

1 The Outlook Query Builder Tab in Custom Views

Outlook Views are an incredibly useful part of Outlook. However, for one reason or another, Microsoft hid the Query Builder tab. This OutlookWise Tips & Tricks Sheet describes how to show this tab and use it to create queries.

We look at:

[Making the Query Builder Tab Visible](#)

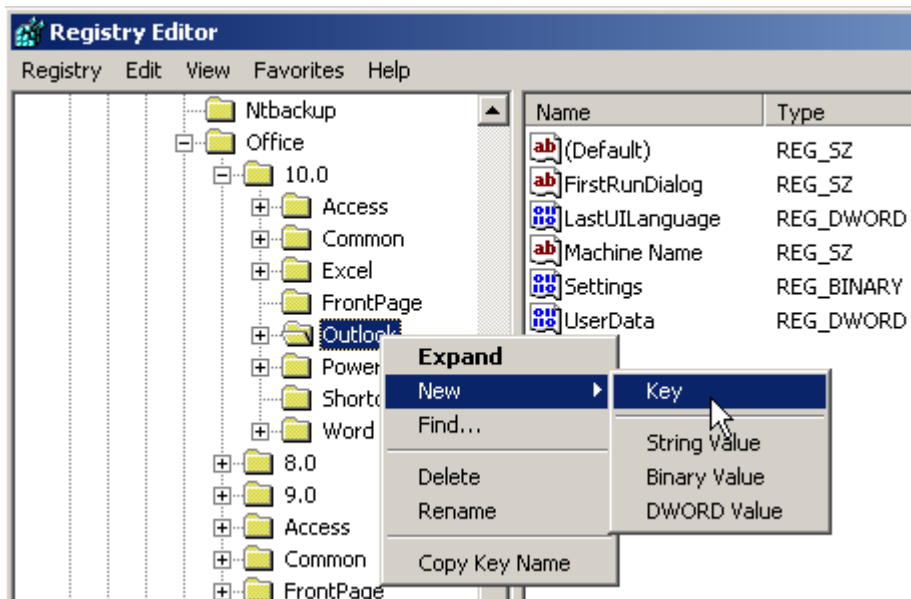
[The Basics of Outlook Views](#), and then

[Building a Filter using the Query Builder Tab](#)

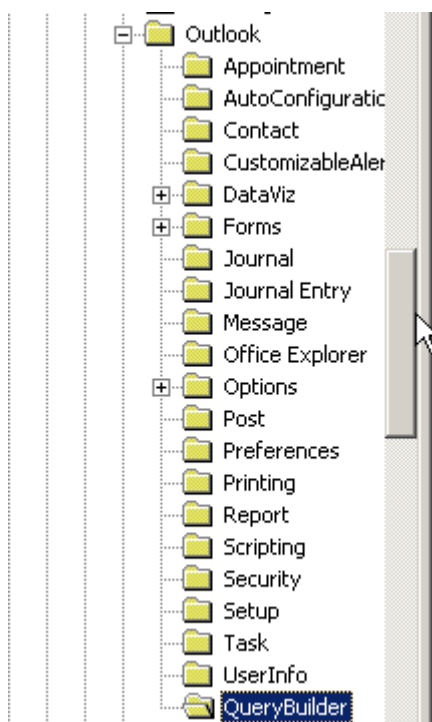
2 Making the Query Builder Tab Visible

Follow these steps to show the **Query Builder** tab in the Custom View Organiser:

1. Make sure Outlook is closed.
2. Open the **Registry Editor**. (Choose **Start, Run**; enter **regedit**; and click **OK**.)
3. Open the key **HKEY_CURRENT_USER\Software\Microsoft\Office\10.0\Outlook**, by clicking on the "+" signs next to the folders (keys) and navigating down to **Outlook**. Note depending on your version of Outlook this will be **\9.0\Outlook** for Outlook 2000, **\10.0\Outlook** for Outlook 2002/XP or **\11.0\Outlook** for Outlook 2003.
4. Right-click **Outlook** and choose **New, Key**:



5. Type **QueryBuilder** in the **Key** edit box. Regedit will default to **New Key #1**, but you should replace that key name with **QueryBuilder**.



6. Close the **Registry Editor**.

3 The Basics of Outlook Views

To use the Query Builder Tab, you need a good knowledge of the standard functionality in Outlook to create custom views, as well as of some of the more advanced topics like the SQL tab. If you are new to Outlook Views, we suggest you review the following articles before continuing.

[Profiling Contacts using the Outlook Forms Designer - 02](#)

[Outlook Views – Using the SQL Tab](#)

For the purposes of demonstrating use of the Query Builder tab, we will take the same exercise as defined in the article on **Using the SQL Tab**, namely create a filter restricting the Contacts view to all **marketing decision makers located on the West Coast** (of the United States).

As reviewed in that article, we can think of this condition as:

(Marketing Decision Makers) AND (lives on the West Coast)

This equated to the conditions:

Job Title contains the word **“Owner”**

OR

Job Title contains the word **“Manager”**.

ANDed with the conditions:

State = “WA”

OR

State = “OR”

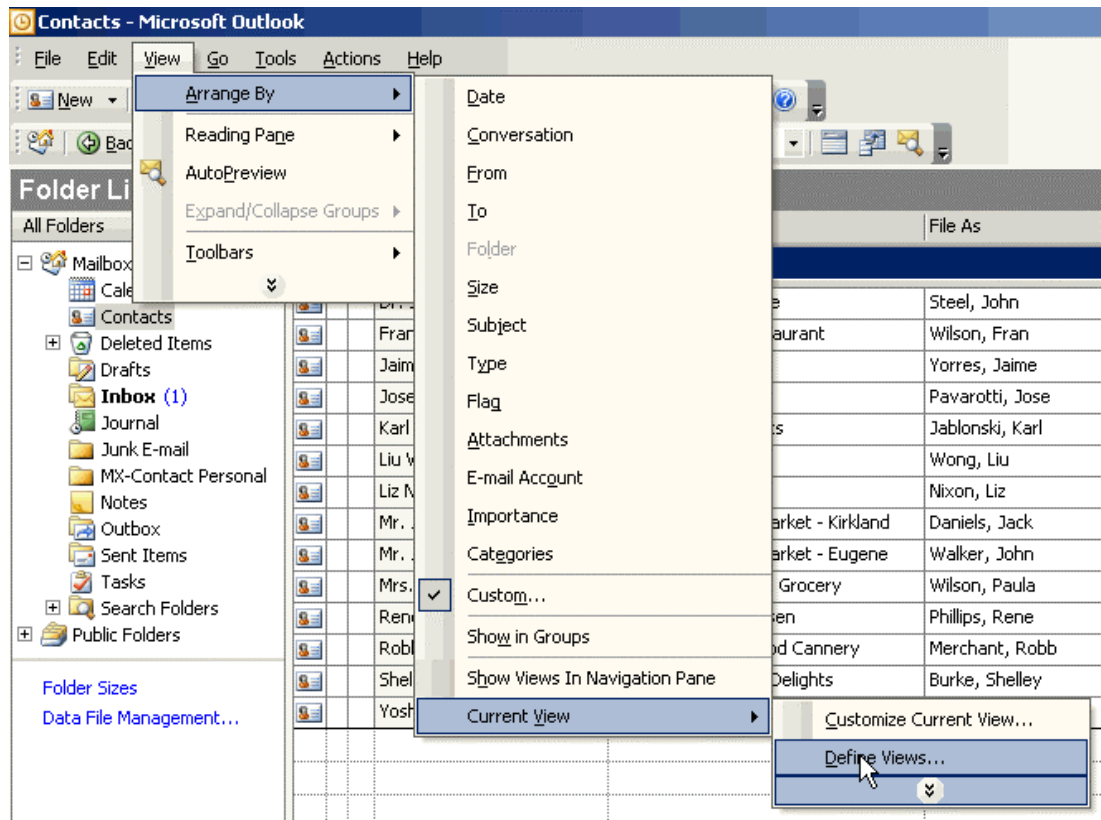
OR

State = "CA"

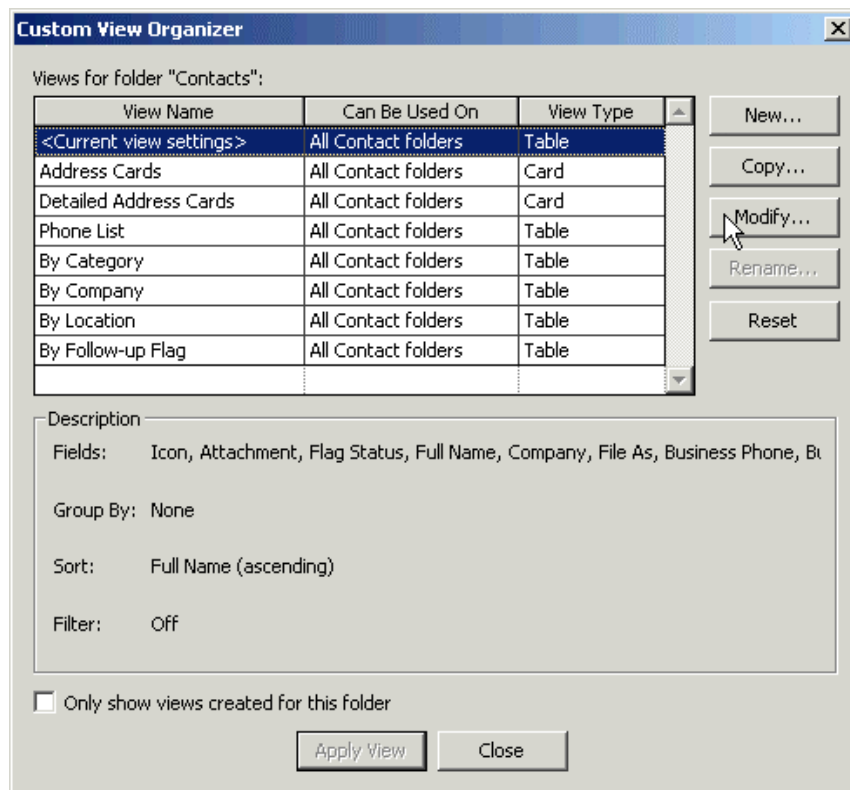
4 Building a Filter using the Query Builder Tab

To build a filter using the **Query Builder** page on the Filter dialog box, do the following:

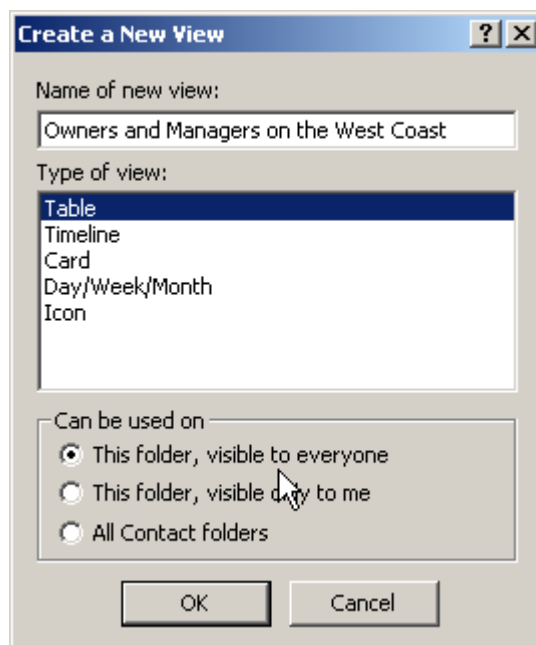
1. Click **View -> Current View -> Define Views** (for Outlook 2000 and 2002/XP), or **View -> Arrange by -> Current View -> Define Views** (for Outlook 2003).



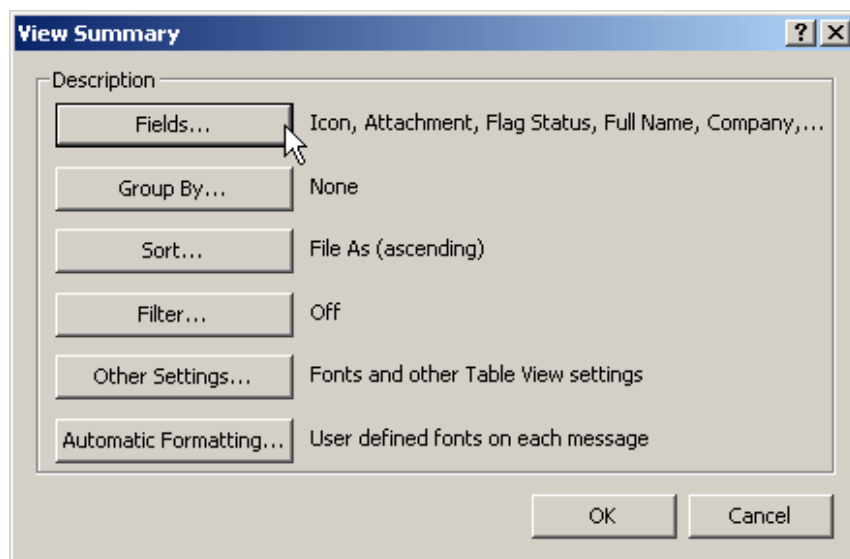
2. The **Define Views/Current View Organizer** screen will be displayed:



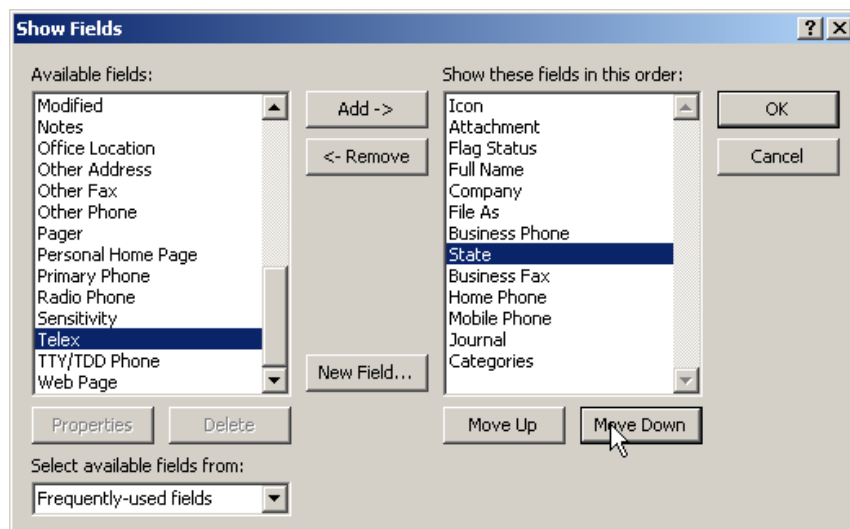
3. Click **New** to create a new View, and enter the **View Name** (Leave the **Type of view** as **Table**):



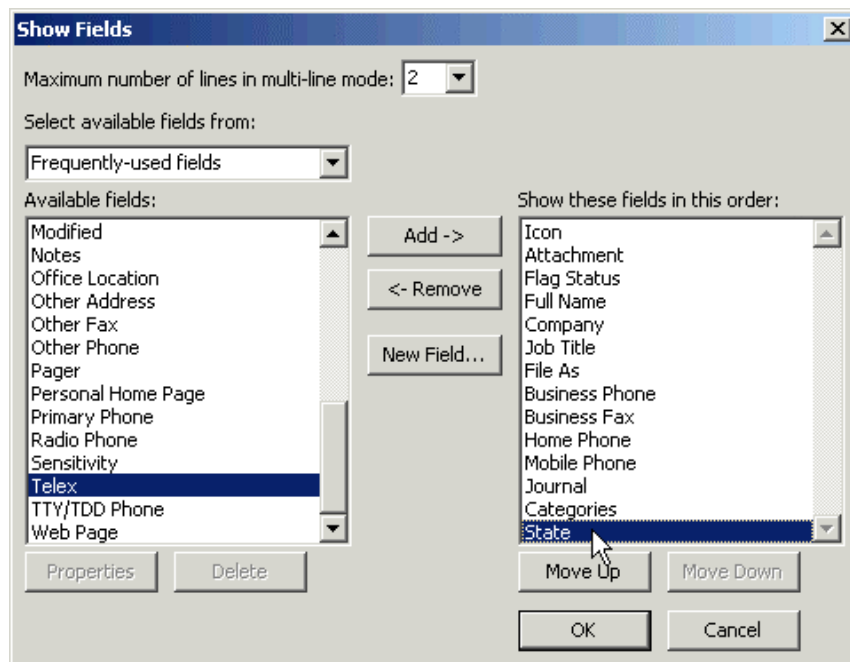
4. Click **OK**. You will then get the **View Summary/Customize View** dialog:



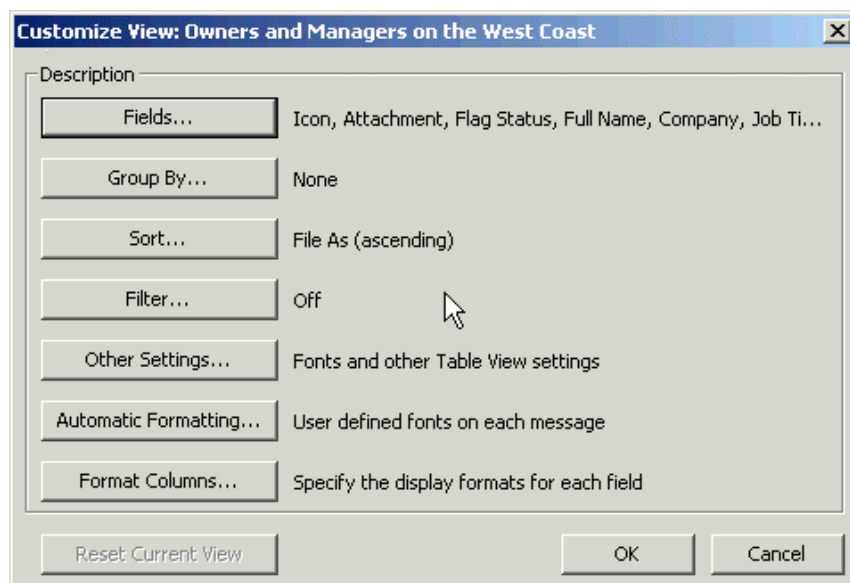
5. In this example I'm working with a few fields that do not ordinarily appear in the default Views, namely **Job Title** and **State**. So it would be useful to see these fields in the View. To do this click on the **Fields** button on the **View Summary/Customize View** dialog:



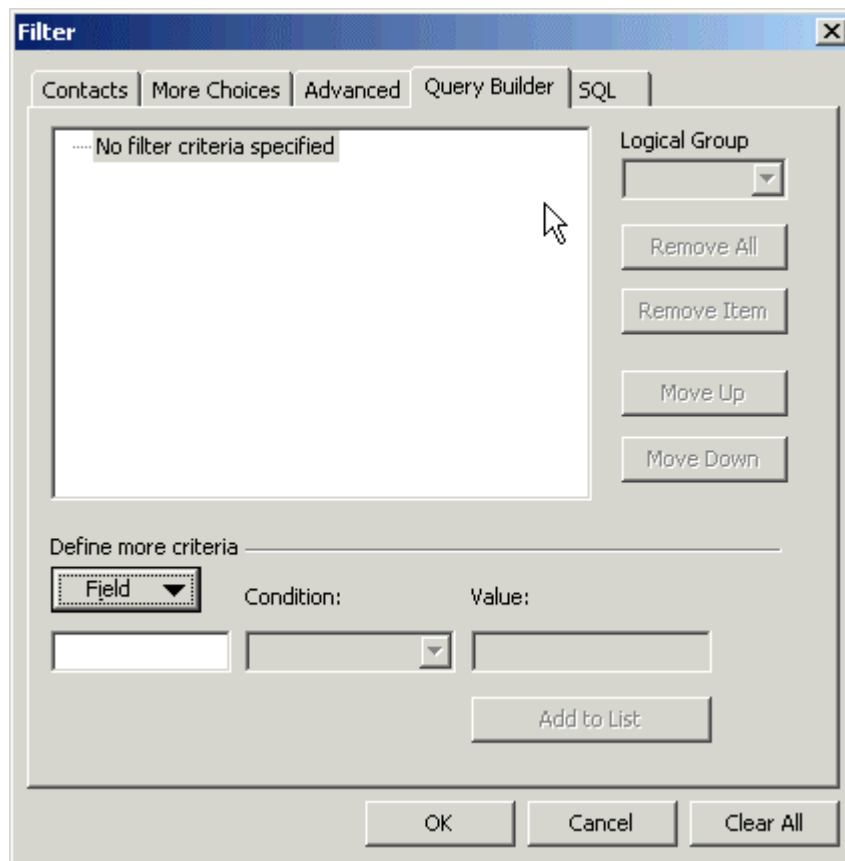
6. From the **Available fields** list (with **Frequently-used fields** selected in the drop down) **Job Title** and **State** in turn and click **Add->** to move the fields to the right hand window showing the fields that will appear in the View.
7. Use the **Move Up** and **Move Down** buttons to reposition these fields so that they will display where you'd like them to.



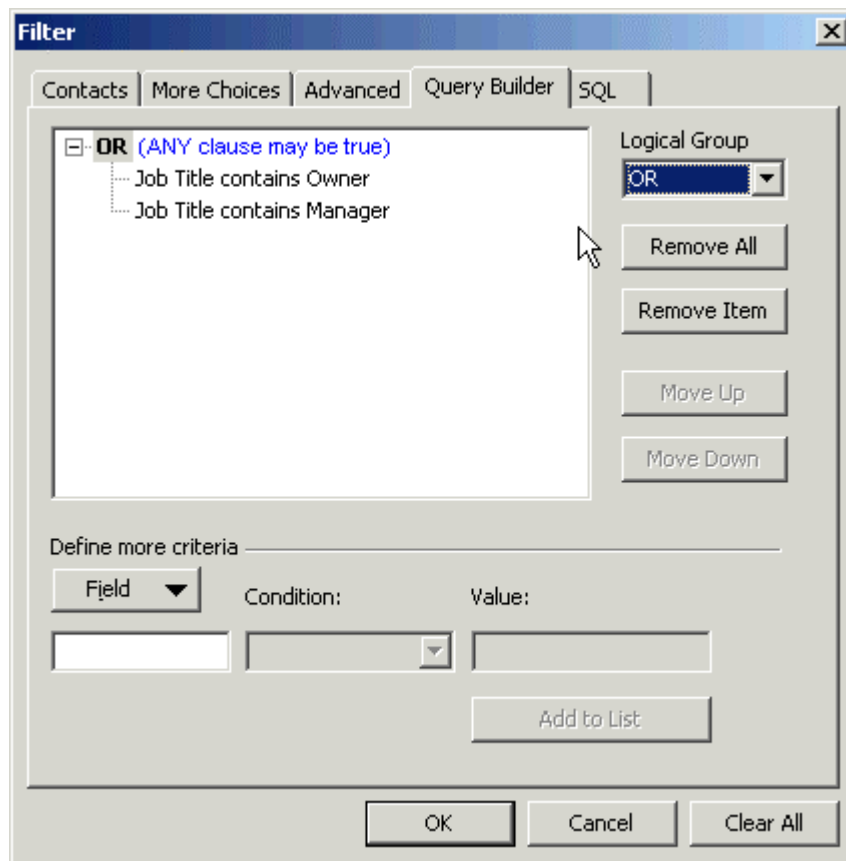
8. Click **OK** to return to the **View Summary/Customize View** dialog.
9. Click the **Filter** button on the **View Summary/Customize View** dialog box:



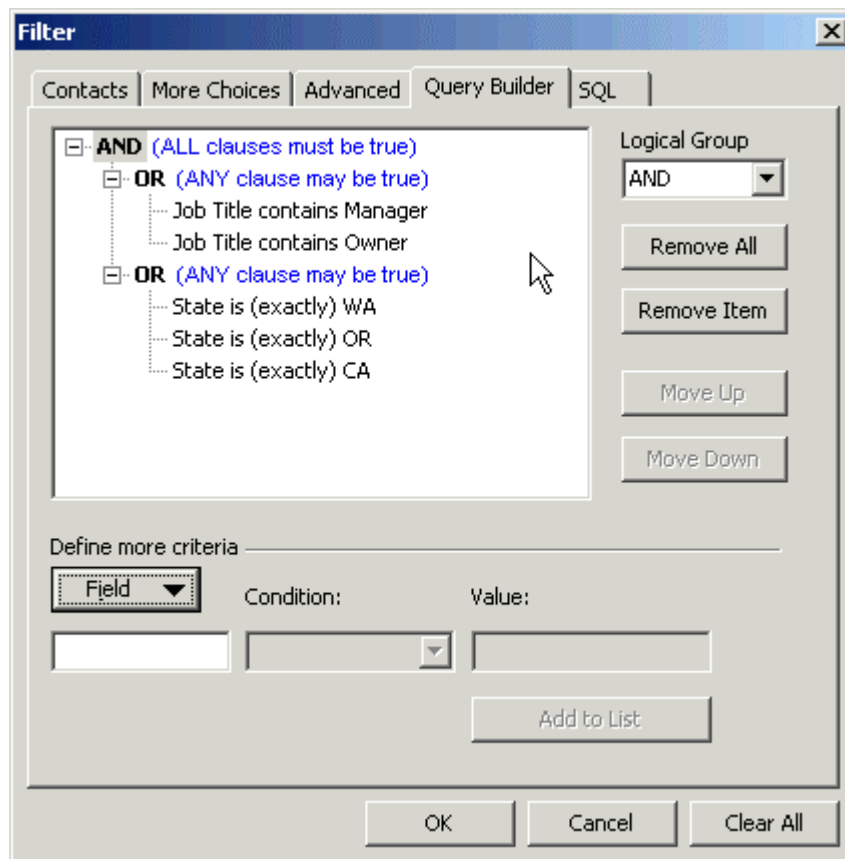
10. Click the **Filter** button and then select the **Query Builder** page on the **Filter** dialog box:



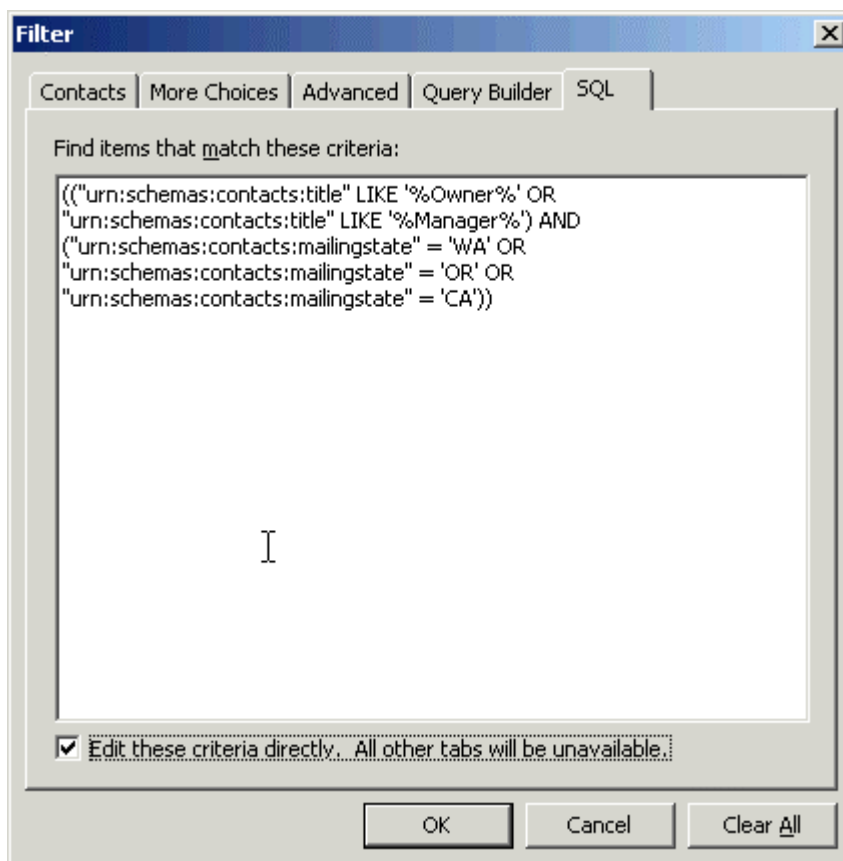
11. Use the Query Builder interface to build your query. When you construct a filter, you actually build a WHERE clause without the WHERE keyword. **Notice that you can use the logical AND or logical OR operator to develop the query and move clauses up or down.** Add the 2 conditions relating to the Job Title, and change the **Logical Group** field to an **OR** condition:



12. Then add the conditions for the 3 **State** values:



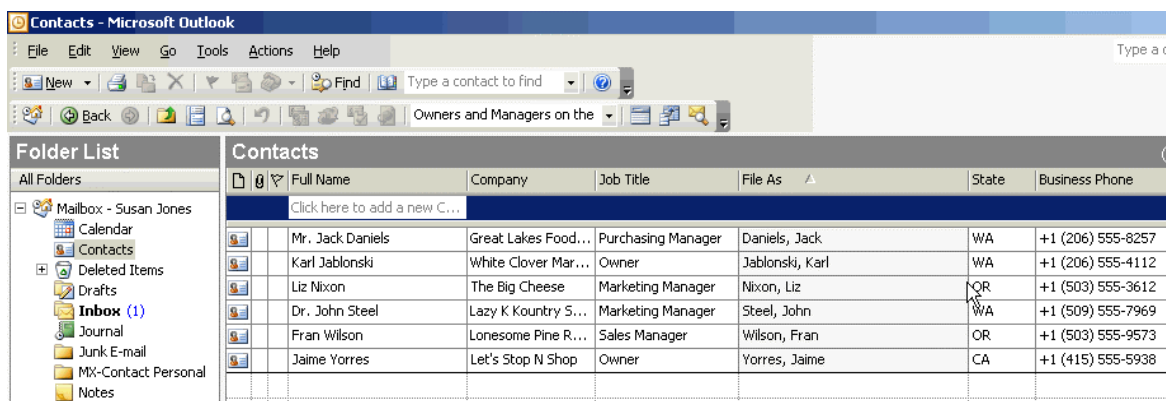
13. Click the **SQL** page shown in Figure 11-2 on the Filter dialog box, and check the **Edit These Criteria Directly** check box:



- Notice the 2 nested conditions are AND'ed together, but the conditions relating to the same field (Job Title and State) are OR'ed together inside each set of brackets. For more details on defining queries using the SQL Tab, refer to the following article:

[Outlook Views – Using the SQL Tab](#)

- We then click **OK** to return to the **Customize View** screen. Then click **OK** to return to the **Custom View Organizer**, and **Apply View** to save and activate the view:



- All the Owners and Managers that are located on the West Coast are displayed in the View – mission accomplished.

5 MX-Contact: Managing Contact Lists inside Outlook/Exchange

If you're looking for an application to assist you with managing a contact list of some kind, whether it be customers, prospects, members, suppliers or whatever, check out [MX-Contact](#). **MX-Contact** is a CRM, Contact Management and Sales Automation package that runs inside Microsoft Outlook 2000, 2002 or 2003.



www.mxcontact.com

The system utilises all the standard functionality of Outlook but provides many additional features that transform Outlook into a powerful Contact Management and CRM system.

MX-Contact has 7 different versions available catering for a single user through to an enterprise with thousands of users, with data storage in an Outlook Data File, Exchange Server Public Folders, or Microsoft SQL Server.

MX-Contact comprises a **Base System**, with optional **Sales**, **Marketing** and **Support** modules that can be added at any time. So you can use MX-Contact just for managing the contacts and/or companies you deal with, and the interactions (phone calls, e-mails, appointments, etc.) you have with them, plus use it to manage your sales opportunities, events and/or customer support incidents, by adding any of the available modules.

6 About OutlookWise and ExchangeWise

[OutlookWise](#) is both a web site and newsletter aimed at keeping Microsoft® Outlook® users up-to-date with news, information and articles of interest on Outlook and Exchange Server, as well as reviews of add-on products and utilities, all geared to enhancing your knowledge of Outlook and increasing your productivity.

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OutlookWise is a service to the Outlook community from [ExchangeWise](#), which is a specialist software company focusing on the development and marketing of applications and utilities that enhance the functionality of Microsoft Outlook and Exchange Server.

OutlookWise is edited by [Brian Drury](#), founder of ExchangeWise, and the architect of [MX-Contact](#), a CRM, Contact Management and Sales Automation System for Microsoft Outlook. Brian has over 20 years experience in the IT industry and has focused on CRM, Messaging and Collaboration systems for the last 14 years.