

Order Time - Exporting Lists

Last Modified on 08/02/2023 1:04 pm EDT

Overview:

The purpose of this article is to demonstrate how to Export your lists of information. In most situations, you will want to Export a list such as Items, Customers, Vendors etc., in order to make updates.

Explanation:

Updating data can be done easily with Imports. The best way to create your template for an Import is with an Export of the already existing data.

- First you will want to select your list. The example below is using Items:

Batch Action	Name / Number	Type	Group	Description	UOM SET	PRICE	ACTIONS
<input type="checkbox"/>	SEL-BEG-01	Kit	Kits Group	Racket and Tennis Ball Set for Beginners		127.00	🔍 🗑️
<input type="checkbox"/>	SEL-BEG-02	Kit	Kits Group	Club level soccer ball orders		2,500.00	🔍 🗑️
<input type="checkbox"/>	SEL-BEG-03	Kit	Kits Group	Test		300.00	🔍 🗑️
<input type="checkbox"/>	Pick list kit	Kit	Kits Group			150.00	🔍 🗑️
<input type="checkbox"/>	TRN-00001	Kit	Kits Group			350.00	🔍 🗑️
<input type="checkbox"/>	AS-0001	Kit	Kits Group	Add assemblies to kit test.		3,000.00	🔍 🗑️
<input type="checkbox"/>	Coach's kit	Kit	Kits Group			1,383.00	🔍 🗑️
<input type="checkbox"/>	SEL-BEG-22	Assembly	Assembly Group	Assembly to test Lot Number	PC-1	280.00	🔍 🗑️
<input type="checkbox"/>	Disassembly test	Assembly	Assembly Group		PC-1	0.00	🔍 🗑️
<input type="checkbox"/>	000002	Assembly	Assembly Group		PC-1	0.00	🔍 🗑️
<input type="checkbox"/>	Concrete resin	Assembly	Assembly Group		grams	50.00	🔍 🗑️
<input type="checkbox"/>	trailer	Assembly	Assembly Group		PC-1	0.00	🔍 🗑️
<input type="checkbox"/>	DA-0001	Assembly	Assembly Group	Disassembly test	PC-1	0.00	🔍 🗑️
<input type="checkbox"/>	PB-0001	Assembly	Assembly Group		EA-2	0.00	🔍 🗑️
<input type="checkbox"/>	BC-00001	Assembly	Assembly Group	Beef Carcass	Pounds	2,500.00	🔍 🗑️
<input type="checkbox"/>	Moving location test	Assembly	Assembly Group		PC-1	50.00	🔍 🗑️
<input type="checkbox"/>	SEL-BEG-21	Assembly	Assembly Group	Beginners Tennis Set Assembly	PC-1	150.00	🔍 🗑️
<input type="checkbox"/>	Report Test	Assembly	Assembly Group	Test for Reports by BOM	PC-1	2,500.00	🔍 🗑️
<input type="checkbox"/>	111	Assembly	Assembly Group	Kino Medical Finished Good	PC-1	3,500.00	🔍 🗑️
<input type="checkbox"/>	Shipping	OtherCharge	Other Charge Group		PC-1	0.00	🔍 🗑️

- This example presents the need to Update fields for Price, Cost and Tax Code on the items.
- Select the gear in the upper right hand corner of the screen.

OrderTime Striker Soccer Logout

Home Sales Purchasing Production Warehouse Reports

Home > Items

Items

Batch Action Name / Number Search Item

NAME / NUMBER	TYPE	GROUP	DESCRIPTION	UOM SET	PRICE	ACTIONS
<input type="checkbox"/> SEL-BEG-01	Kit	Kits Group	Racket and Tennis Ball Set for Beginners		127.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> SEL-BEG-02	Kit	Kits Group	Club level soccer ball orders		2,500.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> SEL-BEG-03	Kit	Kits Group	Test		300.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> Pick list kit	Kit	Kits Group			150.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> TRN-00001	Kit	Kits Group			350.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> AS-0001	Kit	Kits Group	Add assemblies to kit test.		2,600.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> Coach's kit	Kit	Kits Group			1,983.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> SEL-BEG-22	Assembly	Assembly Group	Assembly to test Lot Number	PC-1	280.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> Disassembly test	Assembly	Assembly Group		PC-1	0.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> 000002	Assembly	Assembly Group		PC-1	0.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> Concrete resin	Assembly	Assembly Group		grams	50.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> trailer	Assembly	Assembly Group		PC-1	0.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> DA-0001	Assembly	Assembly Group	Disassembly test	PC-1	0.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> PB-0001	Assembly	Assembly Group		EA-2	0.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> BC-00001	Assembly	Assembly Group	Beef Carcass	Pounds	2,500.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> Moving location test	Assembly	Assembly Group		PC-1	50.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> SEL-BEG-21	Assembly	Assembly Group	Beginners Tennis Set Assembly	PC-1	150.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> Report Test	Assembly	Assembly Group	Test for Reports by BOM	PC-1	2,500.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> 111	Assembly	Assembly Group	Kino Medical Finished Good	PC-1	3,500.00	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> Shipping	OtherCharge	Other Charge Group		PC-1	0.00	<input type="checkbox"/> <input type="checkbox"/>

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Total Records: 51

- Selecting the gear will open the List Options window.

List Options Close

Filters Columns Other

Field Operator Criteria

-- None --	-- None --	
-- None --	-- None --	
-- None --	-- None --	
-- None --	-- None --	
-- None --	-- None --	

- You can only import one Group at a time and will need to select the appropriate Group.
- Under the Filters tab click on the Drop Down menu in the first field and select Group.
- After selecting Group the system will present a Drop Down menu under the Criteria column.
- In this example we are selecting the Parts Group and this will establish the Filters.

The screenshot shows the 'List Options' window with the 'Filters' tab selected. A red box highlights the configuration area for a filter. The 'Field' dropdown is set to 'Group', the 'Operator' is 'in', and the 'Criteria' dropdown is open, showing 'Parts Group' selected. Below this are four rows of empty filter criteria, each with a '-- None --' dropdown for the field and operator, and an empty text box for the criteria. At the bottom are buttons for 'Save', 'Save As', 'Delete', 'Reset', and 'Cancel'.

- With Filters established the next step is to select the Columns for the update.
- Select the Columns tab.
- You will see a menu presenting the Available Columns that can be added.
- You can individually select which Columns you want to include in your Selected Columns or you can hold down the CTRL key and add multiple columns.
- After selecting the columns simply click the Add button between the Available Columns/Selected Columns sections and your selections will then appear in the Selected Columns section. If columns need to be Removed, simply reverses the process by selecting the Column needing removal and clicking the Remove button.
- Click the Save button at the bottom of the window.

The screenshot shows the 'List Options' window with the 'Columns' tab selected. A red arrow points to the 'Available columns' list, which includes items like 'Class', 'COGS Account', 'Record Info Created By', etc. The 'Selected columns' list contains 'Name / Number', 'Type', 'Group', 'Description', 'UOM', 'CostType', 'Price', and 'Tax Code'. A red box highlights 'CostType', 'Price', and 'Tax Code' in the selected list. Between the lists are 'Add' and 'Remove' buttons. To the right of the 'Selected columns' list are 'Top', 'Up', 'Down', and 'Bottom' navigation buttons. At the bottom are buttons for 'Save', 'Save As', 'Delete', 'Reset', and 'Cancel'.

- The system will now present your updated Items list reflecting the Filter and the additional Columns.

Home > Items

Items

Batch Action Name / Number Search Item

<input type="checkbox"/>	NAME / NUMBER	TYPE	GROUP	DESCRIPTION	UOM SET	PRICE	ID	STD. COST	TAX CODE	ACTIONS
<input type="checkbox"/>	SEL-MAT-01	Part	Parts Group	Match Ball from Select	EA-2	150.00	3	80.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	SEL-TRN-0012	Part	Parts Group	Training Balls from select. Bag of 12	Bag of Balls	200.00	4	120.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	SEL-MAT-0025	Part	Parts Group	Import: Game Balls from Select. Box of 25	Select Balls	1,500.00	5	180.00	Tax	<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	SEL-TRN-0025	Part	Parts Group	Box of 25 Training Balls from Select	Box of Balls	750.00	6	500.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	*JUST-IN-Wht	Part	Parts Group	Import: This is color variant style Legend Color:White	EA-2	50.00	14	15.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	*JUST-IN-Blk	Part	Parts Group	Import: This is color variant style Legend Color:Black	EA-2	10.00	15	15.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	*SEL-MAT-02	Part	Parts Group	Bag of 12 Tennis balls.	EA/BAG/12	0.67	16	0.25		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	*SEL-MAT-03	Part	Parts Group	Beginner Tennis Racket	EA-2	125.00	17	70.00	Tax	<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	Melissa Ring-GLD-EMD-Pri-5-OWN	Part	Parts Group	Melissa Ring - Fancy Designer Ring Metal:Gold Ring Stone:Emerald Ring Stone Cut:Princess Ring Size:5 Ring Status:Owned	PC-1	1,000.00	35	250.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	Melissa Ring-GLD-EMD-Pri-5-MEM	Part	Parts Group	Melissa Ring - Fancy Designer Ring Metal:Gold Ring Stone:Emerald Ring Stone Cut:Princess Ring Size:5 Ring Status:MEMO	PC-1	1,000.00	36	250.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	Melissa Ring-GLD-EMD-Pri-5-CAL	Part	Parts Group	Melissa Ring - Fancy Designer Ring Metal:Gold Ring Stone:Emerald Ring Stone Cut:Princess Ring Size:5 Ring Status:Call	PC-1	1,000.00	37	250.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	Earl Grey	Part	Parts Group	Drinking tea	EA-2	0.00	278	0.00	Tax	<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	QUE-0001	Part	Parts Group	Quench Gum strawberry	EA-2	4.00	281	1.50		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	GB-0001	Part	Parts Group	1lb Ground Beef	Pounds	5.00	284	3.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	RE-0001	Part	Parts Group	Ribeye 1 steak	EA-2	6.00	285	3.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	NY-0001	Part	Parts Group	New York cut Steak 2 steaks	EA-2	12.00	286	5.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	Trim	Part	Parts Group		Pounds	0.00	292	8.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	Crumbs	Part	Parts Group		Pounds	0.00	293	6.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	Test SN value adjust	Part	Parts Group		EA-2	0.00	297	0.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	0061705890-FL	Part	Parts Group		EA-2	0.00	300	0.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>

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Total Records: 21

- In preparation to Export, determine if **Escape Characters** are needed or wanted. Once determined simply select the Export icon in the upper right hand corner of the screen.

Home > Items

Items

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<input type="checkbox"/>	SEL-MAT-0025	Part	Parts Group	Import: Game Balls from Select. Box of 25	Select Balls	1,500.00	5	180.00	Tax	<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	SEL-TRN-0025	Part	Parts Group	Box of 25 Training Balls from Select	Box of Balls	750.00	6	500.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
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<input type="checkbox"/>	Melissa Ring-GLD-EMD-Pri-5-OWN	Part	Parts Group	Melissa Ring - Fancy Designer Ring Metal:Gold Ring Stone:Emerald Ring Stone Cut:Princess Ring Size:5 Ring Status:Owned	PC-1	1,000.00	35	250.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
<input type="checkbox"/>	Melissa Ring-GLD-EMD-Pri-5-MEM	Part	Parts Group	Melissa Ring - Fancy Designer Ring Metal:Gold Ring Stone:Emerald Ring Stone Cut:Princess Ring Size:5 Ring Status:MEMO	PC-1	1,000.00	36	250.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
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<input type="checkbox"/>	Crumbs	Part	Parts Group		Pounds	0.00	293	6.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>
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<input type="checkbox"/>	0061705890-FL	Part	Parts Group		EA-2	0.00	300	0.00		<input type="button" value="🔍"/> <input type="button" value="🗑️"/>

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