

## UTILITIES

### DOCUMENT SEARCH

(Searching for / Reprinting a Document)

Standard Reports are generated during processes in the system. These reports have a standard design that is not edited or changed. Use **Document Search** to view copies of previously printed standard reports.

Document Search enables the user to find the following documentation that has been generated by the system:

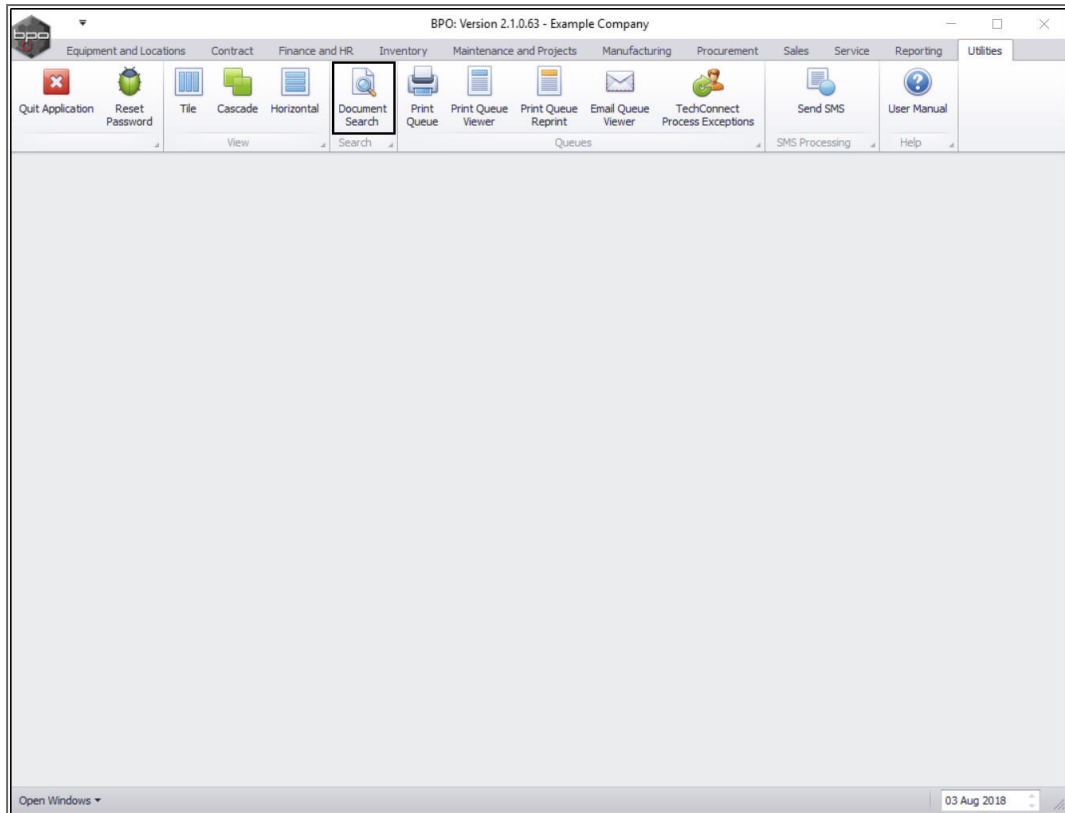
- Goods Received
- Part Issue
- Return Part to Store
- Supplier Return
- Inter-warehouse Transfer
- Asset Stock Adjustment
- Contract Invoices
- Credit Note
- Part Invoices
- Contract Credit Notes
- Stock Adjustment
- Sales Order
- Sales Invoice

The user can use the **From** and **To** filters to refine the search.

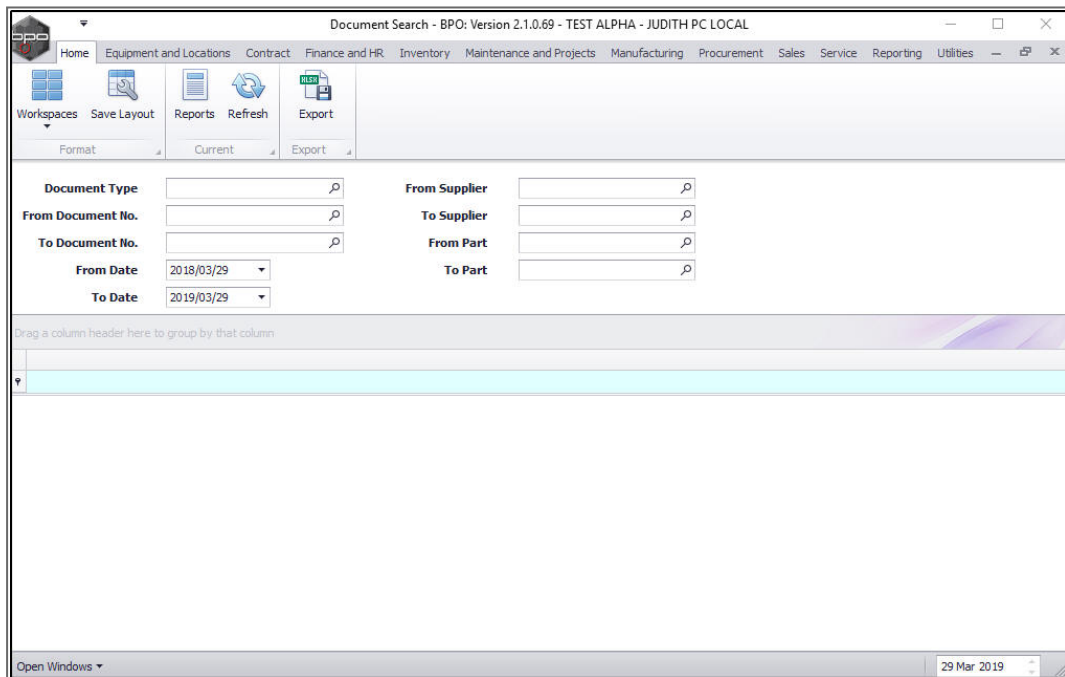
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**Ribbon Access:** *Utilities > Document Search*

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- The **Document Search** screen will be displayed.

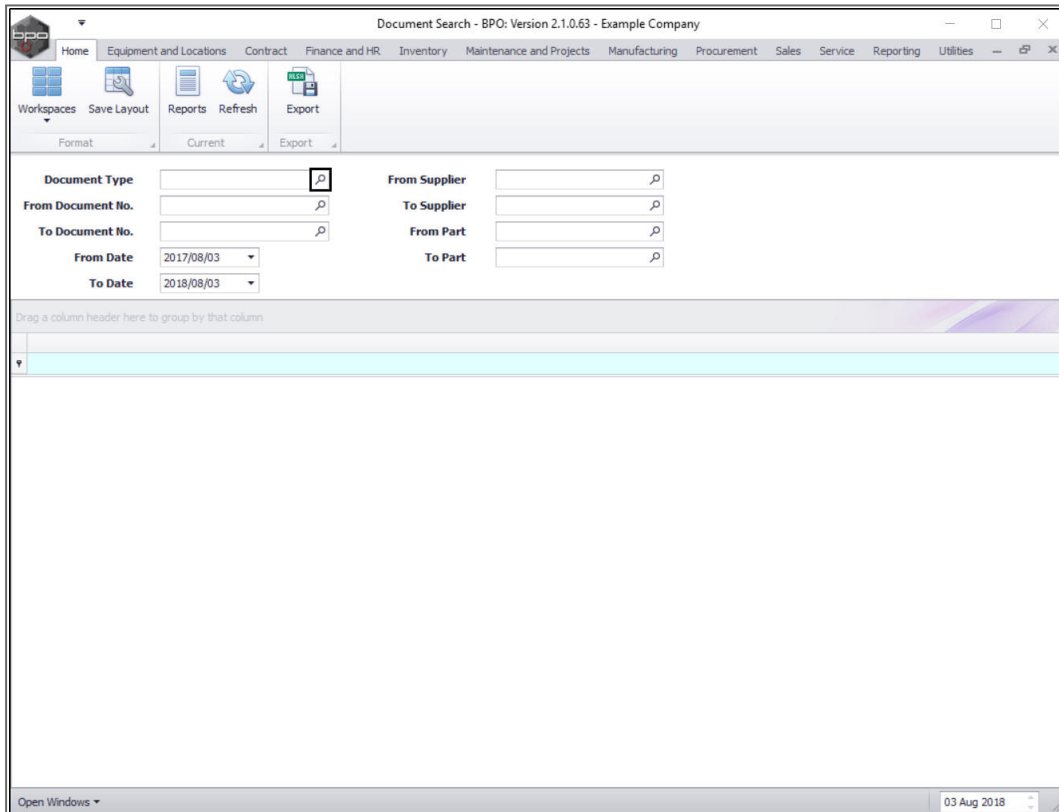


## IMPORTANT NOTES

- i. The search parameters illustrated below are not exhaustive. You can use different combinations of search parameters depending on the document type selected eg Supplier and Part No.
- ii. Parameters in the **Document Search** screen may change or become non-editable if they are not relevant to the document type selected.
- iii. The system sets the **To Date** as the current date and the **From Date** as **1 year** prior to the current date. You can either type in or click on the drop-down arrow in each date field and use the calendar function to select an alternative date range if required.

## SEARCH BY DOCUMENT TYPE AND NO.

- Click on the **search** button in the **Document Type** field.



Document Search - BPO: Version 2.1.0.63 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Workspaces Save Layout Reports Refresh Export

Format Current Export

Document Type

From Document No.

To Document No.

From Date

To Date

From Supplier

To Supplier

From Part

To Part

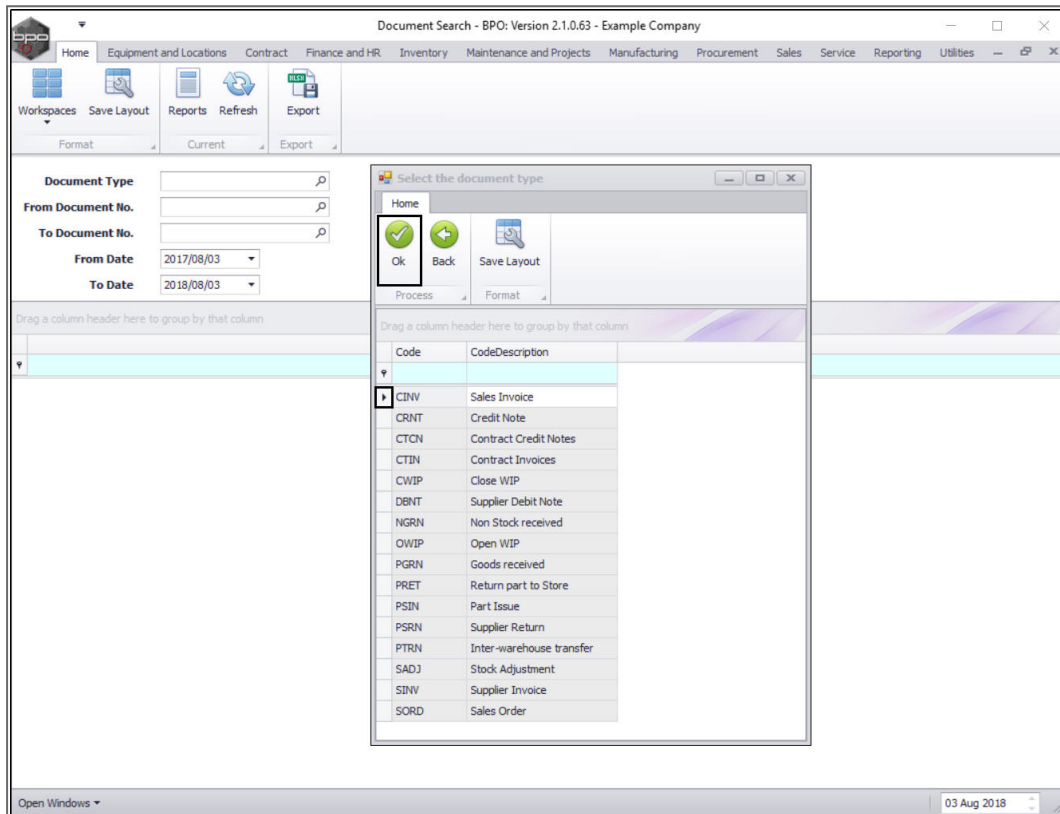
Drag a column header here to group by that column

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- A **Select the document type** screen will pop up.

## SELECT DOCUMENT TYPE

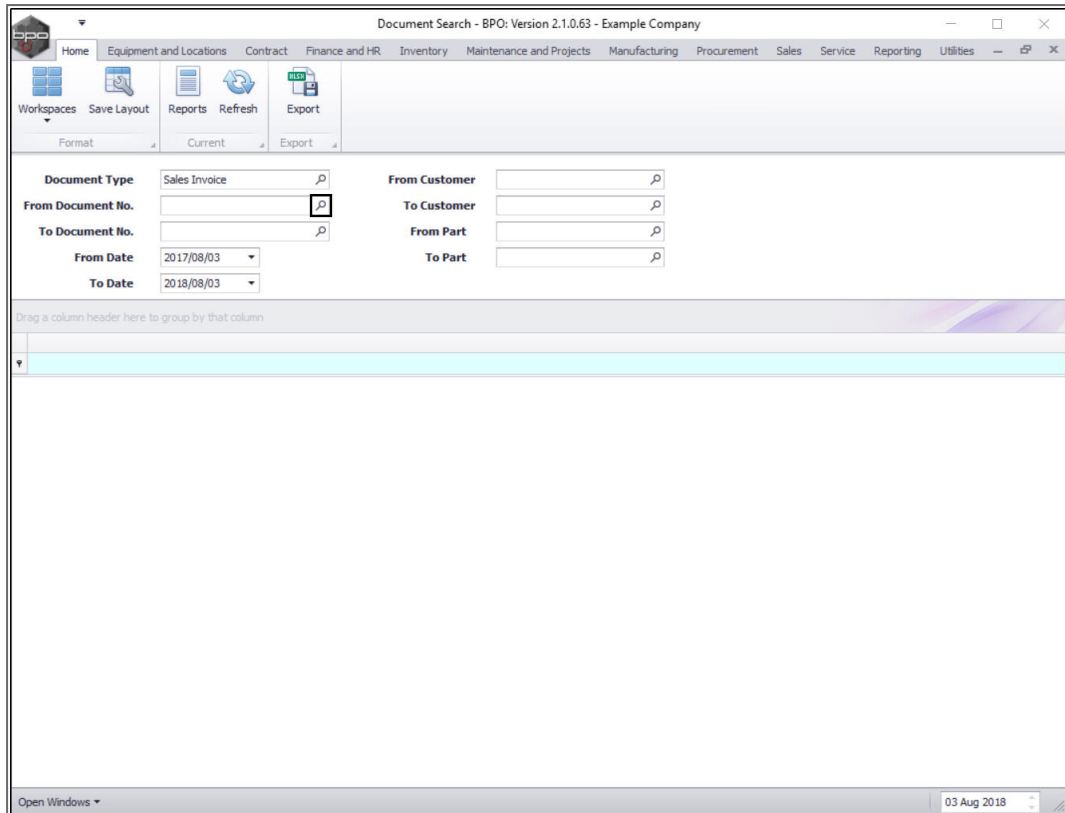
- Select the **row** of the **type** of document that you are searching for.
- In this image **Sales Invoice** has been selected.
- Click on **Ok**.



- The **Document Type** field will populate with the selection in the previous step.

## FROM DOCUMENT NO.

- Click on the **Search** button in the **Document No.** field.



Document Search - BPO: Version 2.1.0.63 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Workspaces | Save Layout | Reports | Refresh | Export

Format | Current | Export

Document Type: Sales Invoice

From Document No.: INV0000412

To Document No.:

From Date: 2017/08/03

To Date: 2018/08/03

From Customer:

To Customer:

From Part:

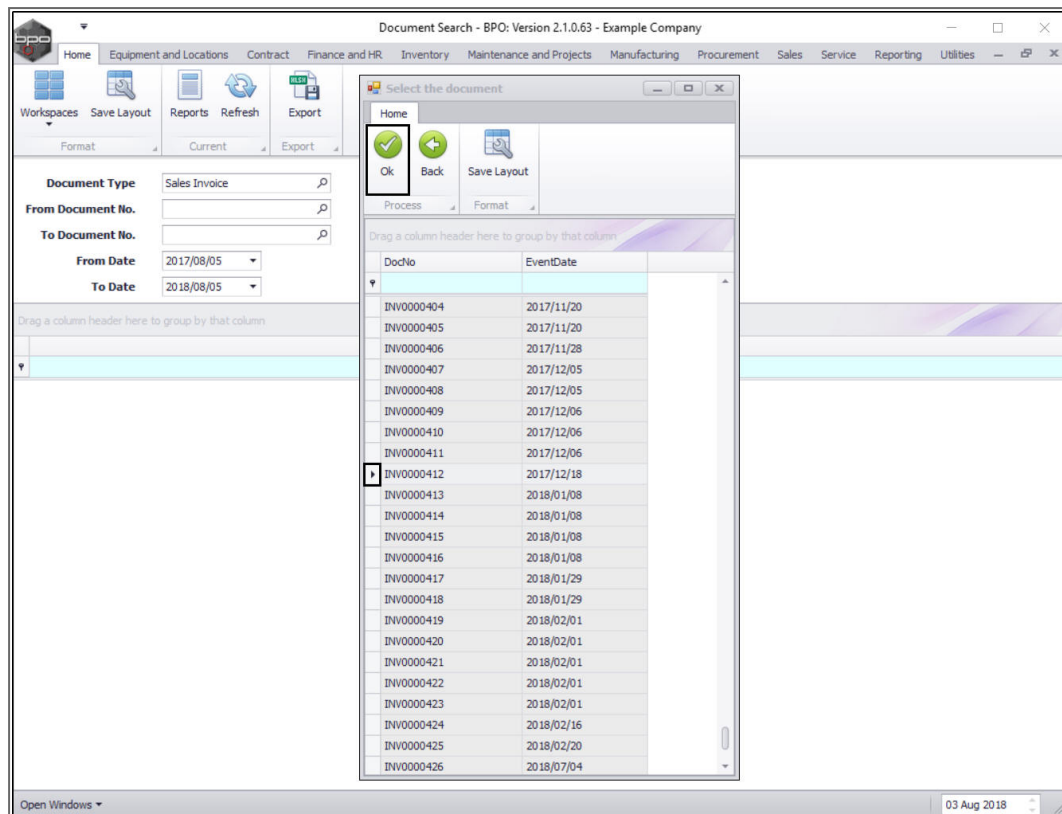
To Part:

Drag a column header here to group by that column

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- A **Select the document** screen will pop up.
- Click on the **row selector** in front of the document (or first document in the range) that you are looking for.
  - In this image **INV0000412** has been selected.
- Click on **Ok**.

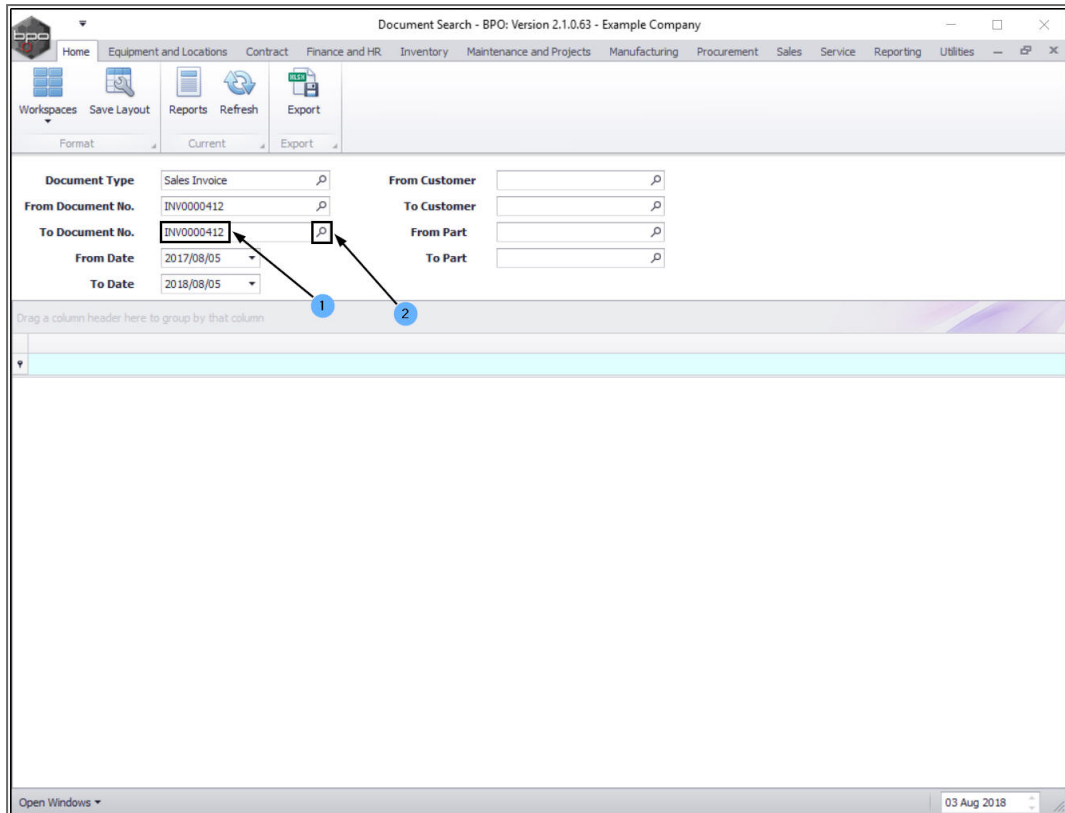


## TO DOCUMENT NO.

1. This field will populate with the same document number that you selected above. Leave this field as is, if you are only searching for **one** document.

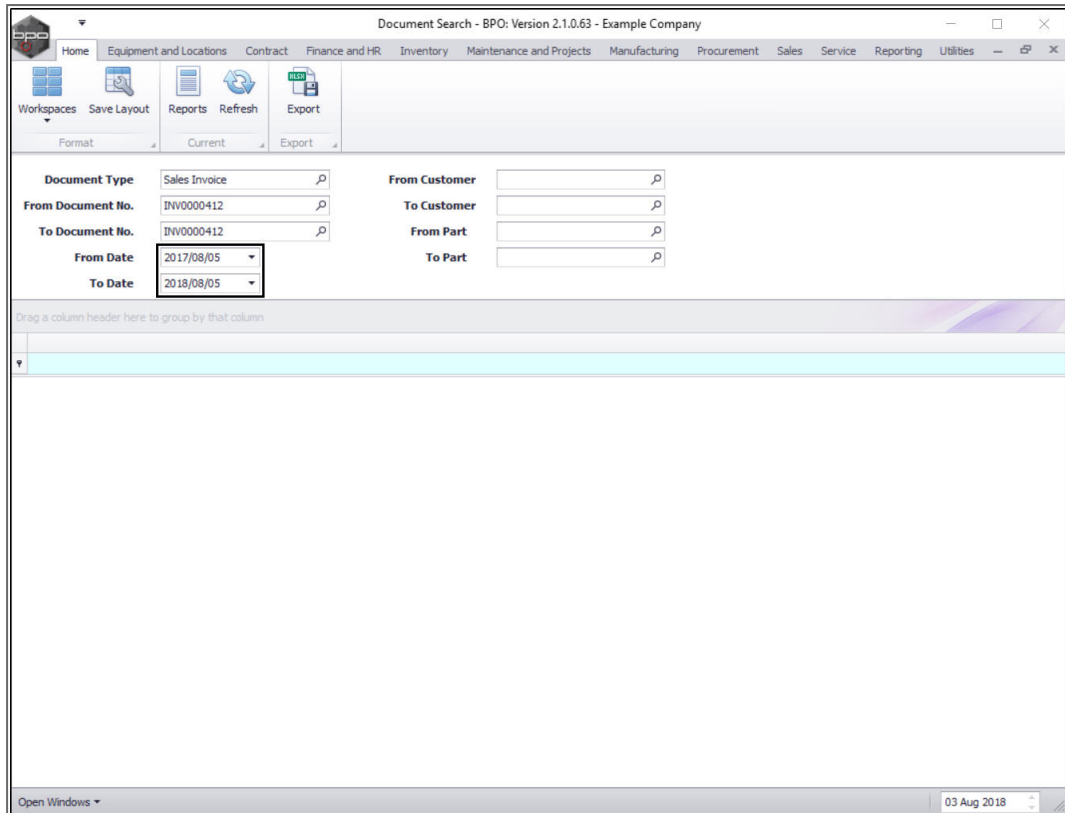
*Otherwise,*

2. Click on the **search** icon. This will bring up the **Select the document** pop up screen again. Select in this screen, the **last** document in the range that you are looking for.



## DATE RANGE PARAMETERS

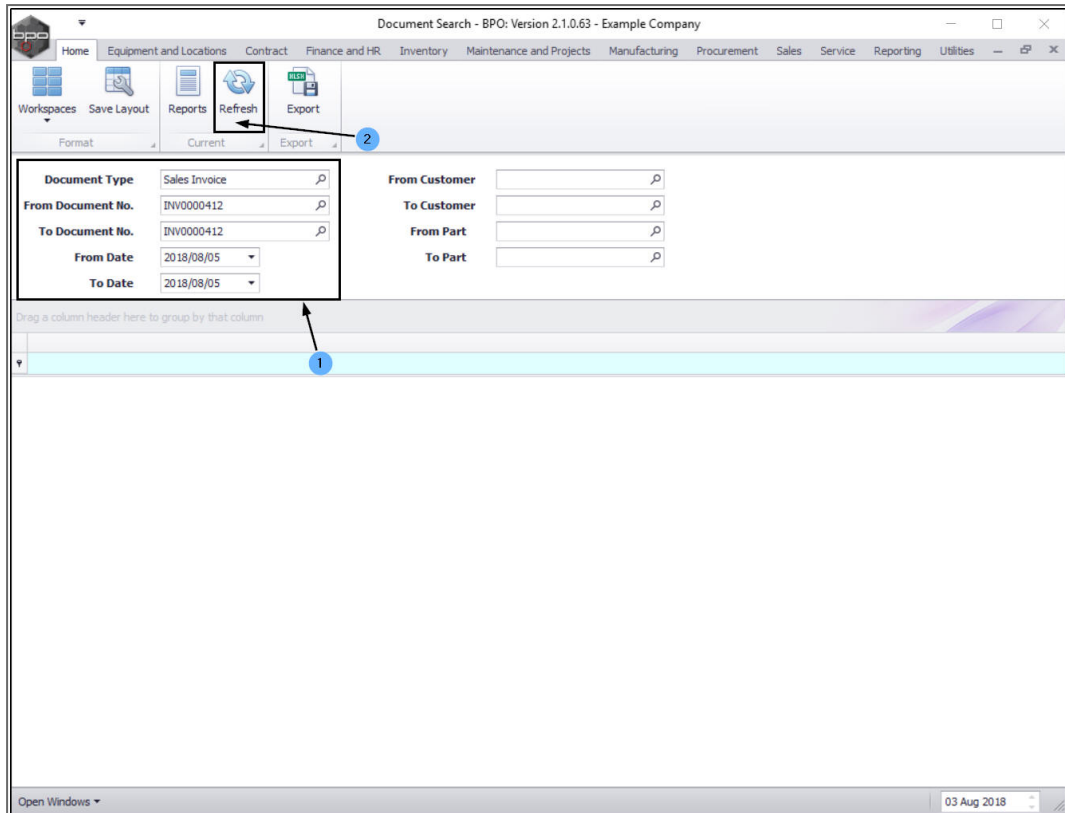
- Ensure that the date range is set to parameters that will include the document(s) that you are searching for.
  - **Note:** The system will set the **To Date** as the current date and the **From Date** as **1 year** prior to the current date. You can either type in or click on the drop-down arrow in each date field and use the calendar function to select an alternative date range if required.



## REFRESH THE SCREEN

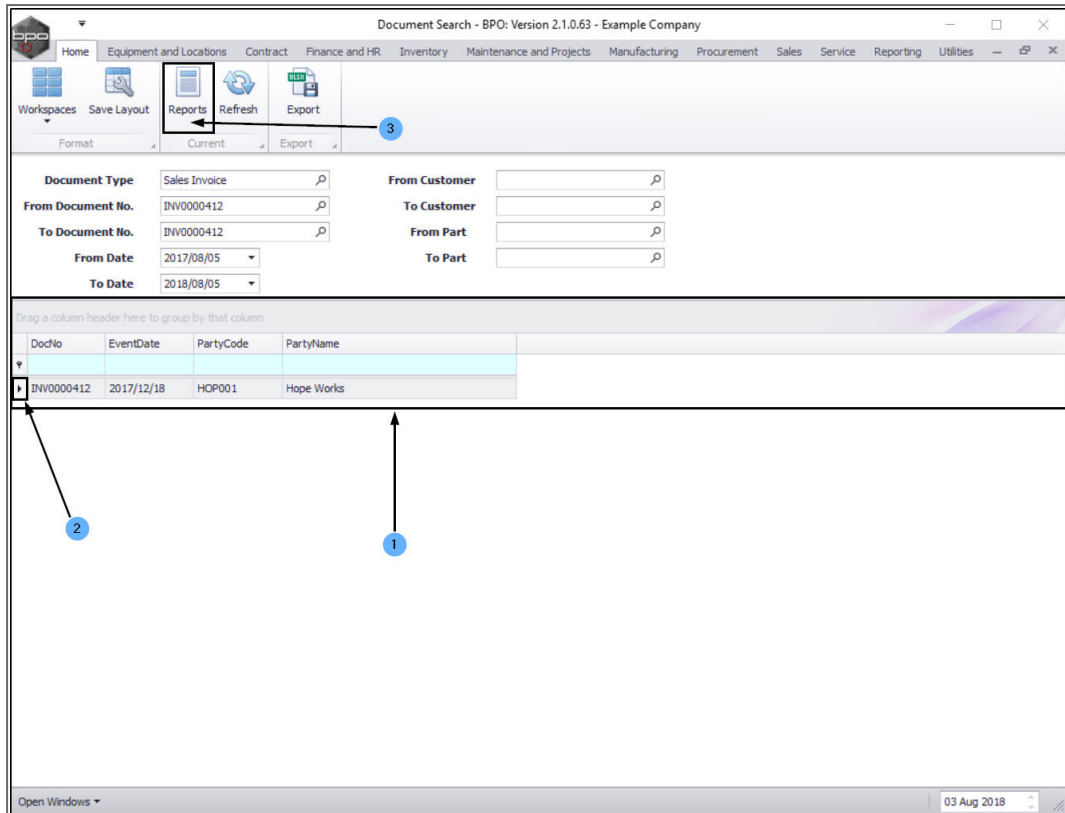
- When you have populated the **Document Type**, **Document No.** and **Date** fields, click on **Refresh**,



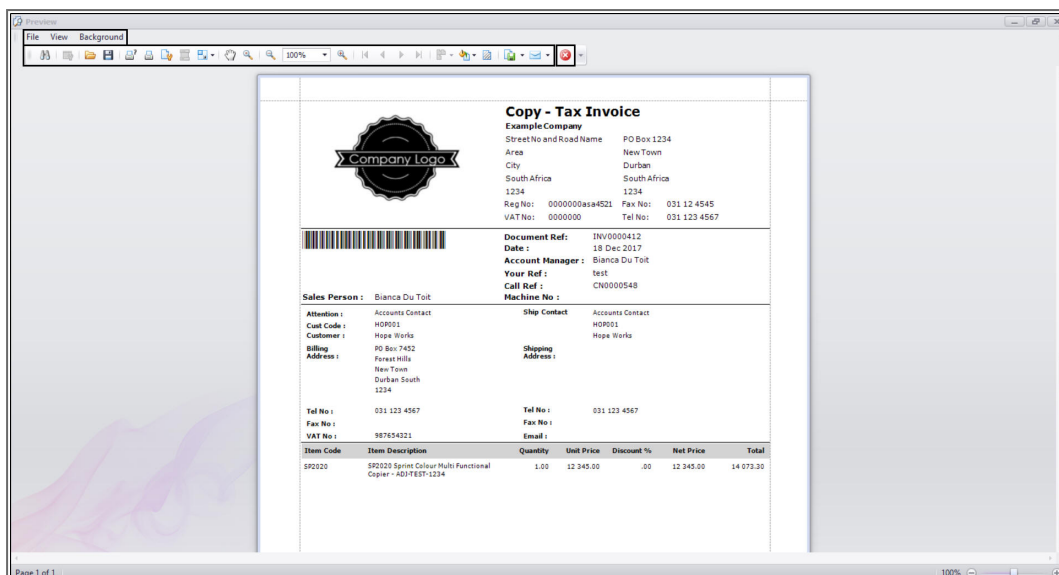


## PREVIEW THE REPORT

1. The documents data grid in the lower half of this screen will populate with the document details.
2. Ensure that the **row selector** is in front of the document.
3. Click on **Reports**.



- The **Report Preview** screen will come up, displaying the document. Sometimes a **copy** of the document is displayed but this depends on the document type selected.
- From here you can **View, Print, Export, Email** the document.
- Close the Report Preview screen when done.



## SEARCH BY DOCUMENT TYPE AND DATE

If you are not certain of a document no. but know that it was created on a certain date/week/month, you can use the **Document Type** and **Date** fields to search for your document.

### SELECT DOCUMENT TYPE

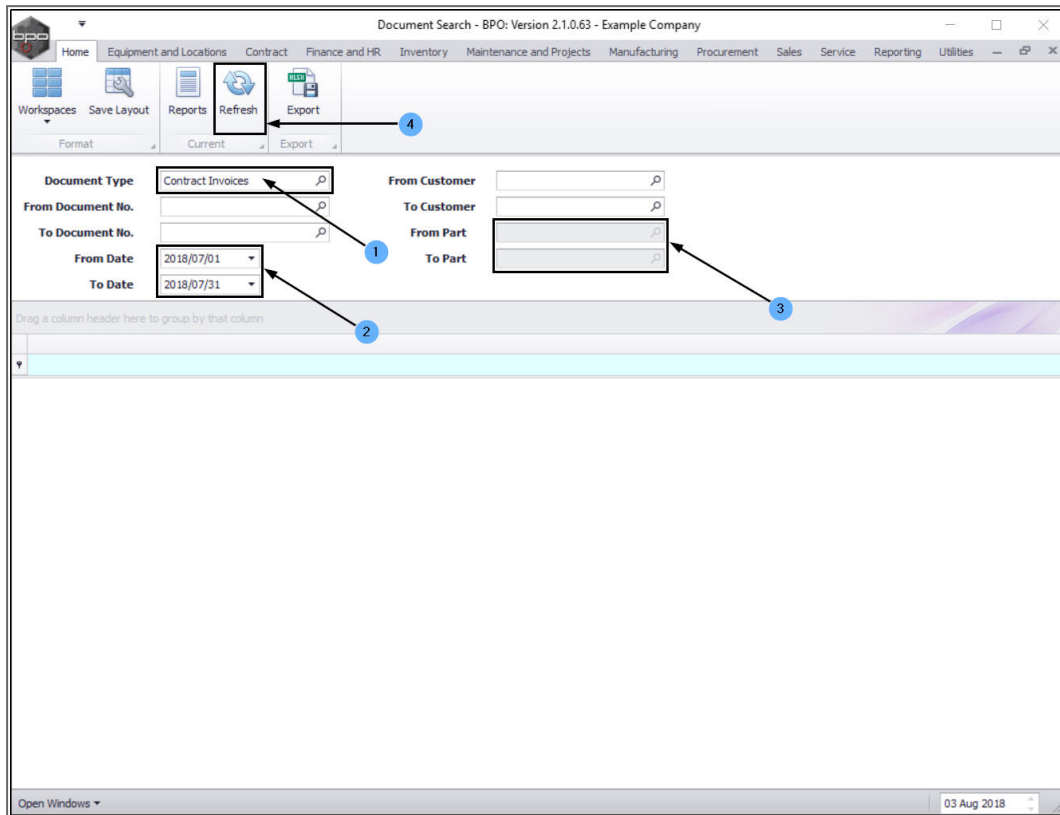
1. Search for the **Document Type**. In this image **Contract Invoices** has been selected.

### SELECT DATE RANGE

1. Select the **date range**.
2. You will note that the **From Part** and **To Part** fields have become non-editable.
  - **Note:** The additional search parameters in this screen may change or become uneditable if they are not relevant to the document type selected.

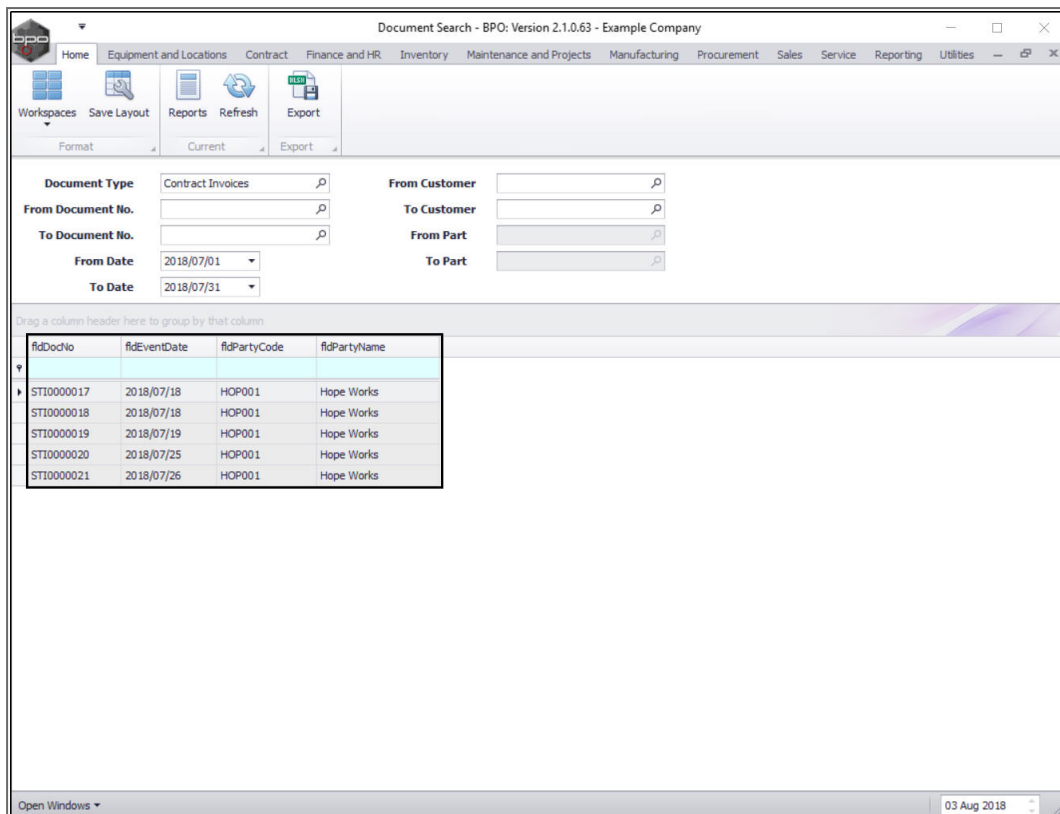
## REFRESH THE SCREEN

4. Click on **Refresh**.



## PREVIEW THE REPORT

- The documents data grid will now be populated with all the Contract Invoices in that date range.
- Follow the process explained in [preview a report](#) to select the relevant document and bring up the **Report Preview** screen.



Document Search - BPO: Version 2.1.0.63 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Workspaces | Save Layout | Reports | Refresh | Export

Format | Current | Export

Document Type: Contract Invoices

From Document No.:

To Document No.:

From Date: 2018/07/01

To Date: 2018/07/31

From Customer:

To Customer:

From Part:

To Part:

Drag a column header here to group by that column

#dDocNo	#dEventDate	#dPartyCode	#dPartyName
ST10000017	2018/07/18	HOP001	Hope Works
ST10000018	2018/07/18	HOP001	Hope Works
ST10000019	2018/07/19	HOP001	Hope Works
ST10000020	2018/07/25	HOP001	Hope Works
ST10000021	2018/07/26	HOP001	Hope Works

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## SEARCH BY DOCUMENT TYPE NO. AND CUSTOMER

You can use the **Document Type**, **Document No** and **Customer** fields to search for your document.

- Document Type:** Search and select the document type. In this image *Contract Invoices* has been selected.
- From and To Document No.:**

**To Document No:** Search for and select the document number.

**To Document No:** This will populate with the same document number you selected above. Leave as is if you are only searching for one document, otherwise search for and select the last document in the range you are looking for.
- From and To Customer:**

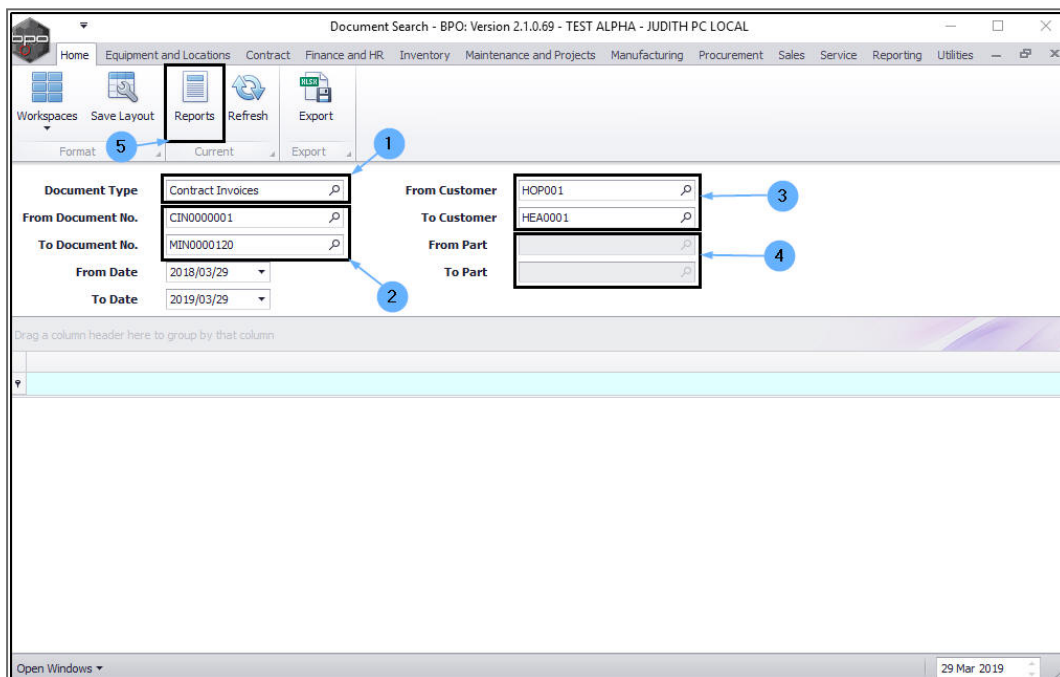
**From Customer:** Search for and select the customer.

**To Customer:** This will populate with the same customer you selected above. Leave as is if you want your search to be limited only to one customer, otherwise search for and select the last customer in the range you are looking for.

4. You will note that the **From Part** and **To Part** fields have become uneditable.

- **Note:** The additional search parameters in this screen may change or become uneditable if they are not relevant to the document type selected.

5. Click on **Refresh**.



The screenshot shows the 'Document Search' window with the following fields and callouts:

- 1:** Points to the 'Refresh' button in the top toolbar.
- 2:** Points to the 'From Date' field, which is set to '2018/03/29'.
- 3:** Points to the 'From Customer' field, which contains 'HOP001'.
- 4:** Points to the 'To Customer' field, which contains 'HEA0001'.
- 5:** Points to the 'Format' button in the top toolbar.

The 'Document Type' dropdown is set to 'Contract Invoices'. The 'From Document No.' is 'CIN0000001' and the 'To Document No.' is 'MIN0000120'. The 'From Part' and 'To Part' fields are disabled.

## PREVIEW THE REPORT

- The documents data grid will now be populated with all the Contract Invoices in that customer range.
- Follow the process explained in [preview a report](#) to select the relevant document and bring up the **Report Preview** screen.

Document Search - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Workspaces | Save Layout | Reports | Refresh | Export

Format | Current | Export

Document Type: Contract Invoices

From Document No.: CIN0000001

To Document No.: MIN0000120

From Date: 2018/03/29

To Date: 2019/03/29

From Customer: HOP001

To Customer: HEA0001

From Part:

To Part:

Drag a column header here to group by that column

Id Doc No	Id Event Date	Id Party Code	Id Party Name
CIN0000463	2019/03/07	TIA001	Titan Group
CIN0000464	2019/03/07	SAM001	Samanthas Diner
CIN0000465	2019/03/07	GIL000001	Dolf Lundgren
CIN0000466	2019/03/07	JUS001	Just In Time
CIN0000467	2019/03/07	BIG0001	Big Bargains
CIN0000468	2019/03/07	HEA0001	Healing Hands
MIN0000120	2019/03/07	BET0001	Betties Summer Shop at the Beach
CIN0000440	2019/01/30	HOP001	Hope Works
CIN0000441	2019/01/30	HOP001	Hope Works
CIN0000442	2019/01/30	HOP001	Hope Works
CIN0000443	2019/01/30	HOP001	Hope Works
CIN0000444	2019/01/30	HOP001	Hope Works

Open Windows

29 Mar 2019

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