

## 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:

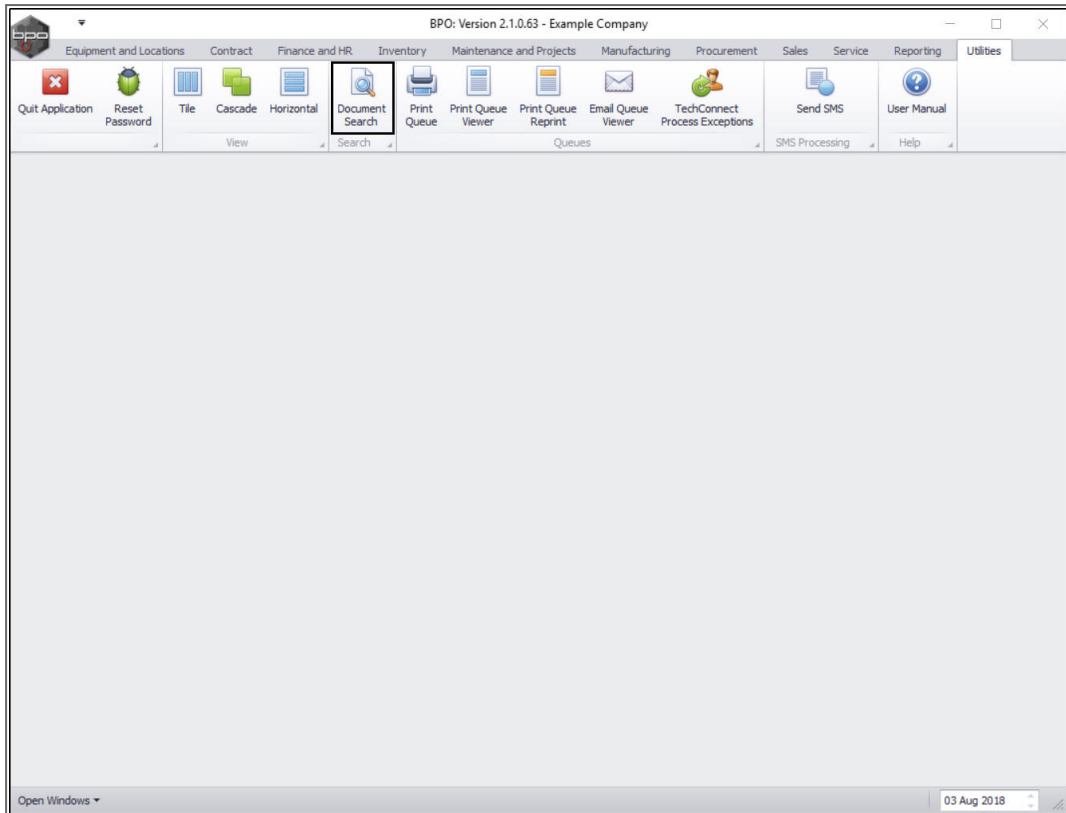
- Goods Received
- Part Issue
- Return Part to Store
- Supplier Return
- Inter-warehouse Transfer
- Asset Stock Adjustment
- Contract Invoices
- Credit Note
- Part Invoices
- Contract Credit Notes
- Stock Adjustment
- Sales Order
- Sales Invoice

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

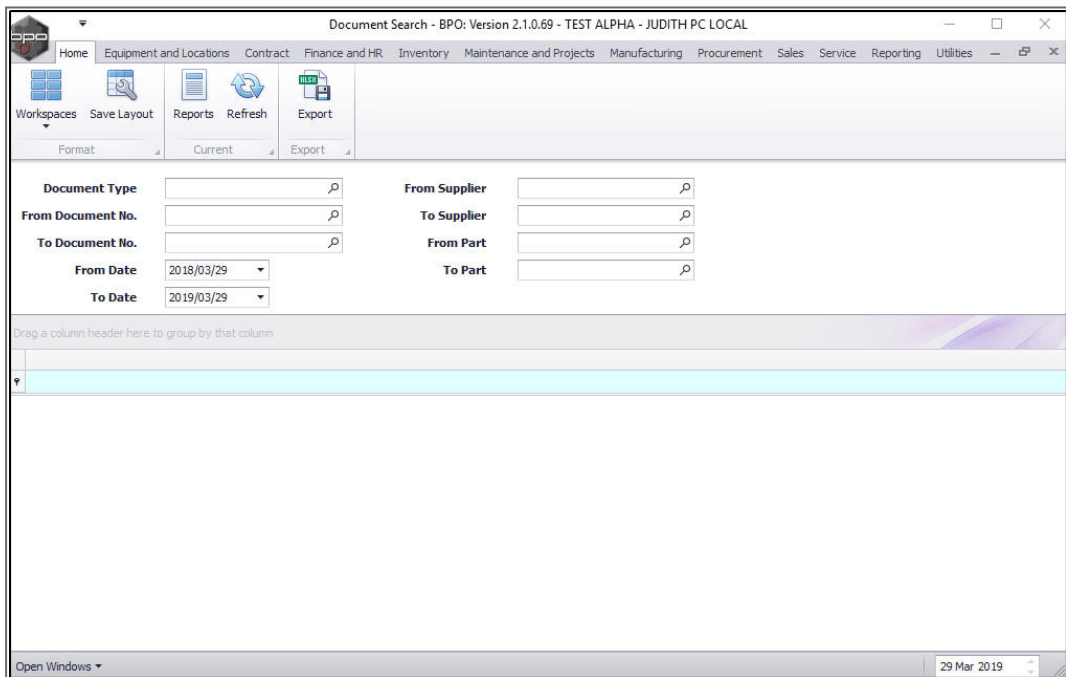
---

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

---



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

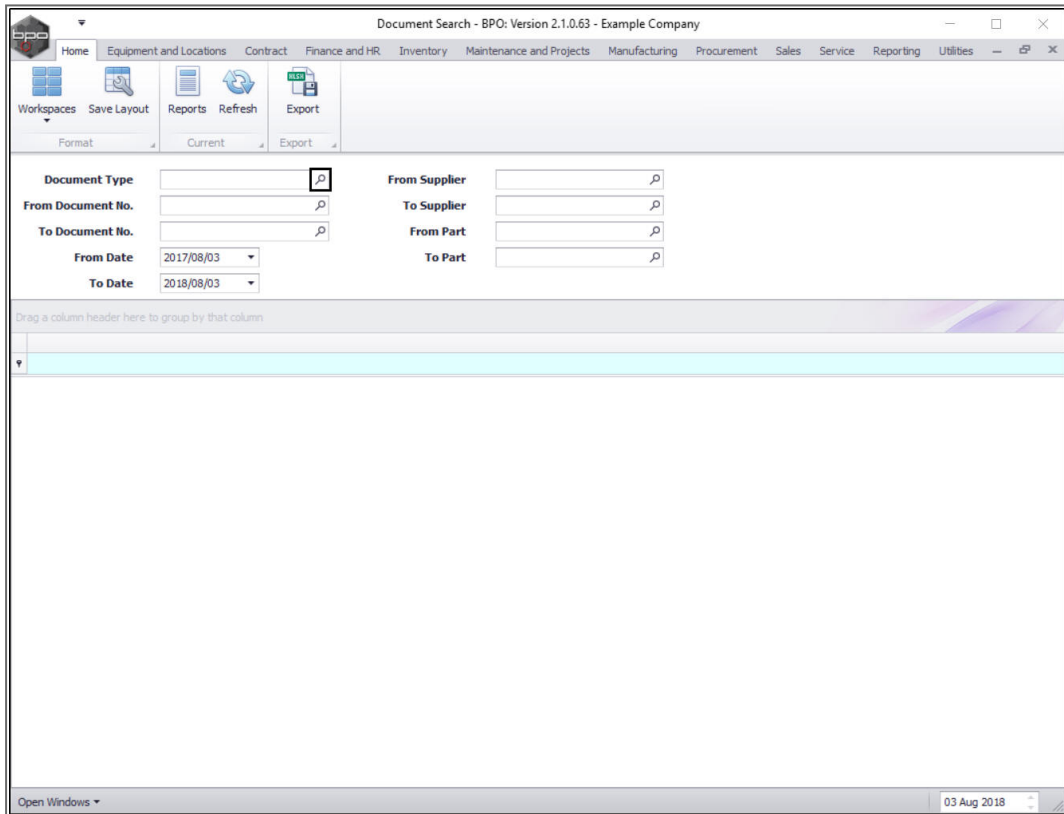


## IMPORTANT NOTES

- 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.



The screenshot shows the 'Document Search - BPO' interface. The title bar indicates 'Document Search - BPO: Version 2.1.0.63 - Example Company'. The menu bar includes: Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, Utilities. The toolbar contains: Workspaces, Save Layout, Reports, Refresh, Export. Below the toolbar are three tabs: Format, Current, and Export. The search filters are organized into two columns:

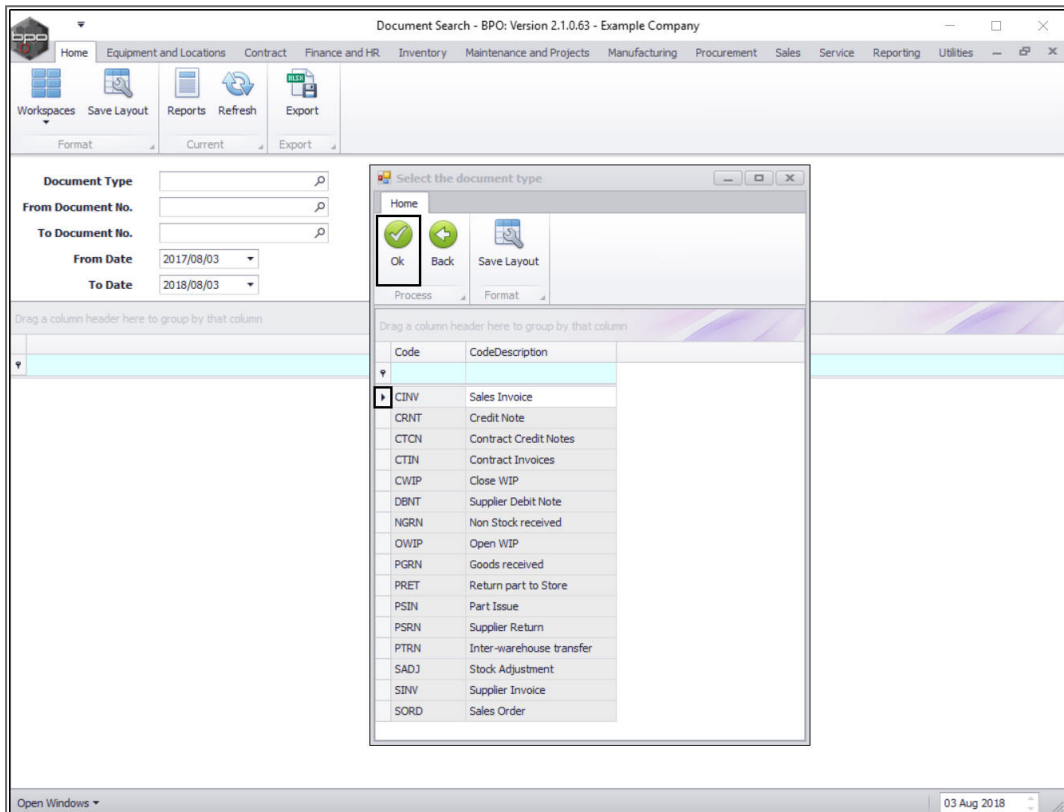
<b>Document Type</b>	<input type="text"/>	<b>From Supplier</b>	<input type="text"/>
<b>From Document No.</b>	<input type="text"/>	<b>To Supplier</b>	<input type="text"/>
<b>To Document No.</b>	<input type="text"/>	<b>From Part</b>	<input type="text"/>
<b>From Date</b>	2017/08/03	<b>To Part</b>	<input type="text"/>
<b>To Date</b>	2018/08/03		

Below the filters is a table with a header row and a data row. The header row is highlighted in light blue. The data row is empty. A message above the table says 'Drag a column header here to group by that column'. The status bar at the bottom shows 'Open Windows' and '03 Aug 2018'.

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

## SELECT DOCUMENT TYPE

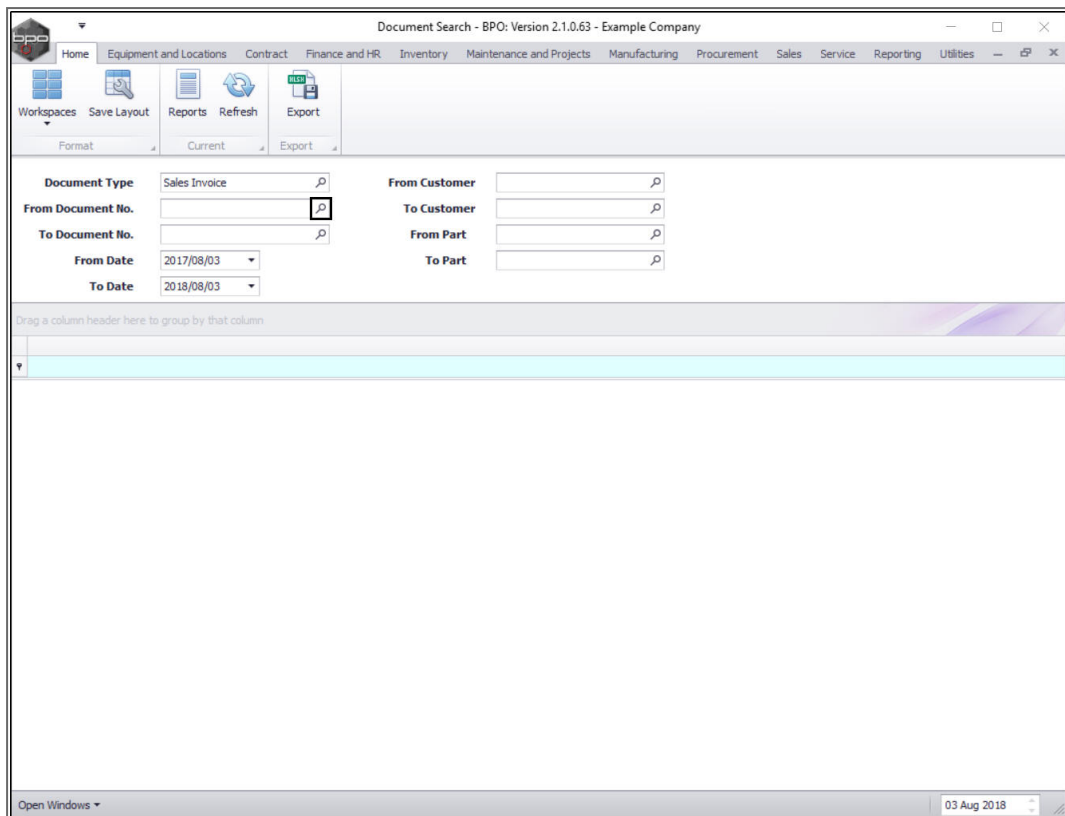
- Select the **row** of the **type** of document that you are searching for.
  - In this image **Sales Invoice** has been selected.
- Click on **Ok**.



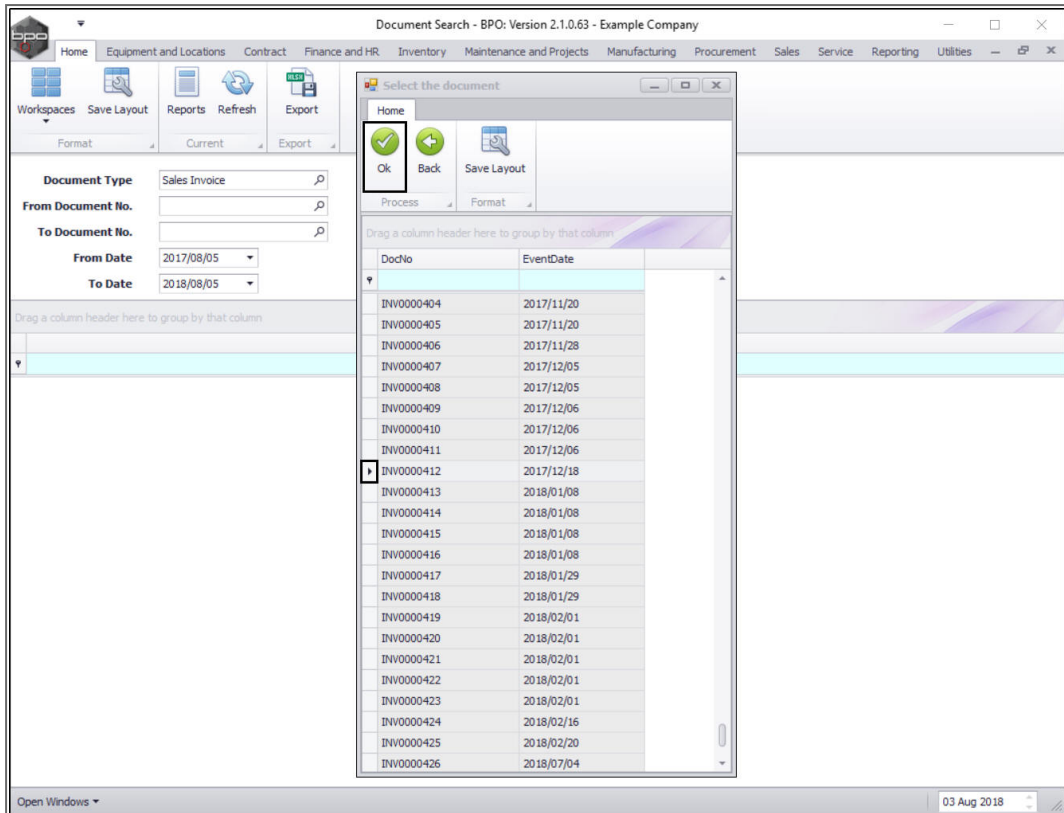
- The **Document Type** field will populate with the selection in the previous step.

## FROM DOCUMENT NO.

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



- 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**.

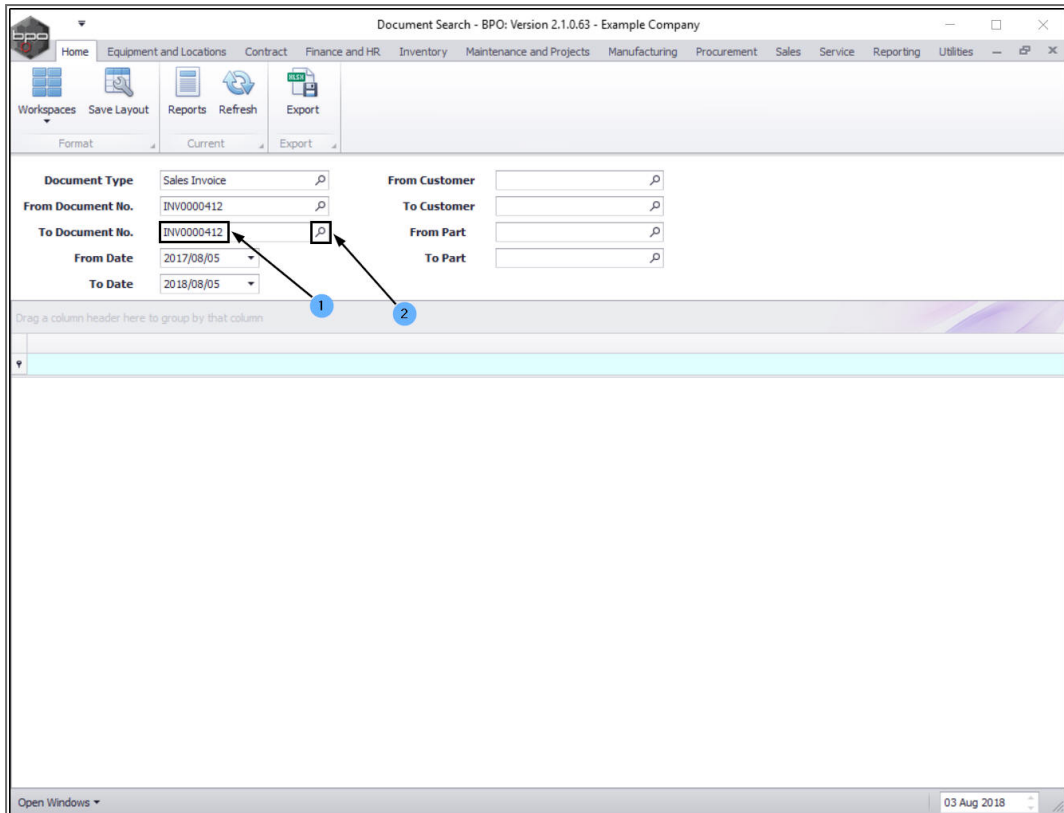


## TO DOCUMENT NO.

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.

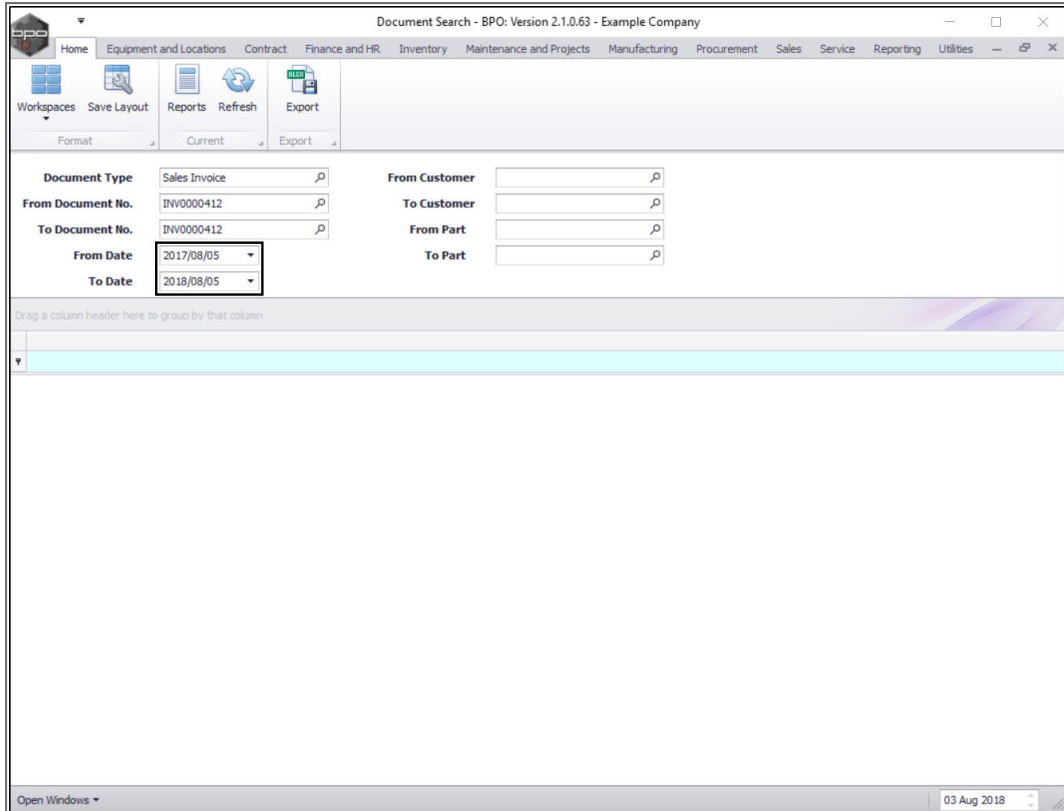
*Otherwise,*

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

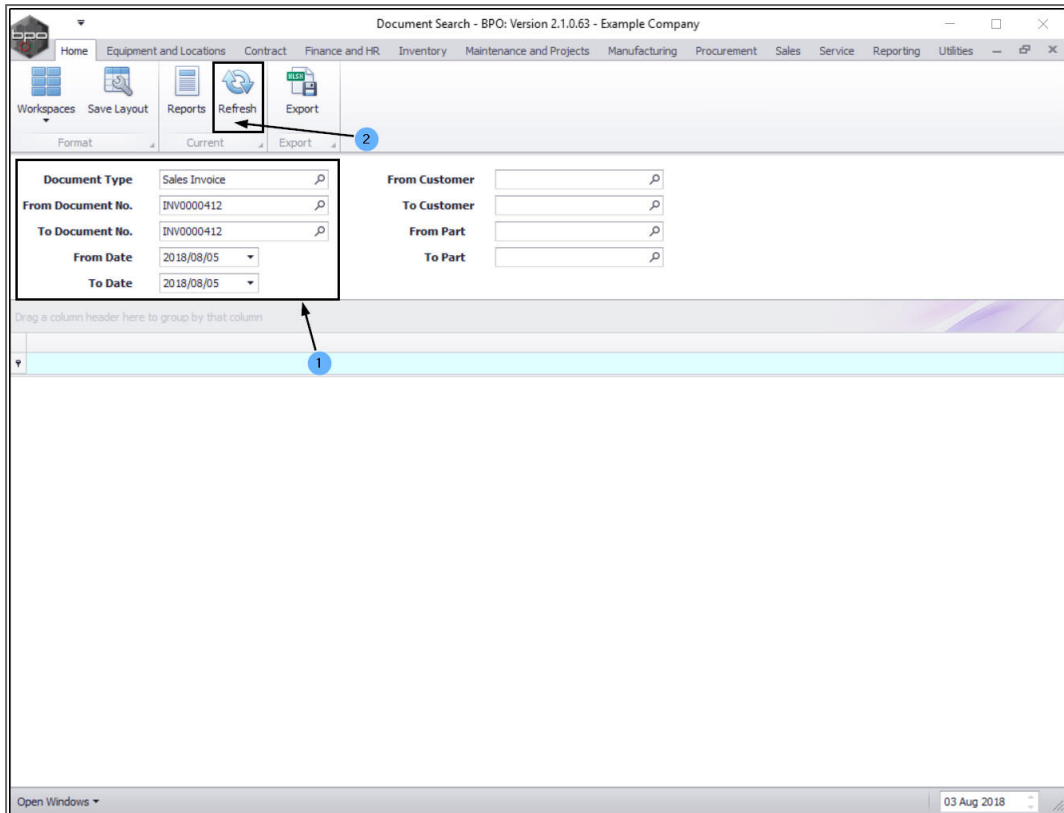
- Ensure that the date range is set to parameters that will include the document(s) that you are searching for.
  - **Note:** The system will set the **To Date** as the current date and the **From Date** as **1 year** prior to the current date. You can either type in or click on the drop-down arrow in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



## REFRESH THE SCREEN

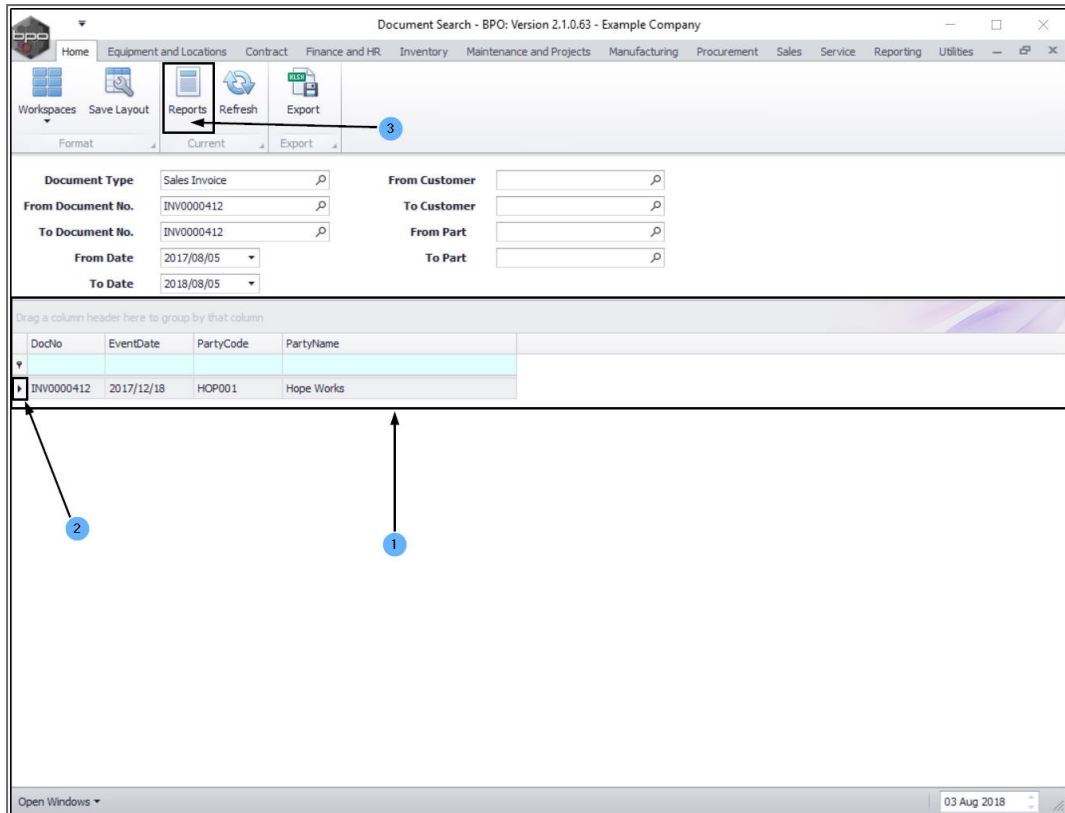
- When you have populated the **Document Type**, **Document No.** and **Date** fields, click on **Refresh**,





## 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**.

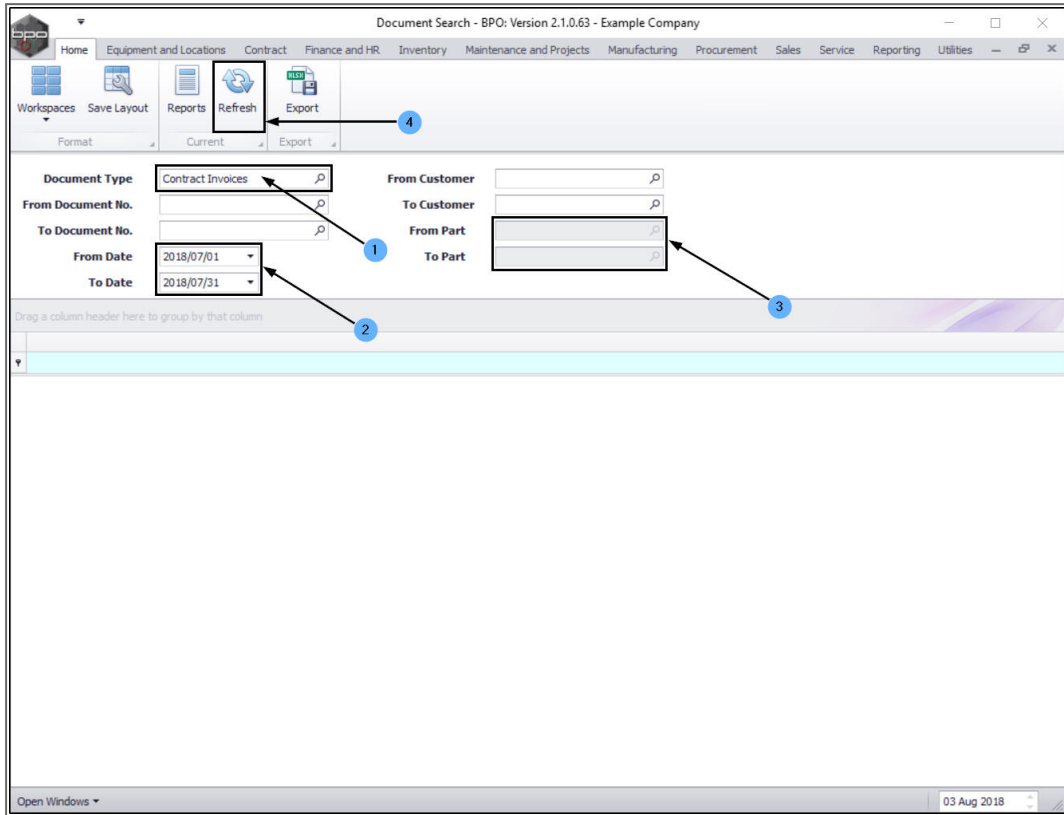


- The **Report Preview** screen will come up, displaying the document. Sometimes a **copy** of the document is displayed but this depends on the document type selected.
- From here you can **View, Print, Export, Email** the document.
- Close the Report Preview screen when done.



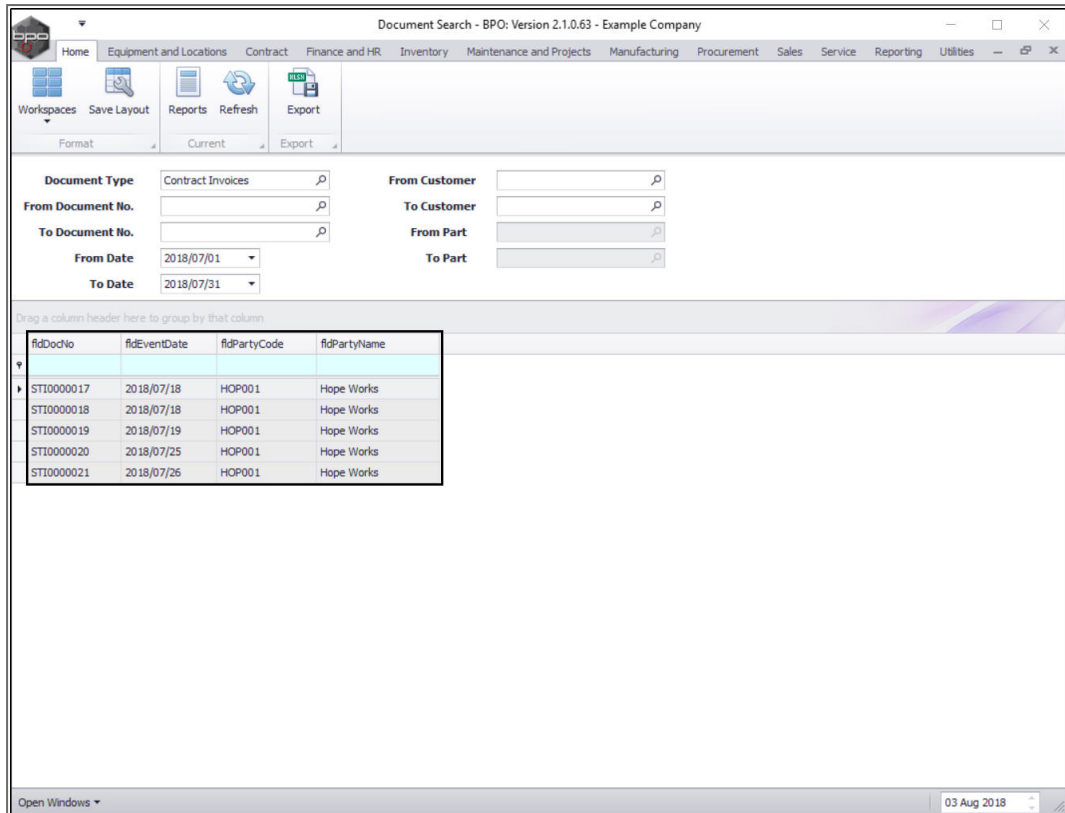
## REFRESH THE SCREEN

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.



## SEARCH BY DOCUMENT TYPE NO. AND CUSTOMER

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

1. **Document Type:** Search and select the document type. In this image *Contract Invoices* has been selected.
2. **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.
3. **From and To Customer:**

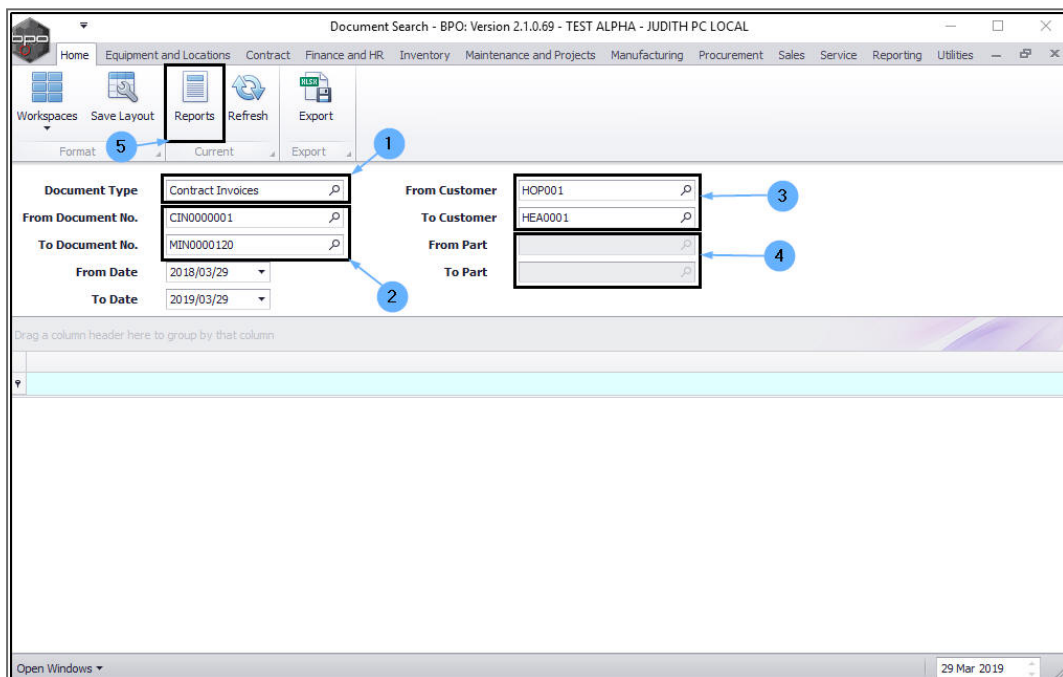
**From Customer:** Search for and select the customer.

**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**.



## 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.: CIN000001

To Document No.: MIN000120

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

fd Doc No	fd Event Date	fd Party Code	fd 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

MNU.081.001

