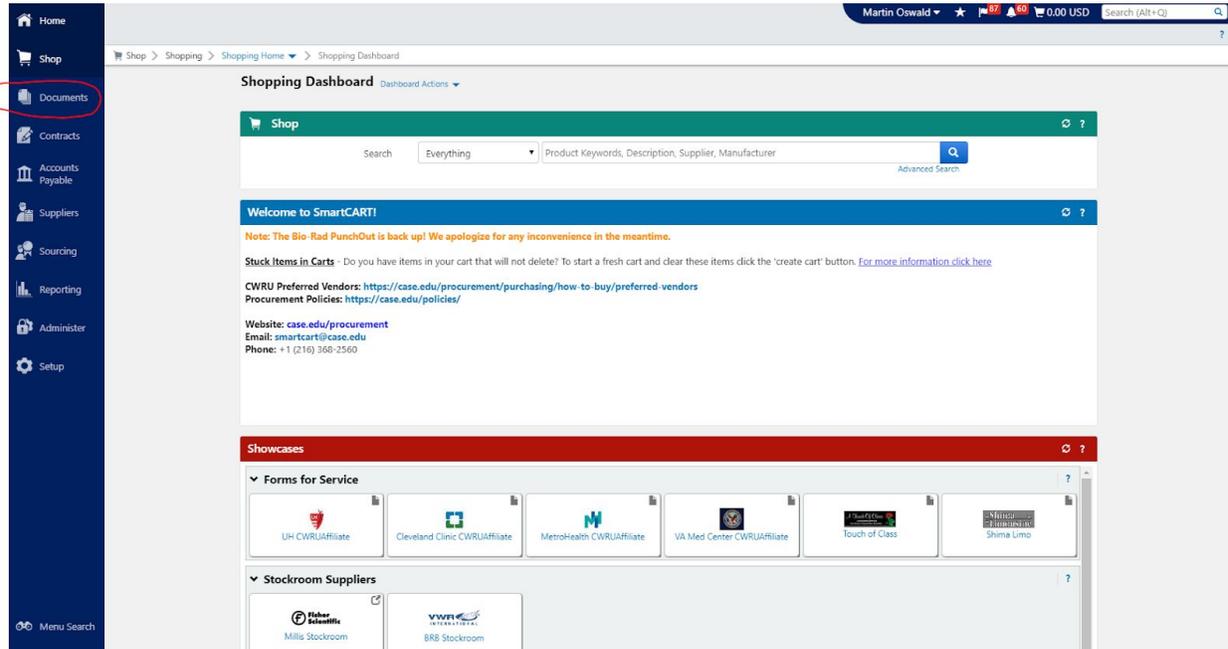


SmartCART Document Search

Document Search can be used to look up Invoices, Purchase Orders, and other important stored information in SmartCART.

To use the search function, start by navigating to the sidebar:



1. Click Documents, then Search Documents

A screenshot of the SmartCART search interface. At the top, there is a search bar with 'Purchase Orders' selected and a 'simple search' link. Below this are several sections of search criteria:

- Purchase Order Identification:** A text input field for 'Purchase Order Number(s)'.
- Purchase Order Information:** Radio buttons for 'Any', 'Me', and 'Pick...'. Text input fields for 'Owner', 'Prepared By', 'Date' (with a dropdown for 'Creation Date (System)' and 'All Dates'), 'Total Amount', 'Supplier', and 'Department'.
- Item/Product Information:** Text input fields for 'Catalog Number(SKU)', 'Product Description', 'Commodity Code', 'Form Name', and 'Form Type'. A 'Product Flags' section with checkboxes for 'Controlled substance', 'Energy Star', 'Green', 'Hazardous material', 'Rad Minor', 'Radioactive', 'Recycled', 'Select Agent', and 'toxin'.
- Requisition Identification:** Text input fields for 'Requisition Number(s)' and 'Requisition Name'.

At the bottom, there is a 'Go to:' navigation bar with links for 'simple search', 'my requisitions', 'my purchase orders', 'my invoices', and 'my forms', followed by a blue 'Search' button.

2. Select what document type you want to search:

The screenshot shows a search interface with a dropdown menu for document type. The dropdown is open, showing "Purchase Orders" selected. A red circle and arrow highlight this selection. The interface includes sections for "Purchase Order Identification", "Purchase Order Information", "Item/Product Information", and "Requisition Identification".

Search | Purchase Orders ▾ | simple search

Purchase Order Identification
Purchase Order Number(s)

Purchase Order Information
Participant(s) Any Me Pick...

Owner

Prepared By

Date Creation Date (System) ▾ | All Dates ▾

Total Amount

Supplier

Department

Item/Product Information
Catalog Number(SKU)

Product Description

Commodity Code

Form Name

Form Type

Product Flags
 Controlled substance Energy Star
 Green Hazardous material
 Rad Minor Radioactive
 Recycled Select Agent
 Toxin

Requisition Identification
Requisition Number(s)

Requisition Name

Go to: [simple search](#) | [my requisitions](#) | [my purchase orders](#) | [my invoices](#) | [my forms](#)

3. Enter conditions for the document search:

The screenshot shows the same search interface as above, but with several fields highlighted in yellow to indicate where search conditions are entered. The dropdown menu is still open, showing "Purchase Orders" selected. A red circle and arrow highlight the dropdown menu.

Search | Purchase Orders ▾ | simple search

Purchase Order Identification
Purchase Order Number(s)

Purchase Order Information
Participant(s) Any Me Pick...

Owner

Prepared By

Date Creation Date (System) ▾ | All Dates ▾

Total Amount

Supplier

Department

Item/Product Information
Catalog Number(SKU)

Product Description

Commodity Code

Form Name

Form Type

Product Flags
 Controlled substance Energy Star
 Green Hazardous material
 Rad Minor Radioactive
 Recycled Select Agent
 Toxin

Requisition Identification
Requisition Number(s)

Requisition Name

Go to: [simple search](#) | [my requisitions](#) | [my purchase orders](#) | [my invoices](#) | [my forms](#)

4. From the Search results, you can do various functions such as select your result or Export Search

Search Details

Search Terms

Purchase Order Number(s)
5000123456

Filtered by

Type: Purchase Orders
Date Type: Creation Date (System)
Date Range: All Dates

[Save New Search](#) [Export Search](#)

Refine Search Results

Type
Purchase Orders

Date Range
All Dates

Supplier
Fisher Scientific Company LLC (1)

Department
No Department (1)

Prepared By
Carol M Rice (1)
Owner

PO No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	Settlement Status	PO Total
5000123456	Fisher Scientific Company LLC	3/7/2011 2:20 PM	20984975	Carol M Rice	Sent	Fully Invoiced	96.80 USD

Export Search

Export Search allows one to export their search results to an .csv format document (usable in Microsoft Excel)

Search Details

Search Terms

Purchase Order Number(s)
5000123456

Filtered by

Type: Purchase Orders
Date Type: Creation Date (System)
Date Range: All Dates

[Save New Search](#) [Export Search](#)

Refine Search Results

Type
Purchase Orders

Date Range
All Dates

Supplier
Fisher Scientific Company LLC (1)

Department
No Department (1)

Prepared By
Carol M Rice (1)
Owner

PO No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	Settlement Status	PO Total
5000123456	Fisher Scientific Company LLC	3/7/2011 2:20 PM	20984975	Carol M Rice	Sent	Fully Invoiced	96.80 USD

1. Click Screen Export and in the popup select your File Name and Description (leave Screen Export)

Document Search Export ×

Request Export (Step 1 of 1) ?

File Name ★

Description

Request Export Template

Description System Default Screen Export

★ Required

2. Click Submit and then follow the prompt to Download your export file

Request Submitted ×

The export request has been successfully submitted.
Pending and completed exports are available in:
Documents > Document Search > Download Export Files
Note: The time required to complete this export request depends upon the size of the request as well as the size and number of other pending requests.

3. You may need to wait for the export process to complete, in which case, simply Refresh

The screenshot shows a software interface with a dark blue sidebar on the left containing navigation icons for Home, Shop, Documents, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, Administer, and Setup. The main content area has a breadcrumb trail: Documents > Document Search > Download Export Files > Search Results Exports. Below the breadcrumb, there are tabs for 'Download Exports' (selected) and 'Recurring Exports'. A text block explains that exports with a status of 'Complete' are available for download, while those with a status of 'Pending' are currently being queued. It also advises that users should ensure 'Search Result Export Confirmation' is selected if they want notifications. Below this text is a button labeled 'Click to filter exports ?'. A table below shows a list of exports with columns for 'File Name', 'Description', and 'Request Date / Time'. The 'File Name' column is circled in red, and the entry 'Test Test.zip' is highlighted. The 'Request Date / Time' for this entry is '10/4/2019 11:33 AM'. At the bottom of the table area is a button labeled 'Templates ?'.

Home
Shop
Documents
Contracts
Accounts Payable
Suppliers
Sourcing
Reporting
Administer
Setup

Documents > Document Search > Download Export Files > Search Results Exports

Download Exports Recurring Exports

Exports with a status of 'Complete' are available to be downloaded. Exports with a status of 'Pending' are currently being que

If you would like to receive a notification when your export is ready, make sure 'Search Result Export Confirmation' is selected

[Click to filter exports ?](#)

Results Per Page 20

File Name	Description	Request Date / Time
Test Test.zip		10/4/2019 11:33 AM

[Templates ?](#)

4. Proceed to download your file by clicking on the filename