    substrb(loc.state,1,2)                  State ,
    substrb(loc.postal_code,1,10)           Zip_Code ,
    cust.status                             Cust_Status
FROM
    ar_lookups look,
    ar_lookups look_status,
    hz_cust_accounts cust,
    hz_parties party,
    hz_cust_site_uses site_uses,
    hz_cust_acct_sites acct_site,
```

```

hz_party_sites party_site,
hz_locations loc,
hz_customer_profiles prof,
hz_cust_profile_classes pc ,
ar_collectors coll
WHERE
    cust.cust_account_id           = acct_site.cust_account_id
AND cust.party_id                 = party.party_id
AND acct_site.party_site_id       = party_site.party_site_id(+)
AND loc.location_id(+)           = party_site.location_id
AND acct_site.cust_acct_site_id   = site_uses.cust_acct_site_id(+)
AND look.lookup_type(+)          = 'SITE_USE_CODE'
AND look.lookup_code(+)          = site_uses.site_use_code
AND look_status.lookup_type(+)    = 'CODE_STATUS'
AND look_status.lookup_code(+)    = nvl(cust.status, 'A')
AND cust.cust_account_id         = prof.cust_account_id (+)
AND prof.collector_id           = coll.collector_id(+)
AND prof.profile_class_id       = pc.profile_class_id
AND prof.site_use_id is NULL
AND SITE_USES.site_use_id in
    (SELECT distinct trx.bill_to_site_use_id from ra_customer_trx trx
    where trx.creation_date > sysdate - 60)
ORDER BY
    party.party_name ;

```

## Summary

For me these queries were very handy whenever I had any Customer Listing request from the Users. A little tweak here and there to these queries would fetch me all the data I needed. I always referred to the TRM to look for additional columns of these tables if there was any need to use them. A handy SQL query for a Consultant helps!

## References

Oracle Receivables eTRM