

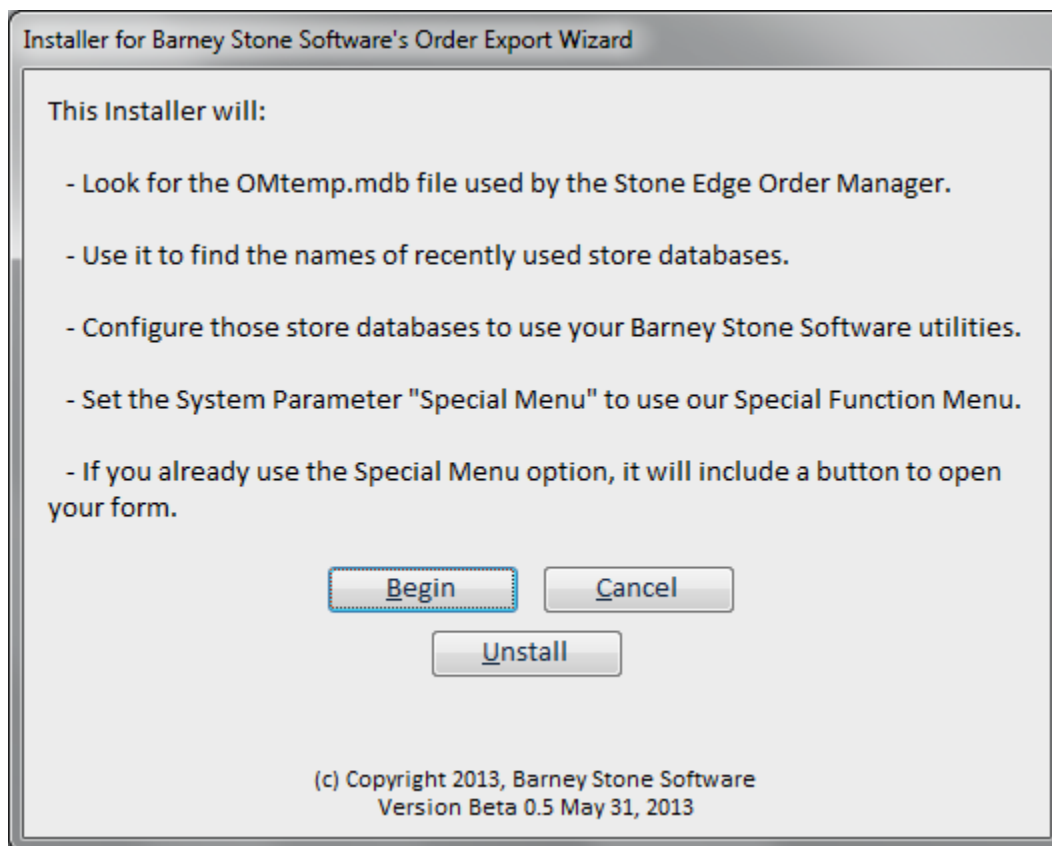
Barney's Order Export Wizard by [Barney Stone Software](#)

Barney's Order Export Wizard is an add-on program for the Monsoon Stone Edge order management system (formerly called the Stone Edge Order Manager). The Order Export Wizard makes it easy to export selected data from Stone Edge into text files that can be used with other systems, such as spreadsheets, accounting programs or bulk email services. Once the Wizard is installed, it can be accessed via the Stone Edge Main Menu.

The Order Export Wizard is available in two editions. The Standard Edition will only work with Microsoft Access data files, such as those created by the Standard Edition of Monsoon Stone Edge. The Enterprise Edition is required for use with the Microsoft SQL Server data files that are used by the Enterprise Edition of Monsoon Stone Edge.

Section 1: Installing the Order Export Wizard

1. Download the installer program from Barney Stone Software and save it on one of the computers that you use to run Monsoon Stone Edge.
2. Get everyone out of the Monsoon Stone Edge program, and any other programs that use Stone Edge's data files.
3. Open the installer program that you downloaded from Barney Stone Software. The following menu will appear:

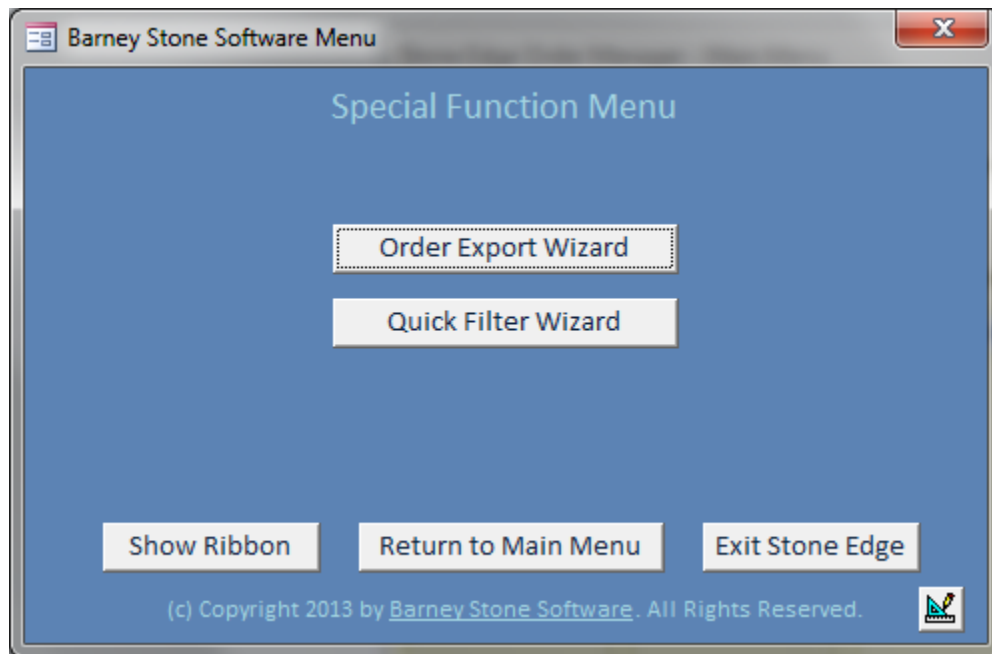


4. Click the Begin button to install the Wizard. Progress information will appear at the bottom of the form on your screen.
5. When the "Done!" message appears on your screen, click OK to exit the Installer.
6. The next time you open Monsoon Stone Edge on each of your computers, the rest of the installation process will take place automatically.

The Special Function Menu

Monsoon Stone Edge can be configured to add an option to its Main Menu, and to open a custom form when that option is clicked. However, it is limited to a single custom form, and many users need more than that. We created the Special Function Menu to solve that problem. The Special Function Menu is included at no additional charge with all Barney Stone Software add-on programs. It can be used for any Barney Stone Software products that you purchase, plus your own custom forms and functions. It currently supports up to 10 buttons, each of which can open a form or call a custom function.

An example of the Special Function Menu, with two Barney Stone Software products installed:



When you install the Order Export Wizard, the installer will also install the Special Function Menu. It will set Stone Edge's system parameter called "SpecialMenu" to "BS Special Function Menu", which is also how the option will appear on the Main Menu. The installer will add a button to the Special Function Menu to open the Order Export Wizard. If you are already using the SpecialMenu option to open a custom form, the installer will automatically create the necessary button to open that form, too. If the Special Function Menu was installed previously, the installer will just add a new button for the Order Export Wizard.

Most users will not have to modify the Special Function Menu. If you would like to add your own buttons to the Special Function Menu, change the menu title, create custom menus for different Stone Edge users, or control which of the three buttons appear at the bottom of the menu, [click here for more information](#).

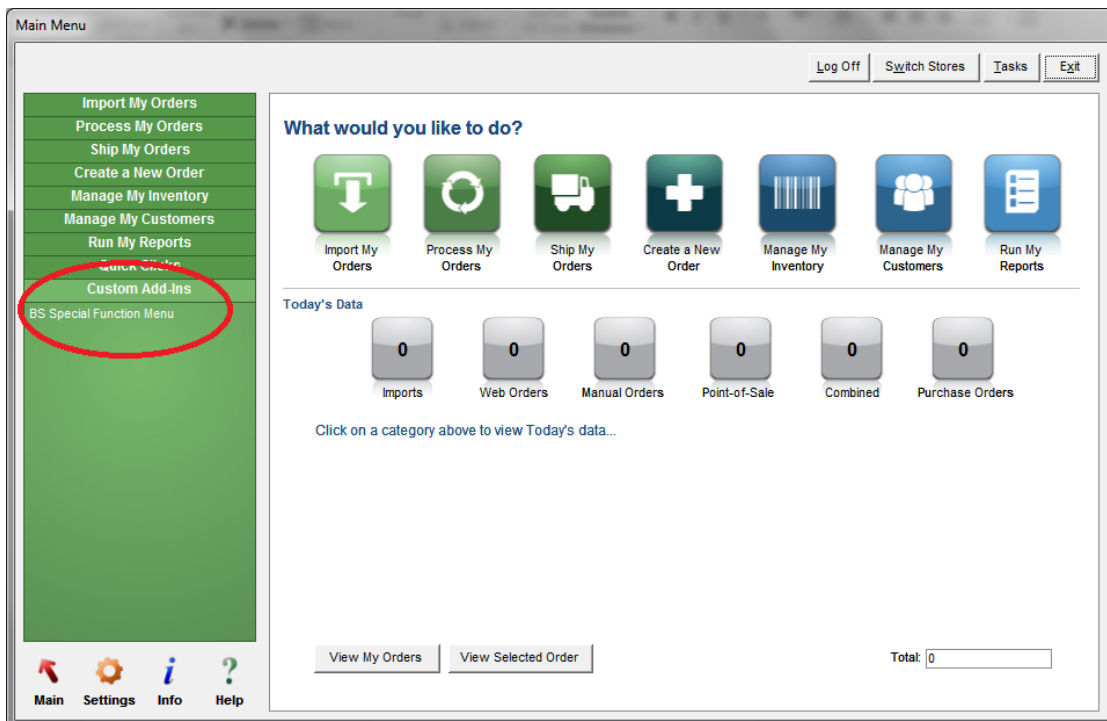
Section 2: Starting the Order Export Wizard

Once the Export Wizard has been installed, the Monsoon Stone Edge Main Menu should include an option for the BS Special Function Menu.

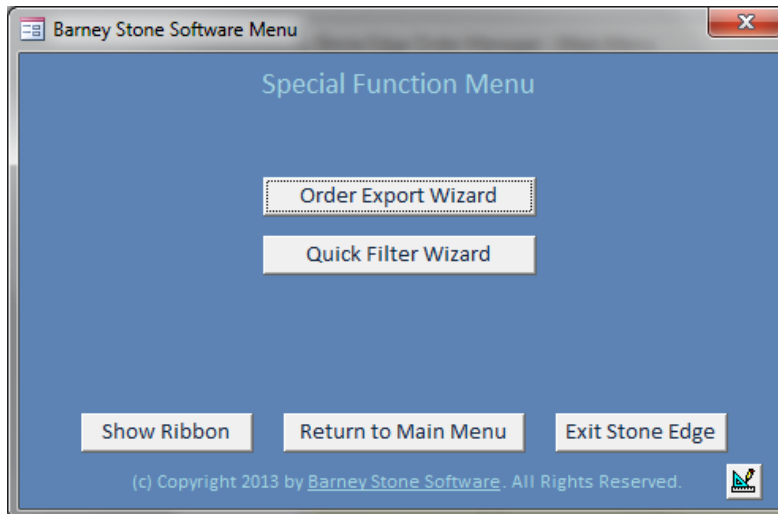
In 5.9xx series versions of Stone Edge:



In Version 7 and later:

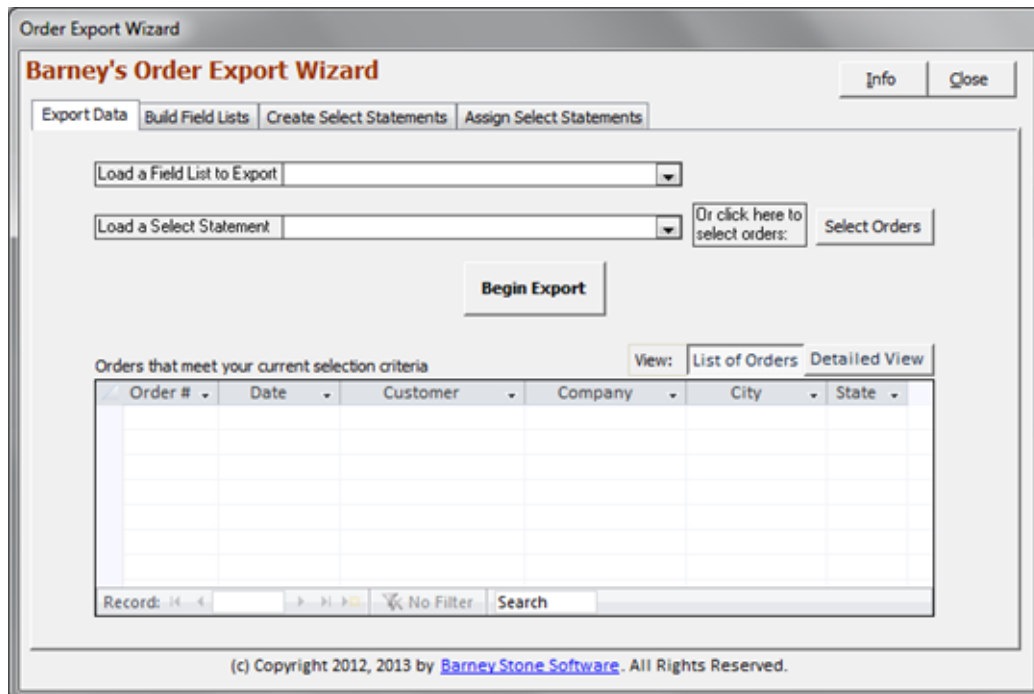


When you click on that link, the Special Function Menu will appear:



The actual format of the menu may differ from the above example. The menu title, the number, order and labels on the buttons, including which buttons appear at the bottom of the menu, are all configurable. See **Configuring the Special Function Menu** for more information.

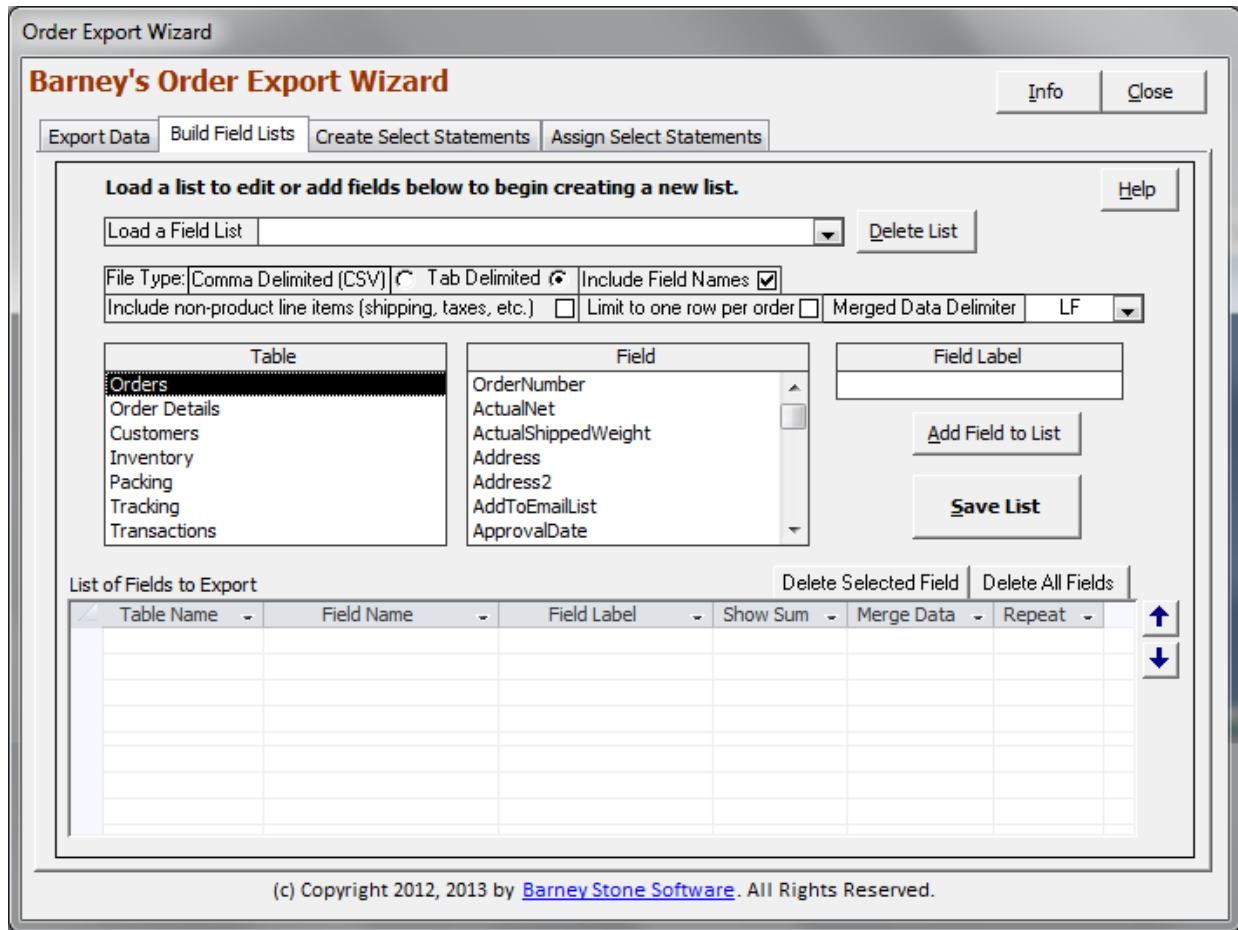
Click the [Order Export Wizard](#) button to open the Order Export Wizard.



Note the four tabs on the form:

- Export Data – once everything is set up, you will do the actual data exports here
- Build Field Lists – use this tab to create export templates, including field lists and other options
- Create Select Statements – here you can create and save criteria for selecting which orders to export
- Assign Select Statements – use this tab to assign default selection criteria to individual export templates

Section 3: The Build Field Lists screen



The Order Export Wizard lets you create and save as many field lists (templates) as you need. Each list includes:

- the fields that will be exported and the order in which they will appear
- whether or not to include column headings in the first row of the text file
- the column headings to use for each field
- whether the text file will be comma- or tab-delimited
- whether the text file will have one row per order, or a row for every line item in the orders
 - for multiple rows per order, whether to have rows for non-product line items (tax, shipping, etc.)
 - for one row per order, how to separate data (e.g. SKUs, product names, etc.) from multiple line items

How Data is Formatted

It is important to understand how data from different sources will appear in your text files.

If you export one row per order:

- Each order will generate a single row of fields in the text file.
- Line item data from numeric and currency fields can be totaled.
- Line item data from text fields can be merged and formatted for easy reading.

If you export multiple rows per order:

- The first row for each order will include order and customer data. It will not include data from line items.
- An additional row will be added for each line item.
 - You can determine whether non-product line items (e.g. tax, shipping, etc.) are included.
 - Data from Orders and Customers can either be repeated or left blank on detail rows.
 - If you include data from Transactions, Tracking or Packing, additional rows will appear for those fields.
 - The first (left-most) column will be added automatically, and will indicate the source of the data (Line Items, Transactions, Tracking or Packing) on each row.

Examples

Example 1: Multiple rows per order, no totals:

Data Source	Order #	Customer ID	SKU	Unit Price	Qty	Subtotal	Amount
Orders	2900	52608					(no data)
Line Items		52608	EAN063480	155	3	465	
Line Items		52608	CS20CBL	23.9	5	0	
Line Items		52608	2-42562-1001	32	2	64	
Orders	2901	52609					(no data)
Line Items		52609	2-14005-8504	18	5	90	
Line Items		52609	P200450	59	1	59	
Line Items		52609	29240	130	3	390	
Line Items		52609	JBRES04183	35	2	70	
Line Items		52609	GB-31008006	34.95	3	104.85	

Notes:

- The Data Source column is added automatically. It shows the source of the data on each row.
- The Repeat option. The Order #, which does not have the Repeat option selected, only appears on the first row for each order. The Customer ID is repeated on every row because it does have the Repeat option selected.
- The SKU, Unit Price, Qty and Subtotal columns do not show data on the first row for each order, because they come from the line items.
- The Amount field comes from the Transactions table, but there are no transactions for these orders, so the program inserts (no data) in that column.

Example 2: Multiple rows per order, with totals:

Data Source	Order #	Customer ID	SKU	Unit Price	Qty	Subtotal	Amount
Orders	2900	52608	EAN063480 CS20CBL 2-42562-1001			529	(no data)
Line Items		52608	EAN063480	155	3	465	
Line Items		52608	CS20CBL	23.9	5	0	
Line Items		52608	2-42562-1001	32	2	64	
Orders	2901	52609	2-14005-8504 P200450 029240 JBRES04183 GB-31008006			713.85	(no data)
Line Items		52609	2-14005-8504	18	5	90	
Line Items		52609	P200450	59	1	59	
Line Items		52609	29240	130	3	390	
Line Items		52609	JBRES04183	35	2	70	
Line Items		52609	GB-31008006	34.95	3	104.85	

Notes:

- The Merge Data option: The SKU column on the first row for each order now shows all of the SKUs for that order because it uses the Merge Data option. The Merged Data Delimiter (Line Feed, Comma, Semicolon, etc.) that is stored with each field list is inserted after each entry within a field.
- The Show Sum option: The Subtotal column on the first row for each order now shows the total for the line items under that order because it uses the Show Sum option.

Example 3: One row per order, no totals:

Data Source	Order #	Customer ID	SKU	Unit Price	Qty	Subtotal	Amount
Orders	2900	52608	EAN063480	155	3	465	(no data)
Orders	2901	52609	2-14005-8504	18	5	90	(no data)

Notes:

- When outputting one row per order without using the Show Sum or Merge Data options, the program will insert data from the first line item into the fields on the row for each order. That is generally not recommended, unless your orders typically have just one line item.

Example 4: One row per order, with totals:

Data Source	Order #	Customer ID	SKU	Unit Price	Qty	Subtotal	Amount
Orders	2900	52608	EAN063480 CS20CBL 2-42562-1001	155	3	529	(no data)
Orders	2901	52609	2-14005-8504 P200450 029240 JBRES04183 GB-31008006	18	5	713.85	(no data)

Notes:

- Using Merge Data and Show Sum on appropriate columns (SKU and Subtotal in the example above) makes single-row per order text files more useful.
- The Unit Price and Qty columns show the data from the first line item because the Show Sum option was not selected for those fields.

Building Field Lists

- Go to the Build Field Lists tab.
- Start by setting the text file options:

File Type: <input type="radio"/> Comma Delimited (CSV) <input checked="" type="radio"/> Tab Delimited <input type="checkbox"/>	<input checked="" type="checkbox"/> Include Field Names		
<input type="checkbox"/> Include non-product line items (shipping, taxes, etc.)	<input type="checkbox"/> Limit to one row per order	Merged Data Delimiter	LF

- Select [Comma](#) or [Tab Delimited](#).
 - [Tab Delimited](#) is the recommended option if the system that you will be using the text files with is compatible with tab delimited files.
- If you want the first row in the text file to contain column headers (field names or aliases that you can create here), put a check mark in the [Include Field Names](#) checkbox.
- To include data from non-product line items (shipping, sales tax, discounts and surcharges, etc.), check the [Include non-product line items](#) option.
- To limit the output to a single row for each order, regardless of the number of line items per order, check the [Limit to one row per order](#) option. When exporting one row per order:
 - Numeric fields (e.g. prices, order totals, etc.) can be configured to export the totals for each order.
 - Text fields from line items (e.g. SKU, Item Name, etc.) can be configured to separate the data from individual line items with carriage returns or other delimiters so they are easier to read.
- Select a Merged Data Delimiter to be used to separate the data from individual line items when exporting one row per order.

- Next create the list of fields to export
 - Each list can include data from Orders, plus related data from Order Details (line items), Customers, Inventory, Packing, Tracking and Transactions. (Transaction data won't include sensitive customer data.)

Table	Field	Field Label
Orders	OrderNumber	
Order Details	ActualNet	
Customers	ActualShippedWeight	
Inventory	Address	
Packing	Address2	
Tracking	AddToEmailList	
Transactions	ApprovalDate	

- When you select a Table, the list of Fields will change to show the available fields from that table.
- To add a field to the list, select a Table and a Field. The **Field Label** will default to the name of the field. You can enter a different field label (alias) here for use with the **Include Field Names** option.
- Click **Add Field to List** to add the selected field to the current field list.
- Once a field is in the list, you can set additional field options by checking them in the list:

Barney's Order Export Wizard

Export Data | Build Field Lists | Create Select Statements | Assign Select Statements

Load a list to edit or add fields below to begin creating a new list.

File Type: Comma Delimited (CSV) | Tab Delimited | Include Field Names | Merged Data Delimiter: LF

Table	Field	Field Label
Orders	BilledSubtotal	Subtotal
Order Details	BTSent	
Customers	CostPerUnit	
Inventory	Date1	
Packing	Date2	
Tracking	Date3	
Transactions	Date4	

Table Name	Field Name	Field Label	Show Sum	Merge Data	Repeat
Orders	OrderNumber	OrderNumber	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customers	FullName	FullName	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking	Carrier	Carrier	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking	TrackingID	TrackingID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inventory	LocalSKU	SKU	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Order Details	BilledSubtotal	Subtotal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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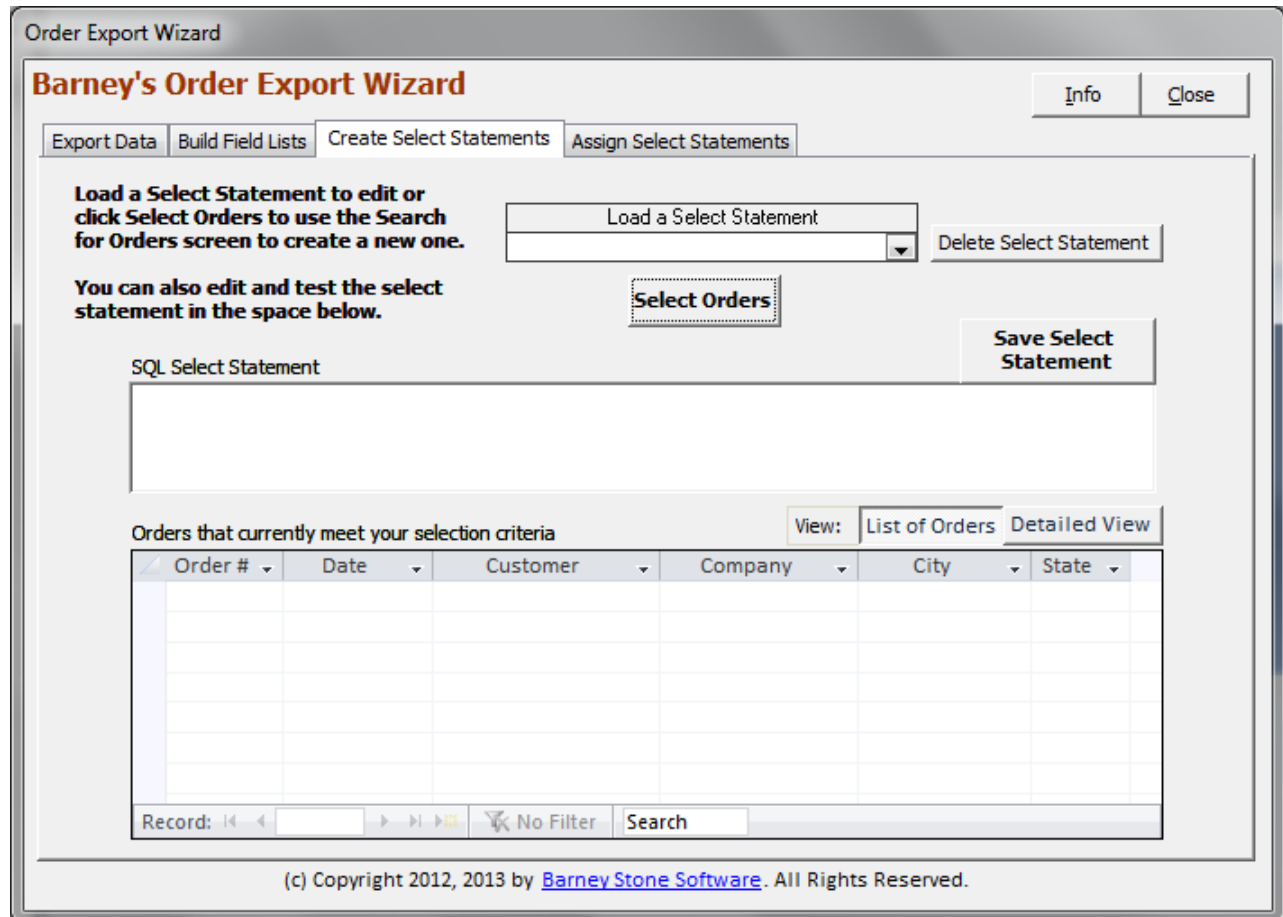
- Show Sum – Only applies to numeric and currency fields. If exporting one row per order, export totals per order for this field?
- Merge Data – Only applies to text fields. If exporting one row per order, merge the data from this field in all of each order's line items into one field per order in the text file?
- Repeat – Only applies to fields from Orders and Customers. If exporting multiple rows per order, include this field on every row, or just in the first row per order?

- Use the Up and Down Arrows to change the order in which fields (columns) will appear in the text files.

List of Fields to Export			Delete Selected Field		Delete All Fields
Table Name -	Field Name -	Field Label -	Show Sum -	Merge Data -	Repeat -
Orders	OrderNumber	OrderNumber	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customers	FullName	FullName	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking	Carrier	Carrier	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking	TrackingID	TrackingID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inventory	LocalSKU	SKU	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Order Details	BilledSubtotal	Subtotal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Select the field to move by clicking anywhere in its row
 - Click the [Up Arrow](#) or [Down Arrow](#) to move the selected field up or down
- To delete a field from the list, select the field by clicking anywhere in its row, then click [Delete Selected Field](#).
- To clear all of the fields from the current list, click [Delete All Fields](#).
- When you are finished with the list, click the [Save List](#) button.
 - The program will ask for a name for the list. Descriptive names are recommended.
- To edit an existing field list, select it from the drop-down list at the top of the screen.
 - The list and its formatting options will appear filled-in below.
 - Follow the steps above to make any changes that you need.
 - When you are finished, click the [Save List](#) button.
 - You can save the edited list using the same name, or create a new list by saving it under a different name.
- To delete a field list, select it from the drop-down list at the top of the screen, then click the [Delete List](#) button to the right of the drop-down list.

Section 4: The Create Select Statements Screen



Use this screen to create re-usable select statements. You can assign default select statements to field lists. You can also pick a stored select statement to use just before you export data. As you create and edit select statements, the program will show you which orders the current selection will include. You can view those orders in a list form or one at a time with order details.

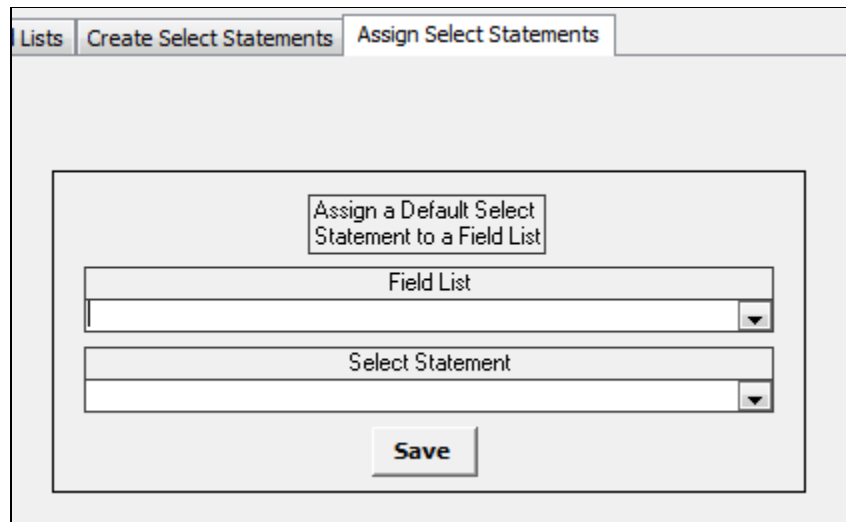
Creating Select Statements

- To see examples of SQL Select Statements, click the [Select Orders](#) button. The familiar Search for Orders screen will appear. Enter some selection criteria, then click [Begin Search](#). The SQL select statement for the search criteria that you entered will appear in the SQL Select Statement area on your screen.
- To create a select statement, you can either:
 - Enter the SQL select code manually into the SQL Select Statement space on your screen.
 - Or click [Select Orders](#) to use Stone Edge's Search for Orders screen.
 - The resulting SQL code will appear on the screen where you can edit it as necessary.
 - Each time you change the SQL Select Statement, the program will display the resulting orders in the space below.

- Use the View options to change how the list of selected orders is displayed.
 - Select [List of Orders](#) to show multiple orders at a time in a one-row-per-order format.
 - Select [Detailed View](#) to show detailed information about one order at a time in this format:

- When you have the statement selecting the correct records, [click Save Select Statement](#) to save it.
 - The program will ask for a name for the select. We recommend using descriptive names.
- To edit an existing select statement, choose it from the drop-down list at the top of the screen. The SQL statement will appear in the space below, where you can edit and test it.
- To delete an un-needed select statement, choose it from the drop-down list at the top of the screen, then click the [Delete Select Statement](#) button to the right of the drop-down list.

Section 5: The Assign Select Statements Screen



The screenshot shows a software window with three tabs: 'Lists', 'Create Select Statements', and 'Assign Select Statements'. The 'Assign Select Statements' tab is active. Inside the window, there is a central box with the title 'Assign a Default Select Statement to a Field List'. Below the title are two dropdown menus. The first dropdown menu is labeled 'Field List' and the second is labeled 'Select Statement'. Below these two dropdown menus is a 'Save' button.

Use this screen to assign default select statements to any of your field lists. That will be helpful if you frequently need to export the same list of fields for a specific selection of orders.

Note that what is stored is the SQL select statement, NOT the list of selected orders. So the actual orders that are exported are determined at the time when you do the export. For example, if your select includes orders approved in the last 30 days, the list of orders that get exported will be different depending on when you export the data.

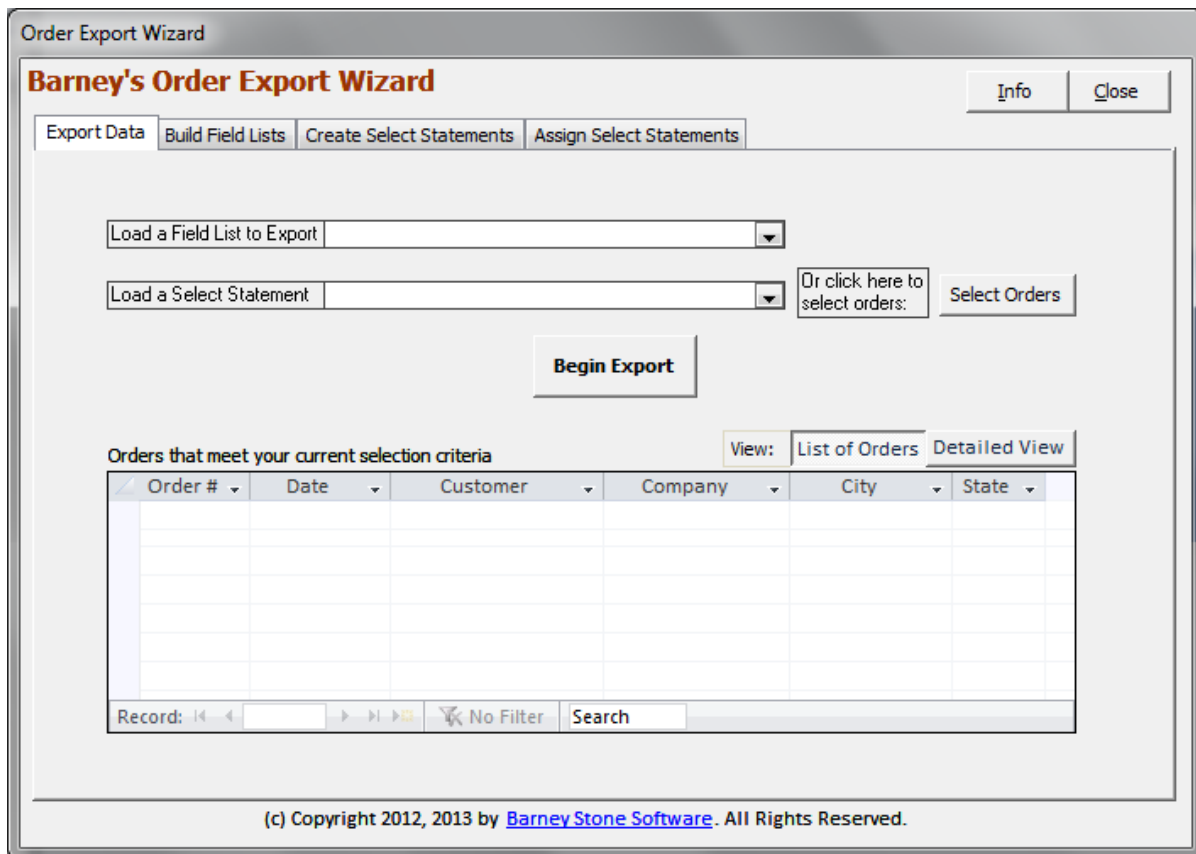
To assign a default select statement to a field list:

- Select the Field List
- Choose the Select Statement
- Click the [Save](#) button.

To change which select statement is assigned to a field list, repeat the same process.

Section 6: The Export Data Screen

Once you have created one or more field lists, it is very easy to export data.



- Select the field list to export
 - If the selected field list has a default select statement assigned to it, the name of that select statement will appear in the list of Select Statements, and the orders that meet those selection criteria will appear in the list at the bottom of the screen.
- To change which orders will be included in the export, either choose a different Select Statement from the dropdown list, or click the [Select Orders](#) button to use the Search for Orders screen.
 - The orders that meet those selection criteria will appear in the list at the bottom of the screen.
- Use the View options to change how the list of selected orders is displayed.
 - Select [List of Orders](#) to show multiple orders at a time in a one-row-per-order format.
 - Select [Detailed View](#) to show detailed information about one order at a time.
- Click the [Begin Export](#) button to begin exporting your data.
 - The program will ask for the file name and the location where the new text file should be created.