

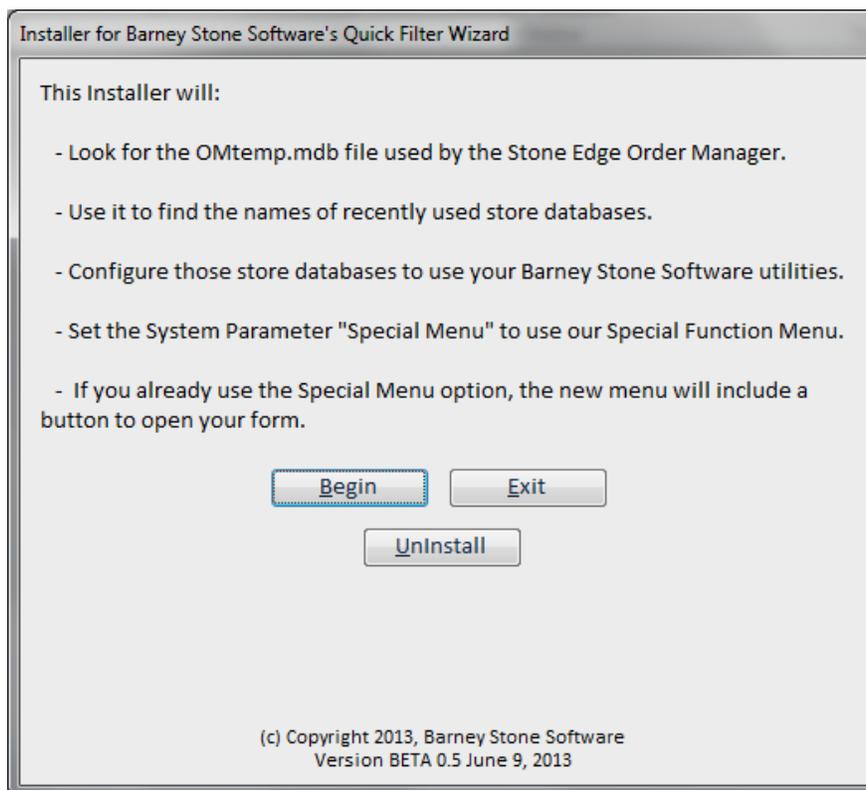
Barney's Quick Filter Wizard by [Barney Stone Software](#)

Barney's Quick Filter Wizard is an add-on program for the Monsoon Stone Edge order management system (formerly called the Stone Edge Order Manager). The Quick Filter Wizard makes it easy to create custom Quick Filters and Quick Filter menus for each of your Stone Edge users. Once the Wizard is installed, it can be accessed via the Stone Edge Main Menu.

The Quick Filter 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 Quick Filter 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:

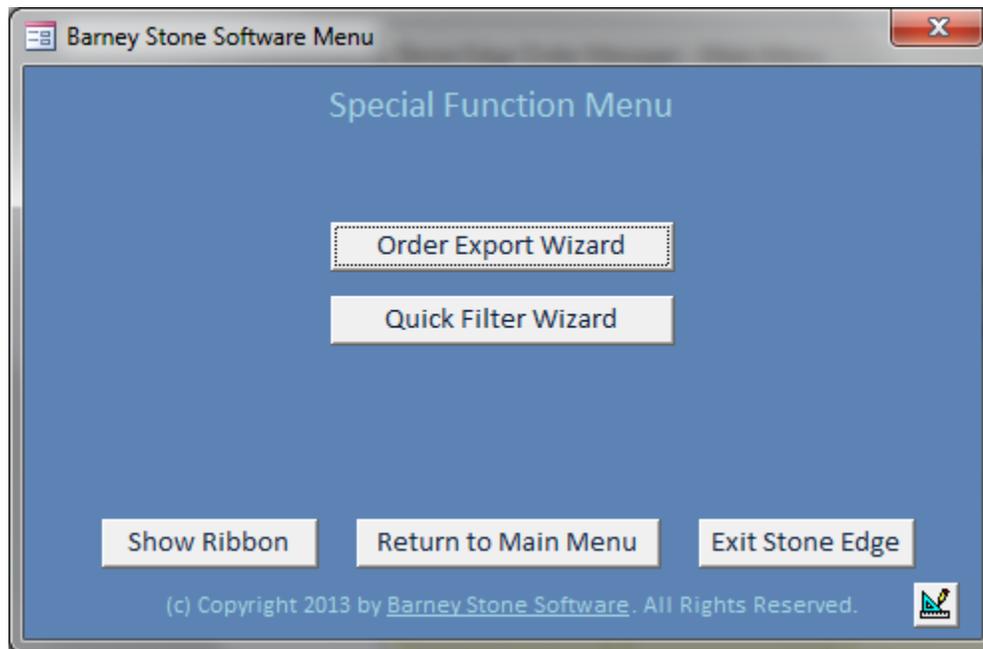


4. Click the Begin button to install the Wizard. Progress information will appear at the bottom of the form on your screen.
5. When the "Done!" message appears on your screen, click OK to exit the Installer.
6. The next time you open Monsoon Stone Edge on each of your computers, the rest of the installation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

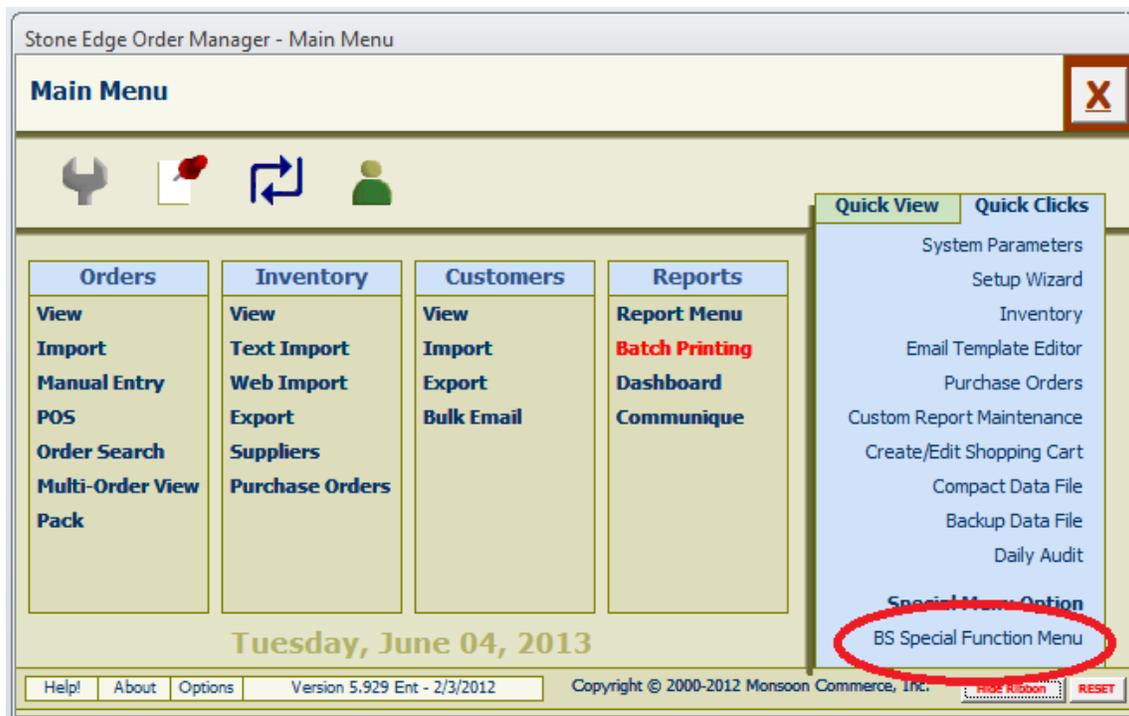
Section 2: Basic Information about the Quick Filter Wizard

- Each Monsoon Stone Edge user can have their own list of custom Quick Filters.
- The Quick Filter Wizard replaces the regular list of Quick Filters at all screens where they normally are available (View Orders, Multi Order View, Search for Orders, etc.).
- If a user does not have any Quick Filters assigned in the Wizard, they will see Stone Edge’s normal list of Quick Filters.
- Unlike Stone Edge’s limited Custom Quick Filters, which appear at the end of the regular list of Quick Filters, the Wizard’s Quick Filters only include those standard filters that you decide to include, and you have complete control over the order in which the filters appear.
- Due to the nature of Quick Filters, which use SQL select statements that must be written in a form that the Order Manager can use, they can be difficult to write. The Wizard has several tools that make it easy to create and test Quick Filters without having to master SQL select statements.
- An added feature of the Wizard is that filters can include fields that you enter each time you use them (similar to “parameter queries” in Access). For example, if you frequently search for orders that include a certain SKU, but each time it may be a different SKU, you could create a custom Quick Filter that would ask for the SKU to search for each time you use it.

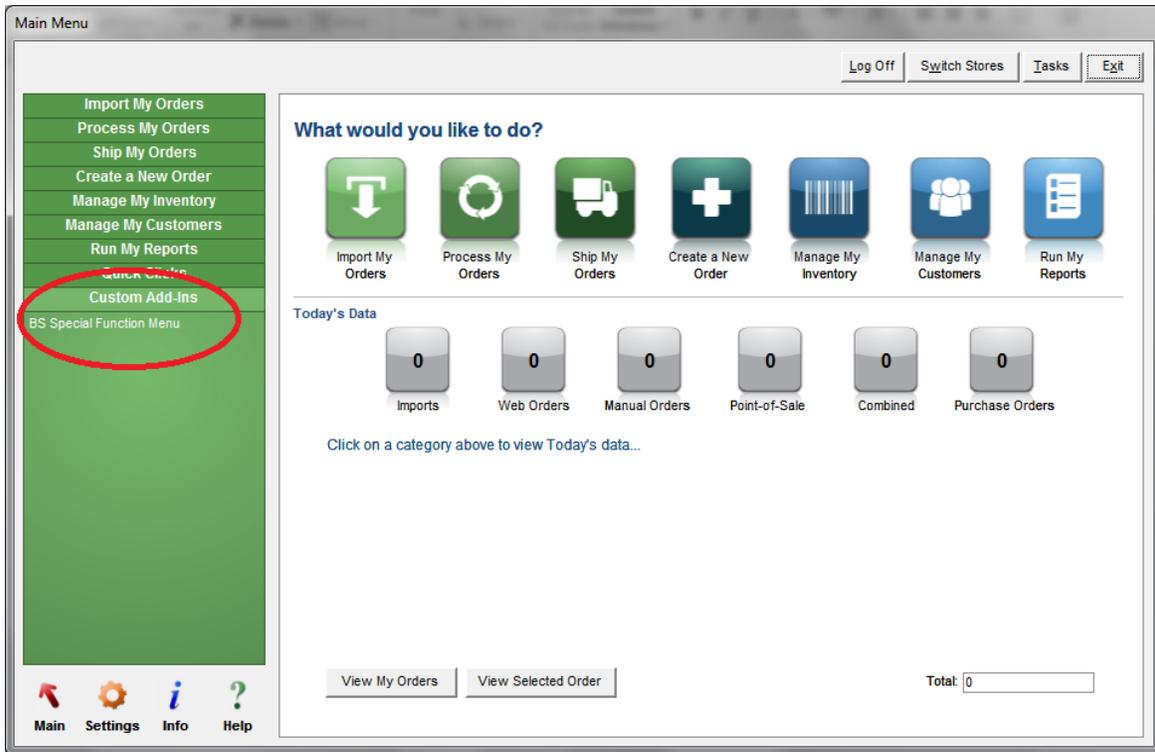
Section 3: Starting the Quick Filter Wizard

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

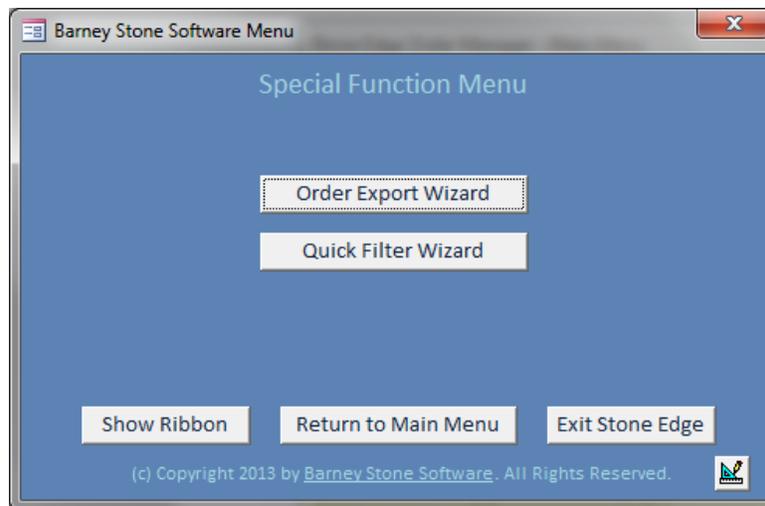
In 5.9xx series versions of Stone Edge:



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 [Quick Filter Wizard](#) button to open the Quick Filter Wizard.

The Quick Filter Wizard Screen

There are two tabs on the Quick Filter Wizard screen:

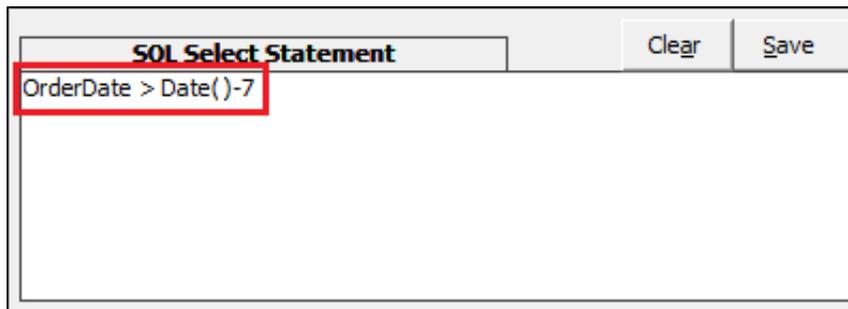
- Create Filters – this is where you do most of the work, creating and testing Quick Filters.
- Arrange Filters – this tab is used for:
 - Setting the order in which filters appear when you see a list of Quick Filters.
 - Deleting quick filters from lists.
 - Adding standard Quick Filters to custom Quick Filter lists.

Section 4: Creating Quick Filters

There are several ways to create the SQL select statements that are used for Quick Filters. The end result always appears in the SQL Select Statement window, where you can review and edit it. In addition, the Selected Orders window in the lower right-hand corner of the screen will show you which orders the current select statement would include.

Entering SQL Select Statements Manually

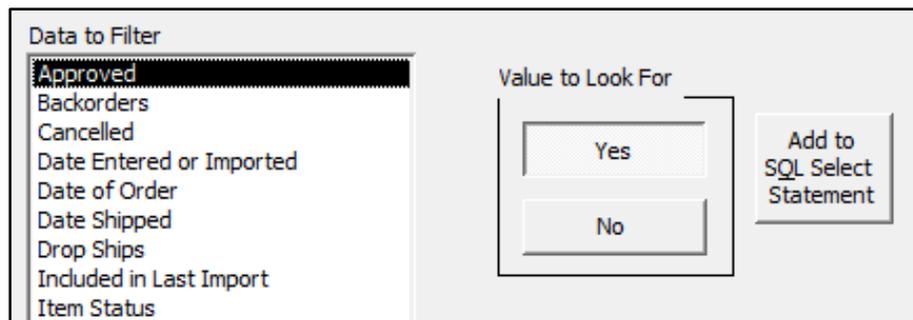
- In the SQL Select Statements window, type the following:



- Press TAB or Enter when you are done. The list of Selected Orders will show you the orders that you have received in the last 7 days.

Using the Wizard's Shortcuts

- Note the list labeled Data to Filter. That list includes fields that are commonly used for Quick Filters.
- Select "Approved" at the top of the list.



- Note the Value to Look For, which now has Yes and No options. Depending on what you select under Data to Filter, you will get a different option for the Value to Look For.

- Select the No option, then click [Add to SQL Select Statement](#).

The screenshot shows a window titled 'SQL Select Statement' with 'Clear' and 'Save' buttons. On the left, a 'Data to Filter' list has 'Approved' selected. In the center, 'Value to Look For' is set to 'No'. On the right, the SQL statement is:


```
OrderDate > Date()-7
AND Approved=FALSE
```

 An 'Add to SQL Select Statement' button is visible between the filter and the statement.

- Note that the Approved option is added to the code you entered before, and that statements are separated with blank line to make them easier to read.
- Once the SQL select statement appears on your screen, you can edit it as needed.

- Select Backorders in the Data to Filter List.

The screenshot shows the 'Data to Filter' list with 'Backorders' selected. The 'Are there any backorders?' dropdown menu is open, showing 'None', 'Some', and 'All' options, with 'None' selected. An 'Add to SQL Select Statement' button is on the right.

- Note that there is now a list of options to choose from.

- Select the None option, then click [Add to SQL Select Statement](#)

The screenshot shows the 'Are there any backorders?' dropdown with 'None' selected. The SQL statement in the main area is now:


```
OrderDate > Date()-7
AND Approved=FALSE
AND BackOrdersToFill=FALSE
```

 An 'Add to SQL Select Statement' button is visible between the dropdown and the statement.

- Note that the program continues to add to your select statement.

- In the Data to Filter list, select SKU near the bottom of the list, then select Begins With under [SKU to look for](#).

The screenshot shows a dialog box titled 'SKU to look for:'. It has a dropdown menu with 'Equals' and 'Begins With' options, where 'Begins With' is selected. To the right is a text field containing 'SKU'. An 'Add to SQL Select Statement' button is at the bottom right.

- Note the new [SKU](#) field that appears. Some options from Data to Filter require you to enter additional information, such as a SKU or a number of days, months or years.

- Enter "ABC" in the SKU field, then click [Add to SQL Select Statement](#).

SKU to look for:	SKU	SQL Select Statement	Clear	Save
Equals	ABC	OrderDate > Date()-7		
Begin With		AND Approved=FALSE		
	Add to SQL Select Statement	AND BackOrdersToFill=FALSE		
		AND OrderNumber IN(SELECT OrderNumber FROM [Order Details] WHERE SKU LIKE 'ABC*')		

- Note that this time the SQL code that was added was more complicated. Since you are using the Quick Filter Wizard, you don't have to write that code yourself – the Wizard does it for you!

Using Other Quick Filters

- To use the code from an existing filter, select one from the list of Standard Filters:

Select a Standard or Custom Filter to create or add to the current SQL Select Statement. Standard Filters can be modified and saved as custom filters.

Standard Filters

Custom Filters

- Or select one from the list of Custom Filters:

Select a Standard or Custom Filter to create or add to the current SQL Select Statement. Standard Filters can be modified and saved as custom filters.

Standard Filters

Custom Filters

- The Custom Filters list only shows the quick filters that have been assigned to the current User.
- The SQL code for the selected filter will appear on your screen, where you can edit it as needed.
- To copy a quick filter from another user:
 - Select that User from the list at the top of the screen.
 - Select the Quick Filter that you wish to copy or use the code from.
 - Then switch back to the User whose filters you are currently creating.

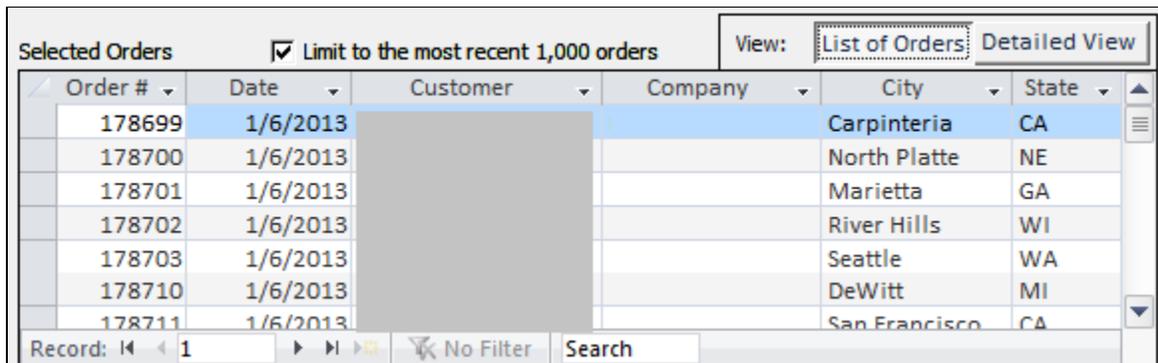
Using the Search for Orders form

Sometimes the easiest way to create a filter, or to start the code for a filter, is to use Stone Edge's regular Search for Orders screen, where you can enter whatever combination of selection criteria you need all at once.

- Click [Open the Search Form](#) in the lower left-hand corner of the screen.
- The regular Search for Orders screen will appear.
- Enter any combination of search criteria, then click the [Begin Search](#) button.
 - Since there is already text in the SQL Select Statement, the program will ask if you want to add the new criteria to the existing text, or replace it.
 - Once the SQL select statement appears on your screen, you can edit it as needed.

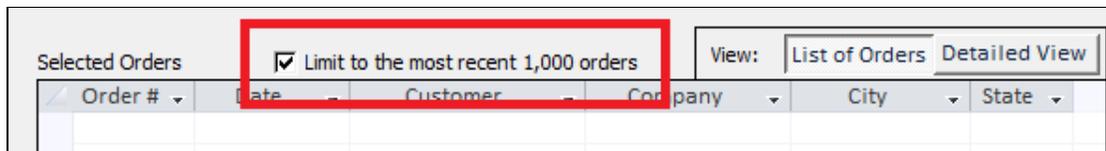
Previewing Selected Orders

As you create and/or edit a SQL select statement, the program will display some or all of the orders that would be selected by that statement.



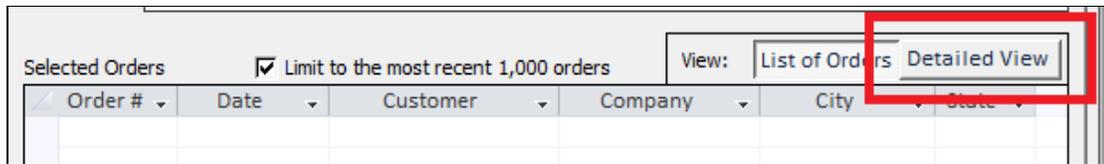
Order #	Date	Customer	Company	City	State
178699	1/6/2013			Carpinteria	CA
178700	1/6/2013			North Platte	NE
178701	1/6/2013			Marietta	GA
178702	1/6/2013			River Hills	WI
178703	1/6/2013			Seattle	WA
178710	1/6/2013			DeWitt	MI
178711	1/6/2013			San Francisco	CA

- To prevent the preview from taking too much time, the default is to limit the selection to the last 1,000 orders. In other words, the program will first select the last 1,000 orders, then apply your SQL select statement to those orders. To remove that limitation and apply your criteria to all of the orders in your data, un-check the [Limit to the most recent 1,000 orders](#) option.

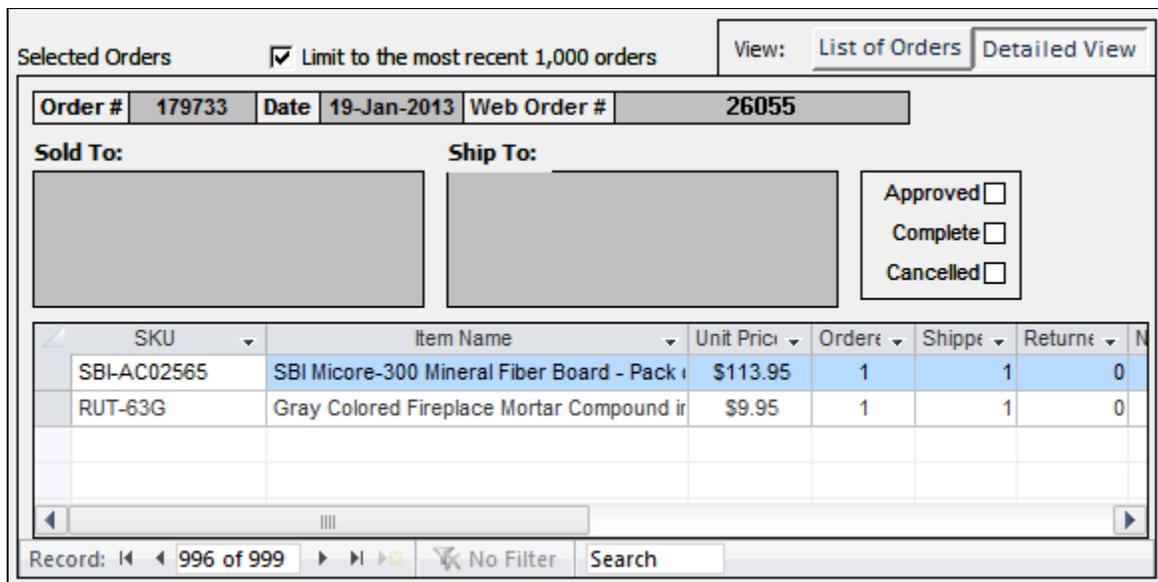


Order #	Date	Customer	Company	City	State
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- The default view is a list that displays multiple orders at a time, with one row per order. To view the same list, but one order at a time, including some line item information about the orders, select the [Detailed View](#) option.



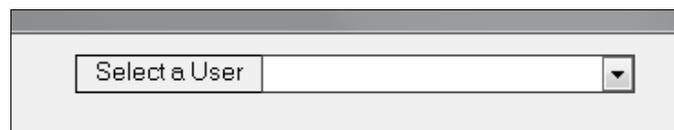
- The records will now appear in this format:



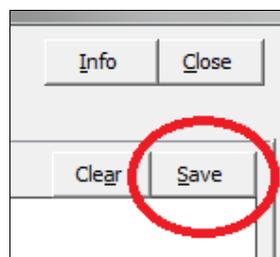
Saving Quick Filters

When you have a filter working the way you want it:

- Make sure that the correct User is selected from the drop-down list at the top of the screen.



- Click the [Save](#) button.



Parameter Queries

Parameter queries let you store a SQL select statement, but fill in one or more pieces of information when you use it. For example, if you frequently search for orders by SKU, you can create a Quick Filter that will ask you which SKU to search for each time you use that filter.

To create a parameter query:

- Enter the SQL select statement using one or more of the methods described above.
- Replace the data to search for (e.g. a specific SKU) with [Enter xxxxx], where xxxxx is a prompt that you will see on your screen.
- Be sure to include any necessary punctuation around the [Enter xxxxx]. For example, if you will be entering text, you must have apostrophes (single quotes) before and after the brackets ([]), like this:

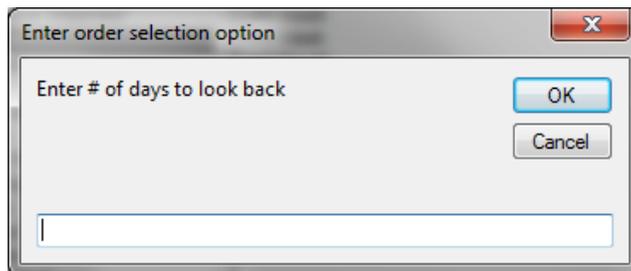
'[Enter the SKU to search for]'

Examples:

- To find orders from the last n days, enter the following:

OrderDate > Date()-[Enter # of days to look back]

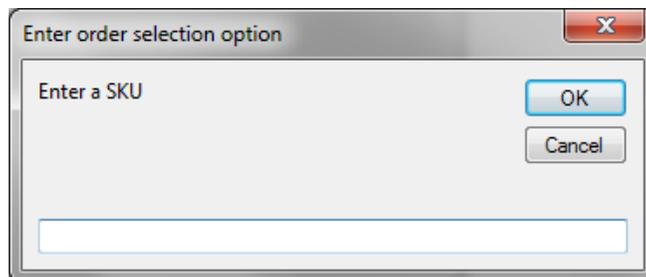
- When you use a Quick Filter with that code, the program will display this message every time you use that filter:



- To search for orders that include a specified SKU, enter:

OrderNumber IN(SELECT OrderNumber FROM [Order Details] WHERE SKU= '[Enter a SKU]')

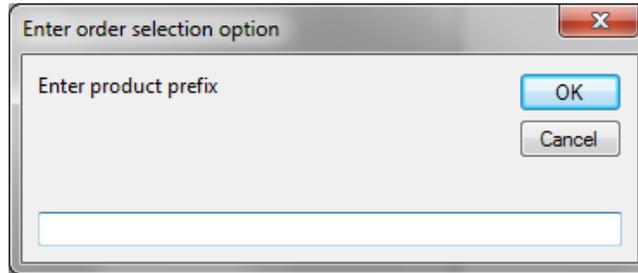
- This message will appear when you use the filter:



- To find orders that include products whose names begin with the same letters, enter:

OrderNumber IN(SELECT OrderNumber FROM [Order Details] WHERE product like '[Enter product prefix]*')

- This is the prompt you will see:

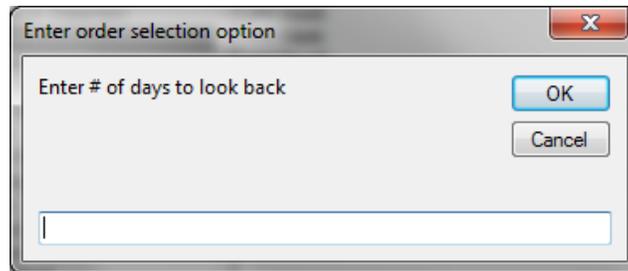


A screenshot of a dialog box titled "Enter order selection option". The dialog has a close button (X) in the top right corner. Inside the dialog, there is a label "Enter product prefix" on the left and two buttons, "OK" and "Cancel", on the right. Below the label is a text input field.

- You can use multiple parameters in the same filter. To look for orders from the last n days that came from a particular Bill To State, enter:

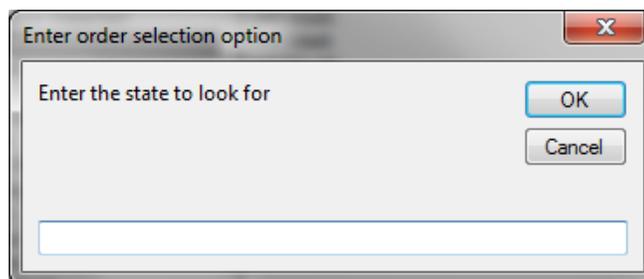
OrderDate > Date()-[Enter # of days to look back] AND state='[Enter the state to look for]'

- When you use the filter, the program will ask:



A screenshot of a dialog box titled "Enter order selection option". The dialog has a close button (X) in the top right corner. Inside the dialog, there is a label "Enter # of days to look back" on the left and two buttons, "OK" and "Cancel", on the right. Below the label is a text input field.

- Then it will ask:

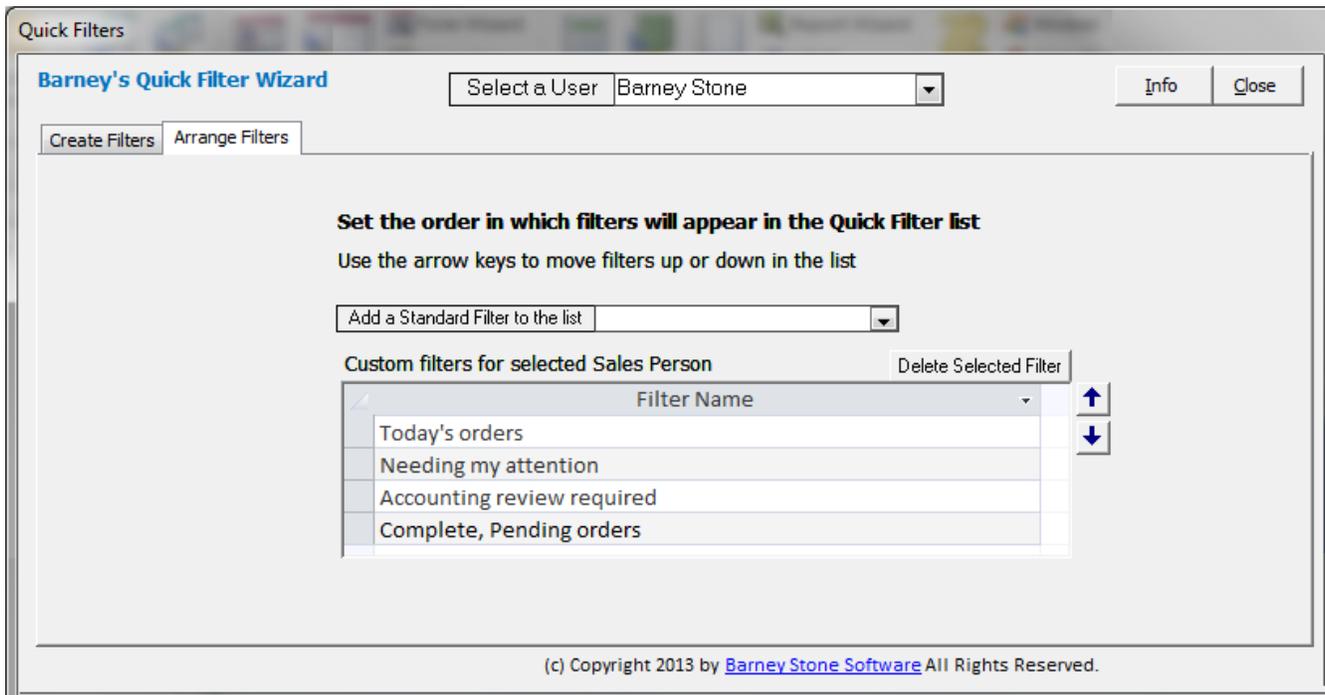


A screenshot of a dialog box titled "Enter order selection option". The dialog has a close button (X) in the top right corner. Inside the dialog, there is a label "Enter the state to look for" on the left and two buttons, "OK" and "Cancel", on the right. Below the label is a text input field.

Section 5: Arranging Quick Filter Lists

Use the Arrange Filters tab to:

- Set the order in which filters appear in a user's list.
- Delete a filter from their list
- Add standard Stone Edge Order Manager filters to their list.
- NOTE: Changes made on this tab take effect immediately. You do not have to click a Save button or anything like that.



Arranging the order of filters in a list

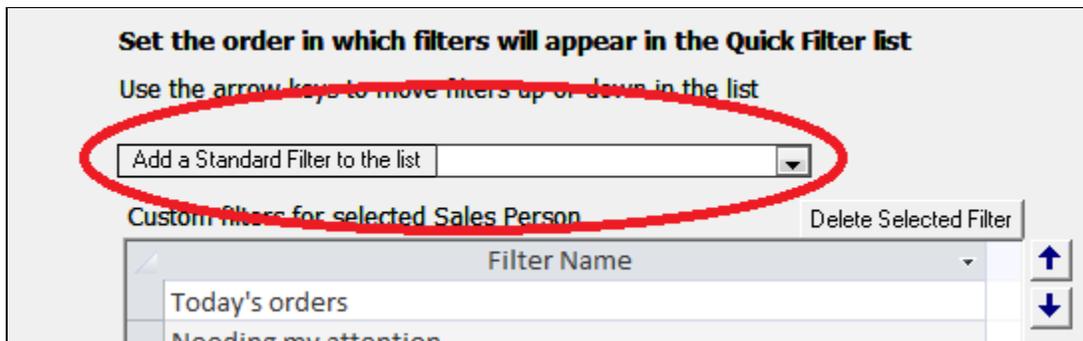
- Select the User whose list you want to arrange.
 - That user's list of filters will appear.
- Select a filter by clicking anywhere on its row.
- Click the Up Arrow to move the selected filter up in the list.
- Click the Down Arrow to move the selected filter down in the list.
- Changes made here take effect immediately.

Deleting filters from a list

- Select the User whose list you want to arrange.
 - That user's list of filters will appear.
- Select a filter by clicking anywhere on its row.
- Click [Delete Selected Filter](#).

Adding a Standard Filter to a list

- Select the User whose list you want to arrange.
 - That user's list of filters will appear.
- Select the filter that you want to add from the drop-down list.



- The selected filter will be added to the list below.
- This change takes effect immediately.