

We are currently updating our site; thank you for your patience.

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:

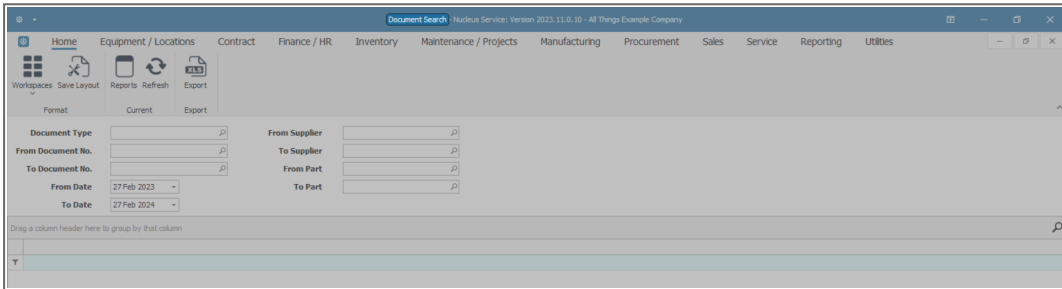
- Sales Invoice
- Credit Note
- Contract Credit Note
- Contract Invoice
- Closed WIP
- Supplier Debit Note
- Non-Stock Received
- Open WIP
- Goods Received
- Return Part To Store
- Part Issue
- Supplier Return
- Inter-Warehouse Transfer
- Stock Adjustment
- Supplier Invoice
- Sales Order

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.

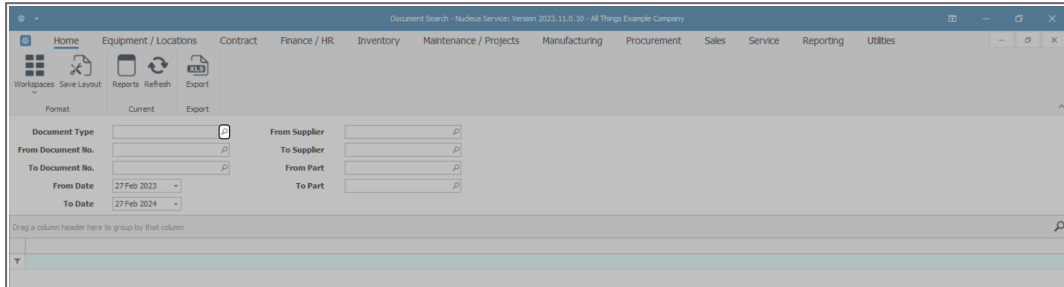


IMPORTANT NOTES

- The search parameters illustrated below are not exhaustive. You can use different combinations of search parameters depending on the document type selected e.g. Supplier and Part Number.
- Parameters in the **Document Search** screen may change or become non-editable if they are not relevant to the document type selected.
- 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 NUMBER

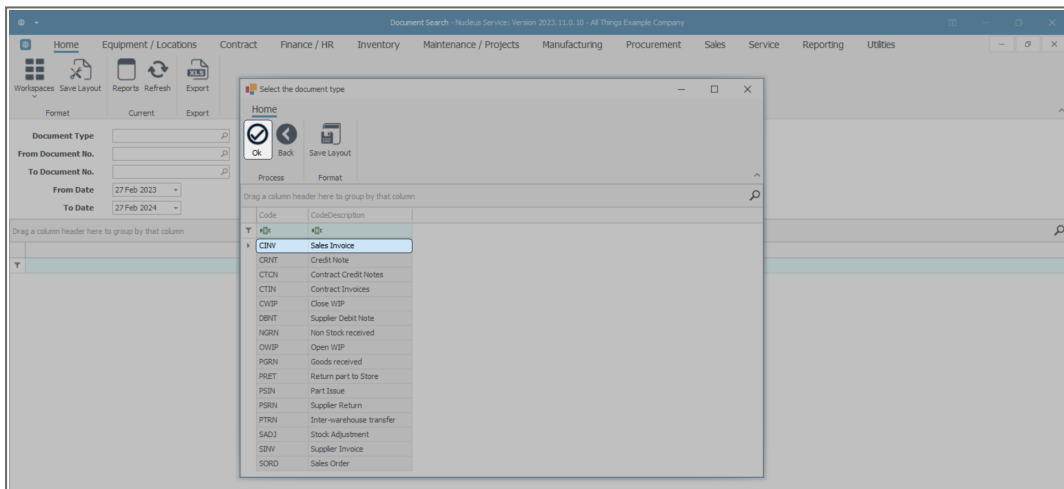
- Click on the **search** button in the **Document Type** field.



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

SELECT DOCUMENT TYPE

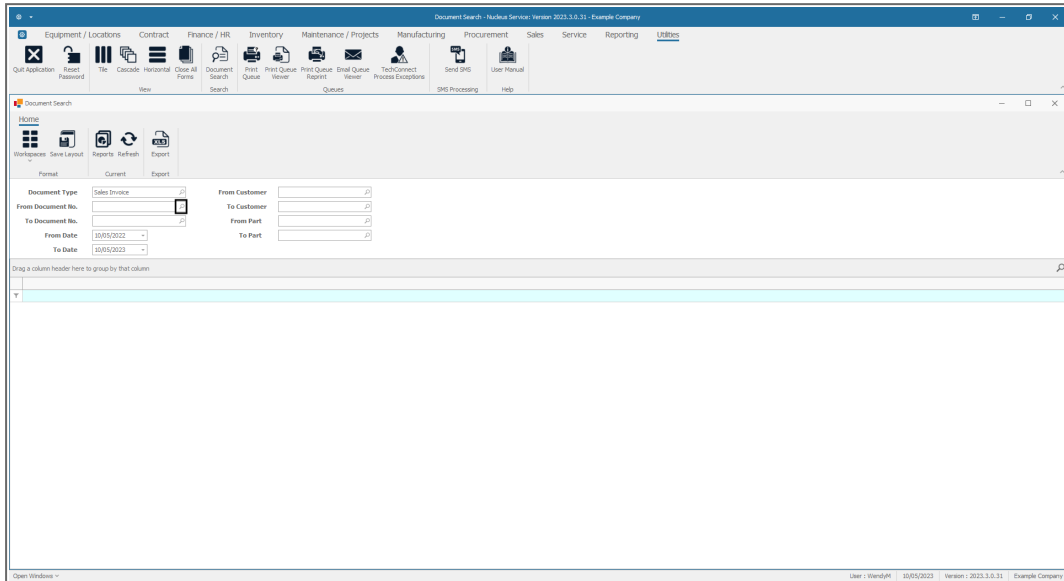
- Select the **row** of the **type** of document that you are searching for.
- In this image **Sales Invoice** has been selected.
- Click on **Ok**.



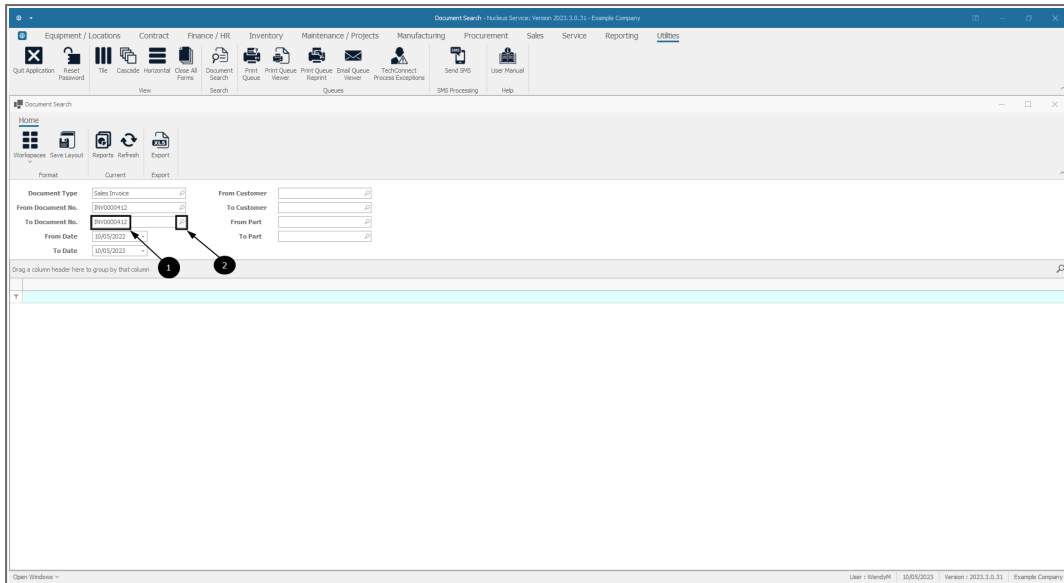
- The **Document Type** field will populate with the selection in the previous step.

FROM DOCUMENT NO.

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

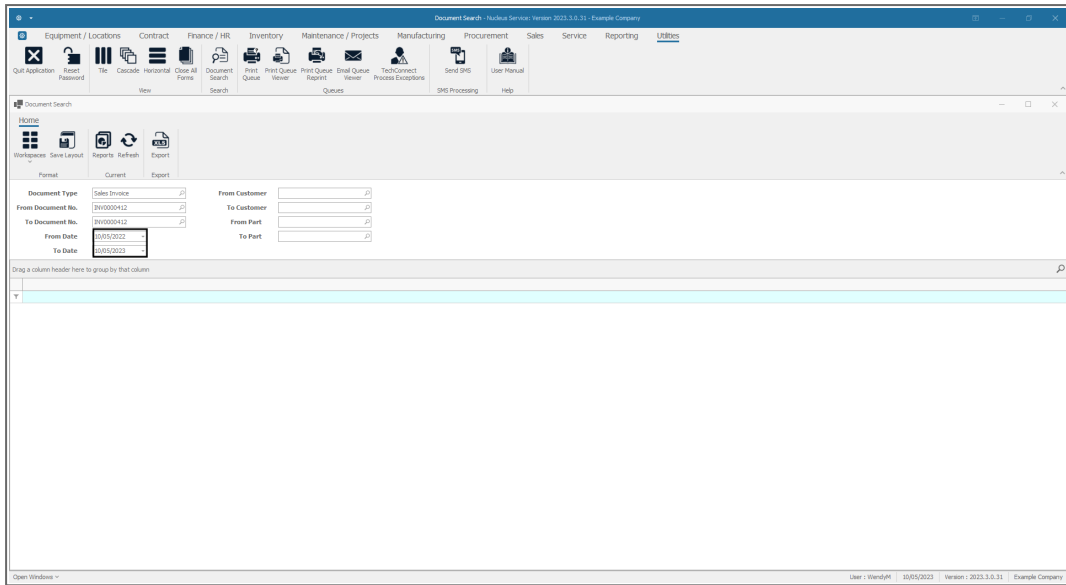


- A **Select the document** screen will pop up.
- Click on the **row selector** in front of the document (or first document in the range) that you are looking for.
- In this image **INV0000412** has been selected.
- Click on **Ok**.



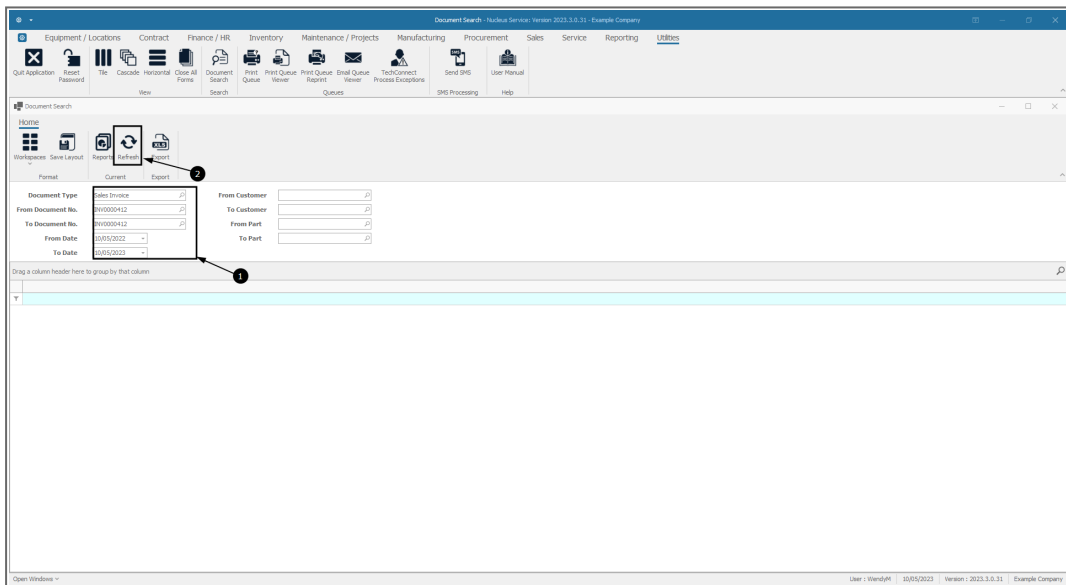
DATE RANGE PARAMETERS

- 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.



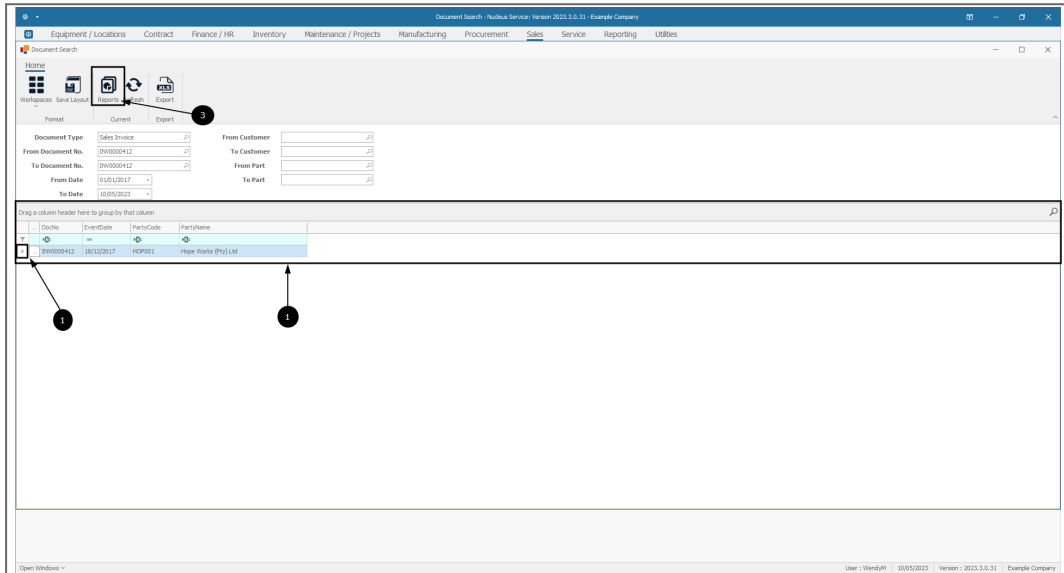
REFRESH THE SCREEN

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

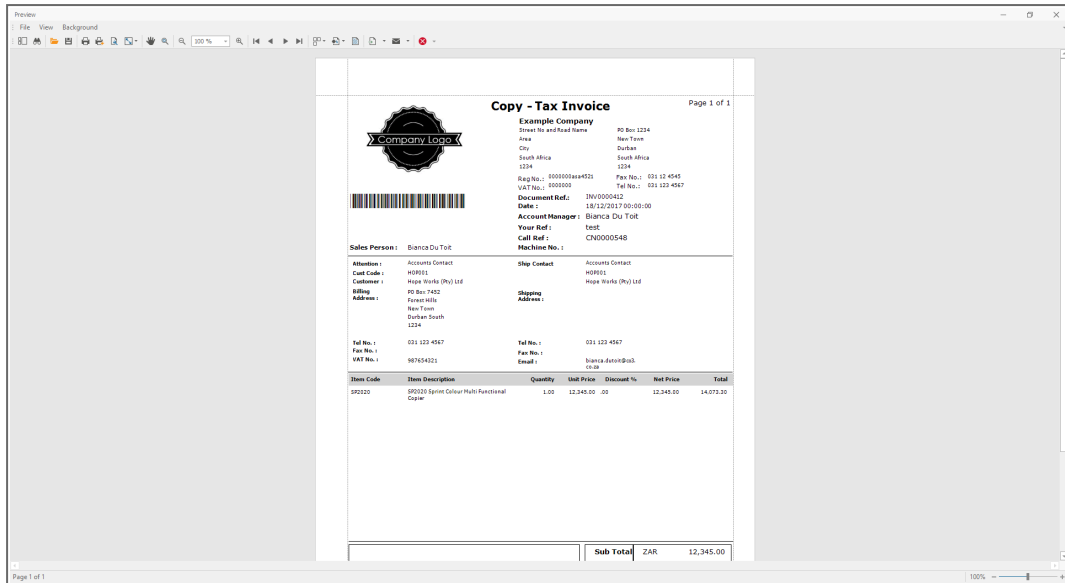


PREVIEW THE REPORT

- The documents data grid in the lower half of this screen will populate with the document details.
- Ensure that the **row selector** is in front of the document.
- 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 number, 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

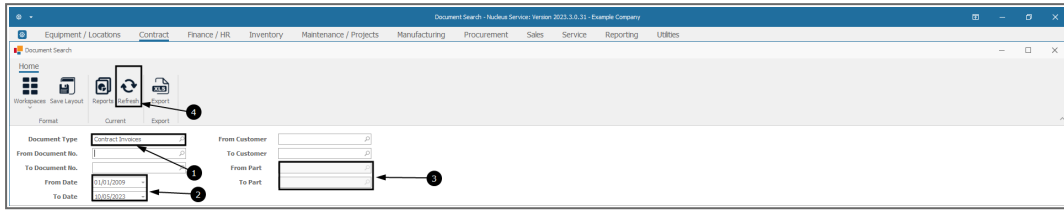
- Search for the **Document Type**.
- In this image **Contract Invoices** has been selected.

SELECT DATE RANGE

- Select the **date range**.
- 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.

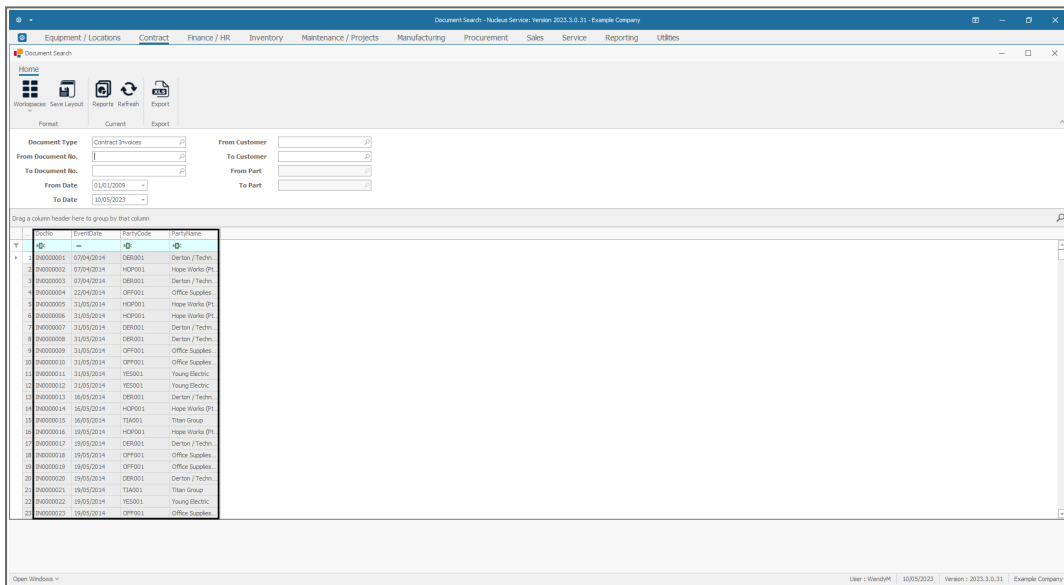
REFRESH THE SCREEN

- Click on **Refresh**.



PREVIEW THE REPORT

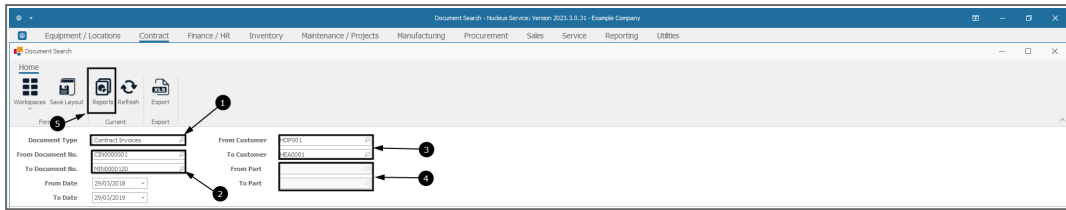
- The documents data grid will now be populated with all the Contract Invoices in that date range.
- Follow the process explained in [preview a report](#) to select the relevant document and bring up the **Report Preview** screen.



SEARCH BY DOCUMENT TYPE NUMBER AND CUSTOMER

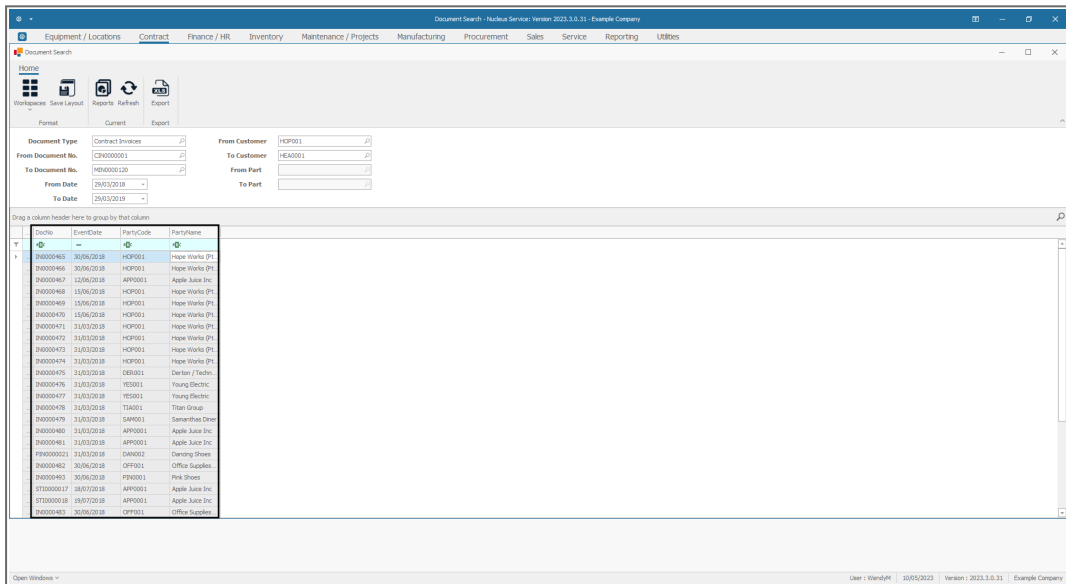
You can use the **Document Type**, **Document No.** and **Customer** fields to search for your document.

- **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.
- 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.
- 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.



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